Sales Programs and Partner Tracks with Enablement

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Sales Programs and Partner Tracks with Enablement

Accelerate business outcomes with sales programs and partner tracks delivered to users in the flow of work. Drive revenue growth with sales programs in Lightning Experience or build brand loyalty in your Partner Relationship Management (PRM) site, built with Experience Cloud. Track the performance of your programs with built-in analytics. Create programs for your products, services, or processes and track progress that users make toward measurable milestones and outcomes.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Note Sales Cloud is now Agentforce Sales. You may see references to Sales Cloud in our application and documentation.

Enablement Rollout Guide
Build, launch, and track Enablement programs that help your company's sales reps achieve revenue outcomes and that grow your business with partner engagement and loyalty.

Driving Business Outcomes with Enablement
Enablement teams can build and launch programs that drive the business outcomes most important to your company. Enablement analytics let teams prove the effectiveness of their enablement strategy and iterate on it over time with automated progress tracking.

Setting Up Enablement
Before you can start creating and completing Enablement programs, Salesforce admins must complete some setup steps. Review Enablement roles and assign appropriate permissions for building and completing programs. For sales programs in Lightning Experience, you can set up Einstein Conversation Insights (ECI) so that Enablement admins can add conversation-based outcomes and milestones.

Getting Started with Sales Programs Quickly
Reduce the time required to bring sales programs to production by installing programs from managed packages or choosing a program template in Program Builder.

Building Enablement Measures

Enablement measures specify the job-related activity that correspond to outcomes and milestones in Enablement programs. A measure identifies the source object, related objects, fields, field values, and logic that you want to associate with a particular activity you want to track. Measures and programs are separate objects in Salesforce so that you can define a measure one time and then reuse it across multiple programs or use it multiple times in one program. To help you get started, some prebuilt measures are available, or you can create measures from scratch.

Designing Enablement Programs

For all program types, you can design and assemble your own Enablement program from start to finish. Build Enablement milestones, add your exercise content, and organize your program in Program Builder. Review considerations and guidelines along the way.

Integrating Einstein Coach with Sales Programs

Einstein for Sales with an Enablement add-on license enables sales reps to close deals better by providing them with the opportunity to practice and perfect their sales pitch before that initial interaction with a prospect. Einstein Coach provides reps with personalized and actionable feedback on how to improve their sales pitch.

Managing Partner Enablement Programs

Show Partner Enablement programs to partner users in supported Experience Cloud sites as part of your Partner Relationship Management (PRM) strategy. Partner Enablement programs are also called Partner Tracks. Work with your site developer to build partner experiences that show Enablement programs, outcomes, milestones, and exercises in site pages where partners interact with your brand.

Launching Enablement Programs

After you develop programs and measures in a sandbox, deploy them to production. Make Enablement programs available to users by publishing programs, assigning programs to users directly, and sharing programs so uses can self-enroll.

Take Enablement Programs

You can take Enablement programs when an Enablement admin assigns you to a program or shares a program with you for self-enrollment. Take an assigned program starting at 12 AM on the start date, or take a self-enrolled program anytime after you enroll.

Tracking Enablement Program Progress

See how users are performing against an Enablement program's outcomes, milestones, and exercises. Prebuilt dashboards and reports provide insights to help you analyze how well Enablement programs are changing behaviors and improving business outcomes.

Maintaining Enablement Programs

Manage the quality of your Enablement programs over time. You can clone existing programs, remove users, unpublish programs, or edit programs you already published.

Enablement Limits

When creating Enablement measures, creating Enablement programs, and making programs available to users, keep limits for measures, programs, and enrollment in mind.

Supported Languages for Enablement

Most features for creating and taking Enablement programs are available in all languages that Salesforce supports. But some records, content, and other items support only one language.

See Also

Trailhead: Sales Programs and Partner Tracks Basics
Salesforce Developers: Sales Programs and Partner Tracks with Enablement Developer Guide
Trailblazer Community Group: Sales Programs Powered by Enablement

Enablement Rollout Guide

Build, launch, and track Enablement programs that help your company's sales reps achieve revenue outcomes and that grow your business with partner engagement and loyalty.

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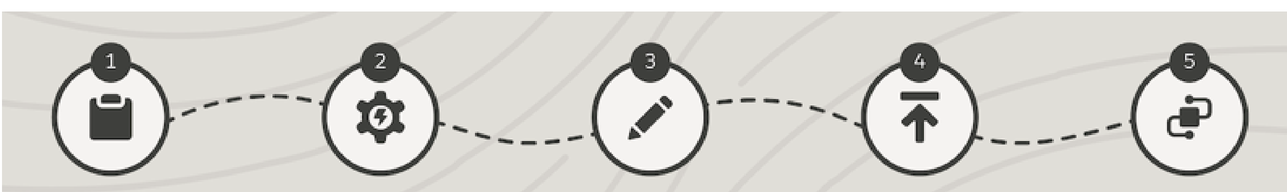
People in multiple roles collaborate to define your Enablement use cases and goals, plan your solution, and develop and maintain programs.



1. Plan

Start by gathering your Enablement team and identifying the specific behaviors you want to target to improve your revenue goals. Learn about the Enablement model of programs, milestones, outcomes, and exercises and how you can apply this model to your unique objectives.

Resource	Salesforce Admin	Business Operations Expert	Enablement Admin	Other Roles
Enablement Team Roles and	✓	✓	✓	

Resource	Salesforce Admin	Business Operations Expert	Enablement Admin	Other Roles
Responsibilities				
Driving Business Outcomes with Enablement	✓	✓	✓	
Sales Programs and Partner Tracks with Enablement Developer Guide: Enablement Data Model	✓	✓		Salesforce developer
Trying Sales Programs for Free with Enablement Lite	✓	✓	✓	
Salesforce Success Events: Implement: Sales Cloud: Set Up Enablement	✓	✓	✓	
Trailhead: Sales Programs and Partner Tracks Basics	✓	✓	✓	Content creator or manager

2. Set Up

Equip your Enablement team members with the access, permissions, and features needed for implementing your plan.

Resource	Salesforce Admin	Business Operations Expert	Enablement Admin	Other Roles
Video: Welcome to Enablement at Salesforce (can be outdated)	✓	✓	✓	
Setting Up Enablement	✓			
Sandbox Support for Enablement	✓		✓	Content creator or manager

3. Create

Now the fun begins! Enablement admins can start building the artifacts needed to implement your plan, including programs, measures for milestones and outcomes, and content for exercises. Work with developers to extend default program capabilities by integrating your preferred content providers and experiences.

Resource	Salesforce Admin	Business Operations Expert	Enablement Admin	Other Roles
Video: Enablement Feature Demo - Building a Program (can be outdated)			✔	Content creator or manager
Getting Started with Sales Programs Quickly			✔	Content creator or manager
Building Enablement Measures	✔	✔	✔	
Guidelines for Assembling Enablement Programs		✔	✔	
Managing Digital Experiences Content for Exercises in Enablement Programs		✔	✔	Content creator or manager
Managing Assessment Surveys for Feedback Request Exercises	✔	✔	✔	Enablement resources manager
Integrating Einstein Coach with Sales Programs	✔	✔	✔	Enablement resources manager
Sales Programs and Partner Tracks with Enablement Developer Guide: Implement Custom Exercise Types for Enablement Programs			✔	Salesforce developer
Managing Partner Enablement Programs	✔	✔	✔	Channel account manager, site developer

4. Launch

Put your team’s hard work into action and make finished programs available to users.

Resource	Salesforce Admin	Business Operations Expert	Enablement Admin	Other Roles
Launching Enablement Programs			✓	
Sales Programs and Partner Tracks with Enablement Developer Guide: Automate Program Assignment	✓		✓	Salesforce developer
Sales Programs and Partner Tracks with Enablement Developer Guide: Migrate Programs and Their Dependencies Between Orgs			✓	Salesforce developer

5. Adopt

Monitor how users are progressing and performing with their programs so that you can iterate on your Enablement strategy. Expand your programs to new groups of users and implement more sophisticated change management.

Resource	Salesforce Admin	Business Operations Expert	Enablement Admin	Other Roles
Tracking Enablement Program Progress	✓		✓	
Maintaining Enablement Programs			✓	Content creator or manager
Supported Languages for Enablement			✓	Content creator or manager
Enablement Limits	✓		✓	

Driving Business Outcomes with Enablement

Enablement teams can build and launch programs that drive the business outcomes most important to your company. Enablement analytics let teams prove the effectiveness of their enablement strategy and iterate on it over time with automated progress tracking.

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How Enablement Drives Outcomes
Enablement teams identify the revenue outcomes or other business goals they want to achieve. With Enablement programs, they can set and track goals using Salesforce data and make programs available to users where they work. To get started, review how programs are structured, how users experience programs, and how your team can track progress.

Outcomes, Milestones, and Measures
Before you start assembling a program in Salesforce, identify your program goals, including the outcome you want users to achieve and the incremental milestones they complete along the way. And, learn how to define the criteria for measuring and tracking progress against your goals.

Plan Your Enablement Program Strategy
To help put all your outcomes, milestones, and related measures into programs, work with your Enablement team to gather your requirements and make an implementation plan. Because Salesforce is highly customizable, your Enablement team can track activity for Enablement measures in different ways. Collaborate with your colleagues in other disciplines for support in building effective programs that align job-related activity with your measure criteria.

See Also

Setting Up Enablement
Designing Enablement Programs
Tracking Enablement Program Progress
Trailhead: Sales Programs and Partner Tracks Basics
Salesforce Developers: Sales Programs and Partner Tracks with Enablement Developer Guide
Trailblazer Community Group: Sales Programs Powered by Enablement

How Enablement Drives Outcomes

Enablement teams identify the revenue outcomes or other business goals they want to achieve. With Enablement programs, they can set and track goals using Salesforce data and make programs available to users where they work. To get started, review how programs are structured, how users experience programs, and how your team can track progress.

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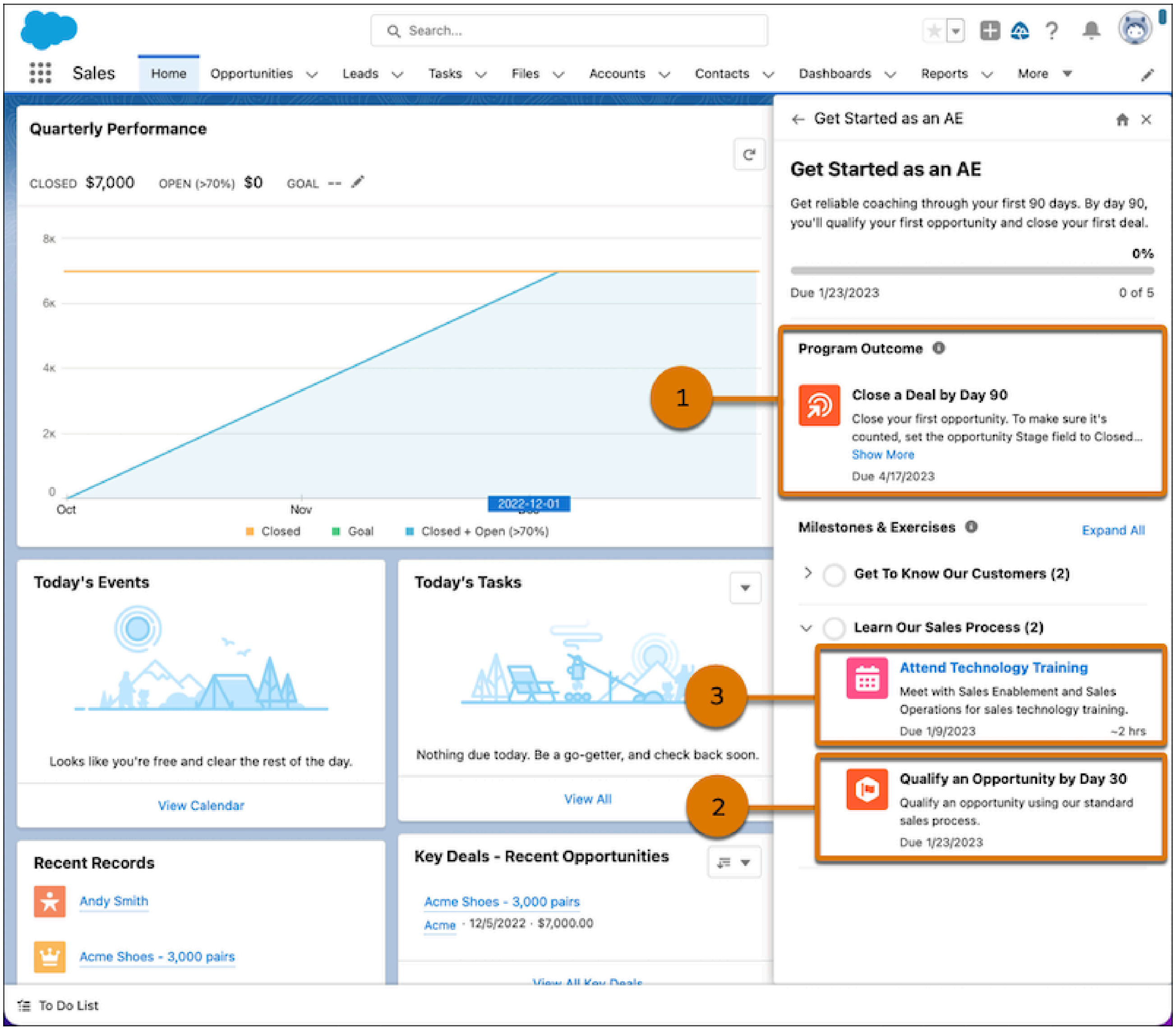
Enablement programs are available for sales reps and other users in Lightning Experience. If your company uses Partner Relationship Management (PRM), you can also make Partner Enablement programs available to partners in supported Experience Cloud sites. Both types of programs can include these key moments for users.



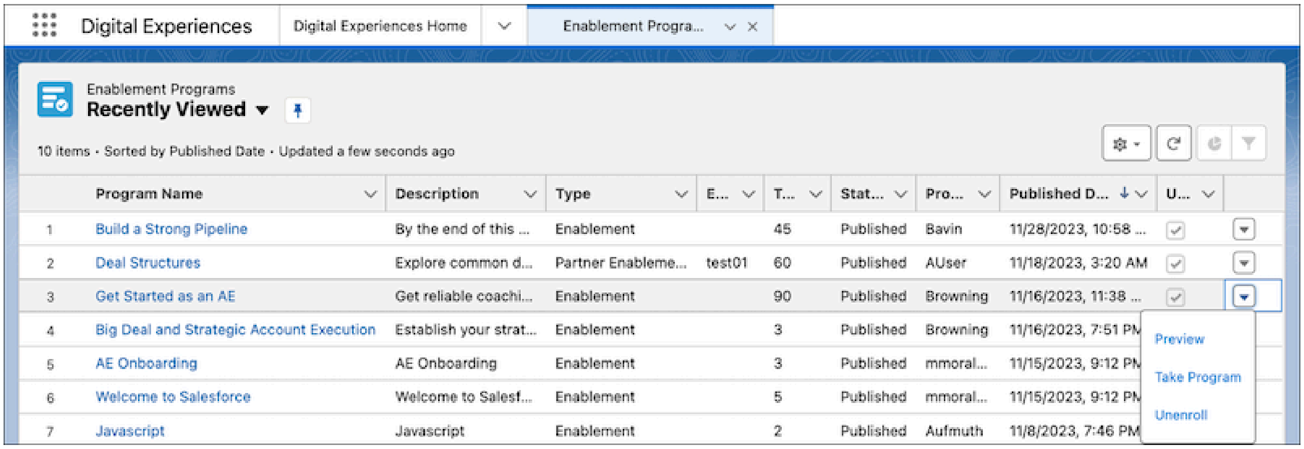
- A program's major goal, called the outcome (1), which is due by the program's conclusion
- Incremental goals called milestones (2), which encourage users to demonstrate their proficiency in on-the-job tasks required to achieve the program outcome
- Exercises (3), which let users build the skills that prepare them to achieve the program outcome and supporting milestones

Define outcomes and milestones around almost anything your company tracks in Salesforce. Exercises include your content and other resources that your company is using, such as videos, slide decks, PDFs, and webinars. Some programs also support giving feedback on users' performance from peers and managers or from Einstein.

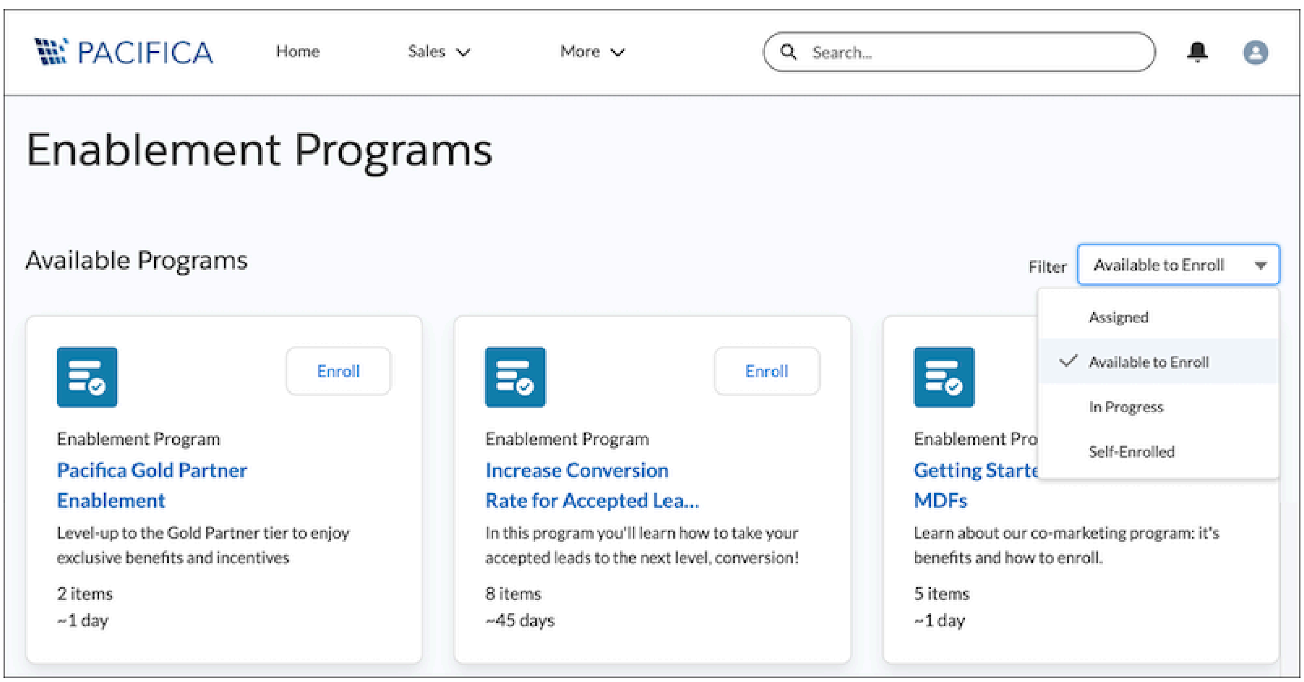
For sales programs in Lightning Experience, you can get started quickly by choosing from program templates. Templates offer recommendations for onboarding sales team members, closing more deals, selling new products, and other revenue-based outcomes. Or, install programs and their dependencies from a managed package.

When you're ready, publish programs and make them available to users. You can assign programs to users directly or allow users to self-enroll in programs that you share.

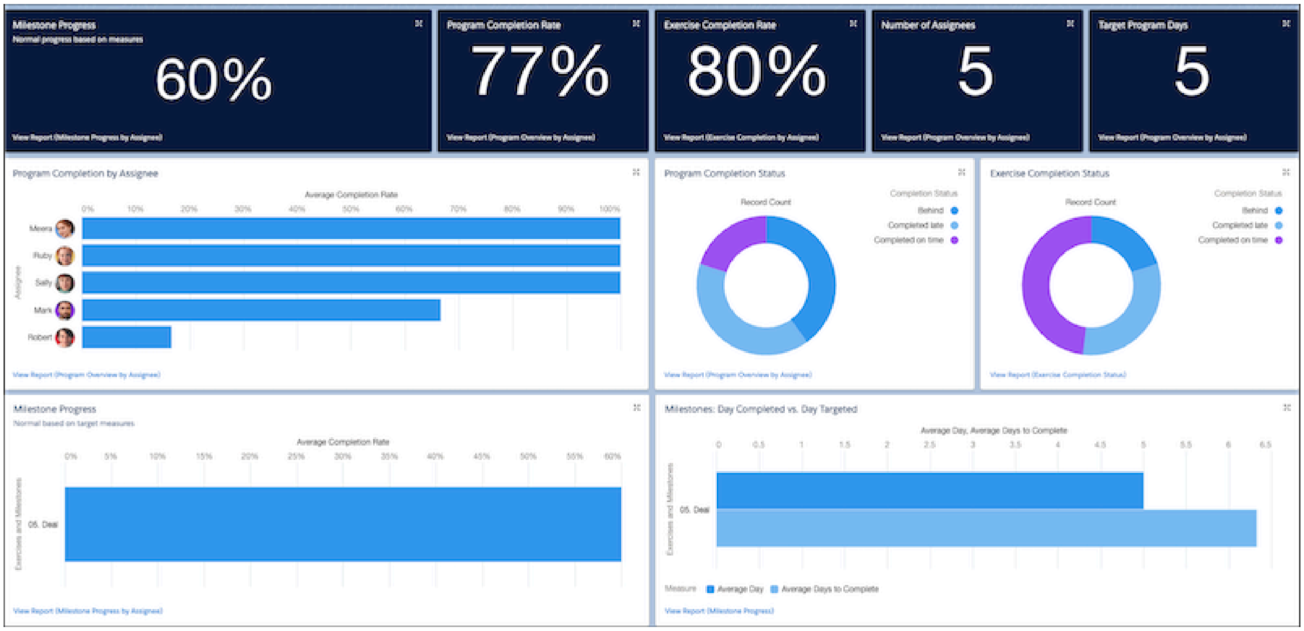
Users can access programs from the notifications they receive. In Lightning Experience, users can also preview and take programs from the Enablement Programs page, where they can see a full list of all programs available to them. Programs open in the Guidance Center, where users complete programs within the flow of their daily work.



In supported Experience Cloud sites, partners can take programs from a page that shows available programs. These programs open in another site page.



As users take programs, progress toward outcomes, milestones, and exercises are tracked. Users can see their progress as they complete programs, and you can see their progress with prebuilt reports and dashboards. Separate reports and dashboards are available for Enablement programs in Lightning Experience and Partner Enablement programs in supported Experience Cloud sites.



Tip For help with building Enablement programs, check out the Build, Launch, and Track Programs guidance set in the Guidance Center. This guidance set is available to users with the Design and Deliver Enablement Programs permission and provides in-app resources to help familiarize you with Enablement features.

See Also

Explore Guidance Sets

Trailblazer Community Group: Sales Programs Powered by Enablement

Outcomes, Milestones, and Measures

Before you start assembling a program in Salesforce, identify your program goals, including the outcome you want users to achieve and the incremental milestones they complete along the way. And, learn how to define the criteria for measuring and tracking progress against your goals.

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How Outcomes and Milestones Differ

A program's outcome is final, most significant activity that you want to track and that maps to your target revenue metric.

Milestones are smaller, incremental goals that help users demonstrate aptitude and build competencies on their way to the outcome. Reinforce preferred business processes or user behaviors, such as how you want users to track your company data in Salesforce.

Note An outcome is optional. Some programs want to emphasize multiple but equally important milestones, rather than incremental milestones that build toward an outcome.

Establishing Program Outcomes and Milestones

Work with your team to identify the outcome and milestones you want to achieve, when you want users to achieve them, how you want to track progress. See Plan Your Enablement Program Strategy.

For example, maybe you're planning a program to help shorten the ramp time of new sales reps. You identify a goal for a sales rep to close a deal within their first 60 days on the job. To support that goal, you want to reinforce standard business practices along the way.

Goal	Goal Type	Day of Program
Close a deal	Outcome	60
Log 5 sales calls	Milestone	10
Log 30 sales emails	Milestone	20
Log 200 sales calls or emails	Milestone	40

Measuring Progress for Outcomes and Milestones

Criteria for completing outcomes and milestones are based on specific objects in Salesforce, such as tasks and opportunities. When you add an outcome or milestone to a program, you select a corresponding Enablement measure and specify the target value that a user must achieve to complete the milestone or outcome.

For example, if a milestone requires a user to log five sales calls, a corresponding measure must specify what counts as a sales call. One way to define a sales call is by using the Task object and its fields.

- Task Subtype is Call.
- Task Subject includes the word "Call".
- Task Status is Completed.

Outcomes and milestones can be modified to include multiple measures and objects for tracking users' progress. For example, you can create a composite milestone that tracks calls and meetings, which are types of Tasks and Events respectively.

Enablement Measures and Enablement Programs are separate objects in Salesforce. You can define a measure one time and then reuse it across multiple programs or use it multiple times in one program. Each outcome or milestone that references the measure can define a different target value.

A Salesforce admin or business operations expert can help you identify the objects, fields, or other data you want to evaluate when you define measues. In some cases, a custom object or field might be required.

Some prebuilt measures are available to help you get started.

See Also
- Building Enablement Measures
- Prebuilt Enablement Measures
- Enablement Measures Examples
- Guidelines for Assembling Enablement Programs
- Managing Composite Outcomes and Milestones

Plan Your Enablement Program Strategy

To help put all your outcomes, milestones, and related measures into programs, work with your Enablement team to gather your requirements and make an implementation plan. Because Salesforce is highly customizable, your Enablement team can track activity for Enablement measures in different ways. Collaborate with your colleagues in other disciplines for support in building effective programs that align job-related activity with your measure criteria.

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1. Gather your Enablement team.
2. Establish the outcomes for your programs. Work with a business operations expert to select business outcomes that you want to achieve when the program is completed. Identify the user behaviors you want to develop or change to help achieve that outcome.
3. Establish the milestones for your programs. Work with a business operations expert to select bite-

sized, incremental goals for users to complete during the program.

4. Determine how you can measure outcome and milestone progress using Salesforce data. Consider the objects, fields, and field values that you want to evaluate when you define Enablement measures. If you don't know Salesforce well or want help with designing a tracking process, enlist help from your Salesforce admin or business operations expert.
5. Gather the content for your program exercises. Identify content that supports the outcomes and milestones that you specified.
6. Ask Enablement team members to communicate changes they make to processes for tracking job-related activities. Any changes after programs are launched can skew or invalidate your analytics. For example, maybe a Salesforce admin removes, renames, or hides an object or field used with an Enablement measure. Any outcomes or milestones that reference the measure no longer function the way they did before the change. For programs that are still in progress, the analytics are no longer accurate. But if your Enablement team communicates changes they plan to make, you can safely iterate on programs without disrupting your users or analytics.

See Also

Enablement Team Roles and Responsibilities
Designing Enablement Programs
Outcomes, Milestones, and Measures
Exercise Types in Enablement Programs

Setting Up Enablement

Before you can start creating and completing Enablement programs, Salesforce admins must complete some setup steps. Review Enablement roles and assign appropriate permissions for building and completing programs. For sales programs in Lightning Experience, you can set up Einstein Conversation Insights (ECI) so that Enablement admins can add conversation-based outcomes and milestones.

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Enablement Data Model

Enablement objects define measures, programs, and program items (also called program tasks), such as outcomes, milestones, and exercises. These objects also track progress that users make through a program and its items.

Trying Sales Programs for Free with Enablement Lite

In Sales Cloud only, you can turn on Enablement for free, with a limited number of programs and users. With Enablement Lite, you can experiment with programs, outcomes, milestones, measures, and exercises for sales users in Lightning Experience. Integrate these free capabilities into your Enablement team's definition and rollout strategy.

Enablement Compatibility with Other Products and Environments

Enablement Lite, full Enablement, and Partner Enablement functionality is compatible with other products and environments, including Government Cloud Plus and Industries solutions, with some limitations.

Considerations for Setting Up Enablement

If you're a Salesforce admin, review considerations about Enablement before setting up the product for your users.

Enablement Team Roles and Responsibilities

Multiple disciplines collaborate to define, build, and track Enablement programs. Identify colleagues who can take on these roles so that your Salesforce admin can assign permissions appropriately.

Enablement Permission Set Groups, Permission Sets, and Permissions

Enablement includes default permission set groups based on team member roles. The permission set groups include default permission sets based on tasks that people in those roles complete. The permission sets include individual user permissions and object permissions.

Assign Permissions to Your Enablement Team

Assign permissions to Enablement team members and users for managing programs, managing content, and taking programs. Give access to Enablement admins to access objects and fields when creating measures. Some options and settings are different depending on whether you're working with Enablement Lite, full Enablement, or Partner Enablement programs.

Set Up Einstein Conversation Insights for Enablement

In full Enablement programs, you can add conversation-based outcomes and milestones. To get started, set up Einstein Conversation Insights (ECI) for use with Enablement. The full Enablement add-on license includes ECI. If your Enablement team wants to influence users to say key phrases during their calls, set up and define custom ECI Call Insights. Setting up ECI is also a prerequisite for using Einstein Coach in Enablement programs to generate feedback for reps' sales pitches.

Refresh the Enablement Reports and Dashboard

Enablement includes prebuilt reports and dashboards for tracking program performance and progress. Different reports and dashboards are available depending on whether you're using Enablement Lite, full Enablement, or Partner Enablement. For all program types, you can make sure that your Enablement team can access the latest version of prebuilt analytics by refreshing the reports and dashboards in Setup. If your Enablement team has customized any of the prebuilt reports or dashboards, take care that you don't override those customizations.

Manage Notifications for Enablement Programs, Outcomes, and Milestones

Help your company's Enablement rollout run smoothly by encouraging users to take and complete programs on time. Notify users when a program is assigned or when they self-enroll in a program, and send congratulations when programs are completed. Remind users when they haven't started taking a program they enrolled in. Nudge users when a program, outcome, or milestone is due soon. Manage notifications separately for sales programs in Lightning Experience and partner programs in Experience Cloud sites.

Sandbox Support for Enablement
Enablement Lite, full Enablement, and Partner Enablement functionality is available in sandboxes with some limitations.

Set Up a Sandbox for Testing Enablement Measures Built on Einstein Conversation Insights
Some additional steps are required if your Enablement admins want to test full Enablement programs that use Einstein Conversation Insights (ECI) measures in a sandbox. Enablement testing is supported in full sandboxes only.

Show or Hide Confetti When Users Complete Assigned Programs
For Enablement Lite or full Enablement programs, you can add some extra celebration when an Enablement user completes a program. Salesforce admins can specify whether animated confetti plays on screen in the Guidance Center.

Enablement Data Model

Enablement objects define measures, programs, and program items (also called program tasks), such as outcomes, milestones, and exercises. These objects also track progress that users make through a program and its items.

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See Enablement Data Model in the Sales Programs and Partner Tracks with Enablement Developer Guide.

Trying Sales Programs for Free with Enablement Lite

In Sales Cloud only, you can turn on Enablement for free, with a limited number of programs and users. With Enablement Lite, you can experiment with programs, outcomes, milestones, measures, and exercises for sales users in Lightning Experience. Integrate these free capabilities into your Enablement team’s definition and rollout strategy.

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Enablement Lite Permissions
Default permission sets that use the Enablement Lite permission set license become available when you turn on Enablement Lite in Setup.

Enablement Lite Considerations and Limitations
Enablement Lite applies limits on programs and users and doesn't include some related features like you get with full Enablement. Upgrading from Enablement Lite to full Enablement affects the permissions you assign and the analytics that your team is using to track program progress. After your full Enablement license expires, you won't be able to switch back to Enablement Lite.

Enablement Lite Permissions

Default permission sets that use the Enablement Lite permission set license become available when you turn on Enablement Lite in Setup.

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- Manage Enablement Lite Essentials default permission set–Users can build, assign, track, and take Enablement programs in Lightning Experience. This default permission set includes these permissions. This default permission set uses the Enablement Lite permission set license and includes these permissions.
  - Create and Customize Reports
  - Run Reports
  - Design and Deliver Enablement Lite Programs
  - Take Enablement Lite Programs
  - Read on Account
  - Read on Surveys
  - Create and Read on Survey Invitations, Survey Subjects, and Survey Responses
- Use Enablement Lite Programs default permission set–Users can view and complete Enablement programs in Lightning Experience. This default permission set includes these permissions. This default permission set uses the Enablement Lite permission set license and includes these permissions.
  - Take Enablement Lite Programs
  - Read on Account
  - Read on Surveys
  - Create and Read on Survey Invitations, Survey Subjects, and Survey Responses

See Also

- Enablement Permission Set Groups, Permission Sets, and Permissions
- Assign Permissions to Your Enablement Team
- Designing Enablement Programs
- Launching Enablement Programs
- Tracking Enablement Program Progress

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Limitations

Enablement Lite applies these limits on programs and users.

- You can assign the Enablement Lite permission sets to up to 15 users.
- You can create up to 300 unpublished programs but publish only 2.
- Enablement Lite doesn't include Einstein Conversation Insights (ECI) like you get with full Enablement. When you check the status of prebuilt measures on the Enablement Settings page, ECI measures are available only if your company uses ECI.
- Enablement Lite doesn't include surveys like you get with full Enablement. The default assessment survey, Discovery Call Assessment, isn't provided. The Enablement Lite default permission sets still provide read access to surveys and create, read, edit, and delete access to related survey objects. You can give access to create surveys outside of these default permission sets.
- Enablement Lite doesn't support Einstein Coach for Feedback Request exercises.
- Enablement Lite includes prebuilt reports but no prebuilt dashboard like you get with full Enablement. On the Enablement Settings page in Setup, the option to refresh prebuilt reports applies to these Enablement Lite reports.
- Enablement Lite supports only sales programs in Lightning Experience.

Upgrade Considerations

When you're ready to upgrade from Enablement Lite to full Enablement, contact your Salesforce account executive.

