salesforce

Sales Engagement Implementation Guide

Salesforce, Spring ’24

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CONSIDERATIONS FOR SETTING UP SALES ENGAGEMENT

Before setting up Sales Engagement, consider these requirements, limitations, and nuances for each feature.

Note: The High Velocity Sales name has changed to Sales Engagement. The automation features within the product now include customer engagement tracking, chatbots, cadences, and automated actions. The new name captures all the tools to use to automate processes and to engage strategically with leads and customers so that your sales team can focus on selling.

EDITIONS

Available in: Lightning Experience

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

General Considerations for Sales Engagement

Learn about general considerations for setting up Sales Engagement.

EDITIONS

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General Considerations

- Enhanced Email must be enabled.
- No support in Experience Cloud sites.
- Sales Engagement supports lead, contact, and person account records.
- Inbox and Einstein Lead Scoring are included with Sales Engagement.
- Sales Dialer is available for an extra cost as an add-on license.
- Sales Engagement can be deployed in scratch orgs, but the settings for the feature can't be updated through the scratch org definition file. Instead, configure settings directly in the Sales Engagement app.
- Sales Engagement is supported in sandbox orgs. If you're creating a sandbox from a production org that has Sales Engagement enabled, you must enable the product in Setup again. It's disabled in the sandbox org by default.
- Some Sales Engagement features, such as Salesforce Inbox, require that users have Microsoft® Exchange or Gmail™ accounts.
- Turning on and using Sales Engagement in Government Cloud and Government Cloud Plus organizations may send data outside the authorization boundary. For more information, please contact your account executive.
- Sales Engagement included in Sales Cloud Unlimited Edition provides analytics reporting using the CRM Analytics platform. When using this functionality, your license doesn't allow you to:
  - Build custom analytics apps or dashboards
  - Upload, access, or connect external data using the API with the exception of datasets provided with Sales Cloud Einstein
  - Import data from Salesforce standard or custom objects that aren't included in this feature

User Permissions

Salesforce Admin or User Task	Preferences and Permissions Required
Set up Sales Engagement	Customize Application, Modify All Data, Assign Permission Sets, and Manage Users
Use Sales Engagement	Convert Leads, Send Email, Edit Tasks, and Sales Engagement User, Sales Engagement User Included, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set
Create cadences	Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permission set
Manage the Activities dashboard and Lead Score dashboard	Analytics for Sales Cloud license (three permission sets included)
View the Analytics Sales Engagement Performance Dashboards	Sales Engagement User, Sales Engagement User Included, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set

Salesforce Admin or User Task	Preferences and Permissions Required
Use Dialer	Dialer Inbound, Dialer Outbound, and Dialer Minutes permission sets
Create email templates for cadences	Manage Public Lightning Email Templates
Create cadence folders	Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permission set
Edit and manage private cadence folders	Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permission set
View shared cadence folders	Sales Engagement User, Sales Engagement User Included, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set, plus view access to the shared folder
Edit shared cadence folders	Sales Engagement User, Sales Engagement User Included, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set, plus edit or manage access to the shared folder
Manage other users' access to shared cadence folders	Sales Engagement User, Sales Engagement User Included, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set, plus manage access to the shared folder
Create a quick cadence	Sales Engagement Basic permission set

Einstein Activity Capture Considerations for Sales Engagement

Learn about general considerations for setting up Sales Engagement.

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Einstein Activity Capture

- Depending on which authentication method you use to connect Salesforce to your email and calendar application, Einstein Activity Capture users are prompted to connect their email and calendar to Salesforce or accept terms of service.
- To connect an account, Einstein Activity Capture users who don't use Inbox must be in an active configuration.
- To capture emails and events, Einstein Activity Capture users must be in an active configuration. If you started using Einstein Activity Capture before Summer '23, users can capture emails and events without being in a configuration.
- Turning on Einstein Activity Capture in Government Cloud and Government Cloud Plus organizations can send data outside the authorization boundary. Contact your Salesforce account executive for more details.

