Sales Cloud Einstein

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Sales Cloud Einstein

Supercharge your team's sales productivity at every step of the sales process with key predictions, intelligent recommendations, and timely automation. Sales Cloud Einstein is your own data science department that learns from your team's sales activities and CRM data. Einstein helps you identify the best leads, convert opportunities more efficiently, and retain customers with ease. Sales Cloud Einstein also includes the Sales Analytics app and Inbox.

REQUIRED EDITIONS

> 📝 **Note** For pricing details, contact your Salesforce account executive. Sales Cloud Einstein is not supported in Government Cloud. Do not turn on the feature in Government Cloud or Government Cloud Plus orgs. Contact your Salesforce account executive for more details.

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Increase Productivity with Sales Cloud Einstein
Free up sales reps' valuable time and increase productivity. When reps connect their email and calendar to Salesforce, Einstein Activity Capture adds email and events to related Salesforce records. This busy work is done automatically, so reps don't have to.

Bring Intelligence to Your Daily Workflow with Sales Cloud Einstein
Take Einstein to the next level with intelligence that impacts daily decisions. Einstein Insights gives sales reps relevant updates and follow-up reminders to help them win more deals and nurture relationships with accounts. Einstein Scoring helps reps prioritize leads and opportunities so they can focus on what's most likely to convert and close.

Build a Smarter Pipeline with Einstein Forecasting
Take the guesswork out of forecasting. Einstein Forecasting uses AI technology to bring more certainty and visibility to your forecasts. Improve forecasting accuracy, get forecast predictions, and track how sales teams are doing.

Understand How Sales Cloud Einstein Works
Sales Cloud Einstein might seem like magic, but it's not. It's built with science. Data science. Learn more about how Sales Cloud Einstein features use your data to bring intelligence to Salesforce.

Prepare for Sales Cloud Einstein
Before you set up Sales Cloud Einstein feature, review information about data requirements and other considerations. Learn about sandbox support and how to run the readiness assessor.

Set Up Sales Cloud Einstein
Use the Sales Cloud Einstein Setup Assistant to get the targeted guidance you need for setting up the

Sales Cloud Einstein features you want.

Analyze Sales Cloud Einstein Data with Reporting
Use reports and dashboards to gain insight into how Sales Cloud Einstein features are working in your org.

Increase Productivity with Sales Cloud Einstein

Free up sales reps' valuable time and increase productivity. When reps connect their email and calendar to Salesforce, Einstein Activity Capture adds email and events to related Salesforce records. This busy work is done automatically, so reps don't have to.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Einstein Activity Capture for Sales Cloud Einstein
Let Einstein help keep data between Salesforce and your email and calendar applications up to date. Then you can get back to more important things, like selling.

Einstein Automated Contacts
Spend even less time on data entry. Einstein Automated Contacts uses email and event activity to find new contacts and opportunity contact roles to add to Salesforce. Depending on how your Salesforce admin set up the feature, Einstein suggests the new data or adds it for you.

Einstein Generative AI for Sales
Einstein Generative AI for Sales connects your sales data with the generative capabilities of artificial intelligence (AI) and large language models (LLMs). With Sales Emails, your sales team can generate personalized emails to send to contacts and leads. Your team gets precious time back in their day by getting nearly-there drafts, already contextualized and grounded in your Salesforce data. And because trust is our #1 value, you can rest easy knowing that your data is secure.

See Also
Sales Cloud Einstein
Salesforce Inbox

Einstein Activity Capture for Sales Cloud Einstein

Let Einstein help keep data between Salesforce and your email and calendar applications up to date. Then you can get back to more important things, like selling.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

For more information, see Einstein Activity Capture.

See Also
  Sales Cloud Einstein

Einstein Automated Contacts

Spend even less time on data entry. Einstein Automated Contacts uses email and event activity to find new contacts and opportunity contact roles to add to Salesforce. Depending on how your Salesforce admin set up the feature, Einstein suggests the new data or adds it for you.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

🛑 **Important** Feature is scheduled for retirement on February 15, 2025. See Einstein Automated Contacts Retirement.

Einstein Automated Contacts finds new data by looking at your activities. For example, the title on suggested contacts comes from a person's the email signature. If your admin chooses that new data is suggested to you, you see suggestions in the Einstein Insights component. If your admin chooses that data is added automatically, notifications alert you when new data is added to Salesforce. In both cases, the type of data determines who sees the suggestions or notifications.

Type of Data	Where Suggestions Appears	Who Sees Suggestions or Notifications
Contact	• Home page	• Anyone in the To field of the email or activity

Type of Data	Where Suggestions Appears	Who Sees Suggestions or Notifications
	• Account records	• Account owner • All account team members (regardless of which team members are included in the email or event activity) • User's manager
Opportunity Contact Role	• Home page • Opportunity records	• Opportunity owner • All opportunity team members (regardless of which team members are included in the email or event activity) • User's manager

Data Added from Suggestions

- When you add suggested data to Salesforce, Einstein takes you to the record edit page. From there, review and save the new data. After the data is added, the suggestion disappears for all users.
- When you decline suggested data, the suggestion disappears for all users.
- From the Home page, you can also dismiss suggestions, which removes them from the Home page. You can also leave feedback about the relevance of individual suggestions.
- To see which contacts and opportunity contact roles Einstein suggested, go to the app launcher and select the Einstein Contact Suggestions or Einstein Opportunity Contact Role Suggestions item. Review the suggestions to see what's been added to Salesforce and what's been declined. Suggestions with the New status can be added or declined from the row-level actions.
- If you use Duplicate Management, when you add a suggested contact, it could be flagged as a duplicate. If the suggestion is flagged, you must select a contact from the list.

Data Added Automatically

- To see which contacts were automatically added to Salesforce, review the contact list view called Added By Einstein. Click the notification text to go directly to the list view. We recommend sorting the list view by Created Date.
- If a contact can't be automatically added because of an error (for example, a required field is missing a default value), the contact is shown to you as a suggestion. You can correct any errors when adding the contact.

See Also

[Enable Einstein Automated Contacts](#)
[Considerations for Setting Up Sales Cloud Einstein](#)
[Review the CRM Analytics Automated Contacts Dashboard](#)
[Sales Cloud Einstein](#)

Einstein Generative AI for Sales

Einstein Generative AI for Sales connects your sales data with the generative capabilities of artificial intelligence (AI) and large language models (LLMs). With Sales Emails, your sales team can generate personalized emails to send to contacts and leads. Your team gets precious time back in their day by getting nearly-there drafts, already contextualized and grounded in your Salesforce data. And because trust is our #1 value, you can rest easy knowing that your data is secure.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with the Einstein for Sales add-on, which is available for an extra cost in **Performance** and **Unlimited** Editions.

To learn more, see [Understand How Einstein Generative AI Creates Sales Emails](#).

See Also

[Einstein Generative AI](#)
[Considerations for Einstein Generative AI Sales Emails](#)

Bring Intelligence to Your Daily Workflow with Sales Cloud Einstein

Take Einstein to the next level with intelligence that impacts daily decisions. Einstein Insights gives sales reps relevant updates and follow-up reminders to help them win more deals and nurture relationships with accounts. Einstein Scoring helps reps prioritize leads and opportunities so they can focus on what's most likely to convert and close.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Sales Cloud Einstein Scoring

Always know what to work on first. Einstein Scoring helps sales reps prioritize leads and opportunities so they can focus on what's most likely to convert and close.

See Also
Sales Cloud Einstein

Sales Cloud Einstein Scoring

Always know what to work on first. Einstein Scoring helps sales reps prioritize leads and opportunities so they can focus on what's most likely to convert and close.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Einstein Lead Scoring
Use AI to score your leads by how well they fit your company's successful conversion patterns. Let your sales team prioritize their leads by lead score. See which fields influence each lead score most.

Einstein Opportunity Scoring
Let artificial intelligence help you and your team focus on the right opportunities so you can close more deals. Each opportunity is given a score, from 1 to 99, which is available on opportunity records and list views. If you use forecasts in Salesforce, opportunity scores are also available on the forecasts page. Plus, use scores with reports, Process Builder, and workflows. Einstein Opportunity Scoring is available to users with or without a Sales Cloud Einstein license.

See Also
Sales Cloud Einstein

Einstein Lead Scoring

Use AI to score your leads by how well they fit your company's successful conversion patterns. Let your sales team prioritize their leads by lead score. See which fields influence each lead score most.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Einstein Lead Scoring uses data science and machine learning to discover your business's patterns of lead conversion. Based on your patterns, Einstein predicts which of your current leads to prioritize. By using

machine learning, Einstein Lead Scoring provides a simpler, faster, and more accurate solution than traditional rules-based lead scoring approaches.

Einstein analyzes your past leads to determine which current leads have the most in common with leads that have previously converted. By default, Einstein scores your leads using most lead fields. If your admin is certain a field doesn't affect lead quality, they can tell Einstein not to include the field.

Einstein also creates internal categories for certain lead text fields that can contain different values with similar meaning. For example, different businesses sometimes use different job titles for the same job. Using the lead title, Einstein associates each lead with a Job Rank and a Department. If a lead's title is CEO, Einstein assigns it the C-level job rank. By associating leads with a smaller list of job ranks and departments, Einstein can find patterns in your data more easily.

Based on its data analysis, Einstein creates a predictive model for your organization. Einstein reanalyzes your lead data every 10 days and refreshes your scores. So if new trends emerge, Einstein won't miss them.

When you score all leads together without creating segments, and you don't have enough lead conversion data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough lead data, Einstein builds a scoring model with your data and uses the model with the better results.

Einstein Lead Scoring adds a Lead Score field to leads. The Lead Score lets sales reps prioritize their work by ranking leads according to their similarities to prior converted leads. Leads with higher scores have more in common with leads that have converted in the past.

The lead score appears in the Einstein Score component on lead detail pages. The component also shows sales reps which of the lead's fields had the greatest influence on its score (1). Depending on the lead, fields with positive or negative influences can appear. Fields that aren't listed in the Einstein Score component still influence the score, but less than the fields listed.

When you or your users add the Einstein Score field to list views, hovering over a score (1) displays the top factors (2) behind the score. When sales reps focus on leads with higher scores, they're likely to convert more of them to opportunities. The lock (3) indicates that the score is read-only.

Einstein Lead Scoring includes a dashboard with reports that show key lead score metrics for your org.

- Average Lead Score by Lead Source
- Conversion Rate by Lead Score
- Lead Score Distribution: Converted and Lost Opportunities

See Also

Enable Einstein Lead Scoring

Considerations for Setting Up Einstein Lead Scoring

Understand How Einstein Scores Your Leads

Einstein Opportunity Scoring

Let artificial intelligence help you and your team focus on the right opportunities so you can close more deals. Each opportunity is given a score, from 1 to 99, which is available on opportunity records and list views. If you use forecasts in Salesforce, opportunity scores are also available on the forecasts page. Plus, use scores with reports, Process Builder, and workflows. Einstein Opportunity Scoring is available to users with or without a Sales Cloud Einstein license.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic.

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Available to eligible customers for no extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Watch a Demo: ▶ Einstein Opportunity Scoring (English only)

Opportunity scores tell you the likelihood that an opportunity will be won. For each opportunity score, Einstein shows the factors that have contributed the most to the score, both positively and negatively.

In Lightning Experience, the score is shown on the compact layout of opportunity records (1) or on the Details tab. Hover over the score to see a list of factors that contribute to the score. For example, a score could be relatively high because the opportunity is moving quickly through the stages compared to other opportunities.

In Salesforce Classic, the score is shown on the record detail of opportunity records. The contributing factors are shown.

You can add the Opportunity Score field to any of your opportunity list views (2). If you don't see the score on public list views, ask your Salesforce admin to add it. In Lightning Experience, hover over the score in the list view to see the factors that contribute to the score. In Salesforce Classic, the contributing factors aren't available from the list views. Instead, navigate to the opportunity record detail page.

If you use forecasts, admins can add opportunity scores to the opportunity list on the forecasts page (3).

See Also

Enable Einstein Opportunity Scoring

Build a Smarter Pipeline with Einstein Forecasting

Take the guesswork out of forecasting. Einstein Forecasting uses AI technology to bring more certainty and visibility to your forecasts. Improve forecasting accuracy, get forecast predictions, and track how sales teams are doing.

REQUIRED EDITIONS

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What's Available	Lightning Experience	Salesforce Classic	CRM Analytics Mobile App
Prediction column	✔	✔	
Prediction details	✔	✔	
Prediction trend graph	✔		
Prediction summary graph	✔		✔

Einstein Predictions

When Einstein Forecasting is enabled, the summary on the forecasts page shows the Einstein prediction column. The values in this column are the median predicted amounts for each manager's team. Predictions are based on opportunities within the Best Case and Commit forecast categories.

- Sometimes a prediction isn't shown, such as when sufficient historical data isn't available or the prediction range is too large to be useful.
- Predictions are always in US dollars, unless you use multiple currencies. In that case, the amounts are converted to the currency selected by the user, using the static conversion rate set by the Salesforce admin.