Upgrading makes these changes.

- The Enablement Lite permission set license and default permission sets are replaced with the full Enablement permission set licenses, permission set groups, and permission sets. Reassign permissions to users who previously had Enablement Lite permissions. If you previously gave access to create surveys outside of the default Enablement Lite permission sets, you can assign the Enablement Resources Manager permission group, which includes access to create surveys by default. After reassigning permissions, users can continue creating and taking programs without any loss of data or functionality.
- The Enablement Lite prebuilt reports remain available but are no longer refreshed. In Enablement Settings, the option to refresh prebuilt reports starts applying only to the full Enablement reports and dashboard.

See Also

View Reports for Enablement Lite Programs
Assign Permissions to Your Enablement Team
Designing Enablement Programs
Launching Enablement Programs
Tracking Enablement Program Progress
Enablement Limits

Enablement Compatibility with Other Products and Environments

Enablement Lite, full Enablement, and Partner Enablement functionality is compatible with other products and environments, including Government Cloud Plus and Industries solutions, with some limitations.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Products and Editions

Full Enablement functionality is available with Sales Cloud, Service Cloud, and Salesforce Platform licenses in Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition editions.

Partner Enablement functionality is available with Sales Cloud, Service Cloud, and Salesforce Platform licenses in Enterprise, Performance, and Unlimited editions if you have a supported Partner Relationship

Management (PRM) add-on license.

Enablement Lite functionality is available only with Sales Cloud in Enterprise, Performance, and Unlimited editions.

Developer Edition

Full Enablement functionality is available with supported products in Developer Edition by default. No Enablement add-on license is required. When you sign up for a Developer Edition org, it includes Enablement licenses for up to five users for free. Enablement in Developer Edition has these limitations.

- Einstein Conversation Insights (ECI) isn’t available in Developer Edition.
- The free Enablement license in Developer Edition doesn't include an allocation of survey responses. However, if you turn on Surveys in Developer Edition, you can use assessment surveys with Feedback Request exercises in an Enablement program.

Partner Enablement functionality is available with supported products in Developer Edition if the org has Partner Relationship Management (PRM) enabled.

Enablement Lite functionality isn’t available in Developer Edition.

Industries

Full Enablement is compatible with most Industries solutions that are available in Enterprise, Performance, Unlimited, and Developer editions.

Enablement Lite is compatible with most Industries solutions that are available in Enterprise, Performance, and Unlimited editions.

Partner Enablement functionality is supported in Experience Cloud sites built with these Industries templates.

- Automotive
- Aura-based B2B Commerce templates (no longer solid)
- Build Your Own (Aura)
- Customer Service
- Financial Services Client Portal
- Insurance Agent Portal
- Partner Central

Government Cloud Plus

Enablement Lite and full Enablement are compatible with a Government Cloud Plus environment, with these limitations.

- Einstein Conversation Insights (ECI) isn’t available, so you can’t create measures for outcomes and

milestones that reference ECI objects.
- Trailhead exercises aren't supported.
- The "Build, Launch, and Track Programs" guidance set isn't available for users with Enablement admin permissions.

Important Partner Enablement functionality isn't compatible with a Government Cloud Plus environment.

See Also

Considerations for Partner Enablement Programs
Enablement Lite Considerations and Limitations

Considerations for Setting Up Enablement

If you're a Salesforce admin, review considerations about Enablement before setting up the product for your users.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Trying Enablement for Free

In Sales Cloud only, you can turn on Enablement for a limited number of users for free. Experiment with Enablement programs, outcomes, milestones, measures, and exercises for sales users in Lightning Experience, with some limitations. In Enablement Settings, turn on **Try Enablement for Free**. Enablement Lite provides different permission sets and analytics compared with what you get with full Enablement. See Trying Sales Programs for Free with Enablement Lite.

Enablement Settings and Partner Enablement Settings

If your company uses Partner Relationship Management (PRM), the Enablement section of Setup includes both Enablement Settings and Partner Enablement Settings. These steps are the same regardless of which page you're using.

- Preparing a sandbox

- Assigning the Content Manager contributor role
- Allowing Enablement admins access to view all objects and fields when creating measures
- Checking the availability of prebuilt measures

Other steps are unique depending on whether you're setting up Enablement Lite, full Enablement, or Partner Enablement.

Object Security, Field Security, and Sharing Settings

When creating Enablement measures, Enablement admins can require access to objects and fields that they can't normally access. From the Enablement Settings page in Setup, under the section Let Enablement Admins Build Measures on All Objects and Fields, turn on **Allow build access for all objects and fields**.

Sometimes Enablement admins can't see qualifying records during a measure preview, so it appears that the measure isn't working correctly, even though the qualifying records exist. Ask your Salesforce admin to check whether your company's sharing settings are limiting your access.

See Resolving Access to Enablement Measures Objects and Fields.

Deleting Scheduled Jobs for Enablement Causes Issues

Don't delete scheduled jobs for Milestone Computation or Program Status. If you need help rescheduling jobs, contact Salesforce Customer Support.

See Also
Trying Sales Programs for Free with Enablement Lite
Resolving Access to Enablement Measures Objects and Fields
Trailhead: Control Access to Objects
Trailhead: Create a Role Hierarchy
Organization-Wide Sharing Defaults
Controlling Access Using Hierarchies

Enablement Team Roles and Responsibilities

Multiple disciplines collaborate to define, build, and track Enablement programs. Identify colleagues who can take on these roles so that your Salesforce admin can assign permissions appropriately.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost

Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

The complexity of your Enablement goals and size of your team determine how these roles work for you. In some cases, one person can fulfill multiple responsibilities. For others, a team of collaborators is needed. Not all of these roles are required to use Enablement. But it can be nice to rely on these folks if they're available.

Business Operations Expert

This role helps identify the business outcomes that you want Enablement programs to focus on. They help determine how day-to-day work affects your revenue goals and how to build Enablement measures that track activity related to those goals.

This role isn't required to build Enablement programs in Salesforce, but you can give them permissions as needed.

Channel Account Manager

For Partner Enablement programs, this role helps plan content and experiences that support partners, who take programs, prompts, and walkthroughs on your partner experience site. They collaborate with Enablement admins and in-app guidance managers for partners to identify content and activities that contribute to partner success.

This role isn't required to build Partner Enablement programs or in-app guidance in supported Experience Cloud sites, but you can give them permissions as needed.

Salesforce Admin

This role can access Setup and manage Salesforce data, including these tasks.

- Set up features and customize Salesforce
- Assign permissions for other roles
- Help define and implement object, field, and field value criteria for measures for outcomes and milestones

Permissions for Salesforce admins can vary depending on the task. To find the appropriate permissions needed, search Salesforce Help for the specific task.

Salesforce Developer

This role can extend Salesforce functionality with custom code that implements company-specific business rules, logic, and workflows. They collaborate with Salesforce admins and other roles to help build custom functionality that supports Enablement programs.

This role isn't required to build Enablement programs, but you can give them permissions as needed.

Site Developer

For Partner Enablement programs, this role helps create, publish, and maintain Experience Cloud sites where partners are interacting with your brand. They use the Enablement components and pages in supported site templates to build experiences where partners can take programs, prompts, and walkthroughs.

To ensure that site developers can access Enablement data, assign the Manage Enablement Essentials permission set to these users.

Enablement Admin

This role leads, implements, and maintains Enablement programs, including these tasks.

- Create, edit, delete, publish, and unpublish Enablement programs in Lightning Experience and Partner Enablement programs in supported Experience Cloud sites
- Make programs available to Enablement users, either by assigning programs directly or sharing programs so users can self-enroll
- View all prebuilt Enablement analytics
- Customize prebuilt Enablement reports and dashboards
- Create reports and dashboards using Enablement report types
- Optionally view and take the programs that they create and maintain
- View custom walkthroughs in Lightning Experience that your company creates for onboarding users

Assign these permissions to Enablement admins.

Program Type	Default Permission Set
Enablement Lite	Manage Enablement Lite Essentials
Enablement	Enablement Admin permission set group, which includes these default permission sets. • Manage Enablement Essentials • Use Custom Walkthroughs
Partner Enablement	Manage Enablement Essentials

Content Creator or Manager

This role adds and maintains links, videos, and rich text lessons for exercises in Enablement programs. In many cases, the same person fulfills both the Enablement admin and content manager roles.

Assign the Content Manager contributor role in the Enablement workspace of the Digital Experiences app. This contributor role applies to all program types.

Enablement Resources Manager

This role adds and maintains resources related to Enablement other than content that Enablement users directly consume as part of programs, such as these items.

- Surveys sent to peers and managers for gathering feedback on user performance
- Prompts and walkthroughs in Lightning Experience that guide users through Salesforce features outside of programs

This role isn't required to build Enablement programs in Salesforce. But, if you want to use assessment surveys in programs or create in-app guidance alongside your programs, assign these permissions to Enablement resource managers.

Program Type	Default Permission Set
Enablement Lite	None
Enablement	Enablement Resources Manager permission set group, which includes these default permission sets. • Manage Assessment Surveys • Manage In-App Guidance
Partner Enablement	None

In-App Guidance Manager for Partners

As part of your Partner Enablement strategy, this role adds and maintains prompts and walkthroughs for partner users in supported Experience Cloud sites, outside of programs.

Assign the Manage In-App Guidance for Partners permission set to these users.

Sales Leader

This role can create, edit, delete, and run Enablement reports and dashboards in personal folders. They can view prebuilt reports and dashboards for full Enablement programs and track progress for all users, including users outside their role hierarchy. This role can also view dashboards owned by people under them in the role hierarchy.

Assign the Manage Enablement Analytics permission to these users.

Enablement User

This role takes published programs that you assign to them or share with them so they can self-enroll. For Enablement programs in Lightning Experience, these users are typically sales reps who take programs in the Guidance Center. For Partner Enablement programs, these users are partners who can take programs, prompts, and walkthroughs on your partner experience site.

Assign these permissions to Enablement users.

Program Type	Default Permission set
Enablement Lite	Use Enablement Lite Programs
Enablement	Enablement User permission set group, which includes these default permission sets. • Use Enablement Programs • Use Custom Walkthroughs
Partner Enablement	Partner Enablement User permission set group, which includes these default permission sets. • Use Partner Enablement Programs • Use In-App Guidance for Partners

See Also

Enablement Permission Set Groups, Permission Sets, and Permissions
Assign Permissions to Your Enablement Team
Assign a Contributor Role in the Enablement Workspace
Managing Partner Enablement Programs
Permissions for Creating and Accessing In-App Guidance
Partner Relationship Management Roles and Responsibilities
Salesforce Developers: Sales Programs and Partner Tracks with Enablement Developer Guide

Enablement Permission Set Groups, Permission Sets, and Permissions

Enablement includes default permission set groups based on team member roles. The permission set groups include default permission sets based on tasks that people in those roles complete. The permission sets include individual user permissions and object permissions.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Enablement Admin

The Enablement Admin permission set group includes these default permission sets and permissions for managing programs and accessing in-app guidance.

- Manage Enablement Essentials default permission set–Users can build, assign, track, and take Enablement programs in Lightning Experience and Partner Enablement programs in supported Experience Cloud sites. For programs in Lightning Experience, users can add exercises that reference existing assessment surveys. This default permission set uses the Enablement permission set license and includes these permissions.
  - Create and Customize Dashboards
  - Create and Customize Reports
  - Manage Dynamic Dashboards
  - Run Reports
  - View My Team’s Dashboards
  - Design and Deliver Enablement Programs
  - Take Enablement Programs
  - Take Partner Enablement Programs
  - Read on Accounts
  - Read on Surveys
  - Create and Read on Survey Invitations, Survey Subjects, and Survey Responses
- Use Custom Walkthroughs default permission set–Users can view and complete custom walkthroughs in Lightning Experience. This default permission set uses the Walkthroughs permission set license and includes the Take Custom Walkthroughs permission.

Note The Enablement Admin permission set group doesn’t include permissions for creating assessment surveys for Feedback Request exercises. The permission set group also doesn’t include permissions for creating prompts and walkthroughs outside of Enablement programs.

Enablement Resources Manager

The Enablement Resources Manager permission set group includes these default permission sets and permissions for managing assessment surveys used with Feedback Request exercises. These permissions also cover managing in-app guidance outside of Enablement programs in Lightning Experience.

- Manage Assessment Surveys default permission set–Users can create, edit, and delete assessment surveys used with Feedback Request exercises. This default permission set uses the Enablement Resources permission set license and includes these permissions.
  - Create, Read, Edit, and Delete on Surveys
  - View Roles and Role Hierarchy
  - View Setup and Configuration
- Manage In-App Guidance default permission set–Users can create, edit, and delete prompts and walkthroughs in Lightning Experience. This default permission set uses the Enablement Resources permission set license and includes these permissions.
  - Design and Deliver In-App Guidance
  - View All Profiles
  - View Roles and Role Hierarchy
  - View Setup and Configuration

Note In-app guidance in Lightning Experience can be used only outside of Enablement programs.

Enablement User

The Enablement User permission set group includes these default permission sets and permissions for taking programs and accessing in-app guidance in Lightning Experience.

- Use Enablement Programs default permission set–Users can view and complete Enablement programs in Lightning Experience, including programs that reference assessment surveys for Feedback Request exercises. This default permission set uses the Enablement permission set license and includes these permissions.
  - Take Enablement Programs
  - Read on Accounts
  - Read on Surveys
  - Create and Read on Survey Invitations, Survey Subjects, and Survey Responses
- Use Custom Walkthroughs default permission set–Users can view and complete custom walkthroughs in Lightning Experience. This default permission set uses the Walkthroughs permission set license and includes the Take Custom Walkthroughs permission.

Partner Enablement User

The Partner Enablement User permission set group includes these default permission sets and permissions for taking programs and accessing in-app guidance in supported Experience Cloud sites.

- Use Partner Enablement Programs default permission set–Users can view and complete Partner Enablement programs in supported Experience Cloud sites. This default permission set uses the Enablement permission set license and includes the Take Partner Enablement Programs permission.
- Use In-App Guidance for Partners default permission set–Users can view and complete prompts and walkthroughs in supported Experience Cloud sites. This default permission set uses the Walkthroughs permission set license and includes the Take In-App Guidance for Partners permission.

In-App Guidance Manager for Partners

No permission set group exists for users who manage in-app guidance for partners, but a default permission set is available.

Manage In-App Guidance for Partners default permission set–Users can create, edit, and delete prompts and walkthroughs in supported Experience Cloud sites. This default permission set uses the Enablement Resources permission set license and includes these permissions.

- Design and Deliver In-App Guidance for Partners
- Take In-App Guidance for Partners
- View All Profiles
- View Roles and Role Hierarchy
- View Setup and Configuration

Sales Leader

No permission set group exists for users who aren't Enablement admins but manage Enablement analytics. However, a default permission set is available.

Manage Enablement Analytics permission set–Users can create, edit, delete, and view prebuilt Enablement reports and dashboards for Enablement programs. This default permission set uses the Enablement permission set license and includes these permissions.

- Create and Customize Dashboards
- Create and Customize Reports
- Manage Dynamic Dashboards
- Run Reports
- View Enablement Analytics
- View My Team's Dashboards

See Also

Assign Permissions to Your Enablement Team
Enablement Lite Permissions
Enablement Team Roles and Responsibilities
Managing Partner Enablement Programs
Permissions for Creating and Accessing In-App Guidance

Assign Permissions to Your Enablement Team

Assign permissions to Enablement team members and users for managing programs, managing content, and taking programs. Give access to Enablement admins to access objects and fields when creating measures. Some options and settings are different depending on whether you're working with Enablement Lite, full Enablement, or Partner Enablement programs.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To assign permission set groups:	Assign Permission Sets AND View Setup and Configuration

To familiarize yourself with the appropriate permission set groups or default permission sets to assign, review the list of default Enablement permission set groups, permission sets, and permissions. If you're trying Enablement for free, review the default permissions and sets included with Enablement Lite.

Note Permission set group assignments are calculated and can take some time before they go into effect. See Permission Set Group Status and Recalculation.

1. From Setup, in the Quick Find box, enter `Enablement`, and then select the page for the types of programs you're creating.
   - For full Enablement, select **Enablement Settings**.
   - For Enablement Lite, select **Enablement Lite Settings**.
   - For Partner Enablement, select **Partner Enablement Settings**.
2. Assign Enablement admin permissions to users who build, assign, and track Enablement programs.
   - For Enablement Lite, assign the Manage Enablement Lite Essentials default permission set.
   - For full Enablement, assign the Enablement Admin permission set group.
   - For Partner Enablement, assign the Manage Enablement Essentials default permission set. For Partner Enablement programs, we recommend that you assign this permission set to both

Enablement admins and site developers.

a. Scroll to the Assign Permissions for Enablement Admins step, and click **Go to Permission Set** or **Go to Permission Set Group**.

   The permission set or permission set group opens in a new browser tab.

b. Click **Add Assignments**.

c. Search for the user that you want to add, and click **Assign**.

d. Close the browser tab, and return to Enablement Settings or Partner Enablement Settings.

3. For Partner Enablement programs only, repeat the previous step to assign the Manage Enablement Essentials default permission set to site developers. These permissions ensure that site developers can access Enablement objects when they add Enablement components and pages to supported Experience Cloud sites.
4. For full Enablement programs only, assign Enablement Resources Manager permissions. These users create assessment surveys for Feedback Request exercises and create prompts and walkthroughs in Lightning Experience for use outside of Enablement programs.
   a. Scroll to the Assign Enablement Resources Managers step, and click **Go to Permission Set Group**.
      The Enablement Resources Manager permission set group opens in a new browser tab.
   b. Click **Add Assignments**.
   c. Search for the user that you want to add, and click **Assign**.
   d. Close the browser tab, and return to Enablement Settings.
5. Assign the Content Manager contributor role in the Enablement workspace in Digital Experiences to users who manage links, videos, and rich text for exercises. Complete the steps in Assign a Contributor Role in the Enablement Workspace.
6. For Partner Enablement programs only, assign In-App Guidance Manager permissions to users who create prompts and walkthroughs in supported Experience Cloud sites.
   a. Scroll to the Assign In-App Guidance Managers in Experience Cloud Sites step, and click **Go to Permission Set**.
      The Manage In-App Guidance for Partners permission set opens in a new tab.
   b. Click **Add Assignments**.
   c. Search for the user that you want to add, and click **Assign**.
   d. Close the browser tab, and return to Partner Enablement Settings.
7. In the Let Enablement Admins Build Measures on All Objects and Fields step, optionally turn on **Allow build access for all objects and fields**. This option gives Enablement admins access to create measures for program outcomes and milestones using objects and fields that they can’t normally access.
   When the setting is on, Enablement admins see the names of all objects, fields, and field values when creating a measure. Outside of Enablement, access to all objects and fields is still limited by object- and field-level security, including the ability to view associated data within records.
8. For full Enablement programs only, assign Manage Enablement Analytics permissions to sales leaders who can create, edit, delete, run, and view prebuilt Enablement reports and dashboard.
   a. Scroll to the Assign Permissions for Viewing Analytics step, and click **Go to Permission Set** .
      The Manage Enablement Analytics permission set opens in a new browser tab.
   b. Click **Add Assignments**.
   c. Search for the user that you want to add, and click **Assign**.
   d. Close the browser tab, and return to Enablement Settings.
9. Assign Enablement user permissions to users who take Enablement programs.

- For Enablement Lite, assign the Use Enablement Lite Programs default permission set.
- For full Enablement, assign the Enablement User permission set group.
- For Partner Enablement, assign the Partner Enablement User permission set group.

a. Scroll to the Assign Permissions for Enablement Users step or Assign Permissions for Partner Enablement Users step, and click **Go to Permission Set** or **Go to Permission Set Group**.
   The permission set or permission set group opens in a new browser tab.
b. Click **Add Assignments**.
c. Search for the user that you want to add, and click **Assign**.
d. Close the browser tab, and return to Enablement Settings or Partner Enablement Settings.

See Also

- Considerations for Setting Up Enablement
- Enablement Lite Considerations and Limitations
- Set Up Einstein Conversation Insights for Enablement
- Enablement Team Roles and Responsibilities
- Assign a Contributor Role in the Enablement Workspace
- Manage Permission Set Assignments

Set Up Einstein Conversation Insights for Enablement

In full Enablement programs, you can add conversation-based outcomes and milestones. To get started, set up Einstein Conversation Insights (ECI) for use with Enablement. The full Enablement add-on license includes ECI. If your Enablement team wants to influence users to say key phrases during their calls, set up and define custom ECI Call Insights. Setting up ECI is also a prerequisite for using Einstein Coach in Enablement programs to generate feedback for reps' sales pitches.

REQUIRED EDITIONS

Available in: Lightning Experience
Available with Sales Cloud, Service Cloud, or Salesforce Platform for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED	
To set up ECI and Enablement and to adjust sharing settings:	View Setup and Configuration AND Modify All Data OR Customize Application

1. Set up Einstein Conversation Insights. To make ECI objects available for Enablement admins to create measures for conversation-based outcomes and milestones, find Turn On Insight Reports and Conversation-related Measures for Enablement and set it to **On**.
2. Create ECI prebuilt measures.

a. From Setup, in the Quick Find box, enter `Enablement`, and then select **Enablement Settings**.
b. Under Check Status of Prebuilt Measures, click **Create Enablement Measures**.

If you're trying Enablement Lite, ECI isn't included like it is with the full Enablement license. When you check the status of prebuilt measures, ECI measures are available only if your company uses ECI.

Important ECI isn't supported in Developer Edition, isn't supported in Partner Enablement programs in Experience Cloud sites, and isn't included with Enablement Lite. However, if you're trying Enablement Lite and your company already uses ECI, you can still use ECI measures with Enablement Lite programs.

When ECI measures are created, you see them in the Available column under Statuses.

3. Assign conversation insights permissions to Enablement admins and Enablement users.
After you complete steps 1–3 in this topic, Enablement admins have access to ECI prebuilt measures on the Enablement Measures page and can build custom measures on ECI objects.
4. Set up Call Insights if Enablement admins want to influence users to say key phrases during their calls.
Ask your Enablement admins about the phrases that they want to track. In some cases, you must define custom call insights.

See Also

Guidelines for Creating Einstein Conversation Insights Measures for Conversation-Based Goals
Set Up a Sandbox for Testing Enablement Measures Built on Einstein Conversation Insights
Integrating Einstein Coach with Sales Programs
Einstein Conversation Insights

Refresh the Enablement Reports and Dashboard

Enablement includes prebuilt reports and dashboards for tracking program performance and progress. Different reports and dashboards are available depending on whether you're using Enablement Lite, full Enablement, or Partner Enablement. For all program types, you can make sure that your Enablement team can access the latest version of prebuilt analytics by refreshing the reports and dashboards in Setup. If your Enablement team has customized any of the prebuilt reports or dashboards, take care that you don't override those customizations.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To refresh the Enablement reports and dashboards:	View Setup and Configuration AND Modify All Data OR Customize Application

If Enablement analytics change, we update the prebuilt reports and dashboards in a release with a new version. When the prebuilt analytics don't change, the reports and dashboards from the previous release remain the latest version. If your Enablement team doesn't see the latest analytics, you can manually refresh them from Setup.

Before you refresh, check whether your team has customized any of the prebuilt items. Refreshing overrides any customizations made to the prebuilt reports, report types, and dashboards. We recommend that you save any customizations made to previous versions of the prebuilt items before you refresh them.

1. From Setup, in the Quick Find box, enter *`Enablement`*, and then select the page for the types of programs you're creating.
   - For Enablement Lite or full Enablement, select **Enablement Settings**.
   - For Partner Enablement, select **Partner Enablement Settings**.
2. Scroll to the step for refreshing analytics.
   - For Enablement Lite, scroll to the Refresh Your Prebuilt Reports step.
   - For full Enablement or Partner Enablement, scroll to the Refresh Your Prebuilt Reports and Dashboard step.
3. Read through the information shown in the step and determine whether anyone has customized the current version of the prebuilt reports and dashboards.
   - If any prebuilt reports or dashboards have been customized, navigate to the Reports and Dashboards tab and save copies of the customized items.
   - If no prebuilt reports or dashboards have been customized, continue to the next step.
4. Review the list of prebuilt reports and dashboards that are refreshed this list, and click **Refresh**.

For Partner Enablement, if the Refresh action isn't available, the Partner Relationship Management (PRM) root folders for reports and dashboards must be regenerated first. Go to PRM Setup and regenerate the PRM Reports and PRM Dashboards folders, then try refreshing prebuilt reports and dashboards from the Partner Enablement Settings page again. See Get the Latest Partner Relationship Management Reports and Dashboards.

After refreshing, verify that the missing analytics are now available in the Enablement reports and dashboards for this release. Refreshing sometimes takes a few minutes.

If you still don't see the latest analytics, verify that you set up related features correctly. Try refreshing again, or contact Salesforce Customer Support.

Note Enablement Lite includes only prebuilt reports, but no prebuilt dashboard like you get with full

Enablement. In Enablement Settings, the option to refresh prebuilt reports applies to these Enablement Lite reports. When you upgrade to full Enablement, the refresh action applies only to the prebuilt reports and dashboard included with the full license. The prebuilt reports included with the free license remain available but are no longer refreshed.

See Also

Tracking Enablement Program Progress
Enablement Lite Considerations and Limitations
Build a Report in Lightning Experience
Build a Lightning Experience Dashboard

Manage Notifications for Enablement Programs, Outcomes, and Milestones

Help your company's Enablement rollout run smoothly by encouraging users to take and complete programs on time. Notify users when a program is assigned or when they self-enroll in a program, and send congratulations when programs are completed. Remind users when they haven't started taking a program they enrolled in. Nudge users when a program, outcome, or milestone is due soon. Manage notifications separately for sales programs in Lightning Experience and partner programs in Experience Cloud sites.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To manage notifications for programs:	View Setup and Configuration AND Modify All Data OR Customize Application

These notification types are available.

- Program Assigned

- Program Completed
- Program Not Started
- Program Due
- Outcome or Milestone Due

For each notification type, specify whether users receive an email notification, in-app notification, or no notification.

For a Program Not Started, Program Due, and Outcome or Milestone Due notification, you can also configure when the notification is sent, with these considerations for weekends.

- Notifications aren’t sent on weekends.
- The times you specify for sending the notifications don’t account for weekends.
- The number of remaining days shown in the email that a user receives represents the total number of real days until the item’s due date, including weekends.

1. From Setup, in the Quick Find box, enter *`Enablement`*, and then select the page for the types of programs you’re managing notifications for.
   - For Enablement Lite or full Enablement, select **Enablement Settings**.
   - For Partner Enablement, select **Partner Enablement Settings**.
2. Scroll to the Manage Notifications step.
3. Find the notification type you want to modify and select **Edit** from the dropdown menu.
4. Modify the notification settings.
   a. To show a notification in Lightning Experience, turn on **In-App Notification**.
   For partner programs in Experience Cloud sites, in-app notifications can also appear in sites. See Considerations for Partner Enablement Programs.
   b. To send a notification in email, turn on **Email Notification**.
   For partner programs in Experience Cloud sites, these email notifications don’t interfere with user-specific email preferences on your site.
   c. To change when a notification is sent, enter the percentage of days that must elapse between the program’s start date and the item’s due date.
   For example, if a program is 30 days long and you specify 20% for the Program Not Started notification, the notification is sent after day 6.
   Percentages that result in partial days round down, and percentages don’t account for weekends.
5. Save your changes.

When you modify a notification setting, the changes apply only to programs that are assigned to users or that users enroll in after you save.

Sandbox Support for Enablement

Enablement Lite, full Enablement, and Partner Enablement functionality is available in sandboxes with some limitations.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
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Migrating Enablement Data from a Sandbox to Production

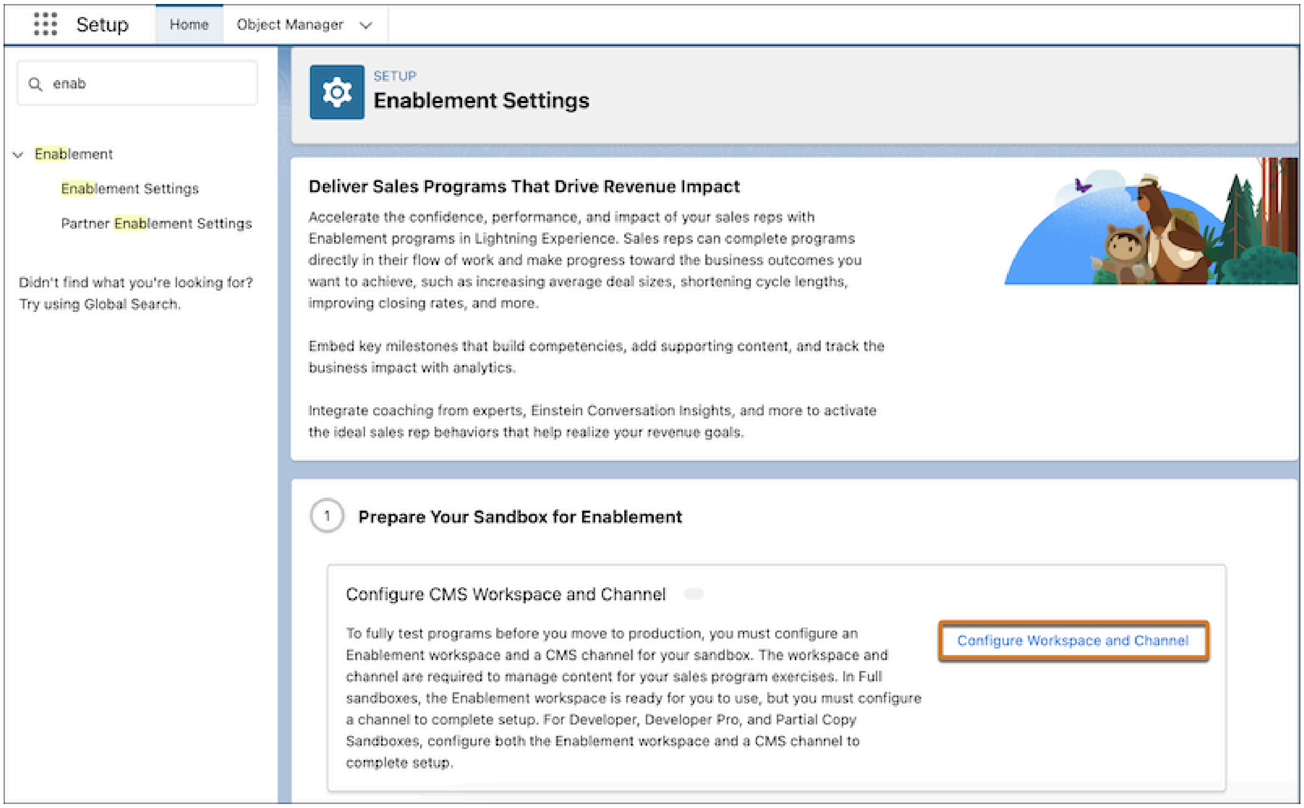
Use a sandbox to test Enablement programs, measures, and other capabilities before you create records in production. When you're ready, migrate Enablement programs and measures from a sandbox to production with Metadata API for change sets and Salesforce CLI. See Deploy Enablement Programs and Measures from a Sandbox to Production.

Enablement Workspace in Digital Experiences

An Enablement workspace and a CMS channel are required for managing content in program exercises. The type of sandbox you're using determines if any additional setup is needed to make your sandbox ready for Enablement programs.

In a Full sandbox, the Enablement workspace is available by default. To create a CMS channel, scroll to the Prepare Your Sandbox for Enablement section on the Enablement Settings page and click **Configure Channel**.

In a Developer, Developer Pro, or Partial Copy sandbox, the Enablement workspace and CMS channel aren't available by default. To create a workspace and channel, click **Configure Workspace and Channel** on Enablement Settings page.



This option is available only one time per sandbox.

Guidance Center

For sales programs in Lightning Experience, Salesforce admins must enable Guidance Center in sandboxes before Enablement users can take programs. To do so, Salesforce admins must turn on **Adoption Assistance in Sandbox Orgs** in the In-App Guidance settings.

In-App Guidance for Enablement Admins

In a sandbox, Enablement admins have limited access to the notifications and resources that they have in production.

- Enablement admins don't receive an email or in-app notification after being assigned either of these permissions, depending on the type of program you're creating.
  - Design and Deliver Enablement Lite Programs
  - Design and Deliver Enablement Programs
- Enablement admins can't access the "Build, Launch, and Track Programs" guidance set, even when the Guidance Center is enabled for sandboxes.
- Enablement admins can't access the walkthrough that appears the first time they visit Program Builder.

Trailhead Availability

When creating Enablement Lite or full Enablement programs from sandboxes, Enablement admins can't add Trailhead modules to Trailhead exercises.

Programs that are created in production and copied to sandboxes can include Trailhead exercises with links to modules. But Enablement users can't view or take those programs from the Guidance Center in a sandbox. Instead, users see an error that the program isn't available and are told to contact the person who assigned them the program.

Partner Enablement programs don't support Trailhead exercises in production or sandboxes.

Programs That Use Einstein Conversation Insights

To test sales programs that reference Einstein Conversation Insights (ECI) in a sandbox, some extra steps are required to turn on ECI first.

Important ECI isn't supported in Developer Edition, isn't supported in Partner Enablement programs in Experience Cloud sites, and isn't included with Enablement Lite. However, if you're trying Enablement Lite and your company already uses ECI, you can still use ECI measures with Enablement Lite programs.

See Also
Set Up a Sandbox for Testing Enablement Measures Built on Einstein Conversation Insights
Sandbox Types and Templates
Sandbox Licenses and Storage Limits by Type

Set Up a Sandbox for Testing Enablement Measures Built on Einstein Conversation Insights

Some additional steps are required if your Enablement admins want to test full Enablement programs that use Einstein Conversation Insights (ECI) measures in a sandbox. Enablement testing is supported in full sandboxes only.