- For events and contacts to sync, the connected email account must be the user's primary account (the email account on their Salesforce user record). It must not be an email alias, and it must be in the user principal name (UPN) format.
- Einstein Activity Capture works with all Salesforce-supported languages. But only ASCII characters are supported in email addresses.
- Einstein Activity Capture users can't delete emails that Einstein Activity Capture adds to Salesforce. Admins can delete past emails and events that include a specific person based on their email address or username.
- If you use Salesforce Essentials Email-to-Case, make sure that the email address you use to connect to Salesforce is different from the one that you use to connect Einstein Activity Capture to Salesforce.
- You can't use Einstein Activity Capture and Lightning Sync at the same time.
- If using Lightning Sync or a version of Einstein Activity Capture without sync, we remove old configurations and settings before you create an Einstein Activity Capture configuration.
- When opportunities have no overdue tasks and Einstein Activity Capture is enabled, the alerts on Opportunity Kanban aren't shown.
- Einstein Activity Capture included in Sales Cloud Unlimited Edition provides analytics reporting using the CRM Analytics platform. When using this functionality, your license doesn't allow you to:
  - Build custom analytics apps or dashboards
  - Upload, access, or connect external data using the API with the exception of datasets provided with Sales Cloud Einstein
  - Import data from Salesforce standard or custom objects that aren't included in this feature
- Activities that are captured by Einstein Activity Capture aren't stored in Salesforce, so they don't show up in standard Salesforce reports. Use the Activities dashboard to see a summary of sales activities that were added to Salesforce manually and by Einstein Activity Capture. You can also use Activity Metrics to get a complete picture of your activities.
- When Einstein Activity Capture is disabled, email tracking isn't displayed in Lightning Experience for emails sent from the Outlook or Gmail integration that aren't part of a cadence.
- To stop capturing the emails of a specific user, add them to an Einstein Activity Capture configuration with emails disabled. Sales Engagement permission sets have the "Use Inbox" permission enabled by default. Users with the "Use Inbox" permission enabled can't be in a configuration that has email disabled because some Inbox features require email data. You can clone one of the standard Sales Engagement permission sets, disable the "Use Inbox" permission, and enable the "Use Einstein Activity Capture" permission. Then, assign the permission set to users whose emails you don't want captured. Add those users to a configuration that has emails disabled.

Email Considerations for Sales Engagement

Learn about email considerations for setting up Sales Engagement.

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Email in Sales Cadences

Automated emails are set up as a cadence step.

- When automated emails are sent through Salesforce, they have a daily org limit that is typically set to 5,000. For more information about this limit, see List Email Limitations. To increase the limit, contact Salesforce Customer Support.
- When automated emails are sent through external services, such as Office 365 or Gmail, they don't count toward your org's daily email limit.

  We recommend that customers send automated email through external services.
- Reps with the complete Sales Engagement permission can send up to 1,000 automated emails a day. Reps with the Sales Engagement Basic permission can send up to 100 automated emails a day.
- There isn't a limit to the number of users who can send automated emails.
- List emails don't count towards the daily automated email limit for each user.
- Email templates used in cadences must be accessible to the sales rep. Store them in the public folder.
- Email templates used in cadences must have a blank Related Entity Type value and can only use merge fields for Sender, Recipient, or Organization.
- If an email is scheduled from a cadence, and the contact is either removed from the cadence or moved to another cadence, the scheduled email isn't sent. The cadence step returns to an active state. The draft email is deleted and no longer appears on the Scheduled Emails component.
- When scheduling an email to send later, use a Classic text email template, a Lightning email template, or an Email Template Builder email template.

Email Tracking

- Email tracking is optional in Sales Engagement. To use tracking, enable Make Inbox Available to Users in Setup and assign an Inbox permission set to users. Then turn on email tracking in Sales Engagement. We recommend turning on the Email Tracking option in Sales Engagement before creating cadences.
- If you turn email tracking off in Sales Engagement, listener actions for email engagements aren't available to add to cadences. Active cadences that contain listener actions for email engagements no longer advance through those steps automatically.
- If you turn email tracking off in Sales Engagement, email tracking is also off for all email sent from Lightning Experience. If you turn off Enable Email Tracking in Activity Settings in Salesforce setup, you also turn off email tracking for emails started from the Work Queue in Sales Engagement.
- If you turn email tracking off in Sales Engagement and your sales reps use the Work Queue in Outlook or Gmail, we recommend turning email tracking off in the integrations. To disable email tracking in the Outlook and Gmail integrations, turn off the Email Tracking option on the Inbox Setup Assistant page in Setup.