Select a value in the prediction column to show more details about the prediction.
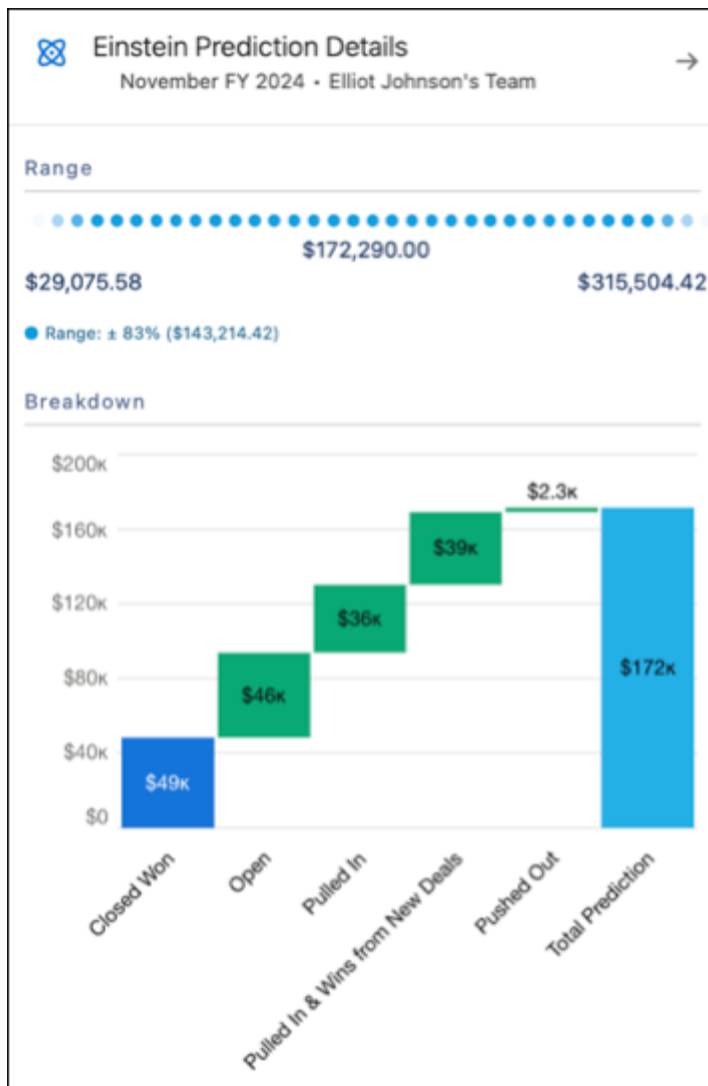
The details panel gives you a comprehensive overview of the prediction.

- Range–The full range of the prediction value, which is used to calculate the median value in the prediction column.
- Breakdown–A closer look at how Einstein came up with the prediction. These values include:
  - Wins from Existing Deals: Opportunities that are predicted to close during the current forecasting period.
  - Wins from New Deals: Recently created opportunities that are predicted to close during the current forecasting period.
  - Pulled In: Opportunities that originally had close dates during a later forecasting period but are "pulled in" and predicted to close during the current forecasting period.
- Top Factors–Details about what contributed to the prediction. For example, perhaps your team closed more deals in a particular month compared to the past month. Or your team has more open deals in the pipeline, increasing the likelihood of closing more deals.

Weekly Changes Chart for the Current Period

From the forecasts page, switch from grid view to chart view to see a visualization of your own predicted closing within the current forecast period. The key performance indicators give you an overall sense of how you're doing and how your numbers compare with Einstein's predictions.
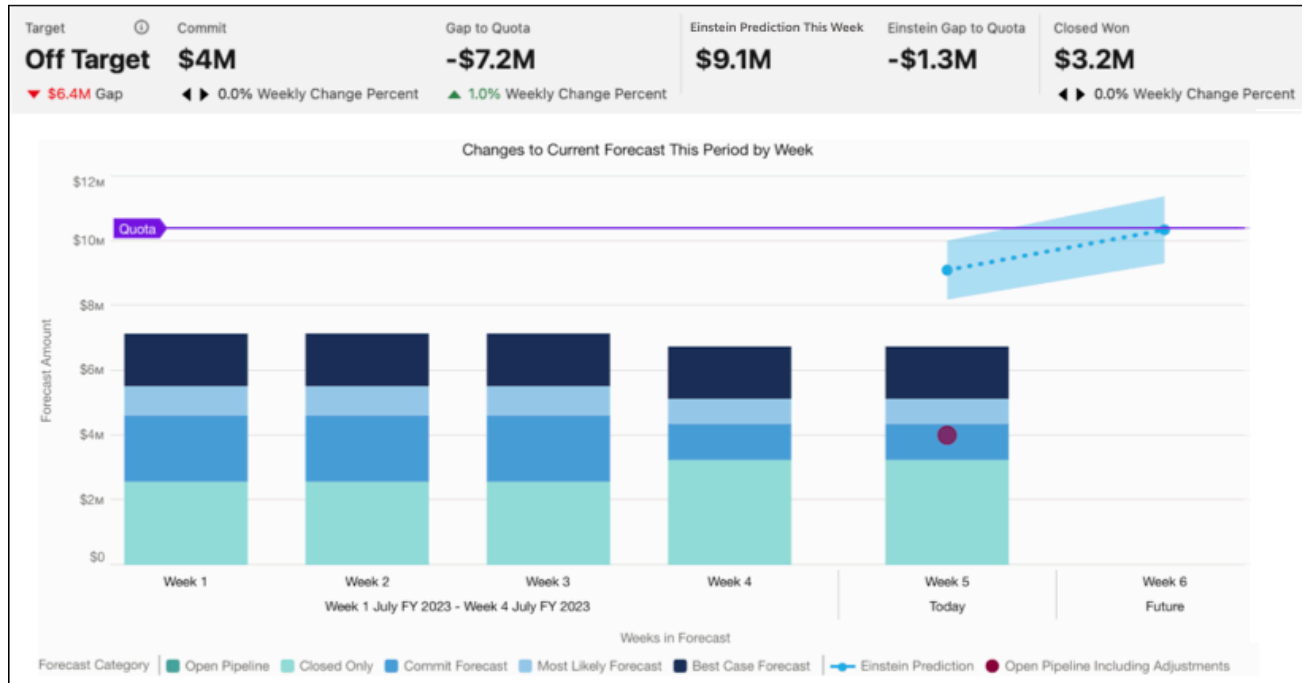
The Einstein Prediction This Week metric shows the forecasted value that Einstein predicts will be Closed Won by the end of the current week. The dotted projection line in the chart indicates the forecasted value that Einstein predicts will be Closed Won from this week through to the end of the forecast period. The predicted value at the end of the forecast period is also shown in the Einstein Prediction column for the forecast period in the forecast grid view.

See Also

Enable Einstein Forecasting

Considerations for Setting Up Einstein Forecasting

Understand How Einstein Creates Your Forecasting Prediction

Understand How Sales Cloud Einstein Works

Sales Cloud Einstein might seem like magic, but it's not. It's built with science. Data science. Learn more about how Sales Cloud Einstein features use your data to bring intelligence to Salesforce.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Understand How Einstein Scores Your Leads

Learn about the process Einstein uses to determine which of your leads to prioritize.

Einstein Lead Scoring FAQ

Learn more about how Einstein Lead Scoring works and how you can use it with your business.

Understand How Einstein Scores Your Opportunities

Learn about the process Einstein uses to predict which opportunities are most likely to be won.

Understand How Einstein Generative AI Creates Sales Emails

Sales Emails lets busy sales reps to speed up and expand deals through personalized and informed content that buyers love. Einstein generative AI generates personalized emails for contacts and leads, and uses Einstein to personalize and contextualize the emails, a method known as grounding. Learn about email types, how your data is used, and how Salesforce tracks usage.

Understand How Einstein Creates Your Forecasting Prediction

Learn about the process Einstein uses to determine your forecast prediction.

See Also

Considerations for Setting Up Sales Cloud Einstein
Sales Cloud Einstein

Understand How Einstein Scores Your Leads

Learn about the process Einstein uses to determine which of your leads to prioritize.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic. Lead Scores available in list views and record detail pages in the Salesforce app.

Available with Sales Cloud Einstein, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Einstein Lead Scoring uses data science and machine learning to discover the patterns in your business' lead conversion history, and to predict which current leads to prioritize. By using machine learning, Einstein Lead Scoring provides a simpler, faster, and more accurate solution than traditional rules-based lead scoring approaches.

The Scoring Model

Einstein analyzes your past converted leads, including custom fields and activity data, to determine your conversion patterns. It then identifies which of your current leads have the most in common with your prior converted leads. Based on this analysis, Einstein builds one or more scoring models for your

organization.

During setup, Salesforce admins can choose to score all of your leads together, or group leads into segments based on field criteria. Einstein builds a separate scoring model for each lead segment. For each lead segment, admins can also choose to omit certain lead fields. When Einstein builds your scoring model, the omitted fields are ignored.

When you score all leads together without creating segments, and you don't have enough lead conversion data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough lead data, Einstein builds a scoring model with your data and uses the model with the better results.

Einstein models are refreshed every 10 days, or whenever the admin updates how Lead Scoring is configured. Lead scores are updated at least every six hours as needed.

Factors That Contribute to Scores

With each lead score, Einstein displays the lead's field values that have the most significant positive and negative effects on its score. These fields are the lead's top positives and top negatives. Sometimes, a lead's score is due to a combination of several fields with only slight positive or negative effects, rather than a few very positive or very negative fields. In this case, Einstein doesn't display top positives or top negatives for the lead.

When Scores Don't Appear

Sometimes, a score doesn't appear on a particular lead for any of these reasons.

- The scores haven't been calculated yet because Einstein Lead Scoring was recently enabled. It can take around 24 hours before scores are available.
- The lead was added a few hours ago.
- The lead wasn't modified in the 6 months before Einstein Lead Scoring was turned on.
- The lead has had no activities or updates in the last 90 days.
- The lead doesn't meet the criteria for any lead segments.
- The lead's Status value is unqualified or similar.
- The lead is in a lead segment that doesn't contain enough data to train a scoring model.

When Scores Don't Change

Sometimes, a score doesn't change on some leads any of the following reasons.

- A previously scored lead hasn't been modified in 6 months.
- The lead was converted.
- Your admin chose to score all leads together in one group, but the amount of lead conversion data in your org falls below the minimum requirements for scoring leads. When there isn't enough data, scores don't update until more data becomes available.

- Your admin chose to score your leads in separate segments, and the lead is in a segment that falls below the minimum data requirements for scoring leads.

See Also
  Einstein Lead Scoring
  Enable Einstein Lead Scoring

Einstein Lead Scoring FAQ

Learn more about how Einstein Lead Scoring works and how you can use it with your business.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic. Lead Scores available in list views and record detail pages in the Salesforce app.

Available with Sales Cloud Einstein, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Training and Certification

What training and certification resources are available for Sales Cloud Einstein?
  A Sales Cloud Einstein accredited professional certification is available. Preparation materials are available at Salesforce.com. Exam preparation takes about 10 hours.
  - Accredited Professional Exam
  - Exam Preparation Curriculum
  - Exam Guide

What Trailhead badges are there for Sales Cloud Einstein?
  The Sales Cloud Einstein badge is available on the Trailblazer website.

Value for Your Company

How can I estimate the return on investment I can expect from Sales Cloud Einstein?
  Before enabling Sales Cloud Einstein, Salesforce customers can use the Einstein Value Assessor to learn approximately how much value Einstein Lead Scoring can provide for their company.

  Prospective Salesforce customers can also use the assessor to estimate its value for their company by answering a few simple questions.

  After you enable Einstein Lead Scoring, the Einstein Lead Scoring Value dashboard, built with CRM Analytics, can show you specifics about how Lead Scoring is working in your company. The dashboard is available on AppExchange.

Data Accessibility

Can I export lead scores from Salesforce?

    No. Scores are available only on lead records, list views, and reports.

Can I use the Lead Score field in Process Builder or Flow?

    Yes, both Process Builder and Flow can use the Lead Score field.

Global Models

What determines when Einstein Lead Scoring uses a global model or a local model?

    When you score all leads together without creating segments, and you don't have enough lead conversion data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough lead data, Einstein builds a local scoring model with your data and uses the model with the better results.

What data does Einstein use for its global scoring model?

    Einstein uses standard lead fields to build the global model. Einstein omits some standard fields that can contain sensitive information or have no correlation to lead conversion.

Does Einstein anonymize the lead data used by the global model?

    Yes, lead data used by the global model doesn't include any personal information or data that connects it to your company.

If Einstein uses the global model, can I score my leads in segments?

    No, when you segment your leads, Einstein can't use the global model. If one of your segments lacks enough data to build an effective model, leads in that segment aren't scored.

Can I choose not to let Einstein use my data in the global model?