REQUIRED EDITIONS

Available in: Lightning Experience
Available with Sales Cloud, Service Cloud, or Salesforce Platform for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED	
To set up ECI and Enablement and to adjust sharing settings:	View Setup and Configuration

USER PERMISSIONS NEEDED	
	AND Modify All Data OR Customize Application
To create, refresh, activate, and delete a Full sandbox:	Manage Sandboxes

Before setting up a sandbox for testing ECI measures, set up ECI in production. See Set Up Einstein Conversation Insights for Enablement.

Important ECI isn't supported in Developer Edition, isn't supported in Partner Enablement programs in Experience Cloud sites, and isn't included with Enablement Lite. However, if you're trying Enablement Lite and your company already uses ECI, you can still use ECI measures with Enablement Lite programs.

1. Log in to a full sandbox copy of your production org.
2. From Setup, in the Quick Find box, enter *`Einstein Conversation Insights General Settings`*, and then select it.
3. Find Turn On Insight Reports and Conversation-related Measures for Enablement and set it to **On**.
   If this setting is already on, turn it off and back on.
4. Verify that Turn On Insight Reports and Conversation-related Measures for Enablement is on.

Show or Hide Confetti When Users Complete Assigned Programs

For Enablement Lite or full Enablement programs, you can add some extra celebration when an Enablement user completes a program. Salesforce admins can specify whether animated confetti plays on screen in the Guidance Center.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED	
To manage the confetti effect:	View Setup and Configuration

USER PERMISSIONS NEEDED	
	AND
	Modify All Data OR Customize Application

Important Partner Enablement programs in Experience Cloud sites don't support the confetti effect.

1. From Setup, enter `Motivation` in the Quick Find box, and then select **Motivation** under User Engagement.
2. Toggle **Confetti Effect**.

Getting Started with Sales Programs Quickly

Reduce the time required to bring sales programs to production by installing programs from managed packages or choosing a program template in Program Builder.

REQUIRED EDITIONS

Available in: Lightning Experience
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Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Create Enablement Programs Based on Templates
With Enablement Lite and full Enablement, you can create sales programs in Lightning Experience quickly by choosing from program templates. Program templates define and organize outcomes, milestones, and exercises for common sales use cases. For example, find templates that help your sales reps onboard, close deals, and sell new products. Even if you're not creating a program for sales, you can browse and preview templates to find inspiration for custom programs you create.

Prerequisites for Enablement Program Templates
Program templates have items that are ready to use and placeholders that require you to complete some extra setup or add some details. To customize template-based programs for your users, review the prerequisites or additional details for the placeholder items.

Installing Enablement Programs from Managed Packages
Quickly bring programs to life in minutes by installing programs and all their dependencies, including

measures and exercise content, from second-generation managed packages.

See Also

Driving Business Outcomes with Enablement

Create Enablement Programs Based on Templates

With Enablement Lite and full Enablement, you can create sales programs in Lightning Experience quickly by choosing from program templates. Program templates define and organize outcomes, milestones, and exercises for common sales use cases. For example, find templates that help your sales reps onboard, close deals, and sell new products. Even if you're not creating a program for sales, you can browse and preview templates to find inspiration for custom programs you create.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED	
To create, edit, publish, unpublish, or delete a program:	Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs

Select a template that aligns with your outcomes, and modify it for your company's preferred business processes or data. Some outcomes, milestones, and exercises in the templates are ready to use. Others have placeholders that require you to complete some prerequisites, or add some details based on how your company wants to track job-related activities in Salesforce.

1. From the App Launcher, find and select **Enablement Programs**.
2. From the Enablement Programs page, click **New**.
3. If prompted, select **Enablement** for the program type and click **Next**.
   If your company uses Partner Relationship Management (PRM), the Partner Enablement option is also available. But templates aren't available for Partner Enablement programs.
4. To preview a template, select it and scroll through the prebuilt details, outcomes, milestones, and exercises.
5. Click **Create**.
6. Customize the program so that it works for your users, then publish it and make it available to users.

See Also
- Prerequisites for Enablement Program Templates
- Designing Enablement Programs
- Launching Enablement Programs

Prerequisites for Enablement Program Templates

Program templates have items that are ready to use and placeholders that require you to complete some extra setup or add some details. To customize template-based programs for your users, review the prerequisites or additional details for the placeholder items.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

For exercise placeholders, add supported content for different exercise types. See Exercise Types in Enablement Programs

For outcomes and measures, select an appropriate prebuilt measure, or create a custom measure. For some custom measures, ask your Salesforce admin for help with custom fields or Einstein Conversation Insights (ECI) configurations.

- Ask your Salesforce admin to identify any custom fields used to track the user behavior or goals in your program. If your company hasn't introduced any custom fields, work with your Salesforce admin to create a field that tracks the details you want to follow in your program.
- To add measures based on ECI voice and video call objects to your programs, your Salesforce admin must set up ECI for Enablement. If you plan to set Enablement program goals that encourage users to mention key phrases during their customer calls, your Salesforce admin must set up ECI Call Insights. For some measures, you must create custom call insights to indicate the phrases that are most important for your company.

Important ECI isn't supported in Developer Edition, isn't supported in Partner Enablement programs in Experience Cloud sites, and isn't included with Enablement Lite. However, if you're trying Enablement Lite and your company already uses ECI, you can still use ECI measures with Enablement Lite programs.

Template	Outcome or Milestone	Measure Details
Get Started as an AE	Milestone: Log a Call or Email by Day 11	Includes a prebuilt measure: Number of logged calls and

Template	Outcome or Milestone	Measure Details
		emails.
	Milestone: Book a Discovery Call by Day 15	Requires a custom measure with a custom field or picklist. See Number of booked discovery calls.
	Milestone: Qualify an Opportunity by Day 30	Requires a custom measure that follows your standard process for qualifying an opportunity.
	Milestone: Conduct a Product Demo by Day 40	Requires a custom measure with a custom field or picklist. See Number of completed demos.
	Milestone: Close a Deal by Day 90	Includes a prebuilt measure: Number of deals won.
Get Started as a BDR	Milestone: Book a Discovery Call	Requires a custom measure with a custom field or picklist. See Number of booked discovery calls.
	Milestone: Log 20 Calls by Day 15	Includes a prebuilt measure: Number of logged calls.
	Milestone: Log 50 Calls by Day 20	Includes a prebuilt measure: Number of logged calls.
	Milestone: Qualify an Opportunity by Day 20	Requires a custom measure that follows your standard process for qualifying an opportunity.
	Milestone: Log 200 Activities by Day 23	Includes a prebuilt measure: Number of logged calls.
	Milestone: Log 100 Calls by Day 25	Includes a prebuilt measure: Number of logged calls.
	Milestone: Qualify 5 Opportunities by Day 40	Requires a custom measure that follows your standard process for qualifying an opportunity.
	Milestone: Qualify 10 Opportunities by Day 60	Requires a custom measure that follows your standard process for qualifying an opportunity.
Get Started as a CSM	Milestone: Close a Case by Day 30	Includes a prebuilt measure: Number of closed cases.

Template	Outcome or Milestone	Measure Details
	Milestone: Run a QBR Meeting	Requires a custom measure that follows your standard process for tracking completed QBR meetings.
	Milestone: Complete an Implementation by Day 120	Requires a custom measure that follows your standard process for tracking completed implementations.
Get Started as an SE	Milestone: Track Your Work on an Opportunity	Requires a custom measure that follows your standard process for assigning opportunities to SEs.
	Milestone: Conduct a Product Demo by Day 40	Requires a custom measure with a custom field or picklist. See Number of completed demos.
	Milestone: Close Your First Deal with an AE	Requires a custom measure that follows your standard process for tracking closed opportunities assigned to SEs.
Build a Strong Pipeline	Milestone: Log 120 Activities by Day 15	Includes a prebuilt measure: Number of logged calls and emails.
	Milestone: Book a Sales Meeting by Day 15	Requires a custom measure that follows your standard process for tracking completed sales meetings.
	Milestone: Log 245 Activities by Day 20	Includes a prebuilt measure: Number of logged calls and emails.
	Milestone: Book 4 Sales Meetings by Day 20	Requires a custom measure that follows your standard process for tracking scheduled sales meetings.
	Milestone: Log 370 Activities by Day 30	Includes a prebuilt measure: Number of logged calls and emails.
	Milestone: Build a $300,000 Pipeline by Day 30	Requires a custom measure that calculates pipeline value for a

Template	Outcome or Milestone	Measure Details
		sales rep.
Win More Opportunities	Outcome: Close 3 Deals	Includes a prebuilt measure: Number of deals won.
	Milestone: Book 10 Meetings with Your Target Personas	Requires a custom measure with a custom field. See Number of meetings with a target customer persona.
	Milestone: Conduct Customer Calls Using Our Demo Script	Requires a custom measure on an ECI object. A custom ECI call insight is also required. See Number of customer calls with keywords mentioned.
	Milestone: Conduct a Customer Call Using Our Value Proposition	Requires a custom measure on an ECI object. A custom ECI call insight is also required. See Number of customer calls with keywords mentioned.
	Milestone: Close Deals Worth $200,000	Requires a custom measure. See Number of deals that meet a minimum deal size.
Increase Deal Size	Outcome: Close 2 deals worth $100,000 each	Requires a custom measure. See Number of deals that meet a minimum deal size.
	Milestone: Qualify an Opportunity with 2 or More Products	Requires a custom measure that follows your standard process for qualifying an opportunity for the products you want to sell.
	Milestone: Conduct Customer Calls to Discuss Products	Requires a custom measure on an ECI object. A custom ECI call insight is also required. See Number of customer calls with keywords mentioned.
	Milestone: Conduct a Customer Call Using Our Value Proposition	Requires a custom measure on an ECI object. A custom ECI call insight is also required. See Number of customer calls with keywords mentioned.

Template	Outcome or Milestone	Measure Details
	Milestone: Close a Deal with a Specific Product	Requires a custom measure. See Number of deals won for a specific product.
	Milestone: Close 2 Deals with 2 or More Products	Requires a custom measure that follows your standard process for closing an opportunity for the products you want to sell.
Sell a New Product	Outcome: Close a Deal	Requires a custom measure. See Number of deals won for a specific product.
	Milestone: Qualify 5 Opportunities with a Target Persona	Requires a custom measure that follows your standard process for qualifying opportunities with key personas.

See Also
Prebuilt Enablement Measures
Building Enablement Measures
Set Up Einstein Conversation Insights for Enablement
Managing Digital Experiences Content for Exercises in Enablement Programs

Installing Enablement Programs from Managed Packages

Quickly bring programs to life in minutes by installing programs and all their dependencies, including measures and exercise content, from second-generation managed packages.

REQUIRED EDITIONS

Available in: Lightning Experience
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Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
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Installed Components

After you install the package, these packaged records become available, but you have only limited permission to modify these files.

Records	What You Can Do
Programs	Edit, change status, and delete
Measures	Change status only
Digital Experiences content	Change status only

If a packaged program includes custom exercise types, the package also installs custom fields on the standard Learning Item object, custom objects, Apex classes, and Lightning web components. The package also installs Learning Item Type and Enablement Program Task Subcategory records, but these records are managed and only the package owner can modify them.

If a packaged program contains a Feedback Request exercise that uses peer and manager feedback, make sure to include the assessment survey in the package.

Important Packaged programs don’t support Feedback Request exercises that use Einstein Coach.

Receiving Updates to Programs Installed from a Package

If a package owner wants to release a new version of the package, they can upgrade program dependencies including measures, Digital Experiences content, and custom exercise components. But, you can’t receive updates for the program itself. Instead, package owners must clone a program that they previously packaged and create a version of the package that includes the cloned program.

When you install the new version of the package, both the previous and the new packaged program are available. Start using the new program included in the new package version, and discontinue the program that you had previously installed.

If the package owner deletes a program in a new version of the package, the program remains available after you install the new package version.

If the package owner deletes a measure or Digital Experiences content in a new version of the package, those records are removed after you install the new package version.

If the package owner deletes a custom exercise in a new version of the package, the custom exercise’s components remain available after you install the new package version. The components are no longer managed and you can edit or delete them.

Uninstalling Packaged Programs

To uninstall a managed package that installed a program, first deactivate the dependencies and delete the program. See Uninstall Packaged Enablement Programs and Dependencies.

Uninstalling the managed package removes all the program's dependencies that were included in the package, including measures and content. If a packaged measure references a custom object or field, uninstalling the package also uninstalls the custom object or field.

Warning Take care when creating other measures outside of a package that reference a custom object or field installed from a package. Uninstalling the package also uninstalls the custom object or field and breaks the unpackaged measures.

See Also

- Considerations for Creating and Editing Measures
- Managing Assessment Surveys for Feedback Request Exercises
- *Object Reference for the Salesforce Platform*: LearningItem
- *Object Reference for the Salesforce Platform*: LearningItemType
- *Object Reference for the Salesforce Platform*: EnblProgramTaskSubCategory
- *Sales Programs and Partner Tracks with Enablement Developer Guide*: Migrate Programs and Their Dependencies Between Orgs

Building Enablement Measures

Enablement measures specify the job-related activity that correspond to outcomes and milestones in Enablement programs. A measure identifies the source object, related objects, fields, field values, and logic that you want to associate with a particular activity you want to track. Measures and programs are separate objects in Salesforce so that you can define a measure one time and then reuse it across multiple programs or use it multiple times in one program. To help you get started, some prebuilt measures are available, or you can create measures from scratch.

REQUIRED EDITIONS

Available in: Lightning Experience
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Prebuilt Enablement Measures

To help you get started with Enablement measures, some prebuilt measures are available and define criteria for completing some typical outcomes and milestones. Review the use cases, criteria, and applicable prerequisites for each prebuilt measure. Some prebuilt measures are available to start using right away, but others require extra setup, including measures that use Einstein Conversation Insights

(ECI). In Program Builder, templates for programs that sales users take in Lightning Experience reference prebuilt measures.

Considerations for Creating and Editing Measures
Work with your business operations expert and other Enablement team members to carefully identify the objects and fields you want to use for tracking job-related activity. Before you start creating or editing measures, review how you can safely modify prebuilt measures or measures that are already used in published programs. See how you can preview measures, handle invalid measures, and create more elaborate measures using related and custom objects.

Guidelines for Creating Einstein Conversation Insights Measures for Conversation-Based Goals
To add conversation-based goals to your Enablement programs using voice and video calls recorded with Einstein Conversation Insights (ECI), create a measure that uses ECI objects. Learn guidelines for building successful ECI measures, such as which parameters are required. Also, get ideas for incorporating ECI Call Insights into your programs, such as counting key phrases that call owners mention during their customer calls.

Create and Activate Enablement Measures
Create measures that align with your company's processes for tracking job-related activities. Specify the criteria for the object and fields that satisfy the activity you want to measure for Enablement program outcomes and milestones. Activate measures you create so that they're available for use in programs.

Clone Enablement Measures
Add measures quickly by cloning measures that are already created and modifying the cloned measures. Cloning measures is recommended for modifying prebuilt measures that come with the Enablement add-on license. You can clone valid measures from the Enablement Measures page regardless of the measure's status. The cloned measures retain all details from the original measures.

Enablement Measures Examples
Find inspiration for creating Enablement measures that track job-related activity for your Enablement program outcomes and milestones. For some examples, a Salesforce admin must set up other features or create custom objects, fields, or picklists. Some examples offer There can be multiple ways to track the same behavior or goal, so you can consider multiple options. To further refine the specific activity that a measure tracks, combine field filters from multiple examples

Resolving Access to Enablement Measures Objects and Fields
Sometimes Enablement admins can't access objects, fields, or fields values when creating or editing measures. This scenario can happen when profiles, permission sets, or sharing settings restrict access or when the objects or fields are deleted or renamed.

See Also
Outcomes, Milestones, and Measures
Prebuilt Enablement Measures

Prebuilt Enablement Measures

To help you get started with Enablement measures, some prebuilt measures are available and define criteria for completing some typical outcomes and milestones. Review the use cases, criteria, and applicable prerequisites for each prebuilt measure. Some prebuilt measures are available to start using right away, but others require extra setup, including measures that use Einstein Conversation Insights (ECI). In Program Builder, templates for programs that sales users take in Lightning Experience reference prebuilt measures.

REQUIRED EDITIONS

Available in: Lightning Experience
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Prebuilt measures define job-related user activities that you want to track for program outcomes and milestones. If you see a prebuilt measure that you want to use, confirm that it evaluates the same objects, fields, and field values for tracking activity that you want to use. Also confirm whether you any extra setup is required.

If the prebuilt measures don't follow your company's processes for tracking user activity, review the measure details for inspiration and guidance as you create custom measures. Or, clone the prebuilt measure and modify it. See Considerations for Creating and Editing Measures.

From Setup, you can check which prebuilt measures are available. Then, you can view prebuilt measures from the Enablement Measures page. Prebuilt measure descriptions indicate that they're provided by Salesforce.

Important ECI isn't supported in Developer Edition, isn't supported in Partner Enablement programs in Experience Cloud sites, and isn't included with Enablement Lite. However, if you're trying Enablement Lite and your company already uses ECI, you can still use ECI measures with Enablement Lite programs.

Prebuilt Measure	What's Measured	How Users Get Credit	Recorded Date and Time of the Achievement
Average Deal Size	Opportunity	The user in the Opportunity Owner field must set the Stage field to Closed Won and fill in the Amount field. When it's completed, the opportunity owner gets credit for closing that deal, and the amount is totaled and averaged across other	The date the opportunity owner provides in the Close Date field.

Prebuilt Measure	What's Measured	How Users Get Credit	Recorded Date and Time of the Achievement
		deals that the user wins.	
Number of Calls with Next Steps This measure requires ECI.	Unified Voice Call Related Objects: • Unified Voice Call Participant • Unified Activity Insight	The user in the Call Owner field for a voice call must mention follow-up, scheduling, or action items according to the ECI recording.	The date and time provided in the Activity Date Time field.
Number of Calls with Talk Ratio Less than 50% This measure requires ECI.	Unified Voice Call • Unified Voice Call Participant • Unified Activity Insight	The user in the Call Owner field for a voice call must have talked less than 50% of the call according to the ECI recording.	The date and time provided in the Activity Date Time field.
Number of Closed Cases	Case	The user in the Case Owner field must set the Status field to Closed. When they do, the case owner gets credit for closing that deal.	The date provided in the Date/Time Closed field. Date/Time Closed is filled automatically when the user sets the case status to Closed.
Number of Logged Calls and Emails	Task	The user in the Assigned To field must meet all these requirements to get credit for logging the call or email. • The Subtype field must be Call or Email, or the word “Call” must be added to the subject. • The Status must be Completed.	The date and time provided in the Completed Date/Time field. Completed Date/ Time is filled when the user sets the task status to Complete.

Prebuilt Measure	What's Measured	How Users Get Credit	Recorded Date and Time of the Achievement
Number of Logged Calls	Task	The user in the task Assigned To field must meet all these requirements to get credit for logging the call. • The Subtype field must be Call or the word "Call" must be added to the subject. • The Status must be Completed.	The date and time provided in the Completed Date/Time field. Completed Date/ Time is filled when the user sets the task status to Complete.
Number of Logged Emails	Task	The user in the task Assigned To field must meet all these requirements to get credit for logging the email. • The Subtype field must be Email. • The Status must be Completed.	The date and time provided in the Completed Date/Time field. Completed Date/ Time is filled when the user sets the task status to Complete.
Number of Deals Won	Opportunity	The user in the Opportunity Owner field must set the Stage field to Closed Won. When they do, the opportunity owner gets credit for closing that deal.	The date the opportunity owner provides in the Close Date field.
Total Amount in Pipeline	Opportunity	The user in the Opportunity Owner field gets credit for the monetary value provided in the Amount	The date provided in the Created Date field.

Prebuilt Measure	What's Measured	How Users Get Credit	Recorded Date and Time of the Achievement
		field for any opportunity with a stage value other than Closed Won or Closed Lost.	
Total Revenue from Deals Won	Opportunity	The user in the Opportunity Owner field must set the Stage field to Closed Won. When they do, the opportunity owner gets credit for winning the monetary value provided in the Amount field.	The date the opportunity owner provides in the Close Date field.

See Also
Getting Started with Sales Programs Quickly
Building Enablement Measures
Outcomes, Milestones, and Measures

Considerations for Creating and Editing Measures

Work with your business operations expert and other Enablement team members to carefully identify the objects and fields you want to use for tracking job-related activity. Before you start creating or editing measures, review how you can safely modify prebuilt measures or measures that are already used in published programs. See how you can preview measures, handle invalid measures, and create more elaborate measures using related and custom objects.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Access to Objects and Fields When Building Measures

When you're creating a measure, if you can't see objects or fields that you want to add, contact your Salesforce admin. Sometimes Salesforce admins can correct the issue by adjusting Enablement settings or object- or field-level security settings. See Resolving Access to Enablement Measures Objects and Fields.

Availability of Prebuilt Measures

Most prebuilt measures are available right away on the Enablement Measures page and in program templates. Sometimes it can take up to 1 hour for prebuilt measures to become available. If you don't see prebuilt measures in that that time, contact Salesforce Customer Support.

Sometimes prebuilt Einstein Conversation Insights (ECI) measures require Salesforce admins to create the ECI measure manually from Setup.

Important ECI isn't supported in Developer Edition, isn't supported in Partner Enablement programs in Experience Cloud sites, and isn't included with Enablement Lite. However, if you're trying Enablement Lite and your company already uses ECI, you can still use ECI measures with Enablement Lite programs.

Customizing Prebuilt Measures

Save time creating Enablement measures by starting from a prebuilt measure that you want to modify. We recommend that you clone a prebuilt measure rather than editing it. Program templates reference prebuilt measures. If you modify a prebuilt measure directly, you permanently change the behavior of any program template that references the prebuilt measure, and the measure no longer functions as the program template describes. To undo changes you make to a prebuilt measure, you must manually reset each parameter.

Editing Measures in Assigned or Enrolled Programs

You can edit the measure name or description for a measure at any time. Measure names are visible to users when they take a program and they view the details of an outcome or milestone, but descriptions aren't visible. Changing the name or description doesn't affect programs where the measure is used.

But we recommend that you avoid editing these measure parameters if the measure is used in a program that users are taking.

- The object the measure is based on
- The User Field, Display Field, and Date Field
- Field filters
- Any related objects and their field filters

To see whether a measure is used in a program, check whether the measure is marked as active. Then to see whether any user is assigned to or enrolled in the program, check the Enrolled Users related list on the program record detail page.

When you edit a measure used in program outcomes or milestones that users have achieved, their progress isn't recalculated. Instead, the changes you make skew completion analytics across that program. Users who previously completed the program were assessed according to the original measure criteria, and the next users who take the program are assessed according to the changed criteria.

Likewise, in users' view of the program, progress continues to appear according to the criteria set at the time the user completed the outcome or milestone.

To avoid these issues, preview your measure to make sure that you built it accurately before you include the measure in a program.

Before you edit a measure that's used in a program that users are taking, first allow the enrolled users to complete the program. Then, retire the program. This strategy avoids disrupting progress data in your analytics. To start using an edited measure, clone it, modify it, and add it to a new program. The new program has specific analytics that your Enablement team can track separately. One exception to this guideline is when you're fixing an invalid measure, where the progress analytics are disrupted anyway.

Invalid Measures

A measure can become invalid and stop tracking progress under these circumstances.

- An object or field is removed.
- An object label or API name is renamed.
- A field's API name is renamed.

Only measures in a program that users are taking can be invalid. Measures are flagged as invalid only after a breaking change is saved and the corresponding outcome or milestone progress is calculated. By default, progress for outcomes and milestones is calculated daily at 6:59 AM, 11:59 AM, 4:59 PM, and 11:59 PM, according to your Salesforce org's time zone setting. Users can also refresh outcome and milestone progress on demand when they take the program.

To avoid disruptions in your program analytics, periodically check the validity of all measures. From the Enablement Measure record detail page, check the status of the Valid field.

In most cases, we recommend that you avoid editing measures used in a program that users are taking so that you don't disrupt your analytics. But for an invalid measure, because analytics are disrupted anyway, editing the measure can be worth the extra work. For the least disruption, try to update an invalid measure so that it tracks the same activity but with the corrected object or field information.

To help you avoid invalid measures, ask your Salesforce admin to stay in touch about changes to objects and fields that you're using with Enablement programs.

Previewing Measures

You can test the accuracy of your measures during the Preview step. Previewing checks that the measure accurately tracks user progress toward the goals you set in a program and avoids introducing issues to programs where you reference the measure.

To determine whether a measure works correctly, try to verify three to five users during the preview. If the preview doesn't show the records that you expect to qualify, consider these steps.

- Reconsider the user and start date that you previewed.
- Return to the measure parameters and verify them. After an unsuccessful preview, the parameters that most commonly require adjustments are the User Field and field filters.
- If the measure follows a newly introduced process for tracking a user behavior or goal, verify that users have started using the process. You can always wait to activate the measure until you're sure the new process is working.
- If your company uses Salesforce reports for tracking the same behavior or goal that you're measuring, the filters on that report can inform how to build this measure. The report can also inform which users and start date to test.
- Sometimes your company's object-level security or sharing settings prevent you from seeing records that qualify for a measure, even when it's built correctly. Ask your Salesforce admin whether your security or sharing settings can be adjusted to allow you to preview the measure. Or consider using different objects or fields to identify the user goal or behavior that you want to track for this measure.
- You can track measures built on ECI objects only up to 180 days in the past. When previewing ECI measures, select a start date that occurs within the last 180 days. Records that qualify for the measure more than 180 days ago don't show up during the preview.

Working with Related Objects

To follow user behavior that's tracked on a related object, create a measure for the parent object and add the related object from the Field Filters step. Indicate the fields and field values that you want to follow by adding field filters on the related object. See Create and Activate Enablement Measures. If you want to add field filters for both the parent object and the related object, the filter logic across all objects is AND (all conditions are met) by default. You can't set OR or custom logic across parent and related objects. You can't apply Contains and Does Not Contain filter operators on related object fields.

Working with Custom Objects and Custom Fields

In some cases, measuring the right job-related activity can require a custom object or field, but use caution. If you associate a measure with a custom object or field, and then the custom object or field is deleted, the measure is broken.

Warning Take care when creating other measures that reference a custom object or field installed from a managed package. Uninstalling the package also uninstalls the custom object or field and breaks the unpackaged measures.

See Also

- Prebuilt Enablement Measures
- Enablement Measures Examples
- Set Up Einstein Conversation Insights for Enablement
- Installing Enablement Programs from Managed Packages
- Editing Published Enablement Programs That Users Are Taking
- Enablement Limits

Guidelines for Creating Einstein Conversation Insights Measures for Conversation-Based Goals

To add conversation-based goals to your Enablement programs using voice and video calls recorded with Einstein Conversation Insights (ECI), create a measure that uses ECI objects. Learn guidelines for building successful ECI measures, such as which parameters are required. Also, get ideas for incorporating ECI Call Insights into your programs, such as counting key phrases that call owners mention during their customer calls.

REQUIRED EDITIONS

Available in: Lightning Experience
Available with Sales Cloud, Service Cloud, or Salesforce Platform for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Getting Started with ECI Measures

Before you can create measures for ECI objects and fields, a Salesforce admin sets up ECI for Enablement. If you plan to set Enablement program goals that encourage users to mention key words or phrases during their customer calls, Salesforce admins also sets up ECI Call Insights.

Important ECI isn't supported in Developer Edition, isn't supported in Partner Enablement programs in Experience Cloud sites, and isn't included with Enablement Lite. However, if you're trying Enablement Lite and your company already uses ECI, you can still use ECI measures with Enablement Lite programs.

Choosing the Right ECI Object for Your Measure

Base your measure on one of these available ECI objects. Consider the user behavior that you want to track in the outcomes and milestones where you plan to add the measure.

User Behavior to Track	ECI Object to Select
Voice calls recorded with ECI.	Unified Voice Call, which stores: • Voice call-related activity insights • Date and time of the call • Call duration
Video calls recorded with ECI.	Unified Video Call, which stores: • Video call-related activity insights • Date and time of the call • Call duration

Setting Who, When, and How to Measure Conversation-Based Goals

When you're creating an ECI measure, some of the parameters you specify in the Who, When, and How step have flexible options. For others, select specific parameters.

- Display Field: Select a field that helps you differentiate qualifying records when you're previewing the measure. For example, select **Unified Voice Call ID** or **Unified Video Call ID** to show the record ID for each qualifying call. Or you can select **Activity Type**, which shows you whether the record is a voice or video call.
- User Field: Select **Voice Call (Voice Call ID).Owner ID**, which gives credit to the user who owns the voice or video call. ECI measures require you to add a related object and a specific field filter to appropriately attribute credit to the person taking the Enablement program.
- Date Field: Select **Activity Date and Time**, which gives credit to the user when the voice or video call occurred.
- Calculation Method: Select how to calculate user progress toward the goal you set in a program using the object that you're measuring.
  - To tally the number of qualifying records, select **Count**.
  - To total a specific field across qualifying records, select **Sum**.
  - To total a specific field across qualifying records and then calculate the average, select **Average**. If you select **Sum** or **Average**, also set the Field for Calculation to select the field you want to total across records.

Adding Required Related Objects and Field Filters to ECI Objects

All ECI measures require you to add a related object and a filter on that related object to properly credit the person taking the program as the ECI call owner. Add one of these related objects based on the original ECI object you selected for your measure.

You can add related objects from the Field Filters tab when you're creating a measure.

Original ECI Object	Related ECI Object to Add	Field Filter on Related Object
Unified Voice Call	Unified Voice Call Participant, which stores call participants': • Roles on the call • Email addresses • Phone numbers	• Field Name: Person ID • Operator: Equals • Field Value: User whose work is measured
Unified Video Call	Unified Video Call Participant, which stores call participants': • Roles on the call • Email addresses • Phone numbers	• Field Name: Person ID • Operator: Equals • Field Value: User whose work is measured

Adding Related Objects and Field Filters for ECI Call Insights and Keywords

For measures that use ECI Call Insights, first identify the keywords that you want to add as ECI call insights. But when you create the measure, set the number of mentions by insight, not by keyword. ECI call insights can have multiple keywords, so work with your Salesforce admin to plan the insights you want to track. For example, if you want a user to mention one keyword 3 times and another keyword 5 times, add those keywords as two separate ECI call insights. That way, you can set the required number of mentions for each insight separately.

Add the ECI related object Unified Activity Insights to your measure. Add this filter logic and these filters to the Unified Activity Insights related object.

- Filter Logic: All conditions are met (AND)
- Field Filter 1:
  - Field Name: Insight Type
  - Operator: Equals
  - Field Value: Add the name of the ECI call insight that includes the keywords that you want to track.
- Field Filter 2:
  - Field Name: Aggregated Keyword Occurrence
  - Operator: Greater or Equal
  - Field Value: Add the number of times you want the user to say keywords from this insight during a call. This number represents the total mentions of all keywords included on the Insight Type you selected in Field Filter 1. For example, say you selected an Insight Type that includes the keywords Product A and Product B, and you set the Aggregated Keyword Occurrence filter to 4. The user can meet the requirement when they say each keyword twice, but they can also meet the requirement when they say “Product A” 4 times.

Previewing ECI Measures

You can track measures built on ECI objects only up to 180 days in the past. When previewing ECI measures, select a start date that occurs within the last 180 days. Records that qualify for the measure more than 180 days ago don't show up during the preview.

Important Starting in Summer '25, Einstein Activity Capture (EAC) Activity 360 Reporting and Activity Metrics aren't available in Einstein Conversation Insights (ECI) unless previously set up. If you're already using data from Activity 360 Reporting and Activity Metrics in ECI, such as Unified Activity Insights and any related reports, you can continue to do so until Summer '26 when these EAC reporting tools are scheduled for retirement. See Einstein Activity Capture Activity 360 Reporting, Activity Metrics, Activities Dashboard Upcoming Retirement (Summer '26).

See Also
Considerations for Creating and Editing Measures
Enablement Measures Examples

Create and Activate Enablement Measures

Create measures that align with your company's processes for tracking job-related activities. Specify the criteria for the object and fields that satisfy the activity you want to measure for Enablement program outcomes and milestones. Activate measures you create so that they're available for use in programs.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To create, edit, activate, or delete a measure:	Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs

Before you create measures, work with your Enablement team to plan your Enablement strategy, which includes planning your measures. Also review considerations for creating and editing messures.

1. From the App Launcher, find and select **Enablement Measures**.
2. Click **New**.
3. Complete the required fields on each tab. As you progress through building the measure, the Help with Measures panel shows you guidance for each field.
4. On the Preview tab, click **Preview** to test your measure. If the preview doesn't show records that you expect to qualify for the outcomes and milestones where you want to use this measure, click **Back**. Modify some of the measure parameters, and then return to Preview and test your measure again. We recommend that you verify three to five user records.
5. When you're done, save your work.
   After saving, the measure's record detail page is shown.
6. If you're ready to make the measure available for use in programs, click **Activate** on the measure's record detail page.

Add measures to program outcomes or milestones from in Program Builder.

See Also

Outcomes, Milestones, and Measures

Trailhead: Understand Custom and Standard Objects

Clone Enablement Measures

Add measures quickly by cloning measures that are already created and modifying the cloned measures. Cloning measures is recommended for modifying prebuilt measures that come with the Enablement add-on license. You can clone valid measures from the Enablement Measures page regardless of the measure's status. The cloned measures retain all details from the original measures.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To clone measures:	Design and Deliver Enablement Programs

USER PERMISSIONS NEEDED	
	OR
	Design and Deliver Enablement Lite Programs

1. From the App Launcher, find and select **Enablement Measures**.
2. From the Enablement Measures page, click the dropdown menu next to the measure that you want to clone.
3. Click **Clone**.
4. In the New Enablement Measure window, customize the new measure, and then save it.

The new measure is saved with a default status of draft. To make the new measure available for use in programs, activate it.