Integration with Outlook and Gmail

- The Work Queue isn't always included in the email integration pane by default when Sales Engagement is enabled. If you've already created a custom pane, or edited default email panes, add the Work Queue component using the Lightning App Builder. Then assign the pane to the user profiles of users who use the Work Queue.
- The My Feed tab in the Work Queue shows engagements and alerts for emails sent from the Work Queue and tracked emails sent from outside the Work Queue. That information is also shown in the Feed tab in the email integration pane. To prevent duplicate feeds for reps who use the Work Queue, use the Lightning App Builder to remove the Feed tab from the email integration pane. Assign that custom pane to Sales Engagement users.
- In the Outlook integration, if a user deletes the Email to Salesforce address (the BCC address) or removes the tracking information from the email body, the email can't be tracked.
- If you turn email tracking off in Sales Engagement and your sales reps also use the Work Queue in Outlook or Gmail, we recommend also turning email tracking off for the integrations. To disable email tracking in the integrations, turn off the Email Tracking option on the Inbox Setup Assistant page in Setup.
- Attachments in email templates aren't supported in the Outlook or Gmail integrations. The template text inserts without the attachment.
- Emails sent from the Work Queue in Outlook or Gmail can bypass Email Opt Out or individual privacy preferences set in Salesforce. Salesforce displays customers' email privacy settings, but it's up to sales reps to respect these preferences.
- In Outlook on the web, there are limitations to how emails are threaded if reps reply to or forward an email that's been logged to Salesforce from the Outlook Sent Items folder. If the sent email is part of an email thread, but isn't part of a previous cadence step, then the email isn't included in the thread. In this case, if the last email in the thread is the sent email, that email isn't considered the most recent in the thread.
- Making calls isn't supported in the Work Queue in the Outlook or Gmail integrations.
- Emails sent from the Outlook or Gmail integrations initially show as In Progress in the Work Queue.

Engagement and Alerts Considerations for Sales Engagement

Learn about engagement and alerts considerations for setting up Sales Engagement.

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Engagement and Alerts

- Alerts appear in the My Feed tab for 30 days. If an email open, reply, or link click occurs within 90 days of when an email was sent, a new alert appears.
- If you're using Einstein Activity Capture, email open, reply, and link click alerts appear for emails sent to excluded email addresses. These emails and their related alerts are visible only to the email sender.
- Deleting leads, contacts, emails, or email templates doesn't delete their related alerts.
- If multiple users connect the same mail account to Einstein Activity Capture, email reply alerts don't appear for that account.
- Email reply alerts appear only for Einstein Activity Capture users.
- For emails that aren't logged or are logged after they're sent, open and link click alerts appear in My Feed. However, users can't click these alerts to view the email content.
- When cadence emails are sent to cadence targets, with other recipients added, alerts appear in My Feed only for cadence targets.
- Clicking email reply alerts in My Feed opens the email in a new console tab.

- The My Feed tab loads more alerts in groups of 15 when you scroll. While alerts load, if new alerts occur an out-of-sync message can appear. To sync the tab, click **Refresh**.
- When a new engagement occurs, it can take from 3–10 minutes for the My Feed tab to prompt the user to refresh.
- When an email hard bounce occurs, it can take up to 10 minutes for the alert to appear.
- When an email has multiple recipients, replies, soft and hard bounces, and out-of-office replies are tracked for each email recipient. Email opens and link clinks are still tracked per email sent, and not per recipient.
- Engagement data is available in the Sales Engagement component for emails and calls made in December, 2020 and later.

Work Queue Considerations in Sales Engagement

Learn about considerations for using the Work Queue in Sales Engagement.

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Work Queue Considerations

- The Work Queue is supported only in the split view in Lightning Console and in the Outlook and Gmail integrations.
- The Work Queue can show up to 1,000 prospects that belong to cadences at a time.
- If you change a cadence name, the new name doesn't appear in the Work Queue for currently pending steps. A workaround is to remove the cadence from the Work Queue view and then add it again.

Cadence Considerations for Sales Engagement

Learn about considerations for using cadences in Sales Engagement.

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Cadences

- Only leads, contacts, and person accounts are supported in cadences.
- Before merging duplicate records, be sure none of the records you're deleting are in a cadence.
- Tasks related to cadence steps are created and updated automatically. Users can't edit these tasks, but they can delete them after the cadence step has been completed.
- The maximum number of steps in a cadence is 100.
- The maximum length of a wait step is 60 days.
- You can add up to 200 targets to a cadence at once, except when adding them from an opportunity. You can add only 20 opportunity contacts to a cadence at one time.
- When a lead converts, completed cadence tasks aren't transferred to the Activity Timeline of the new contact, account, or opportunity.
- Before managers can create branched cadences based on call outcomes, an admin must map your org's call result values in Sales Engagement Setup.