    Yes, you can opt out of contributing data to the model. See Knowledge article Salesforce Einstein: Global Model Opt-Out Process.

Local Models

How often does Einstein score your leads?

    Einstein refreshes your lead scores multiple times each day.

Does Einstein score leads without related activities?

    Einstein scores new leads that don't yet have any related activities. Leads with no new or updated activities for the last 200 days aren't scored.

How can I score leads separately for different departments within my company?

To score leads in separate groups, create lead segments in Setup. Create segments based on up to 35 field criteria that distinguish the leads for each department.

How much data does Einstein need and how can I help Einstein provide the most meaningful scores?

- Encourage sales reps to add as much data as possible to their leads. When leads have more data, Einstein Lead Scoring generates more meaningful scores.
- Einstein needs at least 1,000 leads created in the last 200 days.
- Of the leads created in the last 200 days, at least 120 must be converted to an account and contact.

Can Einstein create a model for leads converted to accounts and contacts and for leads converted to accounts, contacts, and opportunities?

When you set up Einstein Lead Scoring to look at leads that have converted to accounts and contacts, leads that have converted with opportunities are included. When you set up Einstein Lead Scoring to look at leads that convert with opportunities, leads that only convert to an account and contact aren't included.

Which lead fields does Einstein use to create my scoring model, and are those fields weighted differently?

If you use the default settings in Einstein Lead Scoring Setup, Einstein considers all supported standard and custom lead fields when creating your model. If you choose a custom configuration, only the fields you specify are considered when creating your model. The model considers all fields equally and identifies the field values that have the highest correlation with lead conversion.

Does the lead scoring model detect or include seasonal trends?

Einstein Lead Scoring builds its model based on the patterns in your closed leads during the past 3 years. Einstein doesn't explicitly look for seasonal trends, but if your lead conversion patterns contain seasonality, Einstein detects that and includes it in your lead scores.

If I don't use Salesforce in English, can Einstein Lead Scoring work with my leads?

Yes, Einstein can build a model and score leads based on lead data in any language.

Can I customize the Einstein Lead Scoring component?

You can customize the location of the component on your page layouts.

Can I customize how Einstein builds my lead scoring model?

Yes, you can tell Einstein to score your leads in separate segments based on field values, and you can choose which lead fields to include when building your model.

Can Einstein include external data when building a model and scoring leads?

Yes, if you add external data to your leads by using custom lead fields, Einstein can include that data.

What determines the top positives and top negatives that appear in the Einstein Lead Scoring component for each lead?

Einstein determines the top positives and negatives that appear for a lead based on the lead conversion patterns it finds when analyzing your lead conversion history. A top positive is a field value that correlates well with your past lead conversions and increases the lead score. A top negative is a field value that correlates with leads that didn't convert and decreases the lead score.

Can I exclude top positives or top negatives from a lead's score?

You can't exclude specific positives or negatives from a score. You can tell Einstein to omit specific fields from the scoring model, but that excludes those fields from being used to score all your leads.

Can leads with different scores have the same top positive or top negative?

Yes, because many field values can contribute to a lead's score, multiple leads can have similar top positives and top negatives but with different scores.

Why do some leads have a score without showing any top positives or top negatives?

When no individual field value has a significant effect on the score, no top positives or negatives appear. For these leads, many field values combine to determine the score, with no fields standing out above the rest.

How can I understand and evaluate my lead scoring model?

Einstein Lead Scoring includes a CRM Analytics Einstein Lead Scoring dashboard that provides insights into which lead characteristics result in the most conversions. See how well lead scores correlate to conversion rates, monitor the average lead score of each lead source, and view other statistics.

Data Storage

Where does Einstein store lead scoring data?

Einstein stores the data it uses for your lead analysis and your scoring model on Amazon Web Services servers in the United States.

Does Einstein Lead Scoring affect my company's Salesforce data storage limits?

No, Einstein Lead Scoring doesn't change your data storage usage.

Understand How Einstein Scores Your Opportunities

Learn about the process Einstein uses to predict which opportunities are most likely to be won.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic.

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

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Available to eligible customers for no extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

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Einstein Opportunity Scoring uses data science and machine learning to score your opportunities so that you can prioritize them. By using machine learning, Einstein Opportunity Scoring provides a simpler, faster, and more accurate solution than traditional rule-based scoring approaches.

The Scoring Model

To predict which opportunities are most likely to be won, Einstein analyzes your and your team's past closed opportunities (both closed-won and closed-lost) to build a scoring model. The criteria used in the analysis includes the following.

- Each opportunity's record details (both standard and custom fields), history, and related activities
- The related account's record details and some record history
- Details about the related products, quotes, and price books

During setup, Salesforce admins can choose whether to have Einstein consider all opportunity records and custom fields or only a subset. When Einstein builds the scoring model, the omitted records and fields are ignored.

If you don't have enough opportunity data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough opportunity data, Einstein builds a scoring model with your data and uses the model with the better results.

Once a month, or whenever the admin updates the settings, Einstein reanalyzes the opportunity data and the model is refreshed. Opportunity scores are updated every few hours.

Factors That Contribute to Scores

For each opportunity score, Einstein shows the factors that have contributed most to the score, both positively and negatively. Sometimes, an opportunity has a score but doesn't show any factors. This could be because there are too many minor factors for any of them to help understand how the score was calculated. Or, it could be because the factors are complex and, therefore, too difficult to summarize.

Factors are based on your CRM data and accurately contribute to the score, even if they seem counterintuitive. For example, a deal with an enterprise customer requires extra steps, such as legal review and a longer negotiation process. These extra steps delay the close date. But, because the delayed close date signals that the deal is progressing, the delay is associated with a higher score. However, for a deal with an SMB customer that doesn't include extra steps, a delayed close date is associated with a lower score.

When Scores Don't Appear

A score might not appear on a particular opportunity for one of the following reasons.

- The scores haven't been calculated yet because Einstein Opportunity Scoring was recently enabled. It can take around 48 hours before scores are available.
- A previously scored opportunity is closed, so the score is removed.
- The admin excluded the opportunity from Einstein's scoring process. If the opportunity was previously scored, the score is removed.
- The opportunity was added less than six hours ago.
- Einstein couldn't calculate scores because you don't have enough opportunity data. To check your data, run the Sales Cloud Einstein Assessor.
- If Opportunity Scoring was turned on by default, scores aren't available for opportunities that are related to a person account. To get scores for those opportunities, turn off Einstein Opportunity Scoring and then turn it on again.

When Scores Aren't Recalculated

A previously scored opportunity is more than three months past its closed date. Einstein gives the opportunity a default score of 5.

See Also

    Einstein Opportunity Scoring
    Considerations for Setting Up Einstein Opportunity Scoring
    Enable Einstein Opportunity Scoring
    Run the Sales Cloud Einstein Readiness Assessor

Understand How Einstein Generative AI Creates Sales Emails

Sales Emails lets busy sales reps to speed up and expand deals through personalized and informed content that buyers love. Einstein generative AI generates personalized emails for contacts and leads, and uses Einstein to personalize and contextualize the emails, a method known as grounding. Learn about email types, how your data is used, and how Salesforce tracks usage.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with the Einstein for Sales add-on, which is available for an extra cost in **Performance** and **Unlimited** Editions.

Sales Emails and Your Data

Sales Emails uses your Salesforce data to add context and personalization to the email types, a method known as grounding. To learn more about how Einstein generative AI keeps your data secure, see Einstein Trust Layer. For Sales Emails, this data provides email grounding.

Object	Fields	What It Provides
Contact	- Account - Name - Title	
Lead	- Company - Industry - Name - Title	
User	- Company - Name	The sales rep's name and company.

Email Types

Sales reps can use these pre-made options to request a draft from Einstein generative AI. For partner users working in Experience Cloud, only the email types Introduce Myself, Nudge for Follow-Up, and Send a Meeting Invite are available.

Email Type	Output	REQUIRED Actions
Check In	A brief email to say hello and ask how the recipient is doing	
Introduce Myself	An email that introduces the sales rep and suggests a brief meeting	Choose product record.
Nudge for Follow-Up	A follow-up to check in with the recipient and remind them of a previous email	Choose product record.

Email Type	Output	REQUIRED Actions
Reconnect	An email to ask how the recipient is doing, describe the benefits of working together, and suggest a brief meeting	Choose product record.
Send a Meeting Invite	An email to discuss the benefits of a product or service and to invite the recipient to a meeting	Choose product record.

Reps can also use custom email types, created by an admin. An admin can add a related entity when creating a custom email type.

Troubleshooting Einstein and Sales Emails

Generative AI uses LLMs to generate the output. Because other organizations train LLMs, the output isn't always what you expect. If the output doesn't meet your expectations, you can generate a new output by starting over. The generated output from the previous attempt remains in the email composer and the new output is appended.

🛑 **Important** This tool uses generative AI, which is known to include inaccurate or harmful responses. Before sharing externally, review the output for accuracy and safety. You assume responsibility for the output when sharing.

Credit Usage and Tracking

Sales Emails charges only for the activity you use. Learn how your sales reps interact with Einstein and track your usage against your subscription allowance. Only orgs with Sales Emails enabled and sales reps with the Einstein Sales Emails permission set can contribute to your credit usage.

For each Einstein generative AI feature, credit usage depends on the number of LLM requests, the size of the prompt, and the size of the generated outputs. For Sales Emails, a request is created each time a sales rep uses Einstein to draft an email. The exact credit usage depends on the size of the email output.

To learn more or get updates on your Sales Emails credit usage, contact your Salesforce account executive.

See Also
    Einstein Generative AI
    Considerations for Einstein Generative AI Sales Emails
    Set Up Sales Emails
    Prompt Builder

Understand How Einstein Creates Your Forecasting Prediction

Learn about the process Einstein uses to determine your forecast prediction.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Einstein Forecasting uses data science and machine learning to predict how much your sales teams will sell at the end of a forecasting period. Einstein analyzes your team's past opportunities to create a predictive model. The criteria used in the analysis includes the opportunity's and related account's record details, history, and related activities. Information about the opportunity's owner, such as yearly win rates, is also used to calculate the score.

Predictions aren't shown when there isn't enough data about past opportunities (at least 12 months is recommended) or when the prediction range is too large.

See Also
  Einstein Forecasting

Prepare for Sales Cloud Einstein

Before you set up Sales Cloud Einstein feature, review information about data requirements and other considerations. Learn about sandbox support and how to run the readiness assessor.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Data Requirements for Sales Cloud Einstein
To generate the most reliable intelligence, you must meet data requirements for each Sales Cloud Einstein feature.

Considerations for Setting Up Sales Cloud Einstein
Before setting up Sales Cloud Einstein, consider these requirements, limitations, and nuances for each feature.

Sales Cloud Einstein and Sandbox
Review which Sales Cloud Einstein features are available in sandbox.

Run the Sales Cloud Einstein Readiness Assessor
Wondering whether you're ready for Sales Cloud Einstein or whether it can help your sales reps? Run

the Sales Cloud Einstein Readiness Assessor to find out. We analyze your Salesforce implementation, in either a production or sandbox environment, and then send you a personalized report. The report tells you which Einstein features you're ready to use now and which ones require extra steps.

See Also

Set Up Sales Cloud Einstein

Data Requirements for Sales Cloud Einstein

To generate the most reliable intelligence, you must meet data requirements for each Sales Cloud Einstein feature.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

💡 **Tip** To check whether you meet the data requirements, run the Sales Cloud Einstein Assessor.

Einstein Automated Contacts

🚫 **Important** Feature is scheduled for retirement on February 15, 2025. See Einstein Automated Contacts Retirement.

- You must have at least 30 business accounts.
- If you use person accounts, at least 50 percent of accounts must be business accounts.

Einstein Activity Capture

- You must have at least 30 accounts, contacts, leads, or opportunities.

Einstein Lead Scoring

These requirements apply to each segment of leads you create during setup, including the All Leads (Default) segment.

- At least 1,000 leads must be created in the last 200 days.
- Of the leads created in the last 200 days, at least 120 must be converted to an account and contact.
- (Optional) Of the leads created in the last 6 months (180 days), at least 120 must be converted to an account and contact with an opportunity created at conversion time.

When you score all leads together without creating segments, and you don't have enough lead

conversion data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough lead data, Einstein builds a scoring model with your data and uses the model with the better results.

Einstein Opportunity Scoring

- You must have at least 200 closed won opportunities in last 24 months, each with a lifespan of at least 2 days.
- You must have at least 200 closed lost opportunities in last 24 months, each with a lifespan of at least 2 days.
- Opportunity history shows an average of one update to each closed opportunity.
- Use the standard opportunity Stage field because it's used to calculate win rates, and win rates are used to generate scores. If you change the names of the opportunity stage picklist values, make sure that the values are mapped to the correct stage type: Open, Closed/Won. or Closed/Lost.
- If your win rate is extremely high or low, your scores could be skewed. For example, if your win rate is above 90 percent, you could get a large number of opportunities with scores above 90. To avoid skewed scores, make sure that opportunities are set to the correct closed stage. (A win rate is calculated by dividing the last two years of closed-won opportunities by all closed opportunities from that same period.)