See Also
Outcomes, Milestones, and Measures
Considerations for Creating and Editing Measures
Create and Activate Enablement Measures

Enablement Measures Examples

Find inspiration for creating Enablement measures that track job-related activity for your Enablement program outcomes and milestones. For some examples, a Salesforce admin must set up other features or create custom objects, fields, or picklists. Some examples offer There can be multiple ways to track the same behavior or goal, so you can consider multiple options. To further refine the specific activity that a measure tracks, combine field filters from multiple examples

Customer Service Examples

What You're Measuring	Object	Who, When, How	Field Filters	Required User Action
Number of resolved cases.	Case	• Display Field: Subject • User Field: Created By • Date Field: Date/Time Closed • Calculation Method: Count	Field Filter: Status Equals Closed	The user listed in the Created By field must create a case and set the Status field to Closed. The user is credited for meeting this goal on the date and time recorded in the Date/Time

What You're Measuring	Object	Who, When, How	Field Filters	Required User Action
				Closed field.

Einstein Conversation Insights (ECI) Examples

Important ECI isn't supported in Developer Edition, isn't supported in Partner Enablement programs in Experience Cloud sites, and isn't included with Enablement Lite. However, if you're trying Enablement Lite and your company already uses ECI, you can still use ECI measures with Enablement Lite programs.

What You're Measuring	Object	Who, When, How	Field Filters	Required User Action
Number of customer calls with keywords mentioned. This measure requires a Salesforce admin to set up ECI Call Insights and to create custom call insights for any keywords you want to follow. For example, add key phrases from your company call scripts or sales playbooks, or the names of products that you want sales reps to drive sales for.	Unified Voice Call	• Related Object: Unified Voice Call Participant • Unified Voice Call Participant Field Filters: - Filter Logic: All conditions met (AND) - Field Filter 1: Person ID Equals User whose work is measured - Field Filter 2: Participant Type Equals From • Related Object: Unified Activity Insight • Unified Activity Insight Field Filters: - Filter Logic: All conditions met (AND)	• Display Field: Unified Voice Call ID • User Field: Voice Call (Voice Call ID).Owner ID • Date Field: Activity Date and Time • Calculation Method: Count	The call owner must say the keywords identified in the ECI call insight the total number of times that you specified in the field filter. Both calls that the call owner creates and calls that the call owner participates in qualify for this measure. The call owner is credited for meeting this goal on the date and time recorded in the Activity Date and Time field.

What You're Measuring	Object	Who, When, How	Field Filters	Required User Action
		- Field Filter 1: Insight Type Equals the name of the ECI call insight that includes keywords that you want to track. - Field Filter 2: Aggregated Keyword Occurrences Greater or Equal to the number of times you require users to use keywords on each call.		

Opportunity Examples

What you're measuring	Object	Who, When, How	Field Filters	Required User Action
Number of deals in pipeline This measure requires Salesforce admins to set up and customize opportunity contact roles.	Opportunity	• Display Field: Name • User Field: Created By or Owner ID • Date Field: Created Date, Due Date, or the date field that represents when	Field Filters: • Stage Equals the Stage field value or values that represent your pipeline. • If counting the number of deals for a specific product line,	The opportunity owner or the user listed in the Created By field must set the Stage field to one of the values that you specified in the field filter. The user is credited for

What you're measuring	Object	Who, When, How	Field Filters	Required User Action
		an opportunity is considered in the pipeline • Calculation Method: Count	add a related object for Opportunity Product and set a filter for Opportunity Product Name Equals the product field value that you want to count deals for.	meeting this goal on the created date, due date, or the date field that represents when an opportunity is considered in the pipeline. If counting the number of deals for a specific product line, the user must also set the Opportunity Product Name field to the value that you specified in the field filter.
Number of deals qualified for a target persona.	Opportunity	• Display Field: Name • User Field: Created By or Owner ID • Date Field: Close Date • Calculation Method: Count	• Opportunity Field Filter: Stage Equals Qualification • Related Object: Opportunity Contact Role • Opportunity Contact Role Field Filter: Role Equals the value for the persona that you want to target.	The opportunity owner must set the Stage field to Qualification and the Role field to the value that you indicated in the field filter. The user is credited for meeting this goal on the date they provide in the Close Date field.
Number of deals that meet a minimum deal size.	Opportunity	• Display Field: Name • User Field: Owner ID	• Filter Logic: All conditions are met (AND) • Field Filter 1:	The opportunity owner must set the Stage field to Closed Won and the Amount field must meet the

What you're measuring	Object	Who, When, How	Field Filters	Required User Action
		• Date Field: Close Date • Calculation Method: Count	Stage Equals Closed Won • Field Filter 2: Amount Greater or Equal to the minimum amount you want each deal to meet.	minimum requirement that you set in the field filter. The user is credited for meeting this goal on the date they provide in the Close Date field.
Number of deals won for a specific product.	Opportunity	• Display Field: Name • User Field: Owner ID • Date Field: Close Date • Calculation Method: Count	• Opportunity Field Filter: Stage Equals Closed Won • Related Object: Opportunity Product • Opportunity Product Field Filter: Opportunity Product Name Equals the name of the product that you want to count deals for.	The opportunity owner must set the Stage field to Closed Won and the Opportunity Product Name field to the product name you set in the field filters. The user is credited for meeting this goal on the date they provide in the Close Date field.
Number of deals won using a company playbook. This measure requires Salesforce admins to add a customization to track whether your company playbook was used to win a	Opportunity	• Display Field: Name • User Field: Owner ID • Date Field: Close Date • Calculation Method: Count	• Filter Logic: All conditions are met (AND) • Field Filter 1: Stage Equals Closed Won • Field Filter 2: Playbook Used Equals Yes (or your equivalent customization)	The opportunity owner must set the Stage field to Closed Won and the Playbook Used field to Yes (or your equivalent customization). The user is credited for meeting this goal on the close date.

What you're measuring	Object	Who, When, How	Field Filters	Required User Action
deal. For example, Salesforce admins can add the custom field Playbook Used.				
Number of deals won with more than two products. This measure requires Salesforce admins to add a customization to track the number of products that are included on a deal. For example, Salesforce admins can add the custom field Product Count.	Opportunity	• Display Field: Name • User Field: Owner ID • Date Field: Close Date • Calculation Method: Count	• Filter Logic: All conditions are met (AND) • Field Filter 1: Stage Equals Closed Won • Field Filter 2: Product Count Greater or 2 (or your equivalent customization)	The opportunity owner must set the Stage field to Closed Won and the Playbook Used field to Yes (or your equivalent customization). The user is credited for meeting this goal on the close date.
Total amount of revenue in pipeline.	Opportunity	• Display Field: Name • User Field: Owner ID • Date Field: Created Date, Due Date, or the Date field that represents when an opportunity is considered in the pipeline • Calculation Method: Sum	Field Filters: • Stage equals the Stage field value or values that represent your pipeline. • If counting the number of deals for a specific product line, add a related object for Opportunity	The opportunity owner or user listed in the Created By field must set the Stage field to one of the values that you specified in the field filter. The user is credited for adding the monetary amount in the Amount field to their

What you're measuring	Object	Who, When, How	Field Filters	Required User Action
		• Field for Calculation: Amount Field	Product and a filter for Opportunity Product Name Equals the product field value that you want to count deals for.	pipeline on the created date, due date, or the date field that represents when an opportunity is considered in the pipeline. If counting the number of deals for a specific product line, the user must also set the Opportunity Product Name field to the value that you specified in the field filter.
Total amount of upsells generated. This measure requires your Salesforce admin to add a customization to track deal expansions. For example, Salesforce admins can create the custom picklist value Expansion for the Type field.	Opportunity	• Display Field: Name • User Field: Owner ID • Date Field: Close Date • Calculation Method: Sum • Field for Calculation: Amount	• Filter Logic: Custom logic is met (OR/AND) • Custom Logic: 1 AND (2 or 3) • Field Filter 1: Stage Equals Closed Won • Field Filter 2: Type Equals Existing Business • Field Filter 3: Type Equals Expansion	The user opportunity owner must set the Stage field to Closed Won, and the Type field to either Existing Business or Expansion. The user gets credit for meeting this goal on the close date.

Task and Event Examples

What you're measuring	Object	Who, When, How	Field Filters	Required User Action
Number of discovery calls booked. This measure requires Salesforce admins to add a customization for tracking the status of discovery calls. For example, on Task or Event, Salesforce admins can add the custom picklist value Discovery Call to the Type field, set the Field-Level Security for Type to Edit Access, and add Type to the object page layout.	Task	• Display Field: Subject • User Field: Created By or Assigned To • Date Field: Created Date or Due Date • Calculation Method: Count	• Filter Logic: All conditions are met (AND) • Field Filter 1: Type Equals Discovery Call (or your equivalent customization) • Field Filter 2: Status Equals Completed	The user listed in the Created By or Assigned To field must complete a task in which the Type field is set to Discovery Call (or your equivalent customization). The user is credited for meeting this goal on the created date or due date.
	Event	• Display Field: Subject • User Field: Created By or Assigned To • Date Field: Created Date • Calculation Method: Count	Type Equals Discovery Call (or your equivalent customization)	The user listed in the Created By or Assigned To field must conduct an event in which the Type field is set to Discovery Call (or your equivalent customization). The user is credited for meeting this goal on the created date.
Number of meetings with a target customer persona. This measure requires Salesforce admins to add a customization to track the target	Event	• Display Field: Subject • User Field: Assigned To • Date Field: End Date • Calculation Method: Count	• Filter Logic: All conditions are met (AND) • Field Filter 1: Type Equals Meeting • Field Filter 2: Add a filter for the custom field	The user listed in the Created By or Assigned To field must conduct an event in which they set the Type field to Meeting and provides a value for the field used to track the participating

What you're measuring	Object	Who, When, How	Field Filters	Required User Action
persona who participated in the meeting. It also requires Salesforce admins to set the Field-Level Security for the Type to field to Edit Access, and add Type to the object page layout.			your company uses to track the participating persona.	persona. The user is credited for meeting this goal by the event end date.
Number of completed demos. This measure requires Salesforce admins to add a customization for tracking demos. For example, on Task or Event, Salesforce admins can add the custom picklist value Demo to the Type field, set the Field-Level Security for Type to Edit Access, and add Type to the object page layout.	Task	• Display Field: Subject • User Field: Created By or Assigned To • Date Field: Created Date or Due Date • Calculation Method: Count	Field Filter: Type Equals Demo (or your equivalent customization)	The user listed in the Created By or Assigned To field must set the Type field to Demo (or your equivalent customization). The user is credited for meeting this goal on the created date or due date.
	Event	• Display Field: Subject • User Field: Created By or Assigned To • Date Field: Created Date • Calculation Method: Count	Field Filter: Type Equals Demo (or your equivalent customization)	The user listed in the Created By or Assigned To field must conduct an event in which the Type field is set to Demo (or your equivalent customization). The user is credited for meeting this goal on the created date.

See Also

Considerations for Creating and Editing Measures
Guidelines for Creating Einstein Conversation Insights Measures for Conversation-Based Goals

Set Field-Level Security for a Field on All Profiles
Create Page Layouts
Trailhead: Understand Custom and Standard Objects

Resolving Access to Enablement Measures Objects and Fields

Sometimes Enablement admins can't access objects, fields, or fields values when creating or editing measures. This scenario can happen when profiles, permission sets, or sharing settings restrict access or when the objects or fields are deleted or renamed.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Multiple Enablement Admins with Different Object- and Field-Level Security

Enablement Settings, under the section Let Enablement Admins Build Measures on All Objects and Fields, includes the option **Allow build access for all objects and fields**.

When this setting is off, Enablement admins can build measures using only the objects, fields, or field values that they have permission to access.

When this setting is on, Enablement admins can see the names of all objects, fields, and field values, but only when creating measures. Outside of Enablement, or when previewing a measure, access to all objects and fields remains restricted by object- and field-level security, including the ability to view associated data within records.

Turn on this setting in either of these situations.

- Multiple Enablement admins collaborate on programs but have different object- and field-level security.
- Your Enablement users have wider object- and field-level security than your Enablement admins have.

For example, maybe another Enablement admin has wider object- and field-level security than you, and they created a measure using objects and fields that you can't access. When this setting is off, opening the measure shows a message for each hidden object or field explaining that it can't be shown. If you try to edit or clone the measure, you must replace hidden objects or fields with available objects or fields. But, you can't add a hidden object or field back after removing it and saving the measure. In this example, turning on **Allow build access for all objects and fields** can avoid the data access issue.

Deleted or Renamed Objects and Fields

Sometimes you can't see an object or field when you open a measure because the object or field was deleted or renamed. In this case, the measure becomes invalid, and it no longer tracks users' progress until you update the measure to evaluate valid data.

Sharing Settings

Sometimes you can't see qualifying records during a measure preview, so it appears that the measure isn't working correctly, even though the qualifying records exist. In this case, ask your Salesforce admin to check whether your company's sharing settings are limiting your access.

- Make sure that your organizational-wide defaults are set to Public Read Only or Public Read/Write.
- If you're controlling access using hierarchies, grant Enablement admins access to records at a level above Enablement users.

Valid Measures That Are Hidden

When you're editing a measure and you see a message that some objects or fields can't be shown, check the status of the Valid field on the Enablement Measures page. From the App Launcher, find and select **Enablement Measures**.

If the measure is invalid, it's no longer tracking users' progress and you must correct the issue. See Considerations for Creating and Editing Measures.

If the measure is valid, you aren't required to adjust it. A valid measure is still measuring program progress, but your company's security settings are likely preventing you from viewing the hidden objects or fields. To edit or clone a measure that includes hidden items, you must replace the hidden items with available ones. Before removing an object or field that's hidden to you, contact your Enablement team to make sure the hidden item isn't still in use. You can't add a hidden object or field back after removing it and saving the measure.

See Also
Considerations for Setting Up Enablement
Considerations for Creating and Editing Measures
Sharing Settings

Designing Enablement Programs

For all program types, you can design and assemble your own Enablement program from start to finish.

Build Enablement milestones, add your exercise content, and organize your program in Program Builder. Review considerations and guidelines along the way.

REQUIRED EDITIONS

Available in: Lightning Experience
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Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
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Guidelines for Assembling Enablement Programs
With your Enablement measures planned and implemented, and your content ready to go, bring all the ingredients together in Program Builder. Organize your programs appropriately to help users have efficient, enjoyable experiences that help them achieve outcomes and milestones. Write helpful and instructive titles and descriptions for users who take your programs.

Managing Outcomes and Milestones for Enablement Programs
Assign measurable goals based on real, job-related activity in Salesforce to your Enablement users as part of a program. Specify an optional outcome that represents the program's most significant and measurable goal. Add incremental milestones that represent smaller, bite-sized achievements on the way to the outcome. For an outcome and each milestone, select the Enablement measures that define the specific objects, fields, and field value criteria for the activity you want to track. When Enablement users start working toward an outcome or milestone, they see their progress in the flow of the program. You can track users' progress with Enablement dashboards and reports.

Exercise Types in Enablement Programs
The Program Builder palette includes several types of exercises that determine the content you provide and how users experience the content when they take the program.

Managing Digital Experiences Content for Exercises in Enablement Programs
The Enablement add-on license provisions a workspace named Enablement in the Digital Experiences app, where you manage the content that you want to use for exercises in Enablement programs. Define a link to specific content one time and easily reuse that content across multiple programs. Manage rich text and images for Lesson exercises, embedded videos for Video exercises, and links to your company's existing resources–PDFs, slide decks, webinars, recordings, and so on–for other exercise types.

Managing Assessment Surveys for Feedback Request Exercises
For sales programs in Lightning Experience, Enablement users can submit a link to content that they want reviewed and select peers, managers, or other sales leaders to provide feedback. For example, a sales rep records themselves practicing their pitch, uploads the recording to a video platform, and then invites experienced sales leaders to give feedback. Feedback Request exercises for peer and

manager feedback use assessment surveys, which include rating and short text questions for the reviewers to complete. After the reviewers provide their feedback, Enablement users can view the feedback in the Guidance Center. Enablement admins can use feedback response analytics to gain insight about users' behavioral changes as they progress through a program.

Custom Exercise Types in Enablement Programs
Custom exercise types let you bring content from your own repository or a third-party repository into your Enablement program. Salesforce developers can help you implement the requirements for adding custom exericses in Program Builder and the experience of users who take the custom exercise.

See Also

Create Enablement Programs Based on Templates
Driving Business Outcomes with Enablement

Guidelines for Assembling Enablement Programs

With your Enablement measures planned and implemented, and your content ready to go, bring all the ingredients together in Program Builder. Organize your programs appropriately to help users have efficient, enjoyable experiences that help them achieve outcomes and milestones. Write helpful and instructive titles and descriptions for users who take your programs.

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Names, Titles, and Descriptions

For all the items in your program, write concise, action-oriented titles that present clear goals for users who take the program. Use the available description fields to clarify expectations and requirements. Avoid lengthy, repetitive text and think about how you can motivate and inform users while they work.

- The Program Name and all title fields allow up to 80 characters, but we recommend 35 characters or fewer to simplify the experience for users. Consider action-oriented titles, such as “Improve Discovery Call Skills” and “Increase Average Deal Size”.
- All description fields allow up to 350 characters, but we recommend that you use only one or two

sentences. Summarize how the exercise or milestone supports the overall outcome or section.

Experience Cloud Site

For Partner Enablement programs, select a supported Experience Cloud site where you want to show the program to partners. To learn more about requirements for selecting a site and other caveats related to Partner Enablement programs, see Considerations for Partner Enablement Programs.

Outcome-Based Programs

To provide a final goal associated with completing a program, turn on **Outcome-Based Program** and specify a program outcome and related measure. The outcome is shown to users at the top of the program, directly under the program title and description. This prominent location demonstrates the importance of that final achievement and keeps them focused on the end goal that you've set. For most programs, we recommend turning on this option to help your Enablement team associate specific revenue goals and behavior changes with program completion.

Milestones that you add to the program are presented as incremental goals for users to achieve along the way to meeting the program outcome.

If your program includes only equally important smaller goals for users to achieve, turn off **Outcome-Based Program**.

Allowing Users to Self-Enroll

Users can take programs in two ways.

- You can assign users to programs directly.
- Users can self-enroll in programs that you make available.

To allow users to self-enroll, turn on **Users Can Self-Enroll**. After you save and publish the program, you can share it with specific users, groups, or roles. Both assigned and self-enrolled programs are included in the prebuilt reports and dashboards.

To assign users to programs directly, no action is needed in Program Builder. After you save and publish the program, you can assign specific users.

Day

On the outcome and each exercise and milestone, use the Day field to specify the day of the program when that item is due.

For the outcome, the Day field specifies the number of days the full program takes. For example, if your program lasts 60 days, enter `60` for the outcome's Day field. The value you enter contributes to the program's due date that users see when they take the program. See Considerations and Limitations for

Enrolling Users in Enablement Programs.

Exercise Types

In Program Builder, the type of exercise that you select determines the supported resource format, the content you add, and the icon that users see when they take the program. See Exercise Types in Enablement Programs.

Exercise Length

When adding content for exercises, remember that users prefer short bursts of easily consumable content. We recommend that you include only content that users can complete in 15 minutes or less. To minimize disruptions and clicking for users, avoid linking to content that just links to other content.

Exercise Content

Make sure the content that you add to exercises recommends only products that are available to your users. For example, Trailhead exercises reference public modules that Salesforce publishes and that can describe Salesforce products or features that cost extra or not appropriate for your company. If you started from a program template for a sales program in Lightning Experience, review the placeholder exercises for applicability to your users.

Sections in Programs

With sections, group program milestones and exercises into logical, manageable, and trackable chunks of related content and goals. When users take programs, they can expand or collapse sections. The prebuilt reports and dashboards include progress data by section so you can see how users are doing, section by section.

Milestones in Programs

Assign small incremental goals to your Enablement users by using milestones. Milestones are presented to your users throughout the program along with exercises in the order that items are due. Outcomes and milestones include measures to track your users' progress based on criteria defined for specific objects. See Managing Enablement Measures for Outcomes and Milestones.

See Also

- Building Enablement Measures
- Managing Digital Experiences Content for Exercises in Enablement Programs
- Assign Users to Enablement Programs Manually
- Share Enablement Programs So Users Can Self-Enroll
- Editing Published Enablement Programs That Users Are Taking
- Create Enablement Programs Based on Templates
- Installing Enablement Programs from Managed Packages

Managing Outcomes and Milestones for Enablement Programs

Assign measurable goals based on real, job-related activity in Salesforce to your Enablement users as part of a program. Specify an optional outcome that represents the program's most significant and measurable goal. Add incremental milestones that represent smaller, bite-sized achievements on the way to the outcome. For an outcome and each milestone, select the Enablement measures that define the specific objects, fields, and field value criteria for the activity you want to track. When Enablement users start working toward an outcome or milestone, they see their progress in the flow of the program. You can track users' progress with Enablement dashboards and reports.

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Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Managing Enablement Measures for Outcomes and Milestones
Outside of Enablement programs, you create Enablement measures and specify the objects, fields, and field values you want to track. In programs, you specify the criteria for completing an outcome or milestone that references measures. For example, specify the target values to achieve or the number of records to evaluate. You can reuse measures across multiple programs or multiple milestones in the same program.

Managing Composite Outcomes and Milestones
A composite goal in an Enablement program tracks Enablement users' progress through multiple measures or objects, simultaneously. For example, you can create a composite milestone that tracks calls and meetings, which are types of Tasks and Events, respectively. Enablement admins create composite goals by associating multiple measures with an outcome or milestone, where each measure tracks a different source object with optional field filters and related objects. To aggregate the results of the measures in the goal, specify a calculation logic such as Add, Divide, or Percentage. As Enablement users start working toward an outcome or milestone, the aggregated measure result is compared against the target to track users' progress. Users complete a goal when the measure result meets the target.

See Also

Outcomes, Milestones, and Measures
Take Enablement Programs

Managing Enablement Measures for Outcomes and Milestones

Outside of Enablement programs, you create Enablement measures and specify the objects, fields, and field values you want to track. In programs, you specify the criteria for completing an outcome or milestone that references measures. For example, specify the target values to achieve or the number of records to evaluate. You can reuse measures across multiple programs or multiple milestones in the same program.

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Measures for Outcomes and Milestones

For the outcome and each incremental milestone in your Enablement program, select the appropriate measures.

For the Target field, specify the number of times that a user must fulfill the measure's criteria to complete the outcome or milestone. For example, if you set an outcome for users to win 3 deals by the completion of the program, set the Target to 3. Users see the target when taking the program. For example, for a target of 10, users see 0/10 until they progress toward the goal.

For outcomes and milestones that use average-based measures, also specify a value for Minimum Sample Size. The minimum sample size represents the number of records that you want to evaluate for calculating the average value that satisfies the outcome or milestone. For example, if you want users to achieve an average deal size of $50,000 after closing 4 deals, set these values.

- For Minimum Sample Size, enter `4`.
- For Measure Target, enter `50,000`.

For outcomes and milestones that use Einstein Conversation Insights (ECI) measures, specify a Day value that's less than 180. You can track ECI measures only up to 180 days in the past.

Important ECI isn't supported in Developer Edition, isn't supported in Partner Enablement programs in Experience Cloud sites, and isn't included with Enablement Lite. However, if you're trying Enablement Lite and your company already uses ECI, you can still use ECI measures with

Enablement Lite programs.

For composite outcomes and milestones, select multiple measures and specify a calculation logic to aggregate the measures' results. The aggregated measure result is compared against the target for the composite outcome or milestone to track a user's progress. See Managing Composite Outcomes and Milestones.

Multiple Milestones That Reference the Same Measure

You can insert multiple milestones that reference the same measure. When a user taking the program progresses toward one of these milestones, their progress counts toward all milestones that reference that measure. A user's progress is measured cumulatively.

For example, let's say that your program requires a user to win an increasing number of opportunities as the program progresses.

Milestone	Day of Program
Win 1 opportunity	10
Win 3 opportunities	20
Win 10 opportunities	30

In this example, each milestone references the same measure that tracks opportunities won. When a user wins their first opportunity, the program shows that the first milestone is complete. The program also shows that one opportunity has been won for both the second and third milestones. For the user, it can look as if they're getting a head start on upcoming milestones. For the Enablement admin, the same result appears in their analytics.

To make sure that your users are achieving the appropriate milestones, adjust the Target for each subsequent milestone. In this example, you want to make sure that a user wins 1 opportunity first, then 3 *more* opportunities, and finally 10 *more* opportunities. To account for that incremental achievement, adjust the Target values in each milestone.

Milestone	Day of Program	Measure Target
Win 1 opportunity	10	1
Win 3 opportunities	20	4
Win 10 opportunities	30	14

See Also

Building Enablement Measures

Take Enablement Programs

Managing Composite Outcomes and Milestones

A composite goal in an Enablement program tracks Enablement users' progress through multiple measures or objects, simultaneously. For example, you can create a composite milestone that tracks calls and meetings, which are types of Tasks and Events, respectively. Enablement admins create composite goals by associating multiple measures with an outcome or milestone, where each measure tracks a different source object with optional field filters and related objects. To aggregate the results of the measures in the goal, specify a calculation logic such as Add, Divide, or Percentage. As Enablement users start working toward an outcome or milestone, the aggregated measure result is compared against the target to track users' progress. Users complete a goal when the measure result meets the target.

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Guidelines for Managing Composite Goals

Review these guidelines for using composite outcomes and milestones for Enablement programs.

- You can add up to 2 measures to a composite goal and up to 5 composite goals (1 composite outcome and 4 composite milestones) to an Enablement program.
- When you build a composite goal, you must add measures that are built with the Sum or Count calculation method only.
- When you build a composite goal with Add calculation logic, all the measures that you include in the goal must have the same Calculation Method.
- When you build a composite goal with Division or Percentage calculation logic, the first measure you add to the goal is considered the numerator. The second measure is the denominator.
- For a composite goal with Division or Percentage calculation logic, the minimum sample size that you define pertains to the first measure only.

Composite Goals Examples

Get ideas for creating composite goals for your Enablement programs. Review examples of program goals that require multiple measures and see how the objects and calculation logic work together to track the job-related activity. While creating a composite outcome or milestone, you can use the prebuilt measures or create custom measures that suit your use case.

Milestone or Outcome	Target	Measured Object	Measure 1 Details	Measure 2 Details	Calculation Logic	Measures’ Aggregation
Log 100 Activities with 50 Calls and 50 meetings	100	• Task • Event	Prebuilt Measure: Number of Logged Calls	Custom Measure: Number of Booked Meetings	Add	Number of Logged Calls + Number of Booked Meetings
Achieve a Win-Loss Ratio of 2:1 with At Least 4 Closed Deals	2:1	Opportunity	Prebuilt Measure: Number of Deals Won	Custom Measure: Number of Deals Lost	Divide	Number of Deals Won ÷ Number of Deals Lost
Achieve a Win Rate of 60% with At Least 3 Closed Deals	60	Opportunity	Prebuilt Measure: Number of Deals Won	Custom Measure: Number of Deals Created by User	Percentage	(Number of Deals Won ÷ Number of Deals Created by User) × 100

See Also
Prebuilt Enablement Measures
Enablement Measures Examples
Take Enablement Programs

Exercise Types in Enablement Programs

The Program Builder palette includes several types of exercises that determine the content you provide and how users experience the content when they take the program.

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Unlimited Editions for an additional cost. A supported PRM add-on license is required.

The exercise component you select determines these behaviors.

- The icon and content type label that users see when taking the program
- The content source and type that you must use when creating or adding content

Exercise Type	Icon Users See	Content Source	Supported Content Type	Supported in Sales Programs in Lightning Experience	Supported in Partner Enablement Programs in Experience Cloud Sites
Action Item		No content included	No content type required	✓	✗
Audio recording		Enablement workspace in Digital Experiences	Link	✓	✓
Document		Enablement workspace in Digital Experiences	Link	✓	✓
Feedback Request		Surveys or Calls	Assessment survey or video call record	✓	✗
Lesson		Enablement workspace in Digital Experiences	Rich text	✓	✓
Scheduled event		Enablement workspace in Digital Experiences	Link	✓	✓
Trailhead		Trailhead	Public Trailhead modules that Salesforce publishes	✓	✗
Video		Enablement workspace in Digital Experiences	Video	✓	✓
Other		Enablement workspace in Digital Experiences	Link	✓	✓

See Also

Managing Digital Experiences Content for Exercises in Enablement Programs
Custom Exercise Types in Enablement Programs

Managing Digital Experiences Content for Exercises in Enablement Programs

The Enablement add-on license provisions a workspace named Enablement in the Digital Experiences app, where you manage the content that you want to use for exercises in Enablement programs. Define a link to specific content one time and easily reuse that content across multiple programs. Manage rich text and images for Lesson exercises, embedded videos for Video exercises, and links to your company's existing resources–PDFs, slide decks, webinars, recordings, and so on–for other exercise types.

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Guidelines for Digital Experiences Content in Enablement Programs
The Enablement workspace in the Digital Experiences app provides specific functionality for managing content used in Enablement program exercises. If your org already has Digital Experiences enabled, only the provisioned Enablement workspace supports content for Enablement programs.

Assign a Contributor Role in the Enablement Workspace
To manage content for exercises in Enablement programs, assign the Content Manager contributor role in the Enablement workspace in the Digital Experiences app.

Create a Link or Video for an Exercise from Digital Experiences
In the Digital Experiences app, you can add the links or videos that you want to include in a program before you start working in Program Builder.

Create Rich Text for an Exercise from Digital Experiences
In the Digital Experiences app, you can add the rich text content that you want to use for a Lesson exercise in a program before you start working in Program Builder. You can also insert images in the rich text content body.

Add and Publish an Image for Rich Text Content from Digital Experiences
When you create rich text content for use with a Lesson exercise in a program, you can insert images that are already published in the Enablement workspace in the Digital Experiences app. You can add and publish the image separately, and manage its versions outside of the Rich Text content type that references it.

Create Content for an Exercise from Program Builder
Create and edit links, videos, or rich text directly from Program Builder without navigating to the

Digital Experiences app. Working from Program Builder directly requires fewer clicks to create and update content but offers fewer options for managing content records.

Guidelines for Digital Experiences Content in Enablement Programs

The Enablement workspace in the Digital Experiences app provides specific functionality for managing content used in Enablement program exercises. If your org already has Digital Experiences enabled, only the provisioned Enablement workspace supports content for Enablement programs.

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Enablement Workspace

The Enablement add-on license provisions a workspace named Enablement in the Digital Experiences app, where you manage the content that you want to use for exercises in Enablement programs. There's no requirement to first enable the Digital Experiences app. To access the workspace and manage content, you must be assigned the appropriate contributor role by a Salesforce admin.

Only the provisioned Enablement workspace supports content for exercises in programs. If you already use Digital Experiences outside of Enablement, other workspaces that you create or already use aren't compatible with Enablement programs.

Note If you've already reached your org's limit for the number of workspaces or channels, the Enablement workspace isn't provisioned. For help with provisioning the workspace, submit a Salesforce Customer Support case.

The Enablement workspace supports all types of programs, including Enablement Lite and Partner Enablement programs.

The Enablement workspace is also available by default in a Full sandbox. In a Developer, Developer Pro, or Partial Copy sandbox, an extra step is required to create the workspace. See Sandbox Support for Enablement.

Contributor Roles

To give permission to users who manage content for Enablement programs, a Salesforce admin can assign these contributor roles in the Enablement workspace.

- Content Admins can create and publish content in the workspace, and manage contributor roles for other users.
- Content Managers can create and publish content in the workspace.
- Content Authors can create content in the workspace, but can't publish.

Because only published content can be used in Enablement programs, we recommend that you assign the Content Manager contributor role to all users who contribute to programs. This role provides the appropriate access for Enablement. See Assign a Contributor Role in the Enablement Workspace.

Tip If a user already has the Content Admin contributor role assigned, there's no need to downgrade them to Content Manager.

Permissions and Roles Required for Creating Content

To manage content for exercises in Enablement programs, a user must have an appropriate contributor role in the Enablement workspace in the Digital Experiences app or an appropriate combination of permissions.

User Type	If the user has...		Then the user can...	
	Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs	Content Manager contributor role	Save drafts and publish content (one click) from Program Builder	Save Drafts and Publish content (Two Clicks) from the Enablement workspace
Standard user	✔	✔	✔	✔
	✔	–	✘	✘
Salesforce admin	✔	✔	✔	✔
	✔	–	✔	✘

Ways to Create Content

To publish content for use in a program, you can start either in the Enablement workspace in Digital Experiences or add content directly from Program Builder. Starting in the Digital Experiences app provides more options for managing content records, but starting in Program Builder requires fewer clicks and less navigation.

- To add content in Digital Experiences, you first create content in Draft status, and then you manually change content to Published status. Adding content with this workflow requires two separate manual steps. To learn more, see Create a Link or Video for an Exercise from Digital Experiences and Create Rich Text for an Exercise from Digital Experiences.
- To add content from Program Builder, an option to create content is available when you search for content to use for a specific exercise. Adding content with this workflow saves content in Draft status and moves the content to Published status with one click. To learn more, see Create Content for an Exercise from Program Builder.

Content Types

The Enablement workspace defines content types that are compatible only with Enablement programs. These content types support specific exercise types in Program Builder. For a list of exercise types and corresponding content types, see Exercise Types in Enablement Programs.

Note The Image content type is used only for images that appear in Rich Text content types for use in Lesson exercises in programs. You can use the Image content type to manage images separately from the Rich Text content types that reference them. By itself, the Image content type doesn't correspond to any exercise type in Program Builder. To learn more about managing images outside of rich text, see Add and Publish an Image for Rich Text Content from Digital Experiences.

Content Status

Outside of the Enablement add-on license, the Digital Experiences app allows you to move content through a workflow with different statuses, such as Draft, Published, Revised, and Archived. However, because the Enablement license provides limited functionality in Digital Experiences, follow these guidelines for content in Enablement programs.