- When pre-defining an email template for a cadence step, you can only use Lightning email templates.
- Users can't add targets when the cadence has an automated email as the first step and the number of targets will cause them to exceed their daily limit of automated email.
- The limit of active cadence targets is 500,000 per Salesforce org. If your usage exceeds this amount, please contact your Salesforce Account Executive for pricing.
- The Cadence field shouldn't be used on lead, contact, or account search layouts in Lightning Experience and Salesforce Classic, or on list views in Salesforce Classic.
- The Cadence and Cadence Assignee fields on lead, contact, and person account records can't be used to as field criteria in workflow rules and Process Builder.
- Cadence step trackers don't support triggers, but you can use triggers on the related task records as a substitute.
- For these cadence step types, the system creates a task record. Users can't edit these records directly. The task records are marked complete when the user completes the related cadence step. There can be a slight delay between when the user completes the step and the task record is updated.
  - Send an email
  - Make a call
  - Create a task
  - Send an automated email
  - LinkedIn InMail
  - LinkedIn connection request
  - Platform screen flow

Cadence Folders and Sharing

- To grant access to cadences, share the folder, not the cadence itself.
- If a user loses access to a cadence folder, they lose access to all cadences in that folder.
- If a user loses access to a cadence, the user can't complete any in-progress steps from that cadence.
- Access to a cadence folder doesn't grant access to email templates used in that cadence. Email templates used in cadences must be stored in folders accessible to the cadence target assignee.
- CRM Analytics dashboards display all cadence metrics regardless of whether the user has access to the cadence.
- To ensure that your users can access cadence folders, make sure that the Enable Enhanced Folder Sharing for Reports and Dashboards critical update is activated in Setup.

Lead Scoring Considerations for Sales Engagement

Learn about considerations for using lead scoring in Sales Engagement.

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Einstein Lead Scoring

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

Third-Party Lead Scores

- If Einstein Lead Scoring is set up, leads are sorted by Einstein Lead Scores unless you have also configured a third-party lead scoring solution.
- For person accounts, custom number fields that relate to third-party scores can be configured in the object setup for contacts.

Phone Integration Considerations for Sales Engagement

Learn about considerations for each phone integration option for Sales Engagement.

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Sales Dialer

When you use Sales Dialer with Sales Engagement, these features are available:

- Automatic voice connectivity
- Click to dial for call steps from the Work Queue and My List
- Task logging
- Cadences advance automatically when calls are completed
- Cadence branching based on call result
- Automatic target exit from cadence based on call result
- Einstein Conversation Intelligence

Service Cloud Voice

When you use Service Cloud Voice with Sales Engagement, these features are available:

- Automatic voice connectivity
- Click to dial for call steps from the Work Queue and My List
- Task logging
- Cadences advance automatically when calls are completed
- Cadence branching based on call result
- Automatic target exit from cadence based on call result
- Einstein Conversation Intelligence

Open CTI and Sales Engagement

Partner solutions approved by Salesforce are listed on the AppExchange. More information about each third-party integration option is available on its partner solution page.

Sales Engagement can support third-party computer telephony integration (CTI) providers if you're using Open CTI for Lightning Experience. For the best user experience, we highly recommend third-party providers use the available Open CTI methods for Sales Engagement. More information about these methods is available in the Salesforce Open CTI Developer's Guide.

You can use your third-party Open CTI solution with Sales Engagement if:

- Your Salesforce org is using Open CTI for Lightning Experience.
- Your CTI solution uses click-to-dial.
- The saveLog() Open CTI method is used to save a task with a call task type on the related record after the call.

With these requirements, your Open CTI solution can work with Sales Engagement. We highly recommend contacting to your CTI provider in order to implement the best user experience.

To create the best experience, your CTI provider can integrate the Open CTI methods for Sales Engagement. When a third-party CTI solution doesn't use these methods, some features aren't available:

Feature	Available without Sales Engagement CTI Methods?
Click-to-dial	Yes
Task logging	Yes, only if implemented by the CTI solution
Cadence advancement based on call completion	No
Cadence branching based on call result	No
Automatic target exit from cadence based on call result	No

In addition, when providers don't use the Open CTI methods, some details are lost.