If you don't have enough opportunity data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough opportunity data, Einstein builds a scoring model with your data and uses the model with the better results.

Einstein Forecasting

- Salesforce Forecasting must be enabled.
- You must work with opportunities in Salesforce for at least 12 months. Specifically, the opportunity history must show at least one update in each of the past 12 months.
- You must use a standard fiscal year. Standard fiscal years follow the Gregorian calendar, but can start on the first day of any month of the year.
- Forecasts must be measured by opportunity revenue. Predictions are generated for only the oldest activated opportunity revenue forecast type.
- Your forecast hierarchy must include at least one forecasting enabled user who reports to a forecast manager.
- The Amount field should be populated in at least 80 percent of open opportunities.

See Also
Considerations for Setting Up Sales Cloud Einstein

Considerations for Setting Up Sales Cloud Einstein

Before setting up Sales Cloud Einstein, consider these requirements, limitations, and nuances for each

feature.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

General Considerations

- Sales Cloud Einstein is available only to users with standard Salesforce licenses.
- Sales Cloud Einstein isn't supported in Government Cloud and Government Cloud Plus organizations. Turning on Sales Cloud Einstein can send data outside the authorization boundary. Contact your Salesforce account executive for more details.
- When you set up Sales Cloud Einstein, Salesforce installs two packages in your org, SalesforceIQ Cloud and Sales Insights. Each package adds an associated integration user and profile. Salesforce uses these entities to provide insights to your org. If you update these entities, it can affect your org's ability to get insights. Depending on the Einstein features you turn on, these integration users can have full access to Accounts, Campaigns, Contacts, Leads, and Opportunities. These users don't modify your org's data and don't affect your Salesforce license usage.
- Platform encryption isn't currently supported with Sales Cloud Einstein.
- Some Sales Cloud Einstein features require users to connect a Microsoft® Exchange or Gmail™ account to Salesforce.
- Sales Cloud Einstein included in Sales Cloud Unlimited Edition provides analytics reporting using the CRM Analytics platform. When using this functionality, your license doesn't allow you to:
  - Build custom analytics apps or dashboards
  - Upload, access, or connect external data using the API with the exception of datasets provided with Sales Cloud Einstein
  - Import data from Salesforce standard or custom objects that aren't included in this feature

Feature Considerations

- Einstein Lead Scoring
- Einstein Opportunity Scoring
- Einstein Forecasting
- Einstein Activity Capture
- Salesforce Inbox
- Sales Analytics

Considerations for Einstein Generative AI Sales Emails
Sales Emails lets your team use Einstein generative AI to create personalized and contextualized emails to send to your contacts and leads. But whether you're an admin setting things or a sales rep powering through your day, keep these considerations in mind.

Considerations for Setting Up Einstein Automated Contacts

Before setting up Einstein Automated Contacts, consider these requirements, limitations, and nuances.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

⊗ **Important** Feature is scheduled for retirement on February 15, 2025. See Einstein Automated Contacts Retirement.

- You must have at least 30 business accounts.
- If you use person accounts, at least 50 percent of accounts must be business accounts.

- Einstein Automated Contacts isn't supported in sandbox environments.
- Suggestions are based on data from manually and automatically logged activities.
- Contact suggestions and opportunity contact role suggestions aren't available in standard reporting, but you can use them in custom report types.
- To add or decline contact suggestions, users need edit access on accounts.
- To add or decline opportunity contact role suggestions, users need edit access on opportunities, and read or edit access on contacts.
- When an opportunity contact role suggestion refers to a contact that a user doesn't have access to, the following happens. The user doesn't see the suggestion on the opportunity record. When the user views the complete list of suggestions (using the Einstein Opportunity Contact Role Suggestions item from the App Launcher), we show all suggestions but hide contact fields that the user doesn't have access to.
- Make sure that sales reps have access to contact fields, such as Email, Title, or Phone, so that they can see those fields with opportunity contact role suggestions.
- If required contact fields don't have a default value, errors can occur when contacts are automatically created. If an error occurs, the contact is shown to users as a suggestion.
- If the New Contact action for the Contact object is overridden through a custom Visualforce page or Lightning component, then the Add button on the contact suggestion doesn't always populate the contact record.

Access Requirements

Users need access to specific opportunity and account fields to see insights everywhere.

- On the Opportunity object, you need the **Name** and **Type** fields.
- On the Account object, you need the **Activity**, **Name**, **Title**, and **Type** fields.

See Also

Enable Einstein Automated Contacts

Einstein Automated Contacts

Considerations for Einstein Generative AI Sales Emails

Sales Emails lets your team use Einstein generative AI to create personalized and contextualized emails to send to your contacts and leads. But whether you're an admin setting things or a sales rep powering through your day, keep these considerations in mind.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with the Einstein for Sales add-on, which is available for an extra cost in **Performance** and **Unlimited** Editions.

General

- Field-level security is enforced. If users don't have access to a field used for email grounding, then that field data isn't used. The sales rep sees a placeholder to customize as needed.
- Sales Emails isn't available in Government Cloud.
- Sales Emails is available in Salesforce Sites for users with the appropriate permissions.
- If Einstein Activity Capture is on, emails created with Einstein are captured and tracked like other emails, according to your settings.
- If you have Inbox, your users need the permissions for Inbox in addition to the Sales Emails permissions.
- You can generate up to 2,000 emails per hour per org, calculated on a rolling basis. If the limit is reached, the **Draft with Einstein** button isn't available and users see an error message.

Drafting Emails

- You can use Einstein generative AI to draft emails when these conditions are met.
  - At least one recipient is listed in the To field. If you enter more than one recipient, Salesforce drafts an email for the first person in the recipient list that matches to a contact or lead record.
  - The recipient must have a lead or contact record in Salesforce.
  - Sales Emails supports drafting content for new emails. Replying to or forwarding an email isn't supported.
- Einstein adds the output to the contents in the email composer.
- Einstein writes an email subject and replaces any text in the subject line. Each time you regenerate an email, the subject line is updated.

- Drafts must be reviewed and customized before you send them. The output can contain placeholders for missing or incomplete information.
    - If a field used for email context isn't filled out in Salesforce, or if the user doesn't have permission to access the field, then the draft output contains a placeholder. For example, if the Industry field is blank, the output sentence can look like this: "As someone in the [Customize: INDUSTRY] industry, I understand the unique challenges and opportunities."
    - The draft output contains some portions for you to customize, such as to add specific meeting times or products. For example, the Send a Meeting Invite output can contain placeholders such as [Customize: DATE AND TIME].
- Some email types require certain information, such as a company name. If the data isn't available in Salesforce, you don't see the email type in the dropdown.
- Prompt Builder supports these languages for generative responses.
    - English
    - French
    - German
    - Italian
    - Japanese
    - Spanish

🛑 **Important** This tool uses generative AI, which is known to include inaccurate or harmful responses. Before sharing externally, review the output for accuracy and safety. You assume responsibility for the output when sharing.

See Also

  Understand How Einstein Generative AI Creates Sales Emails

Considerations for Setting Up Einstein Lead Scoring

Before you set up Einstein Lead Scoring, consider these requirements and limitations.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic
Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

General

- At least 1,000 leads must be created in the last 200 days.
- Of the leads created in the last 200 days, at least 120 must be converted to an account and contact.
- (Optional) Of the leads created in the last 6 months (180 days), at least 120 must be converted to an account and contact with an opportunity created at conversion time.

These requirements apply to each segment of leads you create during setup, including the All Leads

(Default) segment.

When you score all leads together without creating segments, and you don't have enough lead conversion data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough lead data, Einstein builds a scoring model with your data and uses the model with the better results.

- Encourage reps to add as much data to their leads as possible. When leads have more data, Einstein Lead Scoring generates better insights.
- Reps must have read access to the Company, Phone, and Email fields on leads.
- Don't install Apex classes that reference the ScoreIntelligence field until after you enable Einstein Lead Scoring and receive the notification that enablement is complete. Otherwise, references to the ScoreIntelligence field are invalid.
- Einstein does not use encrypted lead fields in lead score analysis. When you turn encryption on or off for a field, Einstein includes the change in the next analysis. Einstein reanalyzes your leads approximately every 10 days.
- If you turned on Einstein Lead Scoring in Spring '20 or earlier, you no longer need the Lead filter in the Einstein Lead Scoring Analytics app. To remove the filter, open the Data Manager in Analytics Studio and then click **Connect**. Click **Lead**, then **Continue**. Remove the ScoreIntelligence.Score >= 0 filter text and save your changes.

Scoring Leads in Segments

- Data requirements for scoring all leads together also apply to individual lead segments.
- Each time you change Einstein Lead Scoring settings, Einstein updates the segment IDs for each lead segment, even if you score all your leads in a single segment. During these updates, some data in the CRM Analytics Lead Scoring Dashboard, including lead conversion rates, can be incorrect until Einstein updates your scores based on the new settings.
- When using segments or any other custom lead scoring settings, any new fields added to leads must be added manually to the list of included fields for each segment if you Einstein to consider them during scoring.

Using Filters

If you create lead segments using field filters, be aware of what happens when you delete or deactivate picklist field values.

- If you delete a picklist value from a standard field, you can't use the value to set up a field filter.
- If you deactivate a picklist value from a standard field, you can't use it to set up a field filter. However, existing field filters based on that value still work with lead records that contain the deactivated value.
- If you create a field filter using a standard field value and then delete that filtered value from the field, the filter still functions correctly. However, the field appears in Setup with a blank value.
- If you delete a picklist value from a custom field, it still appears in Setup, but any filter created with that value doesn't function.
- If you deactivate a picklist value from a custom field, it can still be used to set up a field filter.

Field-Level Security

For each lead score, Einstein shows the factors that have contributed the most to the score. The contributing factors that sales reps see alongside lead scores are dependent on the reps' field access. For example, reps without access to the Annual Revenue field see an error indicating a factor is based on a field to which they don't have access. To resolve this error, make the field accessible to relevant users.

See Also

Enable Einstein Lead Scoring
Einstein Lead Scoring
Understand How Einstein Scores Your Leads

Considerations for Setting Up Einstein Opportunity Scoring

Before setting up Einstein Opportunity Scoring, consider these requirements, limitations, and nuances.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic.

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Available to eligible customers for no extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

> ☑ **Note** Einstein Opportunity Scoring is available to users with a Sales Cloud Einstein license and eligible customers without a Sales Cloud Einstein license.

Data Requirements and Access

- You must have at least 200 closed won opportunities in last 24 months, each with a lifespan of at least 2 days.
- You must have at least 200 closed lost opportunities in last 24 months, each with a lifespan of at least 2 days.
- For each opportunity, the change history records must have at least two records with open stages, not just those in closed stages. Opportunities with only the final closed stage, and no open stages in its history, prevent Einstein Opportunity Scoring from scoring these opportunities. It also prevents from training the scoring model, affecting all opportunities.

  > ☑ **Note** If your org doesn't have its own predictive scoring model, Einstein scores the open opportunities using the global model.

- Opportunity history shows an average of one update to each closed opportunity.
- Use the standard opportunity Stage field because it's used to calculate win rates, and win rates are used to generate scores. If you change the names of the opportunity stage picklist values, make sure that the values are mapped to the correct stage type: Open, Closed/Won. or Closed/Lost.

- If your win rate is extremely high or low, your scores could be skewed. For example, if your win rate is above 90 percent, you could get a large number of opportunities with scores above 90. To avoid skewed scores, make sure that opportunities are set to the correct closed stage. (A win rate is calculated by dividing the last two years of closed-won opportunities by all closed opportunities from that same period.)

- If you don't have enough opportunity data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough opportunity data, Einstein builds a scoring model with your data and uses the model with the better results.

- After you turn on Einstein Opportunity Scoring, it can take up to 48 hours to analyze your data, build a scoring model, and add scores to opportunities. You can check the status from the Einstein Opportunity Scoring setup page. If Einstein is still analyzing your data after 48 hours, turn off Einstein Opportunity Scoring and then turn it on again, or edit your settings.

- Depending on when you purchased Sales Cloud Einstein, Einstein Opportunity Scoring might be on by default. If it is, scores aren't available for opportunities that are related to a person account. To get scores on those opportunities, turn off Einstein Opportunity Scoring and then turn it on again.

- If you don't have any Sales Cloud Einstein licenses but your org meets specific requirements, all users with a Salesforce user license have access to scores on all opportunities. For information about your eligibility, contact Salesforce Customer Support.

Reporting

- Opportunity scores are available in standard reporting and in custom report types. Model factors, which are used to build scoring models, are available in custom report types. For examples, see Create Custom Report Types for Einstein Opportunity Scoring.