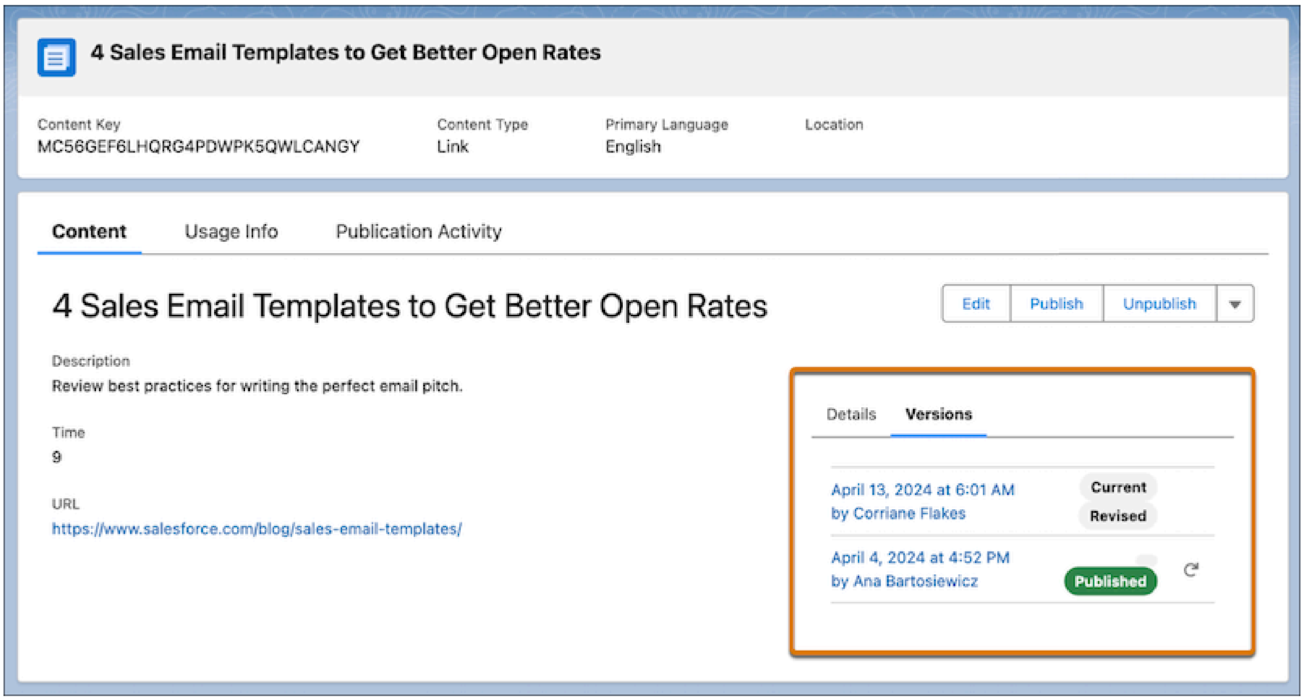
- An exercise in an Enablement program can only reference content that's in the Published status.
- To optimize storage of your managed content, only publish content that you plan to use in a program. Leave all other content in Draft status.
- The Enablement workspace supports unpublishing or deleting content that was previously published, but only if that content isn't used in a published program.
- In Program Builder, you can only add and publish new content or edit previously published content. You can't unpublish or delete previously published content from Program Builder.

Content Installed from a Managed Package

If you install Enablement programs from a managed package, the package can also install a separate Digital Experiences workspace with a name that the package owner defines. This workspace contains content for exercises in the packaged programs. For this content, you can change its publication status, but can't edit the content otherwise. New versions of the managed package can upgrade content in this workspace.

Versions

The detail page of any content in the Enablement workspace includes a version history list. With this list, you can view the publication history of content and restore a previously published version.



For example, when you first publish a link, the version history on the link's content detail page shows one version, with a status of Published. When you edit the published link, the version history shows a second version, with a status of Revised. When you publish the edited link, the version's status updates to Published. If you later decide that you want to revert to the first version of the link, you can click the Restore icon. The Restore option creates a third version, the content of which is the same as the first version.

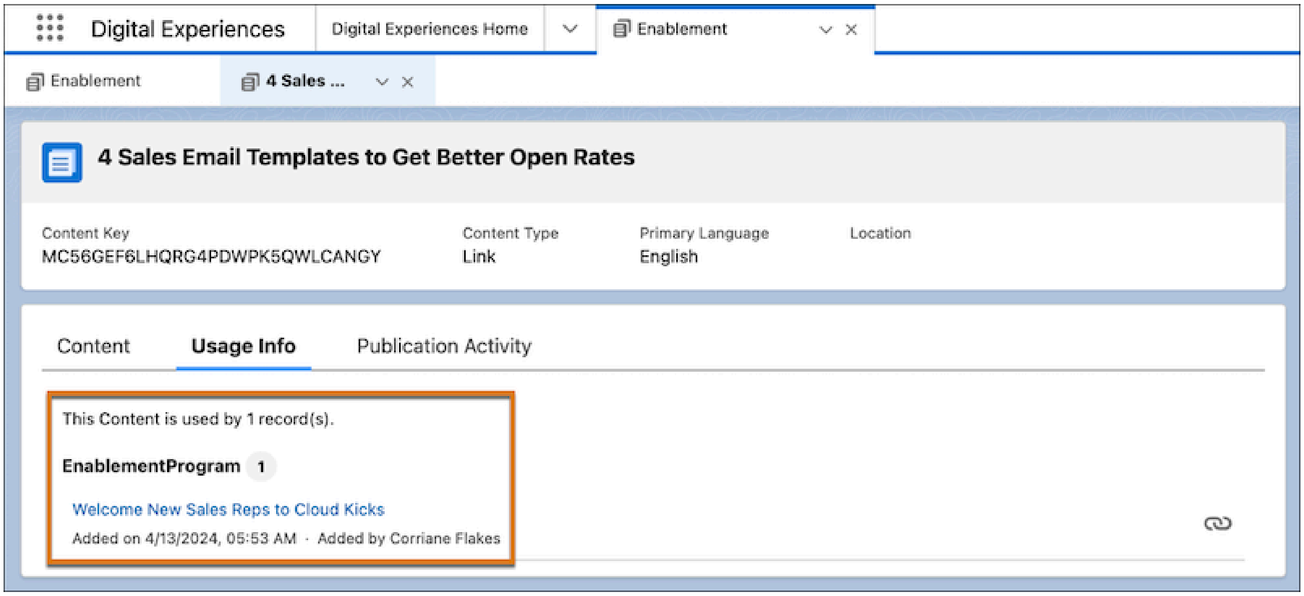
If you insert images in rich text, the images are published as separate Image content type records in the workspace. You can iterate and revert images independently from the rich text that references them.

When you publish a new version of content referenced by an exercise in a published program, the program shows the new version automatically. Assigned users receive your updated content right away.

When you edit content directly from an exercise in Program Builder and save your changes, a new version of the content is created and published.

Usage Info

The Usage Info tab on the detail page of a content record in the Enablement workspace lists the published programs where the content is used. Before you unpublish content records, check whether the content is used in a published program.



Important For Enablement Lite, the Usage Info tab doesn't show data if you published a program, turned off Enablement Lite, and then turned it on again. In this case, unpublish your Enablement Lite programs and republish them to see the Usage Info tab details.

Collections

The Enablement workspace supports Salesforce CMS collections, which you can use to group multiple records of the same content type together in a single container.

With a collection, you can publish multiple records at the same time. However, in a program, you can still reference only one published link, video, or rich text record per exercise. For example, you can't publish a collection and then automatically reference all records in that collection from a program.

Importing and Exporting Content

The Enablement workspace supports the Salesforce CMS capabilities for importing and exporting content. You can export content in .zip files that you can import back into the workspace. You can import only the specific content types that the Enablement workspace supports: links, videos, rich text, and images. To learn more about the import requirements and the export format, see Import and Export Content with Salesforce CMS.

Localization

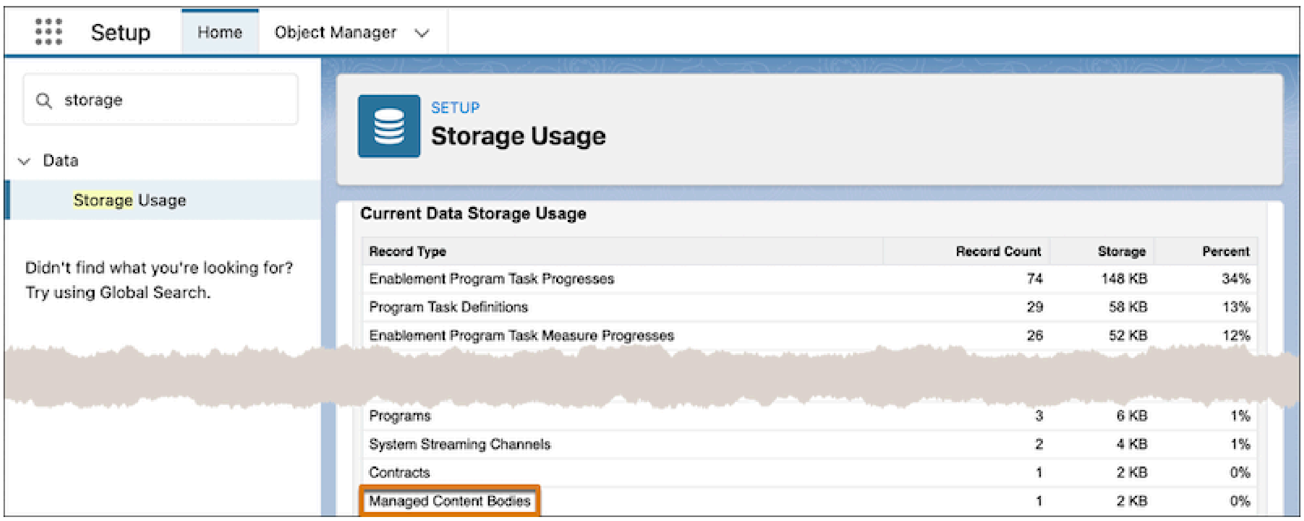
The Enablement workspace supports only English for content.

Storage

The Enablement add-on license allows a minimum of 10 GB for content storage in Digital Experiences.

You can view your company's current storage. From Setup, in the Quick Find box, enter `Storage`, and then select **Storage Usage**. Scroll to the Current Data Storage Usage section, and find the Managed Content Bodies item.

> **Note** This value shows the total storage for all your CMS content, not just content in your Enablement workspace.



See Also

- Assign a Contributor Role in the Enablement Workspace
- Create a Link or Video for an Exercise from Digital Experiences
- Create Rich Text for an Exercise from Digital Experiences
- Installing Enablement Programs from Managed Packages
- Role-Based Access in Salesforce CMS
- Unpublish Content from CMS Channels

Assign a Contributor Role in the Enablement Workspace

To manage content for exercises in Enablement programs, assign the Content Manager contributor role in the Enablement workspace in the Digital Experiences app.

REQUIRED EDITIONS

Available in: Lightning Experience

Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To assign contributor roles	Content Admin contributor role in the Enablement workspace in Digital Experiences OR System Administrator profile

Note Only the provisioned Enablement workspace supports content for exercises. Other workspaces that you create or already use in Digital Experiences aren't compatible with Enablement programs.

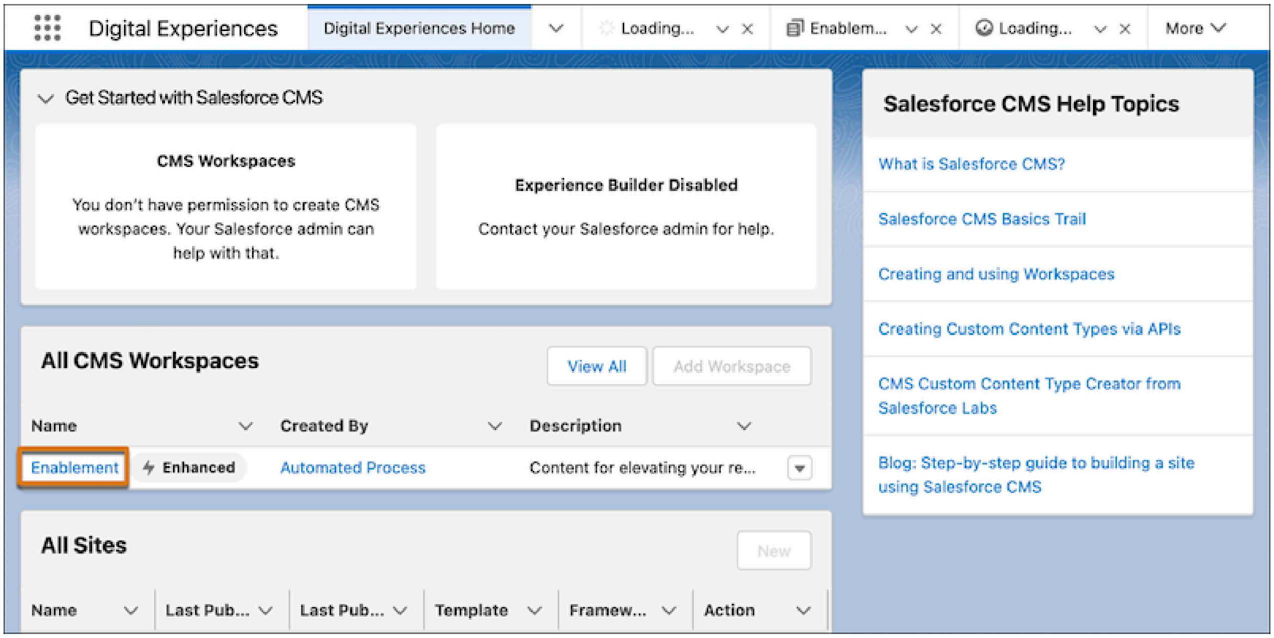
Other contributor roles–Content Admin and Content Author–are available in the workspace. Because only published content can be used in Enablement programs, we recommend that you assign the Content Manager contributor role to all users who contribute to programs. This role provides the appropriate access for Enablement.

Tip If a user already has the Content Admin contributor role assigned, there's no need to downgrade them to Content Manager.

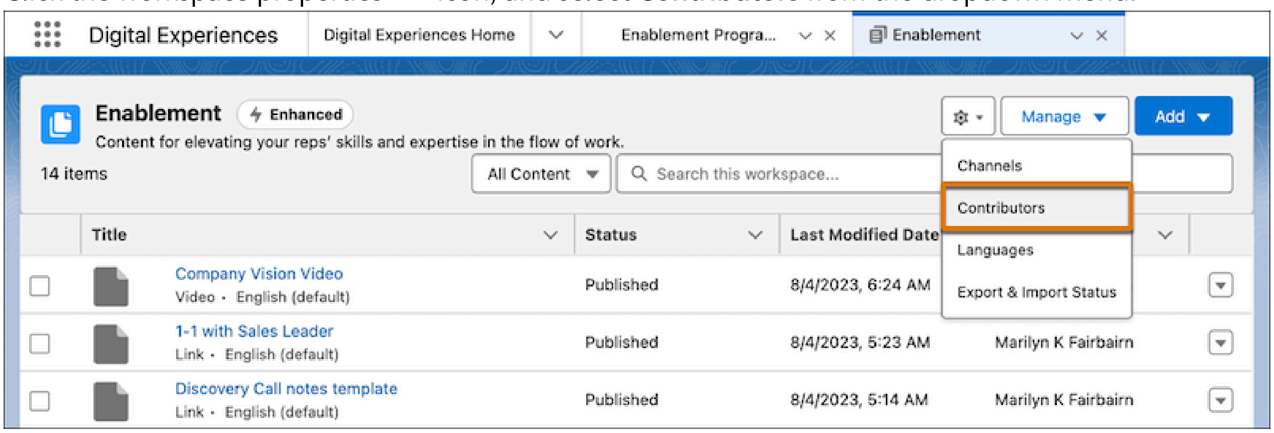
Typically, the person assigned the Content Manager contributor role is the same person who's assigned Enablement admin permissions. If a standard user has this contributor role but doesn't have Enablement admin permissions, the user can only save drafts of content in the Digital Experiences app. They can't publish content for use in a program, and they can't add content directly from Program Builder.

To learn more about the requirements for creating content, see Guidelines for Digital Experiences Content in Enablement Programs.

1. From the App Launcher, select **Digital Experiences**.
2. In the All CMS Workspaces section, select the **Enablement** workspace.



3. Click the workspace properties icon, and select **Contributors** from the dropdown menu.



4. In the Contributors list, click **Add Contributors**.
5. Search for the users who can manage content for exercises in Enablement programs, and click the add + icon.
6. Click **Next**, select **Content Manager**, and click **Finish**.

See Also

Role-Based Access in Salesforce CMS

Create a Link or Video for an Exercise from Digital Experiences

In the Digital Experiences app, you can add the links or videos that you want to include in a program before you start working in Program Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To manage content for program exercises in the Enablement workspace:	Content Manager contributor role in the Enablement workspace in Digital Experiences

First, make sure that you have an appropriate contributor role assigned in the Enablement workspace in the Digital Experiences app.

Note Only the provisioned Enablement workspace supports content for exercises. Other workspaces that you create or already use in Digital Experiences aren't compatible with Enablement programs.

1. In the Digital Experiences app, select the Enablement workspace.
2. Select **Add | Content**.
3. In the Create CMS content window, select **Link** or **Video**, depending on the type of content that you want to add, and click **Create**.
4. Complete the required fields.

Field	Applicable Content Type	Value to Enter
Title	Link or Video	An internal title for the content. Search for this title when adding content to an exercise in Program Builder.
Description	Link or Video	An internal description for the content. This description is visible only to Enablement admins when they add a Link or Video exercise in Program Builder and then search for the link or video to use. This description isn't visible to users when they take a program and open the link or video.
Time	Link or Video	The estimated time in minutes to complete the linked content.

Field	Applicable Content Type	Value to Enter
URL	Link only	The full URL to the content that you want to use. For a user taking the program, the link opens in a new browser tab. For Partner Enablement programs in Experience Cloud sites, you can also specify a relative URL to another site page.
Embed Video URL	Video only	The embed URL to the video that you want to use from an external hosting platform. For a user taking the program, the video plays in the same browser tab. • This URL can be different from the public URL where the video is accessed on its platform, and the format can vary depending on the platform. • Only videos from Vidyard, YouTube, or Vimeo are supported. • Don’t include parameters in the URL.

5. Save your work.
6. If you’re confident that you want to include the content in a program, click **Publish**.

   Tip To optimize storage of Digital Experiences content, only publish content that you plan to use in an Enablement program. Leave all other content in Draft status. To learn more, see Guidelines for Digital Experiences Content in Enablement Programs.

7. To return to the Enablement workspace, click the back arrow in the header menu.

See Also

Guidelines for Digital Experiences Content in Enablement Programs
Unpublish Content from CMS Channels
Vidyard Knowledge Base: Embed your video on a webpage
YouTube Help: Embed videos & playlists
Vimeo Help Center: Access and edit embed codes

Create Rich Text for an Exercise from Digital Experiences

In the Digital Experiences app, you can add the rich text content that you want to use for a Lesson exercise in a program before you start working in Program Builder. You can also insert images in the rich text content body.

REQUIRED EDITIONS

Available in: Lightning Experience
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Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To manage content for program exercises in the Enablement workspace:	Content Manager contributor role in the Enablement workspace in Digital Experiences

First, make sure that you have an appropriate contributor role assigned in the Enablement workspace in the Digital Experiences app.

Note Only the provisioned Enablement workspace supports content for exercises. Other workspaces that you create or already use in Digital Experiences aren't compatible with Enablement programs.

1. In the Digital Experiences app, select the Enablement workspace.
2. Select **Add | Content**.
3. In the Create CMS content window, select **Rich Text**, and click **Create**.
4. Complete the required metadata fields.

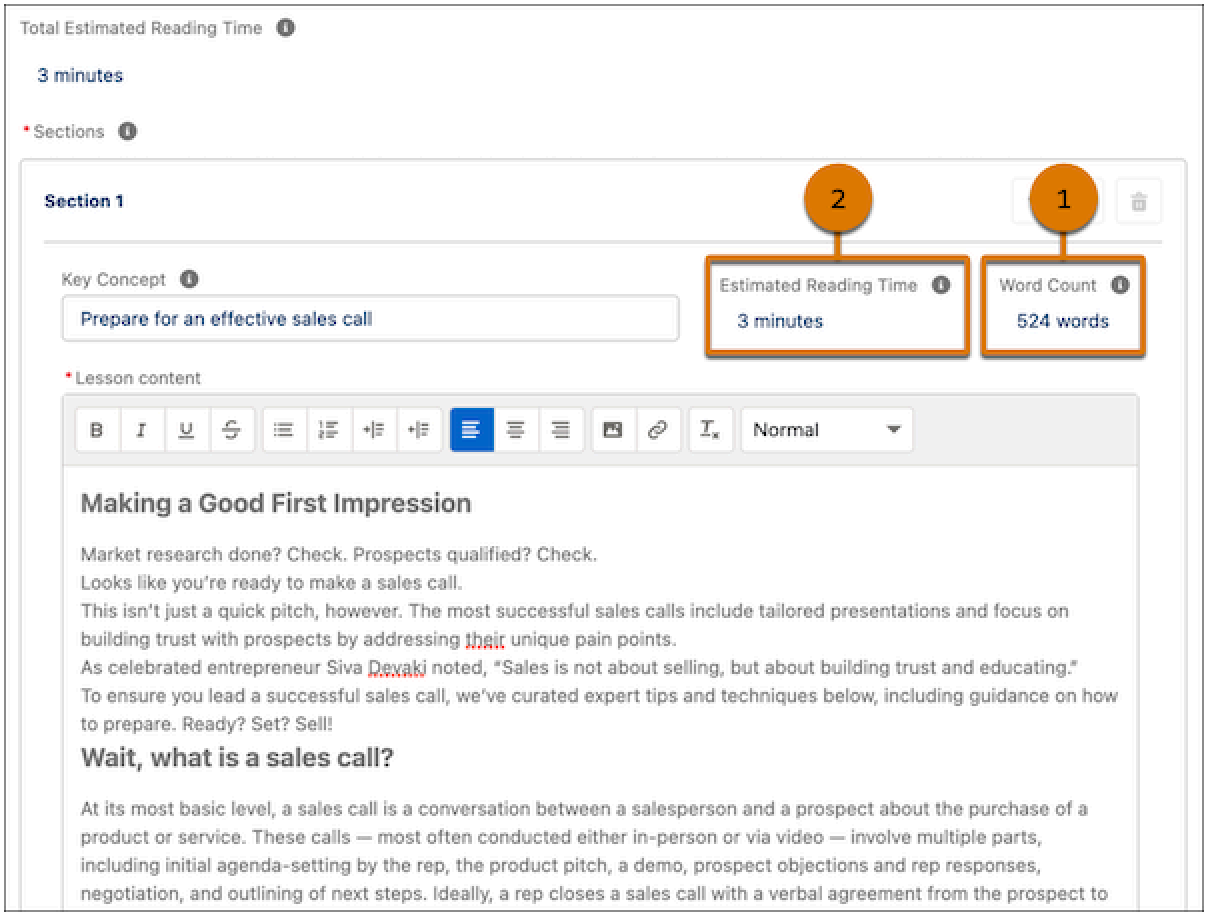
Field	Value to Enter
Title	An internal title for the content. Search for this title when adding content to an exercise in Program Builder.
Description	A short description for the content. This description is visible to Enablement admins when they add a Lesson exercise in Program Builder and search for the rich text record to use. This description is also visible to users when they take a program and open the lesson.

5. Complete at least one section.

Field	Value to Enter
Key Concept	A brief summary (150 characters or fewer) of the major takeaways that you want users to understand after they read the section. This information is visible to users when they take a program and open the lesson.

<table>
<tr><th>Field</th><th>Value to Enter</th></tr>
<tr><td>Lesson Content</td><td>The rich text content for the section, including formatting, images, and links.
You can paste formatted content from another source, but some formatting doesn’t persist. Carefully review pasted content and correct any errors.
You can insert images that are either already published in the Enablement workspace or not yet published. If you insert an unpublished image, you’re prompted to also publish the image when you publish the rich text. To learn more about publishing images outside of the Rich Text content type, see Add and Publish an Image for Rich Text Content from Digital Experiences.
For images, you can add a BMP, GIF, PNG, JPG, or JPEG file up to 25 MB.
For sales programs in Lightning Experience, the Guidance Center panel provides a content area that’s 350 px wide by default and 626 px wide when expanded. We recommend that you choose image files that look good at these sizes.
For Partner Enablement programs in supported Experience Cloud sites, work with your site developer to determine appropriate image sizes for the page and column sizes they’re creating.
You can’t embed a video in body text. To include a video in a program, use the standalone Video exercise type in Program Builder and create a corresponding video record in the Enablement workspace in Digital Experiences.</td></tr>
</table>

These fields update as you enter content in the section.



- Word Count (1) shows the number of words you entered.
- Estimated Reading Time (2) shows the estimated time for a user to read the section, based on an average reading speed of 200 words per minute. The editor shows a warning when a section exceeds 1,000 words and an estimated 5-minute reading time. This warning helps content creators add text that follows research-backed guidelines for how users best consume and understand content.

6. Optionally, create more sections.

   The Total Estimated Reading Time field shows an aggregated count of the estimated time for a user to read all sections together.

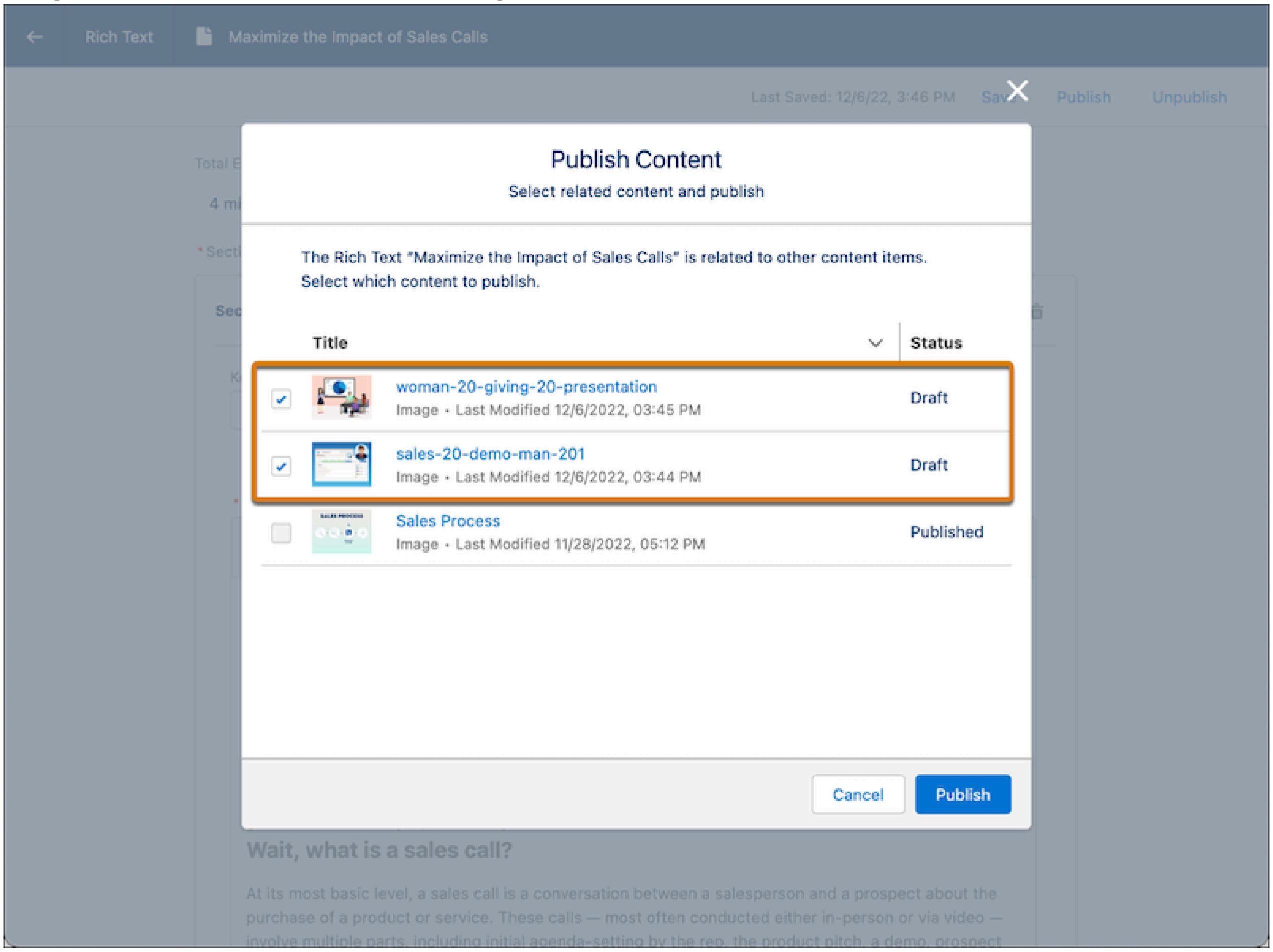
   

   The editor shows a warning when the total for all sections exceeds 3,000 words and an estimated 15-minute reading time. This warning helps content creators add text that follows research-backed guidelines for how users best consume and understand content.

7. Optionally, rearrange your sections.
8. Save your work.
9. If you're confident that you want to include the content in a program, click **Publish**.

   Tip To optimize storage of Digital Experiences content, only publish content that you plan to use in an Enablement program. Leave all other content in Draft status. To learn more, see Guidelines for Digital Experiences Content in Enablement Programs.

10. If you inserted any unpublished images in your sections, you're prompted to review the list of unpublished images and publish them alongside your rich text. Make sure that any unpublished images are selected, and click **Publish** again.



11. To return to the Enablement workspace, click the back arrow in the header menu.

See Also

Guidelines for Digital Experiences Content in Enablement Programs
Add and Publish an Image for Rich Text Content from Digital Experiences
Unpublish Content from CMS Channels

Add and Publish an Image for Rich Text Content from Digital Experiences

When you create rich text content for use with a Lesson exercise in a program, you can insert images that are already published in the Enablement workspace in the Digital Experiences app. You can add and publish the image separately, and manage its versions outside of the Rich Text content type that references it.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To manage content for program exercises in the Enablement workspace:	Content Manager contributor role in the Enablement workspace in Digital Experiences

First, make sure that you have an appropriate contributor role assigned in the Enablement workspace in the Digital Experiences app.

Note Only the provisioned Enablement workspace supports content for exercises. Other workspaces that you create or already use in Digital Experiences aren't compatible with Enablement programs.

1. In the Digital Experiences app, select the Enablement workspace.
2. Select **Add | Content**.
3. In the Create CMS content window, select **Image**, and click **Create**.
4. Complete the required metadata fields.

Field	Value to Enter
Title	An internal title for the image.
Alt Text	Text that describes the image for accessibility.
Source	The image file to add. • You can add a BMP, GIF, PNG, JPG, or JPEG file up to 25 MB. • For sales programs in Lightning Experience, the Guidance Center panel provides a content area that's 350 px wide by default and 626 px wide when expanded. We recommend that you choose image files that look good at these sizes. • For Partner Enablement programs in supported Experience Cloud sites, work with your site developer to determine appropriate image sizes for the page and column sizes they're creating.

5. Save your work.
6. If you're confident that you want to include the image in rich text in a program, click **Publish**.

   Tip To optimize storage of Digital Experiences content, only publish content that you plan to use in an Enablement program. Leave all other content in Draft status. To learn more, see Guidelines for Digital Experiences Content in Enablement Programs.

7. To return to the Enablement workspace, click the back arrow in the header menu.

Next, insert the published image in rich text when you create a record of the Rich Text content type.

You can also insert images that aren't yet published. In this case, you're prompted to publish the image when you publish the rich text.

Note When you create rich text directly from Program Builder, you can only insert published or unpublished images as part of the Rich Text content type. The option to manage images separately from rich text isn't available. And by itself, the Image content type in Digital Experiences doesn't correspond to any exercise type in Program Builder.

See Also

Guidelines for Digital Experiences Content in Enablement Programs
Create Rich Text for an Exercise from Digital Experiences

Create Content for an Exercise from Program Builder

Create and edit links, videos, or rich text directly from Program Builder without navigating to the Digital Experiences app. Working from Program Builder directly requires fewer clicks to create and update content but offers fewer options for managing content records.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To manage content for program exercises in Program Builder:	Content Manager contributor role in the Enablement workspace in Digital Experiences

USER PERMISSIONS NEEDED	
	AND Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs

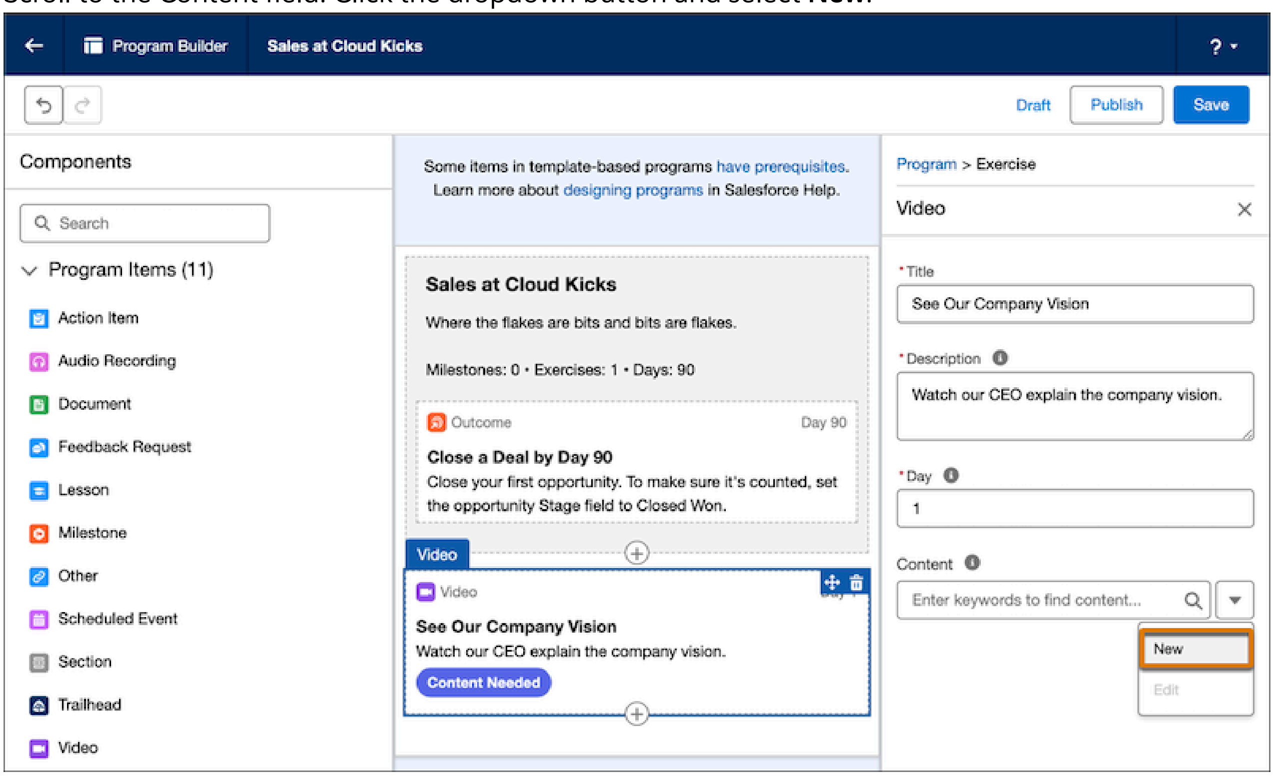
First, make sure that you have an appropriate contributor role assigned in the Enablement workspace in the Digital Experiences app. Or, make sure that you're a Salesforce admin who has Enablement admin permissions assigned, even if you don't have the contributor role assigned.