- For cadences, the cadence doesn't move to the next step when the sales rep logs the call task. Sales reps must manually complete the step to advance the cadence.
- In My List, the call is removed from the list as soon as the sales rep clicks **Call**, even if the call isn't answered.

Einstein Conversation Intelligence can't be used without Open CTI, except with a custom integration. For more information about this option, contact Salesforce Support.

Sales Dialer Considerations for Sales Engagement

Learn about considerations for using Sales Dialer with Sales Engagement.

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Sales Dialer

- Dialer features are available in Lightning Experience on the desktop only.
- No support in Experience Cloud sites.
- Users can now store up to 20 voicemail messages in Salesforce. Voicemail messages are limited to two minutes. The messages are saved as files in Salesforce, and they count toward your files storage quota.
- Call Monitoring is not supported in Salesforce Essentials.
- Outgoing calls are supported to the U.S. and Canada only. Puerto Rico is not supported.
- The Local Presence feature is only available in the U.S. and isn't available in Canada.
- Permission set groups aren't supported for Dialer permissions. Assign Dialer and Call Monitoring permission sets without using permission set groups.
- Dialer users can't have Service Cloud Voice permission sets or be part of a Salesforce call center.
- Phone numbers in dashboards can't be directly called with Dialer.
- The utility bar supports only one Phone item at a time.
- Users can't pop out (or pop in) the call panel from the utility bar during an active call.
- When users call a landline number that's busy, Dialer ends the call without ringing or a busy signal.
- Deactivated call result values aren't removed from the call panel. Delete any unneeded call result values instead.
- Users need the "Edit Task" permission to log calls. This permission isn't automatically included with some profiles, so users with those profiles can make calls, but those calls aren't logged.
- Users need a Dialer Inbound license to assign a number or access personal Dialer settings from the call panel.
- If you're creating a sandbox from an org that already has voice calls, voice call records and voice call recordings are not copied over. To use Dialer in sandbox, you must enable it from Setup again.
- It isn't possible to make or receive live calls with Dialer in sandbox environments. You can make test calls and test automation that occurs after a call is made, such as the log a call task. For more details, see "Test Dialer Features in Sandbox."
- The records that can be added to call lists include leads, accounts, person accounts, and contacts. Call lists use the standard Phone field for these records.
- To use voicemail greetings, password protection can't be required by default for content deliveries. From Setup, enter Content Deliveries in the Quick Find box, then select Content Deliveries. Ensure that Password protection is required is not selected. This feature is available only to users with outbound and inbound calling access.
- Dialer users with the voicemail drop feature can store up to 10 prerecorded voicemail messages.
- With call monitoring, you can listen to only one sales rep at a time, and only outbound calls are monitored. You can't monitor calls that your sales reps receive. Monitored calls use double the minutes of a regular call, counting the call time for both the rep and manager.
- Dialer respects the **Do Not Call** field, and records with the field selected have one-click calling disabled.
- Call recordings are saved as files in Salesforce. An hour of recording takes up roughly 15 MB of storage space, and the same sharing rules apply to recordings as other files in Salesforce. Admins can delete call recordings from the Recording Management page in Setup.

- If required by law, users must notify the call recipient of call monitoring and/or recording and stop monitoring and/or recording upon request.
- Dialer doesn't support Enhanced 911. Location information is not automatically shared over 911 calls.
- You can use Sales Dialer to make calls to or receive calls from the U.S. and Canada only.
- Phone numbers are subject to availability, and numbers from all area codes may not be available.
- Every inbound license is allowed one dedicated number. To change it, an admin can release the number, and the Dialer user can then reassign themselves another number. Admins can release and replace, at most, a single number for each user each month.
- Before a user can use a custom phone number, the user must enter a provided code to verify it. Phone numbers that use a directory can't be verified.
- The same custom phone number can't be used for multiple users.
- Phone numbers provided by Salesforce can be used only in association with Sales Dialer.
- If your org enabled Sales Engagement before Dialer, add the Phone item to the utility bar for the Sales Engagement app to use the feature. Orgs that already enabled Dialer have the item added to the utility bar automatically.
- Sales Engagement users can't access the Call List feature from the call panel. This feature becomes part of the My List experience in Work Queue.
- To advance a cadence to the next step after a call, the call must be logged.

Einstein Conversation Insights Considerations for Sales Engagement

Learn about considerations for using Einstein Conversation Insights with Sales Engagement.