Field-Level Security

- For each opportunity score, Einstein shows the factors that have contributed most to the score. The contributing factors that sales reps see alongside opportunity scores are dependent on the reps' field access. For example, reps who don't have access to the Amount field don't see factors that are based on amount. Keep in mind that factors include only field names, not field values. For example, the **Amount keeps going up** factor doesn't shows amount values to any users.

Lightning Experience and Salesforce Classic

- In Lightning Experience, we show `Not Available` when there's no score. We show `Hidden` when a score isn't available because the user has limited access to opportunity scores. In Salesforce Classic , we show a blank value when there's no score *and* when a score isn't available due to limited user access. For details on why there's no score, see Understand How Einstein Scores Your Opportunities.

- In Lightning Experience, when you use the Opportunity Score field in any type of filtering, use *null* in the filter criteria (when non-numeric values are allowed) to include opportunities that Einstein hasn't calculate a score for yet. Use *-1* in the filter criteria to include opportunities that don't have scores

because of limited access to opportunity scores. In Salesforce Classic, for the same scenarios use *null* in the filter criteria (when non-numeric values are allowed).

See Also
[Enable Einstein Opportunity Scoring](#)
[Einstein Opportunity Scoring](#)
[Understand How Einstein Scores Your Opportunities](#)

Considerations for Setting Up Einstein Forecasting

Before setting up Einstein Forecasting, review the requirements and considerations.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

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- Salesforce Forecasting must be enabled.
- You must work with opportunities in Salesforce for at least 12 months. Specifically, the opportunity history must show at least one update in each of the past 12 months.
- You must use a standard fiscal year. Standard fiscal years follow the Gregorian calendar, but can start on the first day of any month of the year.
- Forecasts must be measured by opportunity revenue. Predictions are generated for only the oldest activated opportunity revenue forecast type.
- Your forecast hierarchy must include at least one forecasting enabled user who reports to a forecast manager.
- You must use the standard Opportunity object and the standard Close Date and Amount fields. Custom date fields aren't supported.
- The Amount field should be populated in at least 80 percent of open opportunities.
- Opportunity splits aren't supported. The forecast predictions are based on total revenue, not shared revenue.
- Territories aren't supported. Forecasts are measured by opportunity revenue, which is based on the user role hierarchy.
- To view the prediction graph on the home page when Einstein Forecasting is enabled, you must enable historical trending for Forecasting Item.
- You can use Einstein Forecasting only in production orgs, not sandboxes.
- Avoid setting field-level security on the Sales Insights Integration User Profile for opportunity fields that you want to use to optimize your predictions. It can impact your forecasting accuracy.
- If you plan to use field filters to segment your opportunities, be aware of what happens when you delete or deactivate picklist field values.
  - If you delete a picklist value from a standard field, you can't use the value to set up a field filter.
  - If you deactivate a picklist value from a standard field, you can't use it to set up a field filter. However, existing field filters based on that value still work with opportunity records that contain the

      deactivated value.
- If you create a field filter using a standard field value and then delete the filtered value from the field, the filter still functions, but appears in Setup with a blank value.
- If you delete a picklist value from a custom field, it still appears in Setup, but any filter created with that value doesn't function.
- If you deactivate a picklist value from a custom field, it can still be used to set up a field filter.

See Also
[Einstein Forecasting](#)
[Enable Einstein Forecasting](#)
[Understand How Einstein Creates Your Forecasting Prediction](#)

Sales Cloud Einstein and Sandbox

Review which Sales Cloud Einstein features are available in sandbox.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance**, and **Unlimited** editions, and for an extra cost in **Enterprise** Edition

💡 **Tip**

- A sandbox environment is best suited for testing how Sales Cloud Einstein features work with architecture, workflows, and Lightning components. Because the data in a sandbox environment is limited, we recommend that you don't evaluate the performance of the Einstein model based on what you see in sandbox. Instead, evaluate the model in a production org that has the required amount of historical data. You can run the Sales Cloud Einstein Assessor in a sandbox to check which Sales Cloud Einstein features are ready to be turned on.
- Don't manipulate the sandbox data before running the Einstein readiness assessor. Doing so can result in the assessor incorrectly passing some of the requirements. For example, Einstein Opportunity Scoring requires opportunities to be at least two days old and have updates that reflect your actual business process. If your sandbox data doesn't include opportunity history and you then update opportunities on the same day that you added them to the sandbox, the assessor incorrectly evaluates the requirement as met. Then, if you turn on Opportunity Scoring in sandbox, you don't see scores. If you don't see scores in sandbox but believe that you fulfilled all the requirements, contact Salesforce Customer Support.

Feature	Sandbox Support	Notes
Einstein Lead Scoring	✅	Einstein Lead Scoring requires at

Feature	Sandbox Support	Notes
		least six months of data, so make sure that you refresh the full sandbox. Re-enable the feature in each new sandbox or when a sandbox is refreshed.
Einstein Opportunity Scoring	✅	Einstein Opportunity Scoring requires at least six months of data, so make sure that you refresh the full sandbox. If you use Opportunity Scoring without Performance or Unlimited editions or Sales Cloud Einstein licenses, sandbox isn't supported. Re-enable the feature in each new sandbox or when a sandbox is refreshed.
Einstein Activity Capture	✅	Because sandbox is best for testing how Einstein Activity Capture works and how it looks, no data is copied from production to sandbox. After you set up Einstein Activity Capture in sandbox, any refresh of that sandbox turns off Einstein Activity Capture and removes all connected accounts from the sandbox.
Inbox	✅	
Recommended Connections	✅	Einstein Activity Capture is required.
Einstein Email Insights	✅	Einstein Activity Capture is required.
Sales Analytics	✅	

Feature	Sandbox Support	Notes
Einstein Forecasting		Einstein Forecasting requires two years of data, but sandbox environments support up to six months of data.

See Also

Run the Sales Cloud Einstein Readiness Assessor

Wondering whether you're ready for Sales Cloud Einstein or whether it can help your sales reps? Run the Sales Cloud Einstein Readiness Assessor to find out. We analyze your Salesforce implementation, in either a production or sandbox environment, and then send you a personalized report. The report tells you which Einstein features you're ready to use now and which ones require extra steps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To run the Sales Cloud Einstein Readiness Assessor:	Customize Application

The Sales Cloud Einstein Readiness Assessor can be run in production and sandbox orgs. Sandbox is best suited for testing Sales Cloud Einstein features in terms of architecture, workflows, and Lightning components. Because the data in sandbox is limited, we recommend that you don't evaluate the performance of the Einstein model based on what you see in sandbox. Instead, evaluate the model in a production org that has the required amount of historical data.

1. From Setup, enter `Assessors` in the Quick Find box, and then select **Sales Cloud Einstein Assessor** under Einstein Assessors.
2. Fill in the form and click **Generate Report**. If you're using a sandbox, click **Generate Report (Sandbox)**.

Alternatively, you can go directly to the assessor and follow the instructions to let Salesforce access your data.

When the assessment is done, we send you an email to let you know that your personalized Sales Cloud Einstein readiness report is available from the Files tab in Salesforce.

If you have problems running the readiness assessor, upgrade your browser to the latest version and try again.

📝 **Note**

- The Sales Cloud Einstein Readiness assessor isn't available for Salesforce Government Cloud customers.
- The Sales Cloud Einstein Readiness Assessor accesses Salesforce data from your account, contact, lead, user, and opportunity records to determine if your Salesforce org meets eligibility requirements for each Sales Cloud Einstein feature. The data, your administrator email address, and an authentication credential is saved and/or processed by Salesforce technologies built on Amazon Web Services and Heroku that offer different privacy and security standards. These third-party hosting providers don't store any personally identifiable information. This data is used to generate your personalized Sales Cloud Einstein Readiness Report. The authentication credential is deleted and access to your org's data is immediately revoked after the report is generated.

See Also

Data Requirements for Sales Cloud Einstein

Set Up Sales Cloud Einstein

Set Up Sales Cloud Einstein

Use the Sales Cloud Einstein Setup Assistant to get the targeted guidance you need for setting up the Sales Cloud Einstein features you want.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic
Available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED

To set up Sales Cloud Einstein:	Customize Application AND Modify All Data

📝 **Note** The following information is for Salesforce orgs with at least one Sales Cloud Einstein add-on license. If you're using Sales Cloud Einstein features with only Salesforce user licenses, see Set Up Einstein Opportunity Scoring for Sales Cloud Users.

Access the Sales Cloud Einstein Setup Assistant
The Setup Assistant is your guide to selecting Sales Cloud Einstein users and setting up features.

Select Who Can Use Sales Cloud Einstein

The Sales Cloud Einstein Included and Sales Cloud Included Bundle standard permission sets include the permissions for Sales Cloud Einstein features. The permission sets also include some CRM Analytics features, such as dashboards and the ability to analyze your report data using Einstein Discovery for Reports. Assign a permission set to users.

Set Up Einstein Activity Capture for Sales Cloud Einstein

Set up Einstein Activity Capture so that emails and events are automatically associated with related Salesforce records. Sales reps must connect their email and calendar to Salesforce.

Enable Einstein Lead Scoring

Give your sales team access to scores that help them prioritize leads. Turn on Einstein Lead Scoring, and then select a lead conversion milestone to use, which leads to score, and which lead fields to consider during scoring.

Enable Einstein Automated Contacts

Help reps spend even less time on data entry. Einstein Automated Contacts uses email and event activity to find new contacts and opportunity contact roles to add to Salesforce. Choose whether Einstein suggests the new data, which reps can add with just a couple of clicks, or adds it automatically.

Set Up Sales Emails

Get ready to add Einstein Sales Emails to your sales team's toolbox. Turn on Sales Emails in Setup and then assign a permission set to your sales reps. If you use Gmail or Outlook email integrations, add the Einstein Sales Emails component to customized email application panes. Then your sales reps can use Einstein where they normally work.

Enable Einstein Opportunity Scoring

Give your sales team access to scores that help them focus on the right deals. When you set up Einstein Opportunity Scoring, you choose whether to have Einstein consider all opportunity records and opportunity fields or only a subset. If Einstein Opportunity Scoring is on by default, make sure that scores appear where you want, such as your customized opportunity page layouts and public list views.

Enable Einstein Forecasting

Provide your forecast managers with AI-powered intelligence that improves forecasting accuracy, predicts results, and tracks how sales teams are doing.

Troubleshoot Sales Cloud Einstein Setup Errors

When setting up Sales Cloud Einstein features, several important steps occur behind the scenes. If one of the steps isn't successful, one or more features can't be enabled. There are several ways to troubleshoot setup issues.

See Also

Sales Cloud Einstein

Manage Data Policies for Einstein Features

Access the Sales Cloud Einstein Setup Assistant

The Setup Assistant is your guide to selecting Sales Cloud Einstein users and setting up features.
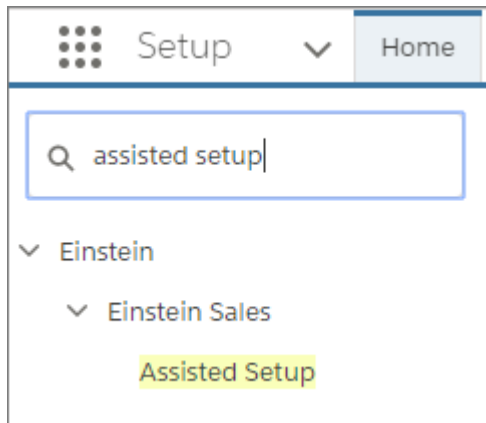
REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

USER PERMISSIONS NEEDED

To access the Sales Cloud Einstein Setup Assistant: Customize Application AND Modify All Data

From Setup, enter `Assisted Setup` in the Quick Find box, then select **Assisted Setup** under Einstein Sales.

The setup page shows all the steps you need for Sales Cloud Einstein deployment, including how to assign Einstein to users.

See Also

[Set Up Sales Cloud Einstein](#)

Select Who Can Use Sales Cloud Einstein

The Sales Cloud Einstein Included and Sales Cloud Included Bundle standard permission sets include the permissions for Sales Cloud Einstein features. The permission sets also include some CRM Analytics features, such as dashboards and the ability to analyze your report data using Einstein Discovery for Reports. Assign a permission set to users.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

USER PERMISSIONS NEEDED

To create permission sets: Manage Profiles and Permission Sets

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USER PERMISSIONS NEEDED

To assign permission sets:	Assign Permission Sets

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1. From Setup, enter `Permission Sets` in the Quick Find. Then, select **Permission Sets**.
2. Click the permission set you want to assign.
   In Performance and Unlimited editions, assign the Sales Cloud Einstein Included or Sales Cloud Included Bundle to users.

   To access Sales Cloud Einstein using Performance or Unlimited editions, users must also have the Salesforce standard user license.

   If you have users who accessed Sales Cloud Einstein through the Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence license before Summer '22, we recommend that you assign those users to the Sales Cloud Einstein Included or Sales Cloud Included permission set, or a custom permission set that includes the Sales Cloud Einstein permission. To make these assignments, assign the new permission set to your users before removing the old permission set. Beginning in Summer '22, you can't add users to the old Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence permission sets.