Note If you don't have the contributor role assigned, you can search for content in Program Builder, but the option to add new content from Program Builder isn't available.

To learn more about the requirements for creating content, see Guidelines for Digital Experiences Content in Enablement Programs.

Make sure that you're confident that you want to use the content in your Enablement program. Completing these steps creates published content in the Enablement workspace of the Digital Experiences app, and this published content counts against the available storage of managed content.

1. Open a program in Program Builder.
2. Select an exercise on your program canvas.
3. In the exercise properties, enter a title and description, and specify the day of the program when the exercise is due.
4. Scroll to the Content field. Click the dropdown button and select **New**.



Note For Feedback Request exercises that have the Peer and Manager Feedback option selected, the dropdown includes options related to surveys. For Trailhead exercises, the dropdown isn't available and you can only search Trailhead modules.

5. Complete the required fields for the content type. If you entered a title and description in the exercise properties, those values persist to the New Content window. Check out these topics for more information about each content type's required fields.
   - Exercise Types in Enablement Programs
   - Create a Link or Video for an Exercise from Digital Experiences
   - Create Rich Text for an Exercise from Digital Experiences
   - Add a Feedback Request Exercise with an Assessment Survey for Peers and Managers
6. Save your work.

Keep these guidelines in mind when you create content for exercises directly from Program Builder.

- When you save, you're both saving content in Draft status and moving the content to Published status with one click. This behavior differs from when you add content in the Enablement workspace in the Digital Experiences app, where saving and publishing require two separate clicks.
- To optimize storage of Digital Experiences content, only publish content that you plan to use in a program. Leave all other content in Draft status, which you can do only from the Digital Experiences app.
- To edit previously published content from Program Builder, select **Edit** from the dropdown on the Content field in Program Builder. When you edit content and save your changes, a new version of the content is created and published in the Digital Experiences app.
- If you want to delete content that you add through Program Builder, you can do so only from the Digital Experiences app.

See Also
Guidelines for Digital Experiences Content in Enablement Programs
Guidelines for Assembling Enablement Programs

Managing Assessment Surveys for Feedback Request Exercises

For sales programs in Lightning Experience, Enablement users can submit a link to content that they want reviewed and select peers, managers, or other sales leaders to provide feedback. For example, a sales rep records themselves practicing their pitch, uploads the recording to a video platform, and then invites experienced sales leaders to give feedback. Feedback Request exercises for peer and manager feedback use assessment surveys, which include rating and short text questions for the reviewers to complete. After the reviewers provide their feedback, Enablement users can view the feedback in the Guidance Center. Enablement admins can use feedback response analytics to gain insight about users' behavioral changes as they progress through a program.

REQUIRED EDITIONS

Available in: Lightning Experience

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Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Important Feedback Request exercises aren't supported in Partner Enablement programs in Experience Cloud sites.

Guidelines for Assessment Surveys with Feedback Request Exercises
Review the permissions required to work with Peer and Manager Feedback Request exercises. Learn guidelines for creating assessment surveys, sending feedback requests, and providing survey responses.

Set Up Surveys and Permissions for Feedback Request Exercises
To let Enablement admins add assessment surveys to Feedback Request exercises in their Enablement programs, Salesforce admins must enable surveys and assign the appropriate permissions.

Evaluate or Copy the Default Assessment Survey
The full Enablement add-on license includes a default assessment survey, Discovery Call Assessment, which provides questions for reviewers to evaluate a sales rep on their practice sales pitch. You can use this default assessment survey, or copy it as a starting point for a custom assessment survey.

Share Assessment Surveys with Enablement Admins
To ensure that Enablement admins can access assessment surveys when they assemble sales programs for users in Lightning Experience, share the surveys with them. Share surveys manually with specific Enablement admins, or share surveys automatically with all Enablement admins at your company by creating a public group and corresponding sharing rule.

Add a Feedback Request Exercise with an Assessment Survey for Peers and Managers
Enablement admins add the Feedback Request exercise to a program and specify the assessment survey that reviewers complete and the number of reviewers that an Enablement user must select. After the program is published and made available, users submit their content for review and select the required number of reviewers.

Guidelines for Assessment Surveys with Feedback Request Exercises

Review the permissions required to work with Peer and Manager Feedback Request exercises. Learn guidelines for creating assessment surveys, sending feedback requests, and providing survey responses.

REQUIRED EDITIONS

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Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

Permissions (Salesforce Admin)

To use the Feedback Request exercise type in an Enablement program, ensure that Surveys are enabled. The Enablement Settings page in Setup includes a step to enable Surveys. The Feedback Request exercise uses a special survey type, called an assessment survey.

To create assessment surveys, users must be assigned the Manage Assessment Surveys permission set, which is included in the default Enablement Resources Manager permission set group.

To add Feedback Request exercises in Enablement programs and access assessment surveys, users must be assigned the Manage Enablement Essentials permission set, which is included in the Enablement Admin permission set group.

To take Feedback Request exercises in the flow of an Enablement program and invite reviewers, users must be assigned the Use Enablement Programs permission set, which is included in the Enablement User permission set group.

To complete a survey as part of a requested review, users must have these object permissions.

- Read on Surveys
- Read on Survey Invitations
- Read and Create on Survey Responses

Supported Program Types (Enablement Admin)

If you're trying Enablement Lite, surveys aren't included like they are with the full Enablement license. The default assessment survey, Discovery Call Assessment, isn't provided. The Enablement Lite default permission sets still provide read access to surveys and create, read, edit, and delete access to related survey objects. You can give access to create surveys outside of these default permission sets. When you upgrade to full Enablement, the Enablement Resources Manager permission set group becomes available and includes access to create surveys by default.

Important Feedback Request exercises aren't supported in Partner Enablement programs in Experience Cloud sites.

Creating an Assessment Survey (Enablement Admin)

- You can link only assessment surveys to Feedback Request exercises in an Enablement program. When you're creating a survey in the Survey Builder, select **Assessment Survey** as the type
- Apart from the Welcome and Thank You pages, you can add only one page to an assessment survey.
- You must add at least one rating and one short text question to save an assessment survey.
- You can add up to five rating questions and two short text questions to an assessment survey.
- If the length of a survey question exceeds 255 characters, the extra characters are truncated in Enablement reports.
- The Guidance Center supports only Star as a rating icon for surveys. Enablement users see only Star

rating icons in the survey response, regardless of what you choose while creating a survey.

- You can label the extreme left and the extreme right item of the rating display to indicate the intensity of a response. Make sure the left and right labels indicate the lowest and highest score, respectively.
- A survey's default settings make all questions optional. You can modify the settings for each question to make them Required.

Sending a Request for Feedback (Enablement User)

- When specifying a URL to the content to review, use a secure URL that starts with the `https` protocol. Make sure the link is accessible by your reviewers and doesn't contain sensitive information.
- A survey owner gets an email when the async job that creates and sends the survey invitation fails. If you don't see the reviewer status in the Guidance Center after 24 hours of sending a feedback request, contact the survey owner to verify that the survey invitation was sent.
- When a reviewer submits the feedback, you get an in-app notification to review their response.
- Each Enablement license allows for 500 total survey responses per year. For example, if you have 10 Enablement licenses, the org allows for up to 5,000 total survey responses per year. Any user in the org can respond to the assessment survey and consume one of the available responses. However, if your company purchases a separate Surveys add-on license, the total survey responses allocated with their Enablement licenses are no longer available.

Note In Developer Edition, the free Enablement license doesn't include an allocation of survey responses. However, if you turn on Surveys in Developer Edition, you can use assessment surveys with Feedback Request exercises in an Enablement program.

Providing Feedback (Peers and Managers)

Review the content linked in the survey invitation email and provide your feedback using the assessment survey. To get more details on a question, check out its description. After you submit the feedback, the Enablement user reviews your response in the Guidance Center. Enablement admins can visualize survey response data through custom reports and dashboard widgets.

Managing the Survey Response Notification Flow (Enablement Admin)

The Send Feedback Ready Notification flow is triggered when a reviewer submits the response for an assessment survey. When the flow execution is completed, an in-app notification is sent to the Enablement user who requested the feedback. If the flow execution fails, the Enablement program owner gets a fault email with the error details. Salesforce admins can clone and customize the flow.

- Salesforce admins can disable the survey response in-app notifications for Enablement users in Custom Notifications settings. The flow remains active.
- The flow uses the custom notification type enablement_coaching_feedback_ready. If Salesforce admins change the custom notification type in Custom Notifications settings, they must update the flow with the new notification type.
- Enablement program owners get an email notification when the async job that sends the in-app

notifications fails. If Enablement users don't get any notification after 24 hours of feedback submission, they can contact the program owners to verify the status of the async job.

See Also

View the Enablement Dashboard from the Dashboards Page
Trailhead: Survey Basics
Create and Customize Surveys
Flow Best Practices
Build a Flow

Set Up Surveys and Permissions for Feedback Request Exercises

To let Enablement admins add assessment surveys to Feedback Request exercises in their Enablement programs, Salesforce admins must enable surveys and assign the appropriate permissions.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED	
To enable surveys:	System Administrator profile

If you're trying Enablement Lite, surveys aren't included like they are with the full Enablement license. The default assessment survey, Discovery Call Assessment, isn't provided. The Enablement Lite default permission sets still provide read access to surveys and create, read, edit, and delete access to related survey objects. You can give access to create surveys outside of these default permission sets. When you upgrade to full Enablement, the Enablement Resources Manager permission set group becomes available and includes access to create surveys by default.

Important Feedback Request exercises aren't supported in Partner Enablement programs in Experience Cloud sites.

1. Enable surveys.
   a. From Setup, in the Quick Find box, enter `Enablement`, and then select **Enablement Settings**.
   b. Scroll to the Enable Surveys section, and click **Go to Survey Settings**.
   c. Turn on surveys.
      After you enable surveys, the Survey Settings page includes an option, Survey Owners Can Manage Responses. This option doesn't apply to Feedback Request exercises in Enablement programs. When this setting is on, Enablement admins can export assessment survey information for other

users who don't have any Enablement permissions, such as managers or team leaders.

2. Verify that you have the latest available reports and dashboard widgets so Enablement admins can track Feedback Request exercises. See Refresh the Enablement Reports and Dashboard.
3. Assign the Enablement Resources Manager permission set group to users who manage assessment surveys.

See Also

Enablement Permission Set Groups, Permission Sets, and Permissions
Assign Permissions to Your Enablement Team
Installing Enablement Programs from Managed Packages

Evaluate or Copy the Default Assessment Survey

The full Enablement add-on license includes a default assessment survey, Discovery Call Assessment, which provides questions for reviewers to evaluate a sales rep on their practice sales pitch. You can use this default assessment survey, or copy it as a starting point for a custom assessment survey.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited**, Editions for an additional cost

USER PERMISSIONS NEEDED	
To view assessment surveys:	Read on Surveys (enabled on the default Manage Enablement Essentials permission set and the default Manage Enablement Lite Essentials permission set)
To create, edit, and delete assessment surveys:	Manage Assessment Surveys default permission set (part of the Enablement Resources Manager permission set group)

If you're trying Enablement Lite, surveys aren't included like they are with the full Enablement license. The default assessment survey, Discovery Call Assessment, isn't provided. The Enablement Lite default permission sets still provide read access to surveys and create, read, edit, and delete access to related survey objects. You can give access to create surveys outside of these default permission sets. When you upgrade to full Enablement, the Enablement Resources Manager permission set group becomes available and includes access to create surveys by default.

Important Feedback Request exercises aren't supported in Partner Enablement programs in Experience Cloud sites.

1. Review the default assessment survey and determine whether it can suit your company's needs.
   a. From the App Launcher, select **Surveys**.
   b. Find the Discovery Call Assessment default assessment survey, and select **Open Latest Version** from the dropdown.
   c. Scroll through the survey and review its content, or click **Preview**.
2. To customize the default assessment survey, make a copy instead of editing the default survey directly.

   You can also manage versions of surveys that you create.

   For tips on how to compose your own assessment survey, see Guidelines for Assessment Surveys with Feedback Request Exercises.

3. When you're satisfied with the assessment survey, activate it.

See Also

Create a Survey from a Copy
Create a Survey Version

Share Assessment Surveys with Enablement Admins

To ensure that Enablement admins can access assessment surveys when they assemble sales programs for users in Lightning Experience, share the surveys with them. Share surveys manually with specific Enablement admins, or share surveys automatically with all Enablement admins at your company by creating a public group and corresponding sharing rule.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED	
To create a public group:	Manage Users
To create sharing rules for assessment surveys:	Assign Permission Sets AND View Setup and Configuration

To share an assessment survey manually with specific Enablement admins, click **Sharing** on the survey record page and specify the users and access level. See Share and Grant Access to Surveys.

To share all assessment surveys automatically with all Enablement admins at your company, complete these steps to create a public group and a sharing rule.

1. Create a public group.
   a. From Setup, in the Quick Find box, enter `Public Groups`, and then select **Public Groups**.
   b. Create a group, and add Enablement admins as group members.
      You can add members to the public group or remove group members when their user permissions change.
   c. Save your work.
2. Create a sharing rule.
   a. From Setup, in the Quick Find box, enter `Sharing Settings`, and then select **Sharing Settings**.
   b. From the Manage sharing settings for dropdown, select **Surveys**.
   c. Scroll to Survey Sharing Rules and click **New**.
   d. For rule type, select **Based on criteria**.
   e. For criteria, enter `Type equals Assessment`.
   f. For Share with, select **Public Groups** and select the Enablement Admins group you created.
   g. Save your work.

See Also
Create Public Groups
Sharing Rules

Add a Feedback Request Exercise with an Assessment Survey for Peers and Managers

Enablement admins add the Feedback Request exercise to a program and specify the assessment survey that reviewers complete and the number of reviewers that an Enablement user must select. After the program is published and made available, users submit their content for review and select the required number of reviewers.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited**, Editions for an additional cost

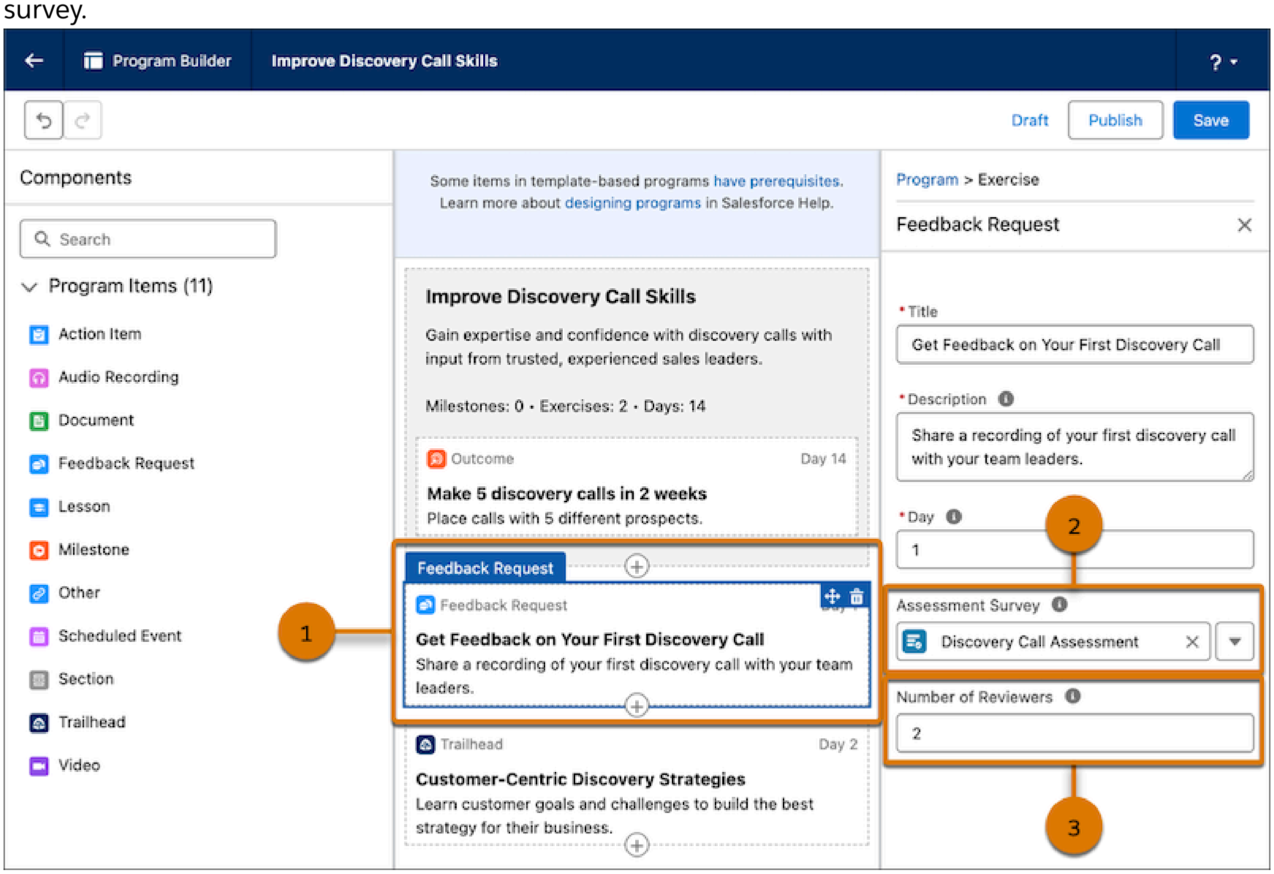
USER PERMISSIONS NEEDED	
To add assessment surveys to Feedback Request exercises:	Read on Surveys (enabled on the default Manage Enablement Essentials permission set and the default Manage Enablement Lite Essentials permission set)

USER PERMISSIONS NEEDED	
	AND Sharing access to assessment surveys AND Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs

If you're trying Enablement Lite, surveys aren't included like they are with the full Enablement license. The default assessment survey, Discovery Call Assessment, isn't provided. The Enablement Lite default permission sets still provide read access to surveys and create, read, edit, and delete access to related survey objects. You can give access to create surveys outside of these default permission sets. When you upgrade to full Enablement, the Enablement Resources Manager permission set group becomes available and includes access to create surveys by default.

Important Feedback Request exercises aren't supported in Partner Enablement programs in Experience Cloud sites.

1. In Program Builder, add the Feedback Request exercise to a program and reference your assessment survey.

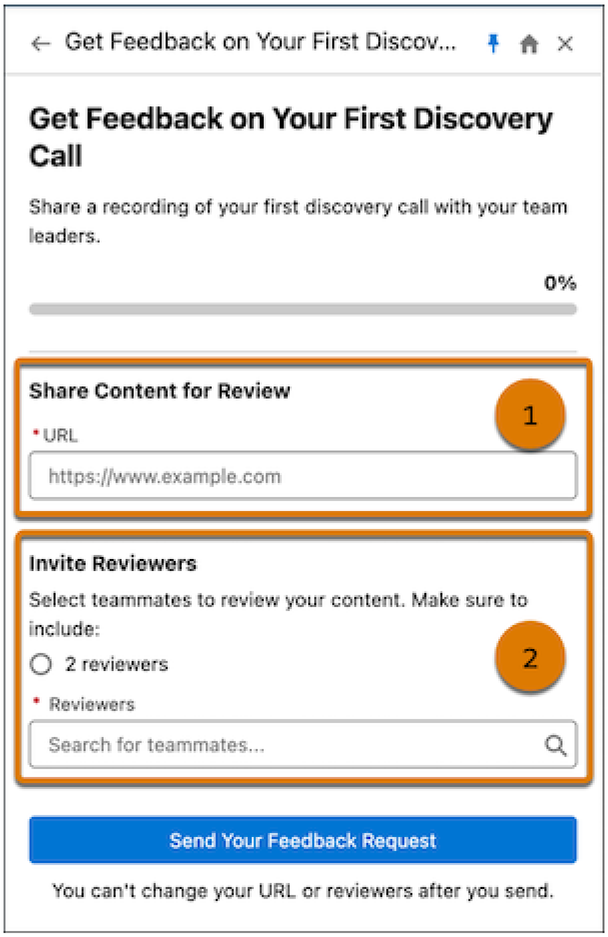


a. Add the Feedback Request exercise to the program canvas (1).

b. In the exercise properties, for Assessment Survey, select the assessment survey you want to use (2).
c. For Number of Reviewers, specify the number of peers, managers, or other users that you want Enablement users to select for gathering feedback (3).

2. Finish assembling the program, and then publish it and assign it to Enablement users. See Launching Enablement Programs.

When Enablement users take the program with the Feedback Request exercise, they're required to specify the URL to the content they want reviewed (1) and select the specified number of reviewers (2).



The selected reviewers receive an email invitation to complete the corresponding assessment survey. When reviewers submit their feedback, a flow is triggered for sending an in-app notification to the Enablement user. In the Guidance Center, Enablement users can view the submitted feedback.

Enablement admins can analyze reviewer responses against changes in user behavior using these reports.

- Feedback Responses to All Questions
- Feedback Responses to Rating Questions

Enablement admins can also monitor Feedback Request exercise progress from these widgets in the latest Enablement dashboard folder.

- Number of Feedback Survey Responses Submitted
- Feedback Responses by Assignee
- Feedback Responses by Exercise

See Also

Guidelines for Assembling Enablement Programs
Guidelines for Assessment Surveys with Feedback Request Exercises
Take Enablement Programs
Enablement Reports and Report Types

Custom Exercise Types in Enablement Programs

Custom exercise types let you bring content from your own repository or a third-party repository into your Enablement program. Salesforce developers can help you implement the requirements for adding custom exericses in Program Builder and the experience of users who take the custom exercise.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited**, Editions for an additional cost

Salesforce developers at your company use Apex classes, custom objects, and custom fields on the Learning Item object to configure the custom exercise types for you. Custom exercise metadata are stored in the LearningItemType and EnblProgramTaskSubCategory objects. Developers map a preferred repository to host content for the custom exercises and use Lightning Web Components to render the custom items in Program Builder and Guidance Center.

For details about creating custom exercise types, see Implement Custom Exercise Types for Enablement Programs in the Sales Programs and Partner Tracks with Enablement Developer Guide.

Important Enablement supports integration with your personal drive accounts and services, infrastructures, and functionalities provided by third-parties. The third-party services you use for Enablement don't include SFDC applications. Make sure the usage of the third-party services complies with their terms or your company’s separate agreement with the third party.

After developers implement your custom exercise types, these permissions are required for adding the exercises in Program Builder.

- View Setup and Configuration
- Design and Deliver Enablement Programs

See Also

Sales Programs and Partner Tracks with Enablement Developer Guide: Implement Custom Exercise

Types for Enablement Programs
Object Reference for the Salesforce Platform: EnblProgramTaskSubCategory
Object Reference for the Salesforce Platform: LearningItemType

Integrating Einstein Coach with Sales Programs

Einstein for Sales with an Enablement add-on license enables sales reps to close deals better by providing them with the opportunity to practice and perfect their sales pitch before that initial interaction with a prospect. Einstein Coach provides reps with personalized and actionable feedback on how to improve their sales pitch.

REQUIRED EDITIONS

Available in: Lightning Experience
Available with Einstein for Sales with an Enablement add-on in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

Set Up Einstein Coach
To allow the use of AI-generated coaching in Enablement programs, Salesforce admins must enable Einstein Coach and assign the appropriate permissions.

Add a Feedback Request Exercise with Einstein Coach
Enablement admins add a Feedback Request exercise to a program and specify that users receive feedback from Einstein. When a user is assigned a program with Einstein Coach, they submit a recording for feedback based on the scenario selected.

Complete a Feedback Request Exercise with Einstein Coach
Practice and perfect your sales pitch by submitting a video call for feedback from Einstein Coach. Einstein Coach analyzes your call's transcription and provides personal and actionable feedback, highlighting your key strengths and growth opportunities.

Access Einstein Coach Outside of a Sales Program
Receive feedback from Einstein Coach on a sales pitch whenever and as often as you like by accessing Einstein Coach in the Guidance Center. Get help perfecting your sales pitch at your convenience, as many times as is necessary.

Considerations for Einstein Coach in Feedback Request Exercises
When you use Einstein Coach as the feedback method for a Feedback Request exercise in an Enablement program, certain factors can affect the admin and user experience.

Set Up Einstein Coach

To allow the use of AI-generated coaching in Enablement programs, Salesforce admins must enable Einstein Coach and assign the appropriate permissions.

REQUIRED EDITIONS

Available in: Lightning Experience
Available with Einstein for Sales with an Enablement add-on in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

USER PERMISSIONS NEEDED	
To enable Einstein Coach:	System Administrator Profile
To assign permission sets:	Assign Permission Sets AND View Setup and Configuration

1. From Setup, in the Quick Find box, enter and select **Einstein for Sales**.
2. Turn on Einstein generative AI.
3. Scroll to the Set Up Einstein Coach section.
4. Turn on Einstein Coach.
5. Assign the Access Einstein Coach and Prompt Template User default permission sets to Enablement admins and Enablement users.
6. Set Up Einstein Conversation Insights.
   a. Turn on Einstein Conversation Insights.
   b. Connect video recording providers.
   c. Assign the Conversation Insights for Sales default permission set to Enablement admins.

See Also

Manage Permission Set Assignments
Set Up Sales Cloud Einstein
Considerations for Einstein Coach in Feedback Request Exercises

Add a Feedback Request Exercise with Einstein Coach

Enablement admins add a Feedback Request exercise to a program and specify that users receive feedback from Einstein. When a user is assigned a program with Einstein Coach, they submit a recording for feedback based on the scenario selected.

REQUIRED EDITIONS

Available in: Lightning Experience
Available with Einstein for Sales with an Enablement add-on in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

USER PERMISSIONS NEEDED	
To create Enablement programs with Einstein Coach:	Use Einstein Coach AND Use Conversation Insights for Sales AND Prompt Template User default permission set AND Design and Deliver Enablement Programs

1. Add a Feedback Request exercise to a program.
2. Select **Einstein Coach** as the feedback method.
   Receive Feedback on a Sales Pitch is the only supported scenario and is select by default.
3. Add a title and description that clearly explains the task of the Enablement user. Consider being specific about what product or solution you want them to practice a pitch for.
4. Save your changes.

See Also

Considerations for Einstein Coach in Feedback Request Exercises

Complete a Feedback Request Exercise with Einstein Coach

Practice and perfect your sales pitch by submitting a video call for feedback from Einstein Coach. Einstein Coach analyzes your call's transcription and provides personal and actionable feedback, highlighting your key strengths and growth opportunities.

REQUIRED EDITIONS

Available in: Lightning Experience
Available with Einstein for Sales with an Enablement add-on in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

USER PERMISSIONS NEEDED	
To complete Feedback Request exercises with Einstein Coach in Enablement programs:	Take Enablement Programs AND Use Einstein Coach

If you're enrolled in an Enablement program with a Feedback Request exercise that provides feedback from Einstein, complete these steps to get the most out of your AI-generated feedback.

1. Open the Feedback Request exercise with Einstein Coach.
2. Record a sales pitch for a product or solution. The pitch must include only one speaker and be recorded using Zoom Meetings, Google Meet, or Microsoft Teams. Calls recorded outside of these supported video recording providers aren't supported.
3. Select your recording from the dropdown menu.
   Recordings can take some time to appear in the dropdown menu. If you recorded a single-user video call using a supported recording provider and don't see your recording, verify the recording has a finished transcript available in the video call's record.
4. Verify you selected the correct recording. You can submit only one video call per exercise. Submitting the wrong video call can result in an error or in inaccurate feedback.
5. Click **Request Feedback from Einstein**.
6. Review the AI-generated feedback provided by Einstein.
7. Click **Mark as Complete**.

The feedback you received stays saved in the exercise. Return to it to view it again, go over it with your manager, or compare it to feedback from other Feedback Request exercises with Einstein Coach. You can also rate how helpful the feedback you received was. To share details about the feedback you received, click **Dislike** and then **Other**. Write out the feedback you want to share and click **Submit**. Your feedback is shared with Salesforce to continue improving the use of Einstein Coach.

See Also
Set Up Sales Cloud Einstein

Access Einstein Coach Outside of a Sales Program

Receive feedback from Einstein Coach on a sales pitch whenever and as often as you like by accessing Einstein Coach in the Guidance Center. Get help perfecting your sales pitch at your convenience, as many times as is necessary.

REQUIRED EDITIONS

Available in: Lightning Experience
Available with Einstein for Sales with an Enablement add-on in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

USER PERMISSIONS NEEDED	
To get feedback from Einstein Coach:	Take Enablement Programs AND Use Einstein Coach

1. Open the Guidance Center by clicking the Trailhead icon in the global navigation bar.
2. Scroll down and find the Einstein Coach tile.
3. Click **Get Feedback**.
4. Search for and select the product you want to practice a pitch for. Or to move forward without selecting a product, click **Skip This Step**.

   Tip Selecting a product allows Einstein Coach to provide you with better and more specific feedback. Einstein Coach receives access to that product's data and uses it to better analyze your product pitch.

5. Record your sales pitch. Make sure the pitch includes only one speaker and is recorded using Zoom Meetings, Google Meet, or Microsoft Teams. Calls recorded outside of these supported video recording providers aren't supported.
6. Select your recording from the dropdown menu.
   Recordings can take time to appear in the dropdown menu. If you recorded a single-user video call by using a supported recording provider and don't see your recording, verify that the recording has a finished transcript available in the video call's record.
7. Click **Request Feedback from Einstein**.
8. Review the feedback you received.

The feedback you receive from Einstein Coach isn't saved. To refer to it again, consider copying and pasting the feedback to another location or taking a screenshot. At the end of the exercise you can rate how helpful the feedback you received was and then try another pitch. The feedback you provide on this exercise is shared with Salesforce so we can continue improve the use of Einstein Coach.

Considerations for Einstein Coach in Feedback Request Exercises

When you use Einstein Coach as the feedback method for a Feedback Request exercise in an Enablement program, certain factors can affect the admin and user experience.

REQUIRED EDITIONS

Available in: Lightning Experience
Available with Einstein for Sales with an Enablement add-on in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

Understand the Use of Einstein Coach in Feedback Request Exercises

- When creating a Feedback Request exercise with Einstein Coach as the feedback method, admins select a scenario for users to receive feedback on. The scenario selected by default, Receive Feedback on a Sales Pitch, is the only supported scenario and can't be changed.
- Einstein analyzes the pitch for specific criteria. Therefore, submitted recordings that aren't a product pitch don't receive relevant feedback.

Recording and Submitting a Call for Feedback

- Only video calls are submitted. Voice calls aren't supported.
- Einstein Coach doesn't support recordings with multiple speakers. The user delivering the pitch must be the only voice detected in the recording.
- The maximum call length supported is 30 minutes.
- Einstein can only evaluate recordings with English transcriptions, but can generate and translate feedback in other supported languages. See the Transcription and Feedback Generation section.
- Record video calls for this exercise using Zoom Meetings, Google Meet, or Microsoft Teams.
- The transcription can take some time to complete and isn't available right away.
- Only transcribed video calls appear in the dropdown menu when a user is selecting a call to submit for feedback. If the desired call doesn't appear there, verify that it has a transcription available.

Transcription and Feedback Generation

- Einstein analyzes and generates feedback based on how a user:
  - Introduces themselves and sets context for the meeting
  - Articulates the value and benefit of a product or solution
  - Defines the business problem and offers a solution
  - Makes compelling points
  - Uses storytelling to connect with the audience
  - Delivers complex information in a short and clear manner
- Artificial hallucinations: AI can mistakenly fill in gaps or make assumptions based on patterns it has learned during training. For Einstein Coach, AI can "invent" details to fill in gaps or to make information seem complete.
- Misinterpretation of words: Different speech variations and pronunciations can lead AI transcribers to misinterpret words, leading to incorrect transcriptions. The misinterpretation of words can lead to sentences that don't make grammatical sense, which can affect the interpretation of the transcript and misunderstanding the speaker's intent.
- Errors: When a language model, like the model that powers Einstein, uses flawed transcripts (such as from hallucinations or misinterpretation) to assess a transcript, it can lead to incorrect evaluations because the analysis is based on inaccurate or incomplete data.
- Language: Einstein Coach analyzes English-only transcriptions and generates feedback in English. For users with non-English locales in their settings, the feedback Einstein generates is automatically translated to the user's locale. Einstein for Sales currently translates to: French, German, Italian, Japanese, and Italian. Translation of English feedback to these supported languages can lead to incorrect evaluations.