   In Enterprise Edition, assign the Sales Cloud Einstein permission set to users.
3. To assign the permission set to users, click **Manage Assignments**

   📝 **Note**

   - The standard Sales Cloud Einstein Included and Sales Cloud Included Bundle permission sets include the permissions for most Sales Cloud Einstein features, plus access to dashboards. Account Insights and Opportunity Insights aren't included with Sales Cloud Einstein in Unlimited and Performance editions. Most permissions are enabled by default. To modify a permission set, clone it and edit the app permissions.
   - The standard Sales Cloud Einstein Included, Sales Cloud Einstein Included Bundle, and Sales Cloud Einstein permission sets include the CRM Analytics permission Can Run Einstein Discovery for Reports. After Can Run Einstein Discovery for Reports is assigned, you must enable CRM Analytics. Then users then get access to the Analyze button on reports, which lets users run statistical analysis on their report data.
   - The View Opportunity Scoring Model Factors permission, which lets users see the factors that are used to build opportunity scoring models, isn't enabled by default. Clone the Sales Cloud Einstein Included or Sales Cloud Included Bundle permission set. Then, enable the View Opportunity Scoring Model Factors permission and assign the permission set to users. Users who can view model factors can sometimes see the object data and object-related data used to build the models, regardless of their sharing settings.
   - The Sales Analytics app also comes with Sales Cloud Einstein but isn't included in the Sales Cloud Einstein Included or Sales Cloud Included Bundle permission set. You must set up permissions for the Sales Analytics App separately.
   - If you used Sales Cloud Einstein before Spring '18, you created a permission set with the Sales

Cloud Einstein permission set license. New permissions were added to the permission set license in later releases. Make sure the permissions for all the Einstein features that you want to use, including analytics, are enabled in your permission set license.

See Also

Set Up Permissions for the Sales Analytics

Set Up Sales Cloud Einstein

Set Up Einstein Activity Capture for Sales Cloud Einstein

Set up Einstein Activity Capture so that emails and events are automatically associated with related Salesforce records. Sales reps must connect their email and calendar to Salesforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

USER PERMISSIONS NEEDED	
To enable Einstein Activity Capture:	Customize Application and Modify All Data

The steps for setting up Einstein Activity Capture are the same regardless of which license you use to access Einstein Activity Capture. You give Sales Cloud Einstein users access to Einstein Activity Capture when you assign the Sales Cloud Einstein permission set to them. After you turn on Einstein Activity Capture, Salesforce asks assigned Sales Cloud Einstein users to connect their email account to Salesforce. It takes up to 24 hours for their emails and events to be initially added to Salesforce.

See Also

Einstein Activity Capture

Enable Einstein Lead Scoring

Give your sales team access to scores that help them prioritize leads. Turn on Einstein Lead Scoring, and then select a lead conversion milestone to use, which leads to score, and which lead fields to consider during scoring.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

USER PERMISSIONS NEEDED

To enable Einstein Lead Scoring:	Customize Application
	AND
	Modify All Data
	AND
	View All Profiles

> 💡 **Tip** Check out this feature in Salesforce Go! Find a guided setup experience, explore more content, discover related features, and monitor feature usage. See Discover and Set Up Features With Salesforce Go.

1. Go to Setup. In the Quick Find box, enter `Einstein Lead Scoring`, and select **Einstein Lead Scoring** under **Einstein Sales**.
2. Turn on Einstein Lead Scoring.
3. Choose whether to use default settings or custom settings.
   If you choose default settings, Einstein looks for leads converted to accounts and contacts, scores all of your leads together, and considers all lead fields during scoring. When using default settings, you can skip the remaining steps and click **Score Leads**.
4. If you chose custom settings, on the Conversion Milestone page, choose the lead conversion milestone (accounts and contacts or opportunity creation) that matches your business practices. Does your sales team simply convert leads to accounts and contacts, or do they create opportunities when they convert leads? Then click **Save & Next**.
5. On the Lead Segments page, choose whether you want Einstein to score all of your leads together, or only certain segments of your leads that meet criteria you specify. To score segments of your leads

separately, click **Segments of Leads**. Otherwise, click **Save & Next**.

Why would you want to score segments of your leads separately? Let's say you have domestic leads and international leads. Their conversion patterns could have significant differences. If you use the Country field to put them in different segments, Einstein can calculate more accurate scores based on those patterns. Define your segments based on the criteria that make sense for your business.

6. If you want Einstein to score segments of your leads separately, click **Add Segment**.
   - Give the segment a name of up to 80 characters.
   - Choose whether to include records that meet all of your conditions or any of your conditions.
   - To add filter criteria for the segment, click **Add Condition** and then choose a field, operator, type and value.

     You can specify up to 100 field filters for the leads you want to score. The CurrencyIsoCode field can't be used in lead field filters.

     The following field data types also can't be used in lead field filters.
     - – Address
     - – Date
     - – Datetime
     - – Double
     - – Encrypted String
     - – Geolocation
     - – Multipicklist
     - – Reference – However, the RecordTypeId reference field is supported.
     - – Text Area
     - – Time
   - Add any other conditions you want the segment to meet.
   - Repeat the process for any additional lead segments you want to create. You can create up to 35 segments.

     Leads that don't meet the conditions for any segment are ignored when Einstein builds the predictive model.
   - If you created more than one lead segment, drag them into priority order. If a lead falls into multiple segments, Einstein scores it as part of the highest priority segment.
   - When you're done adding segments, click **Save & Next**.

7. On the Included Fields page, choose whether you want Einstein to include all your lead fields when building the predictive model for each lead segment. By default, Einstein includes all lead fields. To include only certain fields, click **Include Fields...** and then deselect the fields you don't want Einstein to include. When you're done, click **Next**.

   Why would you tell Einstein not to include some fields? Some businesses use fields that don't affect a lead's chance of converting. For example, you could have a field that indicates the reason a lead didn't convert. Telling Einstein to exclude those fields yields more accurate lead scores. Before excluding a field, make sure that the field doesn't affect the lead's chance of converting. Excluding fields that do affect score analysis decreases the accuracy of your lead scores. If you're uncertain about whether to exclude a particular field, include it and then check the Einstein Lead Scoring dashboard to see what effect it has on your scores.

   If you tell Einstein to score all leads together in the All Leads (Default) segment, Einstein includes any new fields you add to leads automatically. If you create lead segments, add any new fields to your

segments manually in Setup. If you decide to delete an included field from the Lead object, exclude the field from all segments and wait for Einstein to update your scores before deleting it.

8. On the Review Settings page, confirm your choices. If you want, you can edit them.
9. When you're done, click **Score Leads**.
   Einstein analyzes your teams' past converted leads to build a scoring model for each lead segment. It can take up to 48 hours to analyze your data, build a scoring model for each lead segment, and add scores to leads. To check the status, return to the Einstein Lead Scoring setup page.

   When you score all leads together without creating segments, and you don't have enough lead conversion data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough lead data, Einstein builds a scoring model with your data and uses the model with the better results.

10. Using the Lightning App Builder, make sure that the Einstein Lead Scoring component was added to Lightning pages for leads. In Salesforce Classic, add the Lead Score field to lead page layouts. The Lead Score field can't be used on the same page layout as the Lead Score Distribution or Conversion Rate by Lead Score report components.

    To see the Einstein Lead Scoring component, users must have read access to the Company, Phone, and Email fields on leads.

11. After scores are available, add the Lead Score field to public lead list views. Salesforce automatically adds this field to default list views.

    Tip To get the most out of Einstein Lead Scoring, tell sales reps to add the Lead Score field to their lead list views.

If you want to update your lead scoring setup, your changes become draft settings until you click **Score Leads** again. You can save your draft settings and update them as often as necessary before using them to score leads.

If you choose to change your Einstein Lead Scoring settings, and CRM Analytics Data Sync is also enabled, you can see errors during data sync. These errors occur because the ScoreIntelligenceId field on leads is unavailable for data sync while Einstein rebuilds your lead scoring model. The data sync errors resolve when the model is rebuilt, and updated scores appear on lead records.

If you previously turned off Einstein Lead Scoring and are turning it back on, update settings in the Einstein Lead Scoring app in Analytics Studio.

- In Analytics Studio, click the **Einstein Lead Scoring** app.
- Click **Reconfigure app**. If you don't see that link, click **New version available**.
- Read the message about overwriting existing customizations, and then select **It's OK to overwrite current app and any customizations**.
- Click **Continue**.

See Also

Disable Einstein Lead Scoring

If your company decides to turn off Einstein Lead Scoring, take steps to avoid errors with CRM Analytics Data Sync.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

USER PERMISSIONS NEEDED	
To disable Einstein Lead Scoring:	Customize Application AND Modify All Data AND View All Profiles
To disable CRM Analytics dataflows:	Edit Analytics Dataflows

1. From Setup, in the Quick Find box, enter `Einstein Lead Scoring`, and then select **Einstein Lead Scoring** under **Einstein Sales**.
2. Disable Einstein Lead Scoring.
3. In Analytics Studio, click **Data Manager** and then click **Dataflows & Recipes**.
4. Find the Einstein Lead Scoring dataflow, open Options, and then select **Delete**.
5. Click **Connect**.
6. From the list of objects, click **Lead** and then click **Continue**.
7. Scroll to find the ScoreIntelligenceId column. To disable the field from the data sync, click **X** next to the column name.
8. **Save** your changes.
9. Click **Connect**.
10. Click **Lead** and then **Continue**.
11. To remove the ScoreIntelligence.Score >= 0 filter, click ▼, and then delete the filter text.
12. Click **Done**, and then save your changes.

> 📝 **Note** The system requires at least 24 hours to clear old data. If you re-enable Einstein Lead Scoring before data removal is complete, the older data appears on lead records.

Enable Einstein Automated Contacts

Help reps spend even less time on data entry. Einstein Automated Contacts uses email and event activity

to find new contacts and opportunity contact roles to add to Salesforce. Choose whether Einstein suggests the new data, which reps can add with just a couple of clicks, or adds it automatically.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

USER PERMISSIONS NEEDED

To enable Einstein Automated Contacts:	Customize Application AND Modify All Data

🛑 **Important** Feature is scheduled for retirement on February 15, 2025. See Einstein Automated Contacts Retirement.

1. From Setup, enter `Assisted Setup` in the Quick Find box, and then select **Assisted Setup** under Einstein Sales.
   The Sales Cloud Einstein setup page shows all the steps you need for Sales Cloud Einstein deployment, including how to assign Einstein to users.
2. Click **Set Up** next to Einstein Automated Contacts.
3. On the Setup page, enable the types of data you want to suggest to users.
4. Select whether you want Einstein to automatically add new data or suggest it to users.
   Suggestions appear in the Einstein Insights component, so make sure that the Assistant component was added to the Home page and the Einstein Insights component was added to account and opportunity Lightning pages.
5. Make sure users have proper access to accounts, contacts, and opportunities.
   To add or decline contact suggestions, users need edit access on accounts. To add or decline opportunity contact role suggestions, users need edit access on opportunities, and read or edit access on contacts.
6. Make sure users have proper field-level security for the Lead Source field on contacts. The Lead Source field is used to create the Added By Einstein list view.
7. To avoid errors when contacts are created, make sure that:
   • All required contact fields have a default value.
   • Einstein users have proper field-level security on all standard contact fields.

See Also
   Select Who Can Use Sales Cloud Einstein
   Einstein Automated Contacts
   Considerations for Setting Up Einstein Automated Contacts
   Contact Fields
   Field Level Security

Set Up Sales Emails

Get ready to add Einstein Sales Emails to your sales team's toolbox. Turn on Sales Emails in Setup and then assign a permission set to your sales reps. If you use Gmail or Outlook email integrations, add the Einstein Sales Emails component to customized email application panes. Then your sales reps can use Einstein where they normally work.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with the Einstein for Sales add-on, which is available for an extra cost in **Performance** and **Unlimited** Editions.

| USER PERMISSIONS NEEDED	
To set up Sales Emails:	Customize Application and Manage Users

[Watch a demo](#).

> 💡 **Tip** Check out this feature in Salesforce Go! Find a guided setup experience, explore more content, discover related features, and monitor feature usage. See Discover and Set Up Features With Salesforce Go.

1. Turn on Sales Emails.
   a. From Setup, enter `Einstein for` in the Quick Find box, then select **Einstein for Sales**.
   b. Turn on Sales Emails. It can take a few minutes before it's ready to use.
   After Sales Emails is enabled, the Einstein Sales Emails user permission, permission set, and Lightning component are available.
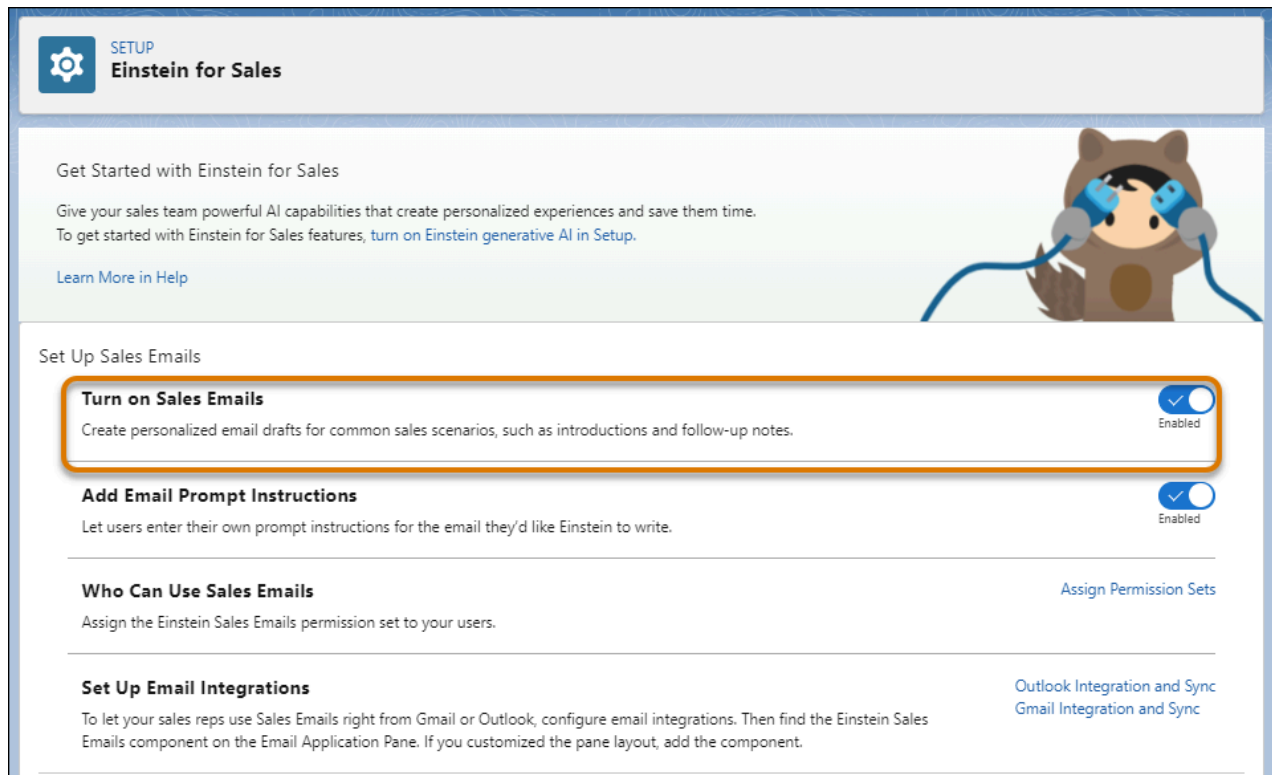
2. Assign the Einstein Sales Emails permission set to your users.

3. **Optional:** Customize email application pane layouts for the Outlook and Gmail email integrations. When you use Salesforce email integrations for Outlook or Gmail, the Einstein Sales Emails component is automatically added to the default layout for the email application pane. If you customized the email application pane, add the component to your layout.

   a. From Setup, enter `Gmail` in the Quick Find box, then select **Gmail Integration and Sync**. Expand the section Let users access Salesforce records from Gmail. Under Email Application Panes, edit your custom layouts.

   b. Drag the Einstein Sales Emails component onto the layout.

   c. Repeat these steps for Outlook on the Outlook Integration and Sync page in Setup.
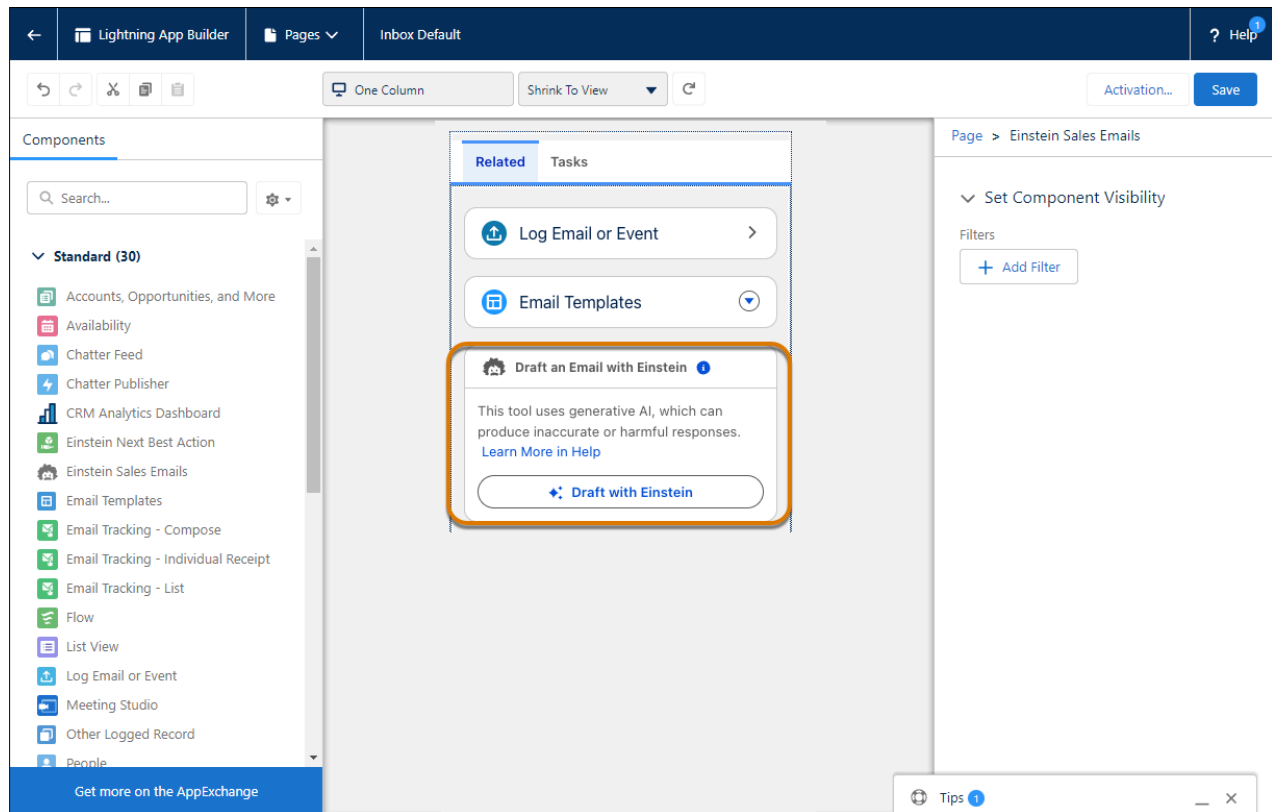
Now that you have things set up, give it a try to see how Einstein can write your next sales email.

🛑 **Important** This tool uses generative AI, which is known to include inaccurate or harmful responses. Before sharing externally, review the output for accuracy and safety. You assume responsibility for the output when sharing.

See Also

Considerations for Einstein Generative AI Sales Emails
Understand How Einstein Generative AI Creates Sales Emails
Draft a Sales Email with Einstein Generative AI
Manage Permission Set Assignments
Customize the Email Application Pane for Outlook and Gmail

Enable Einstein Opportunity Scoring

Give your sales team access to scores that help them focus on the right deals. When you set up Einstein Opportunity Scoring, you choose whether to have Einstein consider all opportunity records and opportunity fields or only a subset. If Einstein Opportunity Scoring is on by default, make sure that scores appear where you want, such as your customized opportunity page layouts and public list views.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic.

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Available to eligible customers for no extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED	
To set up Einstein Opportunity Scoring:	Customize Application AND Modify All Data

📝 **Note** If you use Sales Cloud Einstein features without any Sales Cloud Einstein add-on licenses, and it's your first time setting up Einstein Opportunity Scoring, see Set Up Einstein Opportunity Scoring for Sales Cloud Users.

💡 **Tip** Check out this feature in Salesforce Go! Find a guided setup experience, explore more content, discover related features, and monitor feature usage. See Discover and Set Up Features With Salesforce Go.

1. To open the Einstein Opportunity Scoring setup page in Lightning Experience, from Setup, enter `Assisted Setup` in the Quick Find box, and then select **Assisted Setup**. Then, click **Set Up** next to Einstein Opportunity Scoring.

   In Salesforce Classic, from Setup, enter `Einstein Opportunity Scoring` in the Quick Find box, and then select **Einstein Opportunity Scoring**.

2. Read the introduction, and then click **Next**.
3. Choose whether to have Einstein consider all opportunity records or only a subset when building the scoring model. Then, click **Next**. If needed, define the conditions, and click **Next**.
   When you give Einstein only a subset of opportunities to look at, it can yield more accurate scores. For example, if you use external systems to create opportunities that are closed rather quickly, those opportunities don't reflect the normal opportunity lifecycle and can skew your scores.

   When defining conditions, you can use up to 100 fields. The CurrencyIsoCode field isn't available. The following field data types aren't supported.

   - Address
   - Date
   - Datetime
   - Double
   - Encrypted String
   - Geolocation
   - Multipicklist
   - Reference (However, the RecordTypeId reference field is supported.)
   - Text Area
   - Text Area
   - Time
4. Choose whether to have Einstein consider all opportunity custom fields when building the scoring model. Then, click **Next**. If needed, deselect the fields you want Einstein to exclude, and click **Next**.

Exclude fields from the model only if you're sure they aren't part of the opportunity lifecycle. For example, you can safely exclude automatically generated fields, such as IDs and dates. Mistakenly excluding influential fields makes opportunity scores less accurate. If you're unsure about whether to exclude a certain field, err on the side of caution and include the field.

5. Review your settings. Then, click **Start** to begin the scoring process.

    It can take up to 48 hours to analyze your data, build a scoring model, and add scores to opportunities. To check the status, return to the Einstein Opportunity Scoring setup page. If you don't have enough opportunity data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough opportunity data, Einstein builds a scoring model with your data and uses the model with the better results.

6. Make sure that the Opportunity Score field is on your opportunity page layouts.
    *   In Lightning Experience (Grouped view), add the Opportunity Score field to your customized opportunity page layouts. Salesforce automatically adds this field to default compact layouts.
    *   In Lightning Experience (Full view), Salesforce automatically adds the Opportunity Score field to the Details section of your default and custom layouts.
    *   In Salesforce Classic, add the Opportunity Score field to your customized page layouts for opportunities. Salesforce automatically adds this field to the Details section of default page layouts.
7. By default, the Opportunity Score field is on the Recently Viewed list view for opportunities, but add it to public opportunity list views. To get the most out of Einstein Opportunity Scoring, ask your sales teams to add this field to their own opportunity list views.
8. If you use forecasts, add the Opportunity Score field to the opportunity list on the forecasts page.
9. Add the Opportunity Score field to your opportunity reports where appropriate.

See Also
> Select Who Can Use Sales Cloud Einstein
> Einstein Opportunity Scoring
> Considerations for Setting Up Einstein Opportunity Scoring
> Understand How Einstein Scores Your Opportunities
> Create Custom Report Types for Einstein Opportunity Scoring

Enable Einstein Forecasting

Provide your forecast managers with AI-powered intelligence that improves forecasting accuracy, predicts results, and tracks how sales teams are doing.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

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USER PERMISSIONS NEEDED

| To enable Einstein Forecasting: | Customize Application AND Modify All Data |

💡 **Tip** Check out this feature in Salesforce Go! Find a guided setup experience, explore more content, discover related features, and monitor feature usage. See Discover and Set Up Features With Salesforce Go.

🛑 **Important** To enable users for Einstein Forecasting, make sure they're enabled to use forecasts and are assigned as a forecast manager.

1. From Setup, enter *Assisted Setup* in the Quick Find box, and then select **Assisted Setup**.
   The setup page shows all the steps you need for Sales Cloud Einstein deployment, including how to assign users.
2. Click **Set Up** next to Einstein Forecasting.
3. Click **Enable**.
4. Read the introduction, and then click **Next**.
5. Choose whether to have Einstein consider all opportunity records or only a subset when building the predictive model. Then, click **Next**. If needed, define the criteria, and click **Next**.
6. Choose whether to have Einstein consider all custom opportunity fields when building the predictive model. Then, click **Next**. If needed, deselect the fields you want Einstein to ignore, and click **Next**.
7. Review your settings. Then, click **Save**.
8. If you customized the Home page, add the performance chart to it.

📝 **Note** Einstein uses your data to create your custom predictive model. If organization-wide sharing is set to Private for the User object, to extract relevant information, you might need to give a couple profiles access to users. Make sure the Analytics Cloud Security User and Analytics Cloud Integration User profiles have the View All Users system permission.