See Also
Connect Video Recording Providers

Managing Partner Enablement Programs

Show Partner Enablement programs to partner users in supported Experience Cloud sites as part of your Partner Relationship Management (PRM) strategy. Partner Enablement programs are also called Partner Tracks. Work with your site developer to build partner experiences that show Enablement programs, outcomes, milestones, and exercises in site pages where partners interact with your brand.

REQUIRED EDITIONS

Available in: Lightning Experience
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Considerations for Partner Enablement Programs

In general, Partner Enablement programs in supported Experience Cloud sites behave similarly to sales programs in Lightning Experience. Some details for creating and launching Partner Enablement programs are different, and other considerations apply when you're getting started with a supported Experience Cloud site.

REQUIRED EDITIONS

Available in: Lightning Experience
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Permissions

For Enablement admins, the Design and Deliver Enablement Programs permission gives access to create sales programs for Lightning Experience and Partner Enablement programs in Experience Cloud sites. This permission is included in the Manage Enablement Essentials default permission set. You can create up to 100 unpublished or published Partner Enablement programs.

Also, consider assigning the Manage Enablement Essentials permission set to site developers. Assigning this permission set ensures that site developers can access Enablement objects when they add Enablement components and pages to Experience Cloud sites.

For partner users, the Partner Enablement User permission set group includes permission sets for taking Partner Enablement programs in sites.

User Experience

Partner Enablement programs are delivered to partner users who log in to your Partner Relationship Management (PRM) site, built with Experience Cloud. They find and take programs within your PRM site pages. Typically, these users don't have access to Lightning Experience and their only contact with your brand is the site. Work with a site developer to add Enablement program information to your site. Some default components and pages are available.

Requirements for Experience Cloud Sites

In Program Builder, the Experience Cloud Site field is available in the program properties when you're creating a Partner Enablement program.

The Enablement components are available only in these Experience Cloud site templates that a site developer edits with Experience Builder.

- Automotive
- Aura-based B2B Commerce templates (no longer solid)
- Build Your Own (Aura)
- Customer Service
- Financial Services Client Portal
- Insurance Agent Portal
- Partner Central

Other permissions are required for selecting a site in Program Builder.

Your Permission or Access	Sites You Can Select
Create and Set Up Experiences	Inactive or active sites
Customize Application	Inactive or active sites

Your Permission or Access	Sites You Can Select
Member of the site	Active sites only

If you don't have one of these permissions, you can't see the site in Program Builder. If another Enablement admin with permissions added the site and you edit the program, you can't see the site or save or publish the program.

Outcome, Milestones, and Exercises

A Partner Enablement program can include 30 total items, including the outcome, milestones, and exercises.

Most prebuilt measures for outcomes and milestones are compatible with Partner Enablement programs, but measures that require Einstein Conversation Insights (ECI) aren't supported.

Audio Recording, Document, Scheduled Event, and Other exercises in Partner Enablement programs support relative URLs to other site pages. In the corresponding Link content record in the Enablement workspace in the Digital Experiences app, specify a relative URL to another site page. This behavior differs from sales programs in Lightning Experience, where exercises that use the Link content type must specify full URLs.

Action Item, Feedback Request, and Trailhead exercises aren't supported in Partner Enablement programs.

Enrollment

When you assign partner users to Partner Enablement programs, you can filter by account in addition to the profile, group, and role filters.

The assignment window lists only users who have the Take Partner Enablement Programs permission.

Up to 10,000 users can be assigned to or enrolled in a Partner Enablement program.

Notifications

A Salesforce admin can manage notification settings related to Partner Enablement programs for all partner users. See Manage Notifications for Enablement Programs, Outcomes, and Milestones.

Email notifications related to Partner Enablement programs still respect user-specific email preferences on your site.

In-app notifications related to Partner Enablement programs depend on the environments that partner users can access.

- Partners receive notifications in all sites that they're members of and that support notifications, not

just the site where the Partner Enablement program is published.
- If partners have access to Lightning Experience, they receive notifications related to Partner Enablement programs in Lightning Experience.

Analytics

Partner Enablement provides a dashboard and reports that are separate from the analytics for other program types. To view Partner Enablement analytics, you must have sharing access to the `PRM Reports` and `PRM Dashboards` root folders.

Unlike sales programs in Lightning Experience, Partner Enablement programs don't have the View Analytics button on program record detail pages. And, the Partner Enablement dashboard and reports show data for all Partner Enablement programs, not individual programs.

In Partner Enablement Settings, a Salesforce admin can get the latest Partner Enablement analytics by refreshing the prebuilt reports and dashboard.

In-App Guidance in Sites

Partner Enablement includes prompts and walkthroughs in the same Experience Cloud sites where you publish programs. In Partner Enablement Settings, a Salesforce admin can assign the Manage In-App Guidance for Partners default permission set to users who create prompts and walkthroughs in sites. The Partner Enablement User permission set group that Salesforce admins assign to partner users includes permission to view prompts and walkthroughs in sites.

See Also
Enablement Components and Pages in Experience Cloud Site Templates
Enablement Permission Set Groups, Permission Sets, and Permissions
Assign Permissions to Your Enablement Team
View the Partner Enablement Dashboard and Reports
Refresh the Enablement Reports and Dashboard
Permissions for Creating and Accessing In-App Guidance
User License and Experience Cloud Template Support for Partner Relationship Management
Experience Cloud Site Statuses
Manage Site Emails and Notifications

Create a Partner Enablement Program

Create an Experience Cloud site from a supported template that uses the Enablement pages and components. Then set up your program in Program Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To create a Partner Enablement program:	Design and Deliver Enablement Programs AND Create and Set Up Experiences OR Customize Application OR Member of a supported Experience Cloud site

Before you create an Experience Cloud site and Partner Enablement program, review Considerations for Partner Enablement Programs for details about required permissions and supported sites.

1. Assign permissions for Partner Enablement admins and partner users.
2. Add Enablement pages and components to a supported Experience Cloud site.
3. In Program Builder, create a program and select the site.
   a. On the Enablement Programs page, click **New**.
   b. Select the **Partner Enablement** tile.
   c. For Experience Cloud Site, search for the site where you want to publish the program.
   d. Complete the program with titles, descriptions, outcomes, milestones, and exercises, and then save and publish the program.
4. Assign the program to specific partner users, or make the program available for partner users to self-enroll.

See Also
Enablement Components and Pages in Experience Cloud Site Templates
Guidelines for Assembling Enablement Programs
Assign Permissions to Your Enablement Team
Launching Enablement Programs
User License and Experience Cloud Template Support for Partner Relationship Management
Create an Experience Cloud Site

Enablement Components and Pages in Experience Cloud Site Templates

In Experience Builder, certain site templates include an Enablement section in the Components panel and Enablement pages in the Pages menu. A site developer can use these components and pages to show Partner Enablement programs, outcomes, milestones, and exercises in your Partner Relationship Management (PRM) experience.

REQUIRED EDITIONS

Available in: Lightning Experience
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Components

These components are available in the Enablement section of the Components panel. For some components, properties are available for customizing which details are shown or how the component appears.

Component	What It Shows
Enablement Exercise Header	The title, description, and due date of a selected exercise
Enablement Lesson	The content of a selected Lesson exercise
Enablement Link	The content of a selected Audio Recording, Document, Scheduled Event, or Other exercise
Enablement Milestone	The criteria and progress of a selected milestone
Enablement Program Header	The name, description, enrollment details, and due date of a selected program
Enablement Program Items	A list of the milestones and exercises, including titles, descriptions, and due dates
Enablement Program Outcome	The title, description, and due date of the outcome
Enablement Programs	A list of Enablement programs with filter options and an optional action button
Enablement Video	The content of a selected Video exercise

Filter Values in the Enablement Programs Component

In the Enablement Programs component, specify whether partner users can filter the programs they see by program status.

- To allow partner users to filter programs, turn on **Allow users to filter programs** and select the status filters you want to include, including the filter that you want selected by default.
- To allow partner users to see only programs of one status, turn off **Allow users to filter programs** and

select the status to show in the component from **Default filter**.

These filters are available.

Filter	What It Shows
All	All programs that the user can access
Assigned	Programs that an Enablement admin has assigned and that the user hasn't finished
Available to Enroll	Programs that an Enablement admin has shared with the user for self-enrollment, but that the user hasn't enrolled in yet
Completed	Programs that the user has finished
In Progress	Programs that an Enablement admin has assigned or that the user has enrolled in but that the user hasn't finished
Self-Enrolled	Programs that the user has enrolled in but not finished

Pages

These pages are available in the Pages menu and provide some default surfaces for partner users to explore and take programs. Each page organizes some components into an experience that's similar to how sales programs appear in the Guidance Center in Lightning Experience.

Page	What It Shows
Enablement Program Detail	All the content of a selected program, including the outcome, milestones, and exercises
Enablement Program List	Lists of programs filtered by status
Enablement Program Related List	Not supported
Enablement Program Lesson	A selected Lesson exercise, with a side panel that shows other program items
Enablement Program Link	A selected Audio Recording, Document, Scheduled Event, or Other exercise, with a side panel that shows other program items
Enablement Program Milestone	A selected milestone, with a side panel that shows other program items
Enablement Program Video	A selected Video exercise, with a side panel that shows other program items

The Enablement Program Detail, Enablement Program List, and Enablement Program Related List pages are included as standard pages for the Enablement Program object. By default, Experience Builder allows you to select a page variation for these objects. For the

- For the Enablement Program Detail page, use only the Enablement Program Detail page variation. The default Record Detail page variation isn't supported.
- For the Enablement Program List page, use only the Enablement Program List page variation. The default Record List page variation isn't supported.
- For the Enablement Program Related List page, no page variation is supported.

See Also
Exercise Types in Enablement Programs
Find Your Way Around Experience Builder

Launching Enablement Programs

After you develop programs and measures in a sandbox, deploy them to production. Make Enablement programs available to users by publishing programs, assigning programs to users directly, and sharing programs so uses can self-enroll.

Deploy Enablement Programs and Measures from a Sandbox to Production
After you create and test Enablement programs and measures in a sandbox, migrate the data to production with Metadata API in change sets or Salesforce CLI.

Publish Enablement Programs
After you've created a program, publish it so users can take it.

Considerations and Limitations for Enrolling Users in Enablement Programs
When you assign users to an Enablement program, certain factors can determine how assignments behave, such as permissions, assignment and selection limits, filters, and the user's time zone. These factors can also affect users who self-enroll in programs.

Share Enablement Programs So Users Can Self-Enroll
To make an Enablement program available to users so they can enroll at their own convenience, enable self-enrollment in Program Builder. Then, share a program with specific users, groups, or roles. Users can find programs that are shared with them and start taking the program when they're ready.

Assign Users to Enablement Programs Manually
To ensure that users take an Enablement program by a certain date, assign sales territories or users to the program and select a start date. When you assign territory roles to a program, users in those roles are automatically assigned to the program. Assigned users receive an email and in-app notification on the program's start date.

Automating Enablement Program Assignment
Instead of manually assigning users to Enablement programs, automate assignments with an invocable action in Flow Builder, Apex, or REST API.

Deploy Enablement Programs and Measures from a Sandbox to Production

After you create and test Enablement programs and measures in a sandbox, migrate the data to production with Metadata API in change sets or Salesforce CLI.

REQUIRED EDITIONS

Available in: Lightning Experience
Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

See Deploy Enablement Programs from a Sandbox to Production in the Sales Programs and Partner Tracks with Enablement Developer Guide.

Publish Enablement Programs

After you've created a program, publish it so users can take it.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To publish programs:	Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs

1. From the App Launcher, find and select **Enablement Programs**.
2. From the Enablement Programs page, open the program that you want to publish.
3. In Program Builder, click **Publish**.

Now your program is available to assign to users or share with users so they can self-enroll.

See Also

Maintaining Enablement Programs

Considerations and Limitations for Enrolling Users in Enablement Programs

When you assign users to an Enablement program, certain factors can determine how assignments behave, such as permissions, assignment and selection limits, filters, and the user's time zone. These factors can also affect users who self-enroll in programs.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
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Permissions

For an Enablement admin to assign a program to a user, or for a user to self-enroll in a program, the user needs the appropriate permission depending on the type of program.

Program Type	Required Permission
Enablement Lite	Take Enablement Lite Programs
Enablement	Take Enablement Programs
Partner Enablement	Take Partner Enablement Programs

Enrollment Limits

- For a sales program in Lightning Experience, up to 1,000 users can be assigned or self-enrolled. To increase this limit, submit a Salesforce Customer Support case.
- For a Partner Enablement program in Experience Cloud sites, up to 10,000 partner users can be assigned or self-enrolled. To increase this limit, submit a Salesforce Customer Support case.
- When you assign users to a program, you can select up to 1,000 users individually. This limit applies to sales programs in Lightning Experience and to Partner Enablement programs in Experience Cloud

sites.
- After a user completes a program, they remain assigned to or enrolled in the program. If you've reached the enrollment limit, remove some users.
- You can't assign a program to a user who's enrolled in that program. A user can't self-enroll in a program that's already been assigned to them.

To check the enrollment status of specific users on a program, and manage enrollment if necessary, go to the Enrolled Users related list on the Enablement Program record detail page.

Note Removing users who have started or completed a program affect the program's analytics data. See Considerations for Analyzing Program Completion.

Filtering Enablement Users in the Assignment Window

The assignment window displays when you select Assign Programs from the program details page or from the dropdown on the Enablement Programs page. The assignment window provides these options for filtering available users to assign to the program.

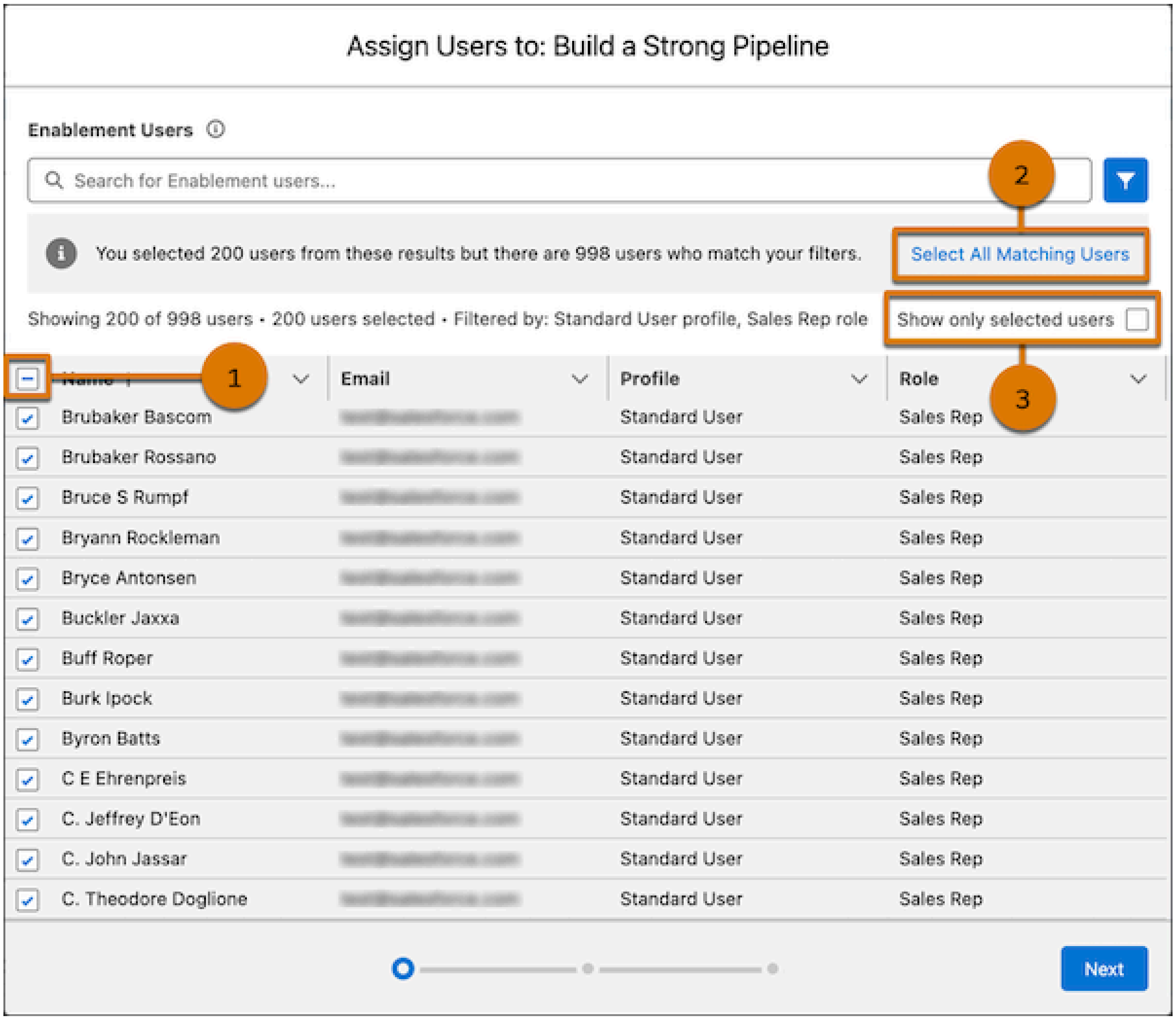
- For sales programs in Lightning Experience, you can filter the available users by profile, role, or public group.
- For Partner Enablement programs in Experience Cloud sites, you can filter the available users by account, profile, role, or public group.
- You can apply multiple filters at one time, but not multiple values of the same filter. For example, you can filter by one profile and one role, but not multiple profiles.
- You can filter only by values that you have permission to view. For example, if you enter the name of a profile that you can't access, that profile isn't matched.
- If you don't have permission to view an entire filter category, a lock icon appears and the filter isn't available. For example, the lock icon appears if you don't have permission to view any roles.
- If you apply filters, select users from the results, and then apply filters again, the selections you made previously are cleared. This clearing occurs even if you apply the same filters.

Selecting Users in the Assignment Window

The assignment window provides these options for selecting users to assign to the program.

- The assignment window first loads up to 200 users who match the applied filters. To load more users, in groups of 200 at a time, continue scrolling. The assignment window can show up to 1,000 users.
- You can select users individually or select multiple users. To select all users shown in the window, select the checkbox in the header (1). If you click the checkbox but both of these conditions are true, a banner can appear with an option to select all matching users with one click (2).
  - More users are available who match your filters.
  - You haven't yet reached the enrollment limit for the program.
- If the number of matching users exceeds your org's enrollment limit, the banner with the option to select all matching users doesn't appear. You can apply filters to reduce the number of available matching users in the results.

- After you've selected some users, you can simplify the view in the assignment window to show only those users that are selected (3).
- If you start selecting users and you reach your org's enrollment limit, a warning message appears.
- If you select 1,000 users individually, a warning message appears and prompts you to finish assigning the selected users before you can try assigning more.



Start Dates and Due Dates for Assigned Programs

After you select the users to assign to a program, you select the program's start date. The assignment window only allows you to select a weekday. If you use an invocable action to assign users and you select a weekend day, the start date is automatically adjusted to the next weekday.

The program's due date is calculated based on the start date that you assign and the length of the program, excluding Saturdays and Sundays. The due date is scheduled for the end of the user's day, based on the time zone they specify in their personal settings. For example, if you schedule a 20-day program with a start date of Monday, January 1, the program is due end of day Friday, January 26. This projection skips the 6 weekend days that fall after Monday, January 1. A user still gets credit for completing exercises or milestones on a Saturday or Sunday.

Tip To ensure that users in time zones around the world have equal time to complete the program, choose a start date that's in the future. If you select the current day as the start date, assigned users in time zones far ahead of you can effectively lose a day of program availability.

A user receives an email notification at approximately 5 AM on the program's start date, based on their selected time zone. If the start date is the same day it's assigned, the notification is sent immediately. However, other resource-intensive activity in your org, such as scheduled Apex jobs, can affect when the notification actually arrives. The user can open the program starting at 12 AM on the start date.

The start date and due date also determine when other notifications are sent. See Manage Notifications for Enablement Programs, Outcomes, and Milestones.

Start Dates and Due Dates for Self-Enrolled Programs

When users self-enroll in a program, the program's start date is the day they enrolled, including weekend days.

The program's due date is calculated based on the start date and the length of the program. If a user enrolls on a weekend day, Day 1 of the program includes both that weekend and the following Monday. Subsequent Saturdays and Sundays are excluded when calculating the program's due date.

Enrollment Type and Assignment Status

On the Enablement Program record detail page, the Enrolled Users related list includes these columns.

- Enrollment Type indicates whether the user was assigned to the program or self-enrolled in the program.
- Assignment Status indicates whether an issue occurred when the Enablement admin tried to assign the program to the user.

The Assignment Status column can show these values.

Status	Description
Succeeded	The user was assigned to the program and can access the program on the start date. This status also appears when a user self-enrolls in a program.
Failed	The user wasn't assigned to the program. This result can occur when you close the assignment window before reaching the final confirmation step, no matter how many users you try to assign. Remove the user from the program and try assigning them again.
In Progress	The assignment operation isn't completed yet.

See Also

Enablement Permission Set Groups, Permission Sets, and Permissions

Assign Permissions to Your Enablement Team

Remove Users from an Enablement Program
Enablement Limits
Enablement Lite Permissions
Enablement Components and Pages in Experience Cloud Site Templates

Share Enablement Programs So Users Can Self-Enroll

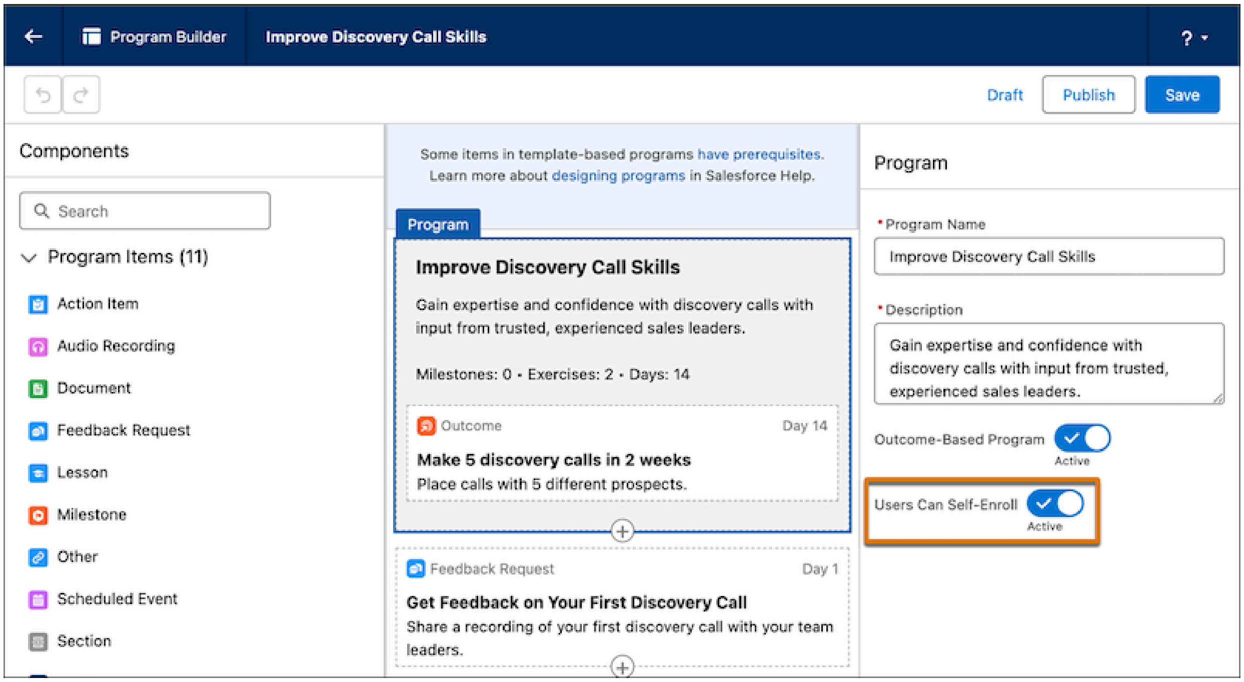
To make an Enablement program available to users so they can enroll at their own convenience, enable self-enrollment in Program Builder. Then, share a program with specific users, groups, or roles. Users can find programs that are shared with them and start taking the program when they're ready.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

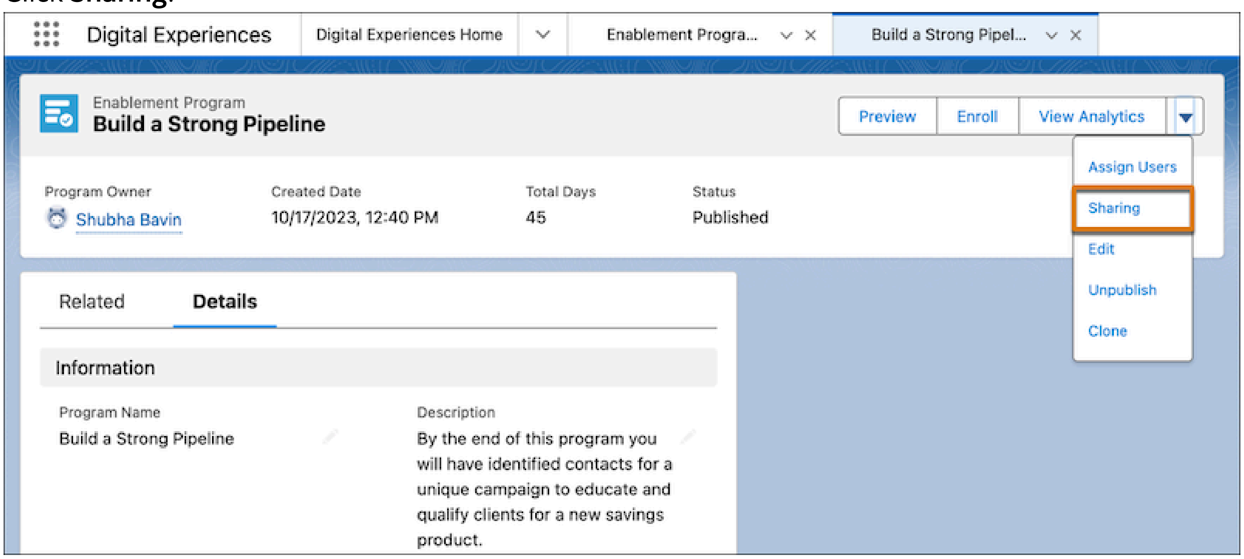
USER PERMISSIONS NEEDED	
To share programs for self-enrollment:	Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs

1. From the App Launcher, find and select **Enablement Programs**.
2. Create or edit a program and enable self-enrollment.
   a. In Program Builder, turn on **Users Can Self-Enroll**.



   b. Save and publish the program.

3. Share the published program with users.
   a. On the Enablement Programs page, open the dropdown menu for the published program that you want to share or navigate to the program's record detail page.
   b. Click **Sharing**.



   c. In the Share window, search for the user, group, or role that you want to make the program available to. For access level, select **Read Only**, and then save.
   d. For access level, select **Read Only**.
   e. Save your changes.

See Also

Considerations and Limitations for Enrolling Users in Enablement Programs

Take Enablement Programs

Enablement Components and Pages in Experience Cloud Site Templates

Assign Users to Enablement Programs Manually

To ensure that users take an Enablement program by a certain date, assign sales territories or users to the program and select a start date. When you assign territory roles to a program, users in those roles are automatically assigned to the program. Assigned users receive an email and in-app notification on the program's start date.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
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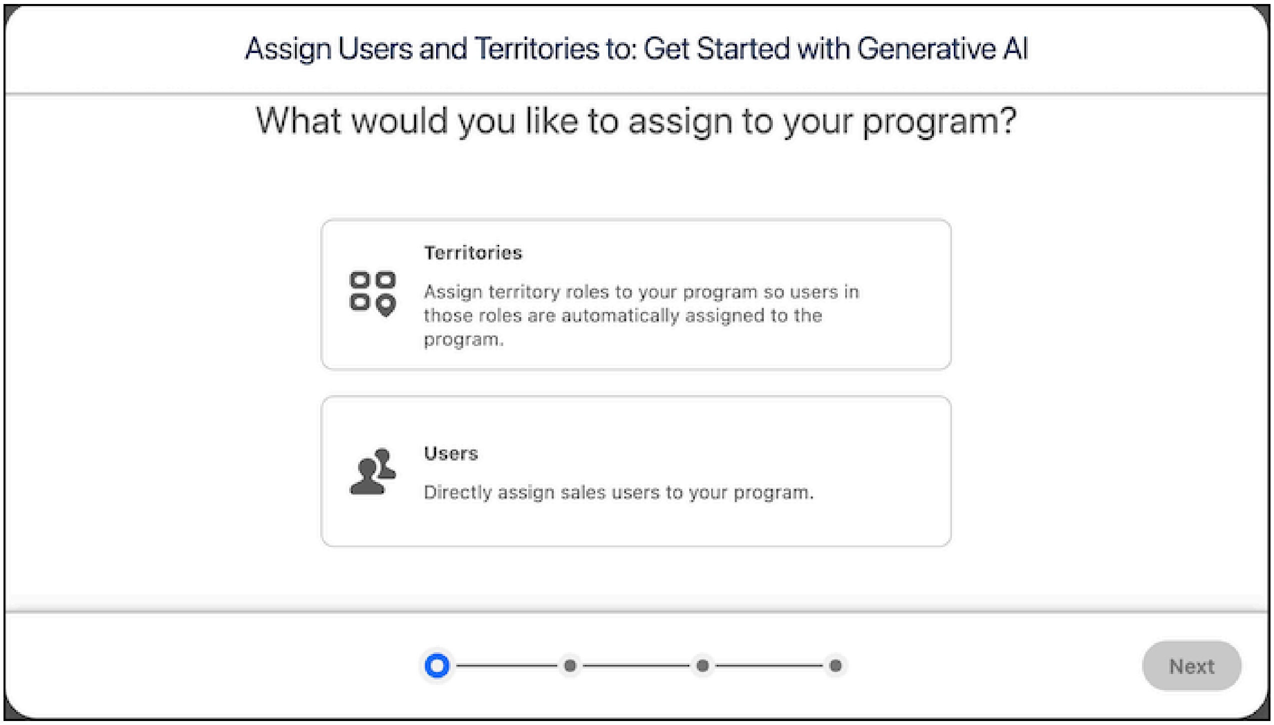
USER PERMISSIONS NEEDED	
To assign programs:	Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs

Before you begin, we recommend that you review Considerations and Limitations for Enrolling Users in Enablement Programs for tips about filtering users, selecting users efficiently, and selecting a start date.

1. From the App Launcher, find and select **Enablement Programs**.
2. On the Enablement Programs page, open the dropdown menu for the published program that you want to assign users to or navigate to the program's record detail page.
3. Select **Assign to Program**.



4. Select **Territories** or **Users**, and click **Next**.
5. If you select **Territories**:
   a. Select a territory model and click **Next**.
   b. Select territories and child territories that you want to assign to the program and click **Next**.
   c. Select roles within the territories and click **Next**.
   d. Verify the users that will be assigned to the program.
6. If you select **Users**:
   a. Search for and select users that you want to assign to the program.
   b. Click **Next**.
7. Choose the start date that your users can access the program.
8. Click **Assign**.

When you select 50 or fewer users to assign to a program, you're notified about the assignment completion in the assignment window. Keep the assignment window open until you receive this information. When you select more than 50 users to assign to a program, you're notified about the assignment completion via email.

See Also

Considerations and Limitations for Enrolling Users in Enablement Programs
Share Enablement Programs So Users Can Self-Enroll
Remove Users from an Enablement Program

Automating Enablement Program Assignment

Instead of manually assigning users to Enablement programs, automate assignments with an invocable action in Flow Builder, Apex, or REST API.

Assign Users to Enablement Programs with a Flow
Create a flow that assigns users to an Enablement program when they satisfy certain criteria.

Assign Users to Enablement Programs with Apex
Create a schedulable Apex class that bulk-assigns users to Enablement programs.

Assign Users to Enablement Programs with REST API
Create a REST API POST request that uses the assignEnablementPrograms invocable action for assigning Enablement programs.

Assign Users to Enablement Programs with a Flow

Create a flow that assigns users to an Enablement program when they satisfy certain criteria.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
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USER PERMISSIONS NEEDED	
To create a flow in Flow Builder:	Manage Flow
To assign or unassign programs:	Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs

Ensure that users have the required permission for taking the type of program you're assigning. Otherwise, the assignment fails.

1. Create a flow.
   a. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
   b. Click **New Flow**.
   c. Select the flow type you want to use. We recommend Record-Triggered Flow.
   d. Click **Create**.
2. To query for a Program ID, add a Get Records element.
   a. In Flow Builder, click ⊕ to add an element.

b. In the Add Element panel, search for `Get Records` and select it.
c. In the new element panel, enter a label, API name, and description.
d. For the Object field, search for `Enablement Program` and select it.
e. Complete the remaining fields.
f. Save your changes.

3. To assign the program, add an Action element to the flow.
   a. After the Get Records element, click ⊕ to add another element.
   b. Click **Action**.
   c. Search for `Assign Enablement Program` and select it.
   d. For Assignee ID, select **$User** and then **Id**. The expected final value is {!User.Id}.
   e. For Notification User ID, enter a formula for the user who you want to notify when the assignment is complete, such as an Enablement admin or a manager.
   f. For Program ID, select **Enablement Program** from the Get Records action you created, and then click **ID**. The expected final value is {!*GetRecordsElementAPIName*.Id}, where *GetRecordsElementAPIName* is the API name you entered for the Get Records element.
   g. For Start Date, select **$Flow** and then **CurrentDate**. The expected final value is {!$Flow.CurrentDate}. If you enter a hard-coded date, the date ends up in the past, causing the assignment to fail. Use a formula to set a date in the future.
   h. Click **Done**.
4. Save and activate the flow.
   a. Click **Save**.
   b. Enter a flow name, API name, and an optional description.
   c. Click **Done**.
   d. In Flow Builder, click **Activate**.