See Also
  Select Who Can Use Sales Cloud Einstein
  Einstein Forecasting
  Considerations for Setting Up Einstein Forecasting
  Understand How Einstein Creates Your Forecasting Prediction

Troubleshoot Sales Cloud Einstein Setup Errors

When setting up Sales Cloud Einstein features, several important steps occur behind the scenes. If one of the steps isn't successful, one or more features can't be enabled. There are several ways to troubleshoot setup issues.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic.

Available with Sales Cloud Einstein, which is available for an extra cost in: **Enterprise**, **Performance**, and

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Unlimited Editions

If you still have issues after following the troubleshooting steps, contact Salesforce Customer Support.

Verify the Integration User Profile Details

Sales Cloud Einstein creates an integration user and assigns it an integration user profile. We updated the names of the integration user, profile, and connected app. If you purchased Sales Cloud Einstein before April 15, 2019, the old and updated names are listed in your org. When troubleshooting setup issues, refer only to the updated names and IP addresses.

Integration User Name	Integration User Profile Name	Connected App
Sales Insights Integration	Sales Insights Integration User	OIQ_Integration

Supported IP Addresses	
35.155.249.183	44.225.239.10
35.160.107.125	44.225.27.211
35.163.185.97	44.226.10.160
35.163.211.82	44.226.28.151
35.163.248.132	44.226.81.25
35.164.15.153	52.26.247.68
35.164.61.92	52.40.129.165
35.165.218.130	52.40.253.214
44.224.239.117	54.148.110.202
44.224.5.68	54.200.204.60
44.225.115.174	54.214.184.254
44.225.191.69	54.69.64.221
100.21.158.232	100.21.112.198

Confirm that the integration user profile:

- Is assigned to the integration user.
- Has read access to the relevant objects and fields. For example, for Einstein Lead Scoring to determine which fields are important to your lead conversion patterns, the integration profile needs access to all

lead fields.
- Has a supported login IP addresses assigned. See table.
- Has access to the connected app. Here's how to check access.
    - From Setup, enter `Profiles` in the Quick Find box, and then select **Profiles**.
    - Click the **Sales Insights Integration User** profile.
    - From the Connected App Access section, confirm that the profile has access to the OIQ_Integration connected app.

Verify the Connected App Details

Sales Cloud Einstein features use a connected app to create a secure connection between Salesforce data and our sales intelligence infrastructure.

- Confirm that the app is installed.
    - From Setup, enter `Installed Packages` in the Quick Find box.
    - Confirm that the Sales Insights package is listed under Installed Packages.
    - If you don't see the package in the list, download it from the Salesforce App Installation page.
- Confirm that the connected app has the correct OAuth policy and user profile assigned.
    - From Setup, enter `Connected Apps` in the Quick Find box, and then click **Manage Connected Apps**.
    - Click the **OIQ_Integration** app.
    - From the OAuth Policies section, confirm that the Permitted Users field is set to **Admin approved users are pre-authorized**.
    - From the Profiles related list, confirm that the Sales Insights Integration User profile is assigned.

See Also

Set Up Sales Cloud Einstein

Considerations for Setting Up Sales Cloud Einstein

Analyze Sales Cloud Einstein Data with Reporting

Use reports and dashboards to gain insight into how Sales Cloud Einstein features are working in your org.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic
Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

CRM Analytics for Sales Cloud Einstein
Get access to more advanced analytics dashboards built on CRM Analytics. Salesforce admins can evaluate the effectiveness of Einstein features such as Einstein Lead Scoring. Sales leaders, managers,

and reps can use Einstein Discovery for Reporting and Sales Analytics to get deeper insights into their sales data. From the Analytics tab or Analytics Studio, see the apps you have access to.

Standard Reports and Dashboards for Sales Cloud Einstein

Use standard reports and dashboards or create custom report types to track how Sales Cloud Einstein features are impacting your business.

See Also

Sales Cloud Einstein

CRM Analytics for Sales Cloud Einstein

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REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Sales Cloud Einstein Feature or App	Description
Einstein Activity Capture	Summary of sales activities, including activities added with Einstein Activity Capture. See Review the Activities Dashboard
Einstein Discovery for Reporting	Adds the Analyze button to reports, letting sales teams surface statistically significant occurrences about their reporting data. See Analyze Report Data.
Einstein Lead Scoring	Insights into company-level predictive factors, lead conversion rates, and top lead sources. See Review the CRM Analytics Lead Scoring Dashboard.
Einstein Forecasting	The prediction trend and summary graphs help you visualize your own predicted closing within a forecast period. See Einstein Forecasting.
Sales Analytics	With intuitive visualizations based on your Salesforce data, the Sales Analytics lets you move from insight to action quickly and helps you turn data into smarter sales. You must create the Sales Analytics app before you can access its dashboards and datasets.

📝 **Note** CRM Analytics for Sales Cloud Einstein reports on Sales Cloud data. You can't use this feature

to:

- Access Analytics Platform assets, such as applications, dashboards, lenses, or data
- Build custom apps or dashboards
- Upload, access, or connect external data using the API
- Import data from Salesforce objects not included in this feature

See Also

Sales Analytics

Understand Sales Analytics Limitations

Sales Cloud Einstein

Review the CRM Analytics Lead Scoring Dashboard

The included CRM Analytics Lead Scoring dashboard provides insights into which lead characteristics result in the most conversions. See how well lead scores correlate to conversion rates, monitor the average lead score of each lead source, and more.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED	
To view the CRM Analytics Lead Scoring app and dashboard:	Use Einstein Lead Scoring AND Use CRM Analytics Templated Apps AND View All Records on leads
To create custom CRM Analytics apps using the Einstein Lead Scoring app template:	Use Einstein Lead Scoring AND Manage CRM Analytics Templated Apps AND View All Records on leads

To open the CRM Analytics Lead Scoring dashboard, click the **Analytics** tab, and then find the Einstein Lead Scoring app.

Your Salesforce admin can tell Einstein to score segments of your leads separately. To see data for a

specific lead segment, choose it from the Segment menu.

The Company-Level Predictive Factors chart shows which lead field values are seen more often in converted leads (1), and unconverted leads (3).

To view the percentage of leads that have a specific field value, hover over a bar on the chart (2).

The Lead Conversion Rate chart (4) shows the conversion rate for each slice of lead scores: 0–20, 21–40, 41–60, 61–80, and 81–100. The Average Lead Score table (5) shows the average scores for each lead source.

To view lead statistics for a specific time period, select a start and end time at the top of the dashboard (6).

The dashboard also displays more statistics for the selected time period.

- Total number of leads scored
- Number of leads scored between 81–100
- Conversion rate for leads scored between 81–100
- Your overall conversion rate

You can create custom CRM Analytics apps for your users based on the Einstein Lead Scoring app.

- From the App Launcher, find and open **Analytics**.
- Click **Create** and then click **App**.
- Choose the **Einstein Lead Scoring Analytics** template.

  Note Each time you change Einstein Lead Scoring settings, Einstein updates the segment IDs for each lead segment, even if you score all your leads in a single segment. During these updates, some data in the CRM Analytics Lead Scoring Dashboard, including lead conversion rates, can be incorrect until Einstein updates your scores based on the new settings.Sometimes, the lead conversion rate for the 0 through 20 bucket incorrectly appears higher than the 81 through 100 bucket. The overall lead conversion rate can also appear significantly higher than the 81 through 100 bucket. This effect is because of how CRM Analytics treats null values in some fields. To resolve these issues, contact Salesforce Customer Support.

See Also

[Einstein Lead Scoring](#)

Review the CRM Analytics Automated Contacts Dashboard

The CRM Analytics Automated Contacts dashboard provides Salesforce admins and sales managers with details about how effective Einstein is at finding and adding new contact records to Salesforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

USER PERMISSIONS NEEDED	
To view the CRM Analytics Automated Contacts app and dashboard:	Use Einstein Automated Contacts AND Use CRM Analytics Templated Apps
To create CRM Analytics apps using the Einstein Automated Contacts app template:	Use Einstein Automated Contacts AND Manage CRM Analytics Templated Apps

🛑 **Important** Feature is scheduled for retirement on February 15, 2025. See Einstein Automated Contacts Retirement.

To see the dashboard, your admin must set up Einstein Automated Contacts to have Einstein add data automatically. The dashboard includes only data that was added automatically.

1. Click the **Analytics** tab or open the Analytics Studio.
2. Find the Einstein Automated Contacts app.
3. Review the Einstein Automated Contacts dashboard.

See how many contacts were added with the help of Einstein Automated Contacts, automatically or from suggestions. Data is broken down by week, month, and year. (1)

Compare how many contacts were added with and without Einstein Automated Contacts. Data is broken down by average number of contacts per user by week. (2)

See Also

Einstein Automated Contacts

Standard Reports and Dashboards for Sales Cloud Einstein

Use standard reports and dashboards or create custom report types to track how Sales Cloud Einstein features are impacting your business.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Standard Dashboard for Einstein Lead Scoring
The standard dashboard for Einstein Lead Scoring helps you track and manage lead conversion rates. All Sales Cloud Einstein users have access to standard dashboards.

Create Custom Report Types for Einstein Opportunity Scoring
Run reports that show how Einstein Opportunity Scoring impacts your business or what factors have the biggest affect on your deals. First, set up custom report types so that sales managers and other teammates can create the reports they need.

See Also
Analyze Sales Cloud Einstein Data with Reporting

Standard Dashboard for Einstein Lead Scoring

The standard dashboard for Einstein Lead Scoring helps you track and manage lead conversion rates. All Sales Cloud Einstein users have access to standard dashboards.

REQUIRED EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

From the Dashboards tab, search for `Einstein Lead Scoring`.

Your Salesforce admin can tell Einstein to score segments of your leads separately. To see data for a specific lead segment, choose it from the Segment menu. To see aggregate data from all segments, choose **All**.

Component	Description
Average Lead Score by Lead Source	See which lead sources are receiving the highest scores from Einstein Lead Scoring.

Component	Description
Conversion Rate by Lead Score	See which lead scores have the highest conversion rate. The data is broken down by buckets. For example, leads with scores in the 80–100 range could have a higher conversion rate than leads with scores in the 20–30 range. This report is most useful after your org has a substantial amount of lead conversion data.
Lead Score Distribution	See a comparison of leads that did and didn't convert, based on lead score bucket.

See Also
  Enable Einstein Lead Scoring

Create Custom Report Types for Einstein Opportunity Scoring

Run reports that show how Einstein Opportunity Scoring impacts your business or what factors have the biggest affect on your deals. First, set up custom report types so that sales managers and other teammates can create the reports they need.

REQUIRED EDITIONS

Available in: Lightning Experience and Salesforce Classic.

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Available to eligible customers for no extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED	
To create or update Opportunity Scoring custom report types:	Manage Custom Report Types AND Use Einstein Opportunity Scoring
To create or update custom reports types related to model factors:	View Opportunity Scoring Model Factors AND Use Einstein Opportunity Scoring
To delete custom report types:	Modify All Data

1. Make sure you're familiar with custom report types and the general steps for creating and maintaining them.
2. Create custom report types with the appropriate object relationships, and configure them as necessary.
3. To get started, check out these examples of custom report types to use with Einstein Opportunity Scoring.

Report type	Lets teammates run reports that show	Primary Object	Related Objects	Make sure you also
Opportunity Scores by Bucket	Opportunities by score bucket (low, medium, high)	Opportunities	Opportunity Scores	• Add the **Opportunity Score** field to the Opportunity Score page layout if you're not using the default page layout. • Tell users to add a bucket column when they create a report with this report type.

Opportunity Weighted Amount by Score	Opportunity amount weighted by score	Opportunities	Opportunity Scores	• Add the **Opportunity Score** field to the Opportunity Score page layout if you're not using the default page layout.
				• Tell users to do the following when they create a report with this report type.
				  – Group the report by the opportunity ID
				  – Add a summary formula to the report.
				`Opportunity.Amount:SUM*(SCORE_Opportunity.Score:SUM/100)`

Orders Related to Opportunities with High Scores	Opportunities with a high score that have orders	Opportunities	Opportunity Scores Orders	• Add the **Opportunity Score** field to the Opportunity Score page layout if you're not using the default page layout. • Enable Orders
Top Model Factors for Opportunities	Top positive and negative model factors for their opportunities	Sales AI Score Model Factors	–	• Add the Cycle Type field to the report so that users can filter reports by Opportunity Scoring model factors. After you create the report type, click **Edit layout**. Click **Add fields related via lookup**. Click the Sales AI Score Cycle object, and then select the Cycle Type field. • Tell users to do the following when they create a report with this report type. – Filter the report by

Report type	Lets teammates run reports that show	Primary Object	Related Objects	Make sure you also
				status='Active' and *SalesAiScoreCycle.CycleType ='OpportunityScoreModeling'*. •- Sort the report by the Score Correlation field to see the top positive or negative model factors. •- Focus on the Factor Summary Org Language and Score Correlation fields.

4. Deploy the report types you want to make available.
5. Let your sales teams know that they can create reports using these custom report types.

See Also

Create a Custom Report Type
Add a Summary Formula Column to a Report
Einstein Opportunity Scoring