The assignEnablementProgram invocable action counts against your org's Bulk API 2.0 limits. To help avoid these limits, we recommend that you bulkify your request.

See Also

Considerations and Limitations for Enrolling Users in Enablement Programs
Assign Permissions to Your Enablement Team
Build a Flow
Flow Bulkification in Transactions
Actions Developer Guide: Assign Enablement Program

Assign Users to Enablement Programs with Apex

Create a schedulable Apex class that bulk-assigns users to Enablement programs.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and

Einstein 1 Sales Edition Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

See Assign Users to Programs with a Schedulable Apex Class in the Sales Programs and Partner Tracks with Enablement Developer Guide.

Assign Users to Enablement Programs with REST API

Create a REST API POST request that uses the assignEnablementPrograms invocable action for assigning Enablement programs.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited**, Editions for an additional cost

See Assign Users to Programs with REST API in the Sales Programs and Partner Tracks with Enablement Developer Guide.

Take Enablement Programs

You can take Enablement programs when an Enablement admin assigns you to a program or shares a program with you for self-enrollment. Take an assigned program starting at 12 AM on the start date, or take a self-enrolled program anytime after you enroll.

REQUIRED EDITIONS

Available in: Lightning Experience
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Unlimited Editions for an additional cost. A supported PRM add-on license is required.

Take an Enablement Program in Lightning Experience

To access an assigned or shared sales program in Lightning Experience, navigate to the Enablement Programs page. From there, you can preview, enroll, and start the program.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED	
To take sales programs in Lightning Experience:	Take Enablement Programs OR Take Enablement Lite Programs

1. From the App Launcher, find and select **Enablement Programs**.
2. To preview a program before you start it, find an assigned or shared program and select **Preview** from the dropdown.
   The preview shows the structure of the program, including titles, descriptions, and due dates for the outcome, milestones, and exercises.
3. If the program was shared with you but not assigned, select **Enroll** from the program's dropdown.
   You receive an email and in-app notification after the enrollment is completed.
4. When you're ready to start the program, select **Take Program** from the program's dropdown.

The program opens in the Guidance Center.

Take a Partner Enablement Program in an Experience Cloud Site

To access an assigned or shared Partner Enablement program in a supported Experience Cloud site, navigate to a site page that shows programs. From there, you can preview, enroll, and start the program.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED	
To take Partner Enablement programs in supported Experience Cloud sites:	Take Partner Enablement Programs AND Member of a supported Experience Cloud site

1. In the Experience Cloud site, go to the page that shows Enablement programs.
2. If a program was shared with you but not assigned, preview the program and enroll in it before you try

to start it.
Programs that you can enroll in show an Enroll button next to the program name. Programs that are assigned to you show “Assigned” above the program name.
   a. To preview a program, click the program name.
      The preview shows the structure of the program, including titles, descriptions, and due dates for the outcome, milestones, and exercises.
   b. To enroll in the program, click **Enroll** in the preview.
      You receive an email and in-app notification after the enrollment is completed. Programs that you enrolled in show “Self-Enrolled” above the program name.
3. To start a program, click the program name.

The program opens on a site page.

Progress Shown When Taking a Program

When you start taking the program, you work through exercises and progress toward the outcome and milestones. Complete the requirements for each program item and check your progress.

Exercise Progress

Some exercises open content in a new browser tab, and some exercises show content on the same tab you’re on.

Most exercises are considered complete after you follow the link, watch the video, or finish the lesson. Some exercise types have unique requirements.

- For an Action Item exercise in a sales program in Lightning Experience, click **Mark as Complete** after you finish the offline activity.
- For a Feedback Request exercise in a sales program in Lightning Experience, specify the URL to content that you want peers, managers, and other leaders to leave feedback on. Select the reviewers that you want to receive an invitation.
- For a Lesson exercise in a Partner Enablement program in an Experience Cloud site, click **Mark as Complete** after you finish the lesson.

Exercise completion is calculated in real time.

If you miss the due date of an exercise, you can still access the linked content after the due date has passed.

Outcome and Milestone Progress

By default, progress for outcomes and milestones is calculated daily at 6:59 AM, 11:59 AM, 4:59 PM, and 11:59 PM, according to your time zone setting in Salesforce. If you don’t want to wait, you can also click **Refresh Progress** when taking the program. To view your progress on an outcome or milestone, click its title. You can see your overall progress percentage on a progress bar and individual records that contribute to your progress in a qualifying records table. To view the details of a qualifying record, click it.

Note You can't view the details of a qualifying record if the milestone or outcome is built to measure a virtual Salesforce entity.

To see your progress toward goals that are measured in averages, you must meet the required record count.

In some programs, multiple milestones require you to complete the same action, or the outcome and incremental milestones require you to complete the same action. When you progress toward one milestone, that progress counts toward other milestones that require the same action.

If you miss the due date of the outcome or a milestone, you can still complete the requirements, but the outcome or milestone's status is Behind. If you don't complete the outcome or milestone 30 days after the program's due date has passed, the outcome's or milestone's status is no longer tracked. At that point, it's no longer possible to complete all items in the program. If the outcome or milestone requires you to complete a voice or video call recorded with Einstein Conversation Insights, progress isn't tracked after the outcome's or milestone's due date has passed.

Program Progress

For sales programs in Lightning Experience, the progress bar shows your progress through the program. Program status completion is computed twice per day–5 AM and 8 PM–according to the time zone set in Salesforce.

Tracking Enablement Program Progress

See how users are performing against an Enablement program's outcomes, milestones, and exercises. Prebuilt dashboards and reports provide insights to help you analyze how well Enablement programs are changing behaviors and improving business outcomes.

REQUIRED EDITIONS

Available in: Lightning Experience
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Enablement Reports and Report Types

Prebuilt reports are available for tracking users' progress toward completing programs, milestones, exercises, and outcomes. If you want to create your own Enablement reports, several report types (also referred to as pre-designed custom report types) are also available.

Considerations for Analyzing Program Completion

The analytics tools for measuring Enablement program, milestone, exercise, and outcome completion have some dependencies and caveats.

View Reports for Enablement Lite Programs

If you're trying Enablement Lite, find analytics for your published programs by navigating directly to Reports and opening the appropriate folder. Enablement Lite doesn't include a prebuilt dashboard like you get with full Enablement and doesn't include the View Analytics button on program record detail pages.

View the Enablement Dashboard from the Enablement Programs Page

For a sales program in Lightning Experience, you can open the prebuilt Enablement dashboard from the Enablement Programs page or the program's record detail page.

View the Enablement Dashboard from the Dashboards Page

For a sales program in Lightning Experience, you can open the prebuilt dashboard from the Dashboards page. With a few extra steps, filter the dashboard to see analytics for a specific program.

View the Partner Enablement Dashboard and Reports

For Partner Enablement programs in Experience Cloud sites, open the prebuilt dashboard from the Dashboards page or the prebuilt reports from the Reports page. Unlike sales programs in Lightning Experience, Partner Enablement programs don't have the View Analytics button on program record detail pages. And, the Partner Enablement dashboard and reports show data for all Partner Enablement programs, not individual programs.

Completion Statuses in Enablement Analytics

Prebuilt Enablement reports and dashboards show status values for programs, outcomes, milestones, and exercises.

Enablement Reports and Report Types

Prebuilt reports are available for tracking users' progress toward completing programs, milestones, exercises, and outcomes. If you want to create your own Enablement reports, several report types (also referred to as pre-designed custom report types) are also available.

REQUIRED EDITIONS

Available in: Lightning Experience
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Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and

Unlimited Editions for an additional cost. A supported PRM add-on license is required.

Prebuilt Reports

Find prebuilt reports for different Enablement program types in separate folders. Prebuilt reports track program completion, exercise completion, milestone progress, and outcome progress. User progress data includes users that are assigned to programs and users who have self-enrolled. If Enablement analytics change, we update the prebuilt reports in a release with a new version. When the prebuilt analytics don't change, the reports from the previous release remain the latest version. For example, if the analytics don't change in Winter '25, the reports in Enablement Dashboard Reports Summer '24 folder remain the latest version. For Enablement Lite and full Enablement programs, analytics include reports that track responses for Feedback Request exercises.

Report Types

These report types can be used to create custom reports. These report types are available when you create custom reports. See Build Reports in Lighting Experience.

Enablement Lite Report Type	Enablement Report Type	Partner Enablement Report Type	Description
Feedback Responses *Release Name* (Enablement Lite)	Feedback Responses *Release Name*	None	Report on the feedback delivered to users by their peers and managers via the Feedback Request exercise. Add details to your report such as assessment survey questions, ratings, short text responses, and the names of responders.
Program Definition *Release Name* (Enablement Lite)	Program Definition *Release Name*	None	Review your analytics with a program-like structure. See each program task, target day, results, and more directly in a report and dashboard.
Program Progress *Release Name* (Enablement Lite)	Program Progress *Release Name*	Program Progress *Release Name* (Partners)	Report on program progress. The overall program progress isn't captured in this report.
Program Item Progress *Release Name* (Enablement Lite)	Program Item Progress *Release Name*	Program Item Progress *Release Name* (Partners)	Report on tasks like exercises, milestones, and outcome progress. Overall program progress isn't captured in this report.

Note Partner Enablement programs don't include Action Item, Feedback Request, and Trailhead exercise types.

See Also

View Reports for Enablement Lite Programs
Completion Statuses in Enablement Analytics
Build a Report in Lightning Experience

Considerations for Analyzing Program Completion

The analytics tools for measuring Enablement program, milestone, exercise, and outcome completion have some dependencies and caveats.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Program Types

Separate reports and dashboards are available for different program types.

- For Enablement Lite, prebuilt reports are available.
- For full Enablement, prebuilt reports and a dashboard are available.
- For Partner Enablement, prebuilt reports and a dashboard are available.

When you upgrade from Enablement Lite to full Enablement, the prebuilt reports remain available but are no longer refreshed.

Release-Specific Reports and Dashboards

The prebuilt reports and dashboards are updated each release to reflect the latest Enablement enhancements. A Salesforce admin can refresh the prebuilt reports and dashboards from Setup. If your Enablement team has customized any of the prebuilt reports and dashboards, let your Salesforce admin know before they refresh. See Refresh the Enablement Reports and Dashboard.

Completed Programs and Removed Users

After a user completes a program, they remain enrolled in the program unless you remove them. The enrollment counts toward the maximum number of users enrolled in the program, including both assigned users and users who have self-enrolled.

When you remove a user from a program they were previously enrolled in, analytics data is no longer available for that user on that program. If you reassign the same user to that same program later, or the same user re-enrolls in the same program, some analytics data isn't retained.

Dashboard Customization

The Enablement dashboards are available to other users with Enablement admin permissions. Changes that you make to the prebuilt dashboards are visible to everyone else. If you want to modify the prebuilt dashboards, clone the dashboard first.

You can open a cloned dashboard only from the Dashboards page. The View Analytics button on the Enablement Programs page or record detail page opens only the prebuilt dashboard.

Outcome and Milestone Progress

By default, progress for outcomes and milestones is calculated daily at 6:59 AM, 11:59 AM, 4:59 PM, and 11:59 PM, according to your Salesforce org’s time zone setting. Users can also refresh outcome and milestone progress on demand when they take the program.

Outcomes and milestones that use average-based measures show 0% progress until the user meets the minimum sample size you specified in Program Builder.

A program can include multiple milestones that all reference the same measure. When a user taking the program progresses toward one of these milestones, their progress counts toward all milestones that reference that measure.

In most cases, outcomes and milestones with the Behind or Overdue status are still tracked for up to 30 days after the program’s due date. Then, the status changes to No longer tracking, except in these two cases.

- The outcome or milestone uses an Einstein Conversation Insights (ECI) object, in which case progress is tracked only until the outcome’s or milestone’s due date.
- Your company contacted Salesforce Customer Support to change the number of days that milestones and outcomes are tracked beyond the program’s due date.

If you edit the criteria for an outcome or milestone in a published program, users’ progress and program analytics aren’t retained.

Exercise Progress

Exercise completion is calculated in real time.

You can include the same content link on multiple exercises within the same program. But when a user clicks a link for one exercise, all exercises that reference that link are marked as complete when the page refreshes.

Enablement admins can replace exercise content for a published program, but in most cases we recommend that you don't edit programs that users are taking.

See Also

Completion Statuses in Enablement Analytics
Guidelines for Assembling Enablement Programs
Considerations for Creating and Editing Measures
Refresh the Enablement Reports and Dashboard
Enablement Limits

View Reports for Enablement Lite Programs

If you're trying Enablement Lite, find analytics for your published programs by navigating directly to Reports and opening the appropriate folder. Enablement Lite doesn't include a prebuilt dashboard like you get with full Enablement and doesn't include the View Analytics button on program record detail pages.

REQUIRED EDITIONS

Available in: Lightning Experience
Available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS NEEDED	
To view Enablement Lite prebuilt reports:	Design and Deliver Enablement Lite Programs
To create and customize Enablement Lite reports:	Create and Customize Reports
To run Enablement Lite reports:	Run Reports

If you opt in to the Unified Home experience for analytics, reports and dashboards across Salesforce are aggregated under one Analytics tab. See Manage Your Reports and Dashboards in Analytics Home.

1. From the App Launcher, find and select **Reports**.
2. Select **All Folders**.
3. Select **Enablement Lite Reports *Release Name***.

See Also

Enablement Lite Considerations and Limitations
Refresh the Enablement Reports and Dashboard

View the Enablement Dashboard from the Enablement Programs Page

For a sales program in Lightning Experience, you can open the prebuilt Enablement dashboard from the Enablement Programs page or the program's record detail page.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited**, Editions for an additional cost

USER PERMISSIONS NEEDED	
To view the prebuilt Enablement dashboards and reports:	Design and Deliver Enablement Programs
To create and customize Enablement dashboards:	Create and Customize Dashboards
To create and customize Enablement reports:	Create and Customize Reports
To manage dynamic dashboards:	Manage Dynamic Dashboards
To run Enablement reports:	Run Reports
To view your team's dashboards:	View My Team's Dashboards

If you opt in to the Unified Home experience for analytics, reports and dashboards across Salesforce are aggregated under one Analytics tab. See Manage Your Reports and Dashboards in Analytics Home.

1. From the App Launcher, find and select **Enablement Programs**.
2. From the Enablement Programs page, find the program you want to see analytics for.
3. Click the dropdown menu for that program.
4. Select **View Analytics**.

This option always opens the latest version of the prebuilt Enablement dashboard, which shows data from the latest prebuilt Enablement reports. If you customized or modified the dashboard or reports, access them directly from the Dashboards or Reports page instead.

Tip If you can't access the dashboard after completing these steps, submit a Salesforce Customer Support case.

The View Analytics button isn't available for Enablement Lite or Partner Enablement programs. Instead, navigate to the Dashboards or Reports pages.

See Also

Considerations for Analyzing Program Completion

View the Enablement Dashboard from the Dashboards Page

For a sales program in Lightning Experience, you can open the prebuilt dashboard from the Dashboards page. With a few extra steps, filter the dashboard to see analytics for a specific program.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited**, Editions for an additional cost

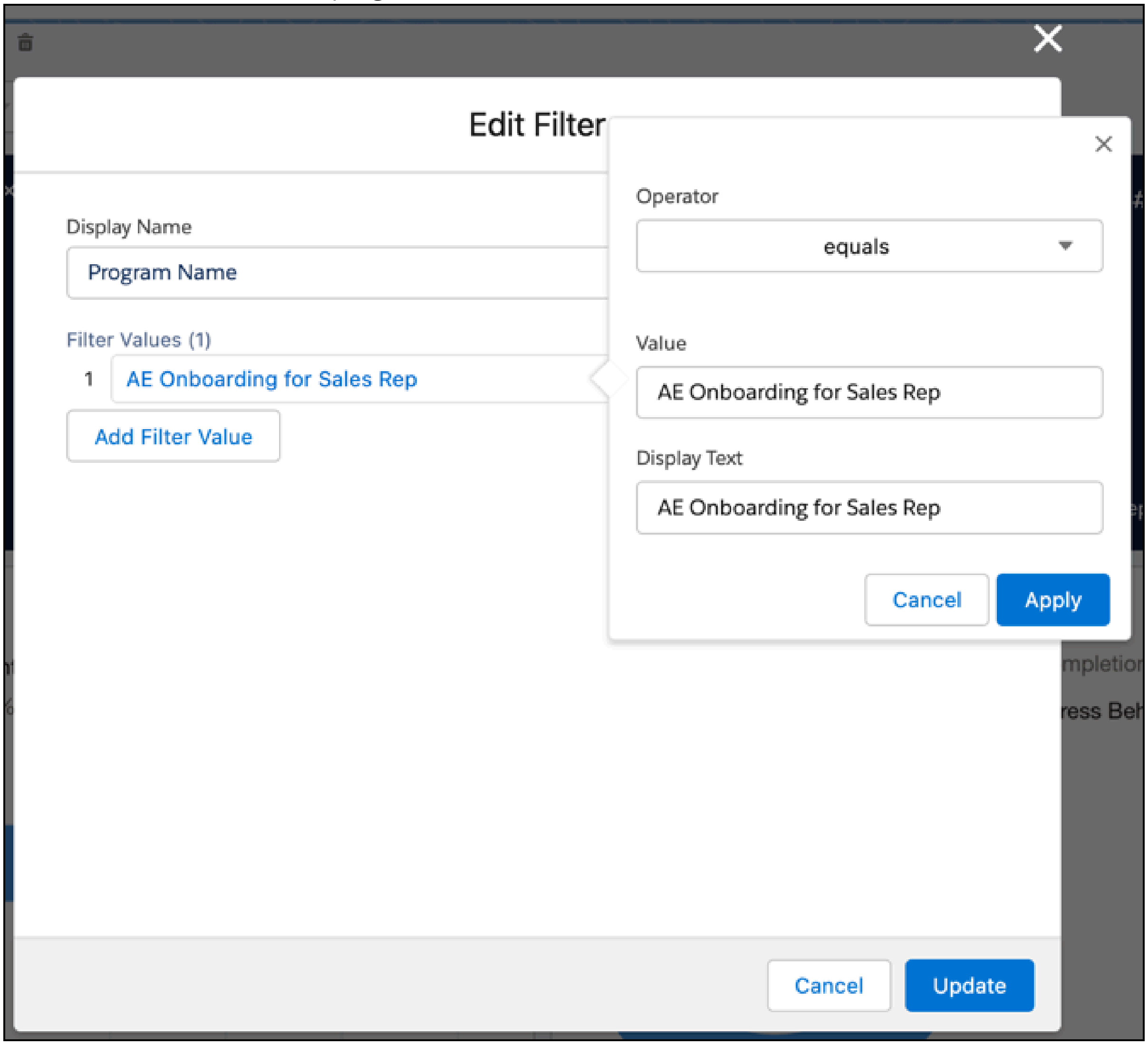
USER PERMISSIONS NEEDED	
To view the prebuilt Enablement dashboards and reports:	Design and Deliver Enablement Programs
To create and customize Enablement dashboards:	Create and Customize Dashboards
To create and customize Enablement reports:	Create and Customize Reports
To manage dynamic dashboards:	Manage Dynamic Dashboards
To run Enablement reports:	Run Reports
To view your team's dashboards:	View My Team's Dashboards

When you open the prebuilt dashboard from a specific Enablement program's View Analytics button, the dashboard is already filtered to the program. When you open a dashboard from the Dashboards page, apply dynamic filtering to view analytics for a specific program. If you cloned the prebuilt dashboard, you can open the cloned dashboard only from the Dashboards page.

If you opt in to the Unified Home experience for analytics, reports and dashboards across Salesforce are aggregated under one Analytics tab. See Manage Your Reports and Dashboards in Analytics Home.

1. From the App Launcher, find and select **Dashboards**.
2. Select **All Folders**.
3. Select the **Enablement Dashboard *Release Name*** folder.
4. Select **Enablement Dashboard**.
5. From the dashboard, click **Edit**.
6. Next to Program Name, click the pencil icon.

7. In the Edit Filter window, click **Add Filter Value**.
8. Keep Operator as equals.
9. In the Value field, enter the program name.



10. Click **Apply**, then **Update**.

Data for the program now appears in your dashboard.

View the Partner Enablement Dashboard and Reports

For Partner Enablement programs in Experience Cloud sites, open the prebuilt dashboard from the Dashboards page or the prebuilt reports from the Reports page. Unlike sales programs in Lightning Experience, Partner Enablement programs don't have the View Analytics button on program record detail pages. And, the Partner Enablement dashboard and reports show data for all Partner Enablement programs, not individual programs.

REQUIRED EDITIONS

Available in: Lightning Experience
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To view the prebuilt Partner Enablement dashboard and reports:	Design and Deliver Enablement Programs AND Sharing access to the `PRM Reports` and `PRM Dashboards` root folders
To create and customize Partner Enablement dashboards:	Create and Customize Dashboards
To create and customize Partner Enablement reports:	Create and Customize Reports
To run Partner Enablement reports:	Run Reports
To view your team's dashboards:	View My Team's Dashboards

If you opt in to the Unified Home experience for analytics, reports and dashboards across Salesforce are aggregated under one Analytics tab. See Manage Your Reports and Dashboards in Analytics Home.

1. From the App Launcher, go to the appropriate page.
   - For dashboards, find and select **Dashboards**.
   - For reports, find and select **Reports**.
2. Select **All Folders**.
3. Navigate to the appropriate subfolder.
   - For the dashboard, go to **PRM Dashboards | Partner Enablement | Partner Enablement Dashboard *Release Name***.
   - For reports, go to **PRM Reports | Partner Enablement | Partner Enablement Reports *Release Name***.
4. Select the dashboard or report.
   - For the dashboard, select **Partner Enablement Dashboard**.
   - For reports, select the report name you want to open.

See Also

Considerations for Partner Enablement Programs

Refresh the Enablement Reports and Dashboard

Completion Statuses in Enablement Analytics

Prebuilt Enablement reports and dashboards show status values for programs, outcomes, milestones, and exercises.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

Program Completion Statuses

Completion Status	What the Status Tells You About the Program
Not started	Users have made no progress toward any program items, or the program's start date is in the future.
On track	Users started the program and haven't completed all program items, but the program's due date is in the future.
Behind	Users started the program and haven't completed all program items, but the program's due date is in the past.
Completed on time	Users completed all program items before or on the program's due date.
Completed late	Users completed all program items but at least one item was completed after the program's due date.

Outcome and Milestone Completion Statuses

Completion Status	What the Status Tells You About the Outcome or Milestone
Not completed	Users haven't completed the outcome or milestone yet, but the item's due date is today or in the future.
Behind	Users haven't completed the outcome or milestone yet, but the item's due date is in the past.

Completion Status	What the Status Tells You About the Outcome or Milestone
Completed on time	Users completed the outcome or milestone on or before the item's due date.
Completed late	Users completed the outcome or milestone, but the item's due date is in the past.
Overdue	Users haven't completed the outcome or milestone, but the program due date is in the past.
No longer tracking	Users haven't completed the outcome or milestone, and more than 30 days have passed after the program's due date.

In most cases, outcomes and milestones with the Behind or Overdue status are still tracked for up to 30 days after the program's due date. Then, the status changes to No longer tracking, except in these two cases.

- The outcome or milestone uses an Einstein Conversation Insights (ECI) object, in which case progress is tracked only until the outcome's or milestone's due date.
- Your company contacted Salesforce Customer Support to change the number of days that milestones and outcomes are tracked beyond the program's due date.

Exercise Completion Statuses

Completion Status	What the Status Tells You About the Exercise
Not completed	Users haven't completed the exercise yet, but the exercise's due date is today or in the future.
Behind	Users haven't completed the exercise yet, but the exercise's due date is in the past.
Completed on time	Users completed the exercise on or before the exercise's due date.
Completed late	Users completed the exercise, but the exercise's due date is in the past.
Overdue	Users haven't completed the exercise, but the program's due date is in the past.

See Also
Considerations for Creating and Editing Measures
Enablement Reports and Report Types

Maintaining Enablement Programs

Manage the quality of your Enablement programs over time. You can clone existing programs, remove users, unpublish programs, or edit programs you already published.

Editing Published Enablement Programs That Users Are Taking

You can modify some details of a published program even after users start taking it. For some simple changes to names, titles, and descriptions, you can edit and save the program without disrupting the user experience or the integrity of your analytics. Other changes require you to remove users and unpublish programs, which can be disruptive.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and

Unlimited Editions for an additional cost. A supported PRM add-on license is required.

Edits That Don't Affect Analytics

For these types of edits to published Enablement programs, users receive your changes after you save. The changes don't disrupt your analytics.

- Program name and description
- Outcome title and description
- Section titles
- Milestone titles and descriptions
- Exercise titles and descriptions

Note For considerations about editing Enablement measures in programs that users are taking, see Considerations for Creating and Editing Measures.

Edits That Affect Analytics

What if you want to edit a part of a published Enablement program other than the titles and descriptions of the program, outcome, milestones, and exercises? These types of changes can be more disruptive to the user experience and the integrity of your analytics. Review the options available for handling these types of changes.

Option 1: Retire the Program (Recommended)

To avoid disrupting analytics for these types of changes, we recommend that you let currently enrolled users complete the program. Then, retire the program, and start a new program with the updated details and a new set of users. The new program has separate analytics.

Option 2: Unpublish, Edit, and Republish the Program

Alternatively, you can edit the program for these types of changes at the same time that users are taking it, which disrupts your analytics. In this case, users only receive the changes after you remove users, unpublish the program, make your changes, republish the program, and add users back. These steps remove any program progress made by users who are still taking the program. Analytics from users who completed the program are no longer retained.

However, in some cases, editing a published program can be worth the extra work.

- If the program is new, or few users are taking it, then editing the program perhaps outweighs the effort of rolling out a new program.
- If you're replacing a measure for an outcome or milestone, or you're correcting an invalid measure, then progress analytics are disrupted anyway.

See Also

Remove Users from an Enablement Program
Unpublish Enablement Programs
Publish Enablement Programs
Assign Users to Enablement Programs Manually
Share Enablement Programs So Users Can Self-Enroll
Considerations for Creating and Editing Measures

Clone Enablement Programs

Create more programs quickly by cloning programs, regardless of the program's status. The cloned programs retain all the outcomes, sections, milestones, and exercises, along with the referenced content and measures from the original programs. Cloned programs have their own analytics.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To clone programs:	Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs

1. From the App Launcher, find and select **Enablement Programs**.
2. From the Enablement Programs page, click the dropdown menu next to the program that you want to clone.
3. Click **Clone**.
4. In Program Builder, modify the new program, and then save your changes.

The new program is a draft until you publish it.

See Also

Editing Published Enablement Programs That Users Are Taking
Designing Enablement Programs

Remove Users from an Enablement Program

Remove enrolled and assigned users from an Enablement program when it no longer pertains to them or has reached the enrollment limit. You can manually select the users that you want to remove, or filter them by profile, role, and public group.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To remove a user from a program:	Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs

After a user completes a program, they remain enrolled in the program unless you remove them. The enrollment counts toward the maximum number of users enrolled in the program, including both assigned users and users who have self-enrolled.

When you remove a user from a program they were previously enrolled in, analytics data is no longer available for that user on that program. If you reassign the same user to that same program later, or the same user re-enrolls in the same program, some analytics data isn't retained.

1. From the App Launcher, find and select **Enablement Programs**.
2. On the Enablement Programs page, click the dropdown menu next to the program that you want to remove users from or navigate to the program's record detail page.
3. Select **Remove Users**.
4. Search for and select the users to remove, or apply a filter and select the matching users.
5. click **Remove**.

When you remove 5 or fewer users from a program, a confirmation appears in the removal window. When you remove more than 5 users, you receive an email notification.

See Also

Editing Published Enablement Programs That Users Are Taking

Unpublish Enablement Programs

For major changes to published programs, such as adding or removing program items, updating parameters for outcomes or milestones, or updating exercise content, first unpublish the program.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To unpublish a program:	Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs

1. From the App Launcher, find and select **Enablement Programs**.
2. Remove any enrolled users.

   When you remove a user from a program they were previously enrolled in, analytics data is no longer available for that user on that program. If you reassign the same user to that same program later, or the same user re-enrolls in the same program, some analytics data isn't retained.

3. From the Enablement Programs page, click the dropdown menu next to the program that you want to unpublish.
4. Select **Unpublish**.

See Also

Editing Published Enablement Programs That Users Are Taking

Uninstall Packaged Enablement Programs and Dependencies

To remove Enablement programs and all dependencies that were installed from a managed package, first deactivate the dependencies and delete the program. Then uninstall the managed package.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

USER PERMISSIONS NEEDED	
To modify Enablement programs and measures:	Design and Deliver Enablement Programs OR Design and Deliver Enablement Lite Programs
To modify assessment surveys:	Manage Assessment Surveys default permission set (part of the Enablement Resources Manager permission set group)
To unpublish Digital Experiences content:	Content Manager contributor role in the Enablement workspace in Digital Experiences

1. Make sure that no users are enrolled in the program and that the program is unpublished. See Unpublish Enablement Programs.
2. Edit the program and delete the outcome and milestones that reference Enablement measures that were packaged with the program.
3. Edit the program and delete exercises that reference Digital Experiences content, assessment surveys, or custom content sources.
4. In the Surveys app, archive assessment surveys that were packaged with the program.
5. In the Digital Experiences app, unpublish content that was packaged with the program.
6. Delete the program.
7. Uninstall the managed package that installed the program.

See Also

Installing Enablement Programs from Managed Packages
Remove Users from an Enablement Program
Unpublish Enablement Programs

Enablement Limits

When creating Enablement measures, creating Enablement programs, and making programs available to users, keep limits for measures, programs, and enrollment in mind.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
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Program Limits

Limit	Sales Programs in Lightning Experience	Partner Enablement Programs in Experience Cloud Sites
Maximum number of programs, including published and unpublished programs	300[1]	100
The maximum number of items in a program, including: • Outcome, if the Outcome-Based Program option is turned on • Milestones • Default and custom exercises	50	30
Maximum number of sections in a program	50	50
Maximum number of goals in a program, including outcome and milestones	10	5
Maximum number of composite	5	2

Limit	Sales Programs in Lightning Experience	Partner Enablement Programs in Experience Cloud Sites
goals in a program, including composite outcome and milestones		
Maximum value for the Measure Target field in a milestone if the selected measure is of aggregation type Count	1,000	1,000
Maximum value for the Measure Target field in a milestone if the selected measure is of aggregation type Sum	999,999,999.99	999,999,999.99
Maximum value for the Day field in the outcome, a milestone, or an exercise	365	365
Maximum number of Feedback Request exercises in a program	6	Not applicable
Maximum number of reviewers for peer and manager feedback in a Feedback Request exercise	5	Not applicable
Maximum number of custom exercises in a program	50	Not applicable
Maximum number of custom exercise types in a Salesforce org	10	Not applicable
Maximum number of custom learning item types in an org	15,000	Not applicable
Maximum number of custom learning items of a specific type in an org	15,000	Not applicable

Measure Limits

Limit	Sales Programs in Lightning Experience	Partner Enablement Programs in Experience Cloud Sites
Maximum number of measures	100	100
Maximum number of related	2	2

Limit	Sales Programs in Lightning Experience	Partner Enablement Programs in Experience Cloud Sites
objects in a measure		
Maximum number of filter conditions referenced in a measure	15 total: • 5 for the source object • 5 for each related object	15 total: • 5 for the source object • 5 for each related object
Maximum number of levels on the measure filter condition lookup field	2	2
Maximum number of records that can be recorded on a milestone	1,000	1,000

Enrollment Limits

Limit	Sales Programs in Lightning Experience	Partner Enablement Programs in Experience Cloud Sites
Maximum number of users assigned to or enrolled in a program	1,000[2]	10,000
Maximum number of users that you can select individually in the assignment window	1,000	1,000

To request an increase in the maximum number of users assigned to or enrolled in a program, submit a Salesforce Customer Support case.

See Also
Considerations for Creating and Editing Measures
Considerations and Limitations for Enrolling Users in Enablement Programs
Enablement Lite Considerations and Limitations
Considerations for Partner Enablement Programs

[1] If you're trying Enablement Lite, you can create up to 300 unpublished programs but publish only 2.

[2] If you're trying Enablement Lite, you can assign permissions to up to 15 users.

Supported Languages for Enablement

Most features for creating and taking Enablement programs are available in all languages that Salesforce supports. But some records, content, and other items support only one language.

REQUIRED EDITIONS

Available in: Lightning Experience
Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, **Unlimited**, and **Einstein 1 Sales Edition** Editions for an additional cost
Enablement Lite is available with Sales Cloud in: **Enterprise**, **Performance**, and **Unlimited** Editions
Partner Enablement is available in **Developer** Edition with a limited number of add-ons. It is also available with Sales Cloud, Service Cloud, or the Salesforce Platform in: **Enterprise**, **Performance**, and **Unlimited** Editions for an additional cost. A supported PRM add-on license is required.

These items are available in English only.

- Program templates
- Prebuilt measures
- Titles, descriptions, and the text provided in text fields in prebuilt reports and dashboard

These items appear in the language that you write them in, but support for multiple languages isn't available. For Partner Enablement programs, these items aren't available for translation if your Experience Cloud site has multiple languages.

- Program titles and descriptions
- Milestone titles and descriptions
- Exercise titles and descriptions
- Content that you add for exercises

For Feedback Request exercises that use Einstein Coach, Einstein can only evaluate recordings with English transcriptions, but can generate and translate feedback in other supported languages. See Considerations for Einstein Coach in Feedback Request Exercises.

For Trailhead exercises, not all Trailhead modules are available in all supported languages. If the Enablement user's preferred language isn't English, the program tries to show the module in the user's preferred language. Otherwise, the program shows the module in English.

See Also

Supported Languages

Multilingual Sites