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Einstein Conversation Insights

- To see transcripts from Zoom meetings, enable the Cloud recording and transcript features in Zoom in advance. After enabling the feature in Zoom, it can take some time before transcripts are available in Salesforce.
- Orgs can have up to 100 custom insights. Each insight can have a maximum of 25 keywords, with each keyword limited to 255 characters.
- The opportunity amount filter doesn't support the currency format or decimals. When entering a new value in the opportunity amount filter, tab out of the widget to update the dashboard with your changes.
- If your org is using Opportunity Matching, the user placing the call needs access to the related opportunity for it to be matched for voice calls. User access isn't required for opportunity matching with video calls.
- In order for the video integration to work, the email address of the connected video account must match the email address used to log into Salesforce.
- To delete video call records, the Modify All Data permission is required.
- Search functionality within a transcript is not currently supported.

SET UP SALES ENGAGEMENT

Use the Setup menu to get the guidance you need for setting up Sales Engagement.

> **Note:** The High Velocity Sales name has changed to Sales Engagement. The automation features within the product now include customer engagement tracking, chatbots, cadences, and automated actions. The new name captures all the tools to use to automate processes and to engage strategically with leads and customers so that your sales team can focus on selling.

Set up Sales Engagement in four high-level steps.

1. Enable Sales Engagement and configure Einstein Activity Capture.
2. Assign relevant permission sets.
3. Configure features that are relevant for your company.
4. Let sales managers and reps know how to start using Sales Engagement.

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USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

TURN ON SALES ENGAGEMENT FEATURES

Enable Sales Engagement and specific features in Setup.

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Turning on and using Sales Engagement in Government Cloud and Government Cloud Plus organizations may send data outside the authorization boundary. For more information, please contact your account executive.

Note: Some features included in Sales Cloud are set up through Sales Engagement.

1. From Setup, enter `Sales Engagement` in the Quick Find box, and then select **Sales Engagement Settings**.
2. Click the **Automate** tab.
3. To turn on Sales Engagement, click the toggle.

   Turning on Sales Engagement automatically enables these features.

   - Enhanced Email—In the Cadence Settings section of the Automate tab, this setting lets you relate emails to other records, add custom fields to emails, use triggers with emails, modify the email layout, and manage emails using the Salesforce API. You also get an improved email detail page that shows emails in their original format.
   - Email Tracking—In the Cadence Settings section of the Automate tab, this setting allows tracking of email opens, link clicks, and replies.
   - Einstein Activity Capture—In the Guide tab, this setting lets you keep data between Salesforce and your email and calendar applications up to date, including emails, events, and contacts.
   - Automated Email—In the Cadence Settings section of the Automate tab, this setting lets cadence creators include email steps that send the email automatically using a template.
   - Use LinkedIn Sales Navigator with Cadences—In the Cadence Settings section of the Automate tab, this setting lets sales managers add LinkedIn InMail and Connection Request steps to cadences if you have the native integration of LinkedIn Sales Navigator enabled.
   - Skip Weekends—In the Cadence Settings section of the Automate tab, this setting assigns cadence tasks to reps on weekdays only. Calls, emails, and custom steps aren't assigned on Saturday or Sunday. When Skip Weekends is on, wait steps in cadences don't complete on weekends. Action steps that follow a wait step, including auto emails, don't come due until after the weekend.
   - Allow Email Template and Call Script Variant Testing in Cadences—In the Cadence Settings section of the Automate tab, this setting lets sales managers try out different versions of an email template or call script on a single cadence step. On cadence records, they can compare the engagement results of each variant.
   - Change Cadence Target Assignees—In the Cadence Settings section of the Automate tab, this setting lets users update the who is assigned to work a target through a cadence. If you want to prevent this feature from being available to all Sales Engagement users, you can optionally turn on Limit Who Can Change Target Assignees. Then assign the Change Cadence Target Assignees permission to the users who need it.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

- Relate Opportunities to Cadences—In the Cadence Settings section of the Automate tab, this setting lets your sales team associate opportunities with cadence targets so they can track which opportunities result from each cadence.
- Assign Targets to Multiple Cadences—In the Cadence Settings section of the Automate tab, this setting lets users add the same target to up to five cadences. If you turn off this feature, existing targets remain in their cadences, but new targets can't be added to more than one cadence. The Total Cadences field on lead, contact, and person account list views shows how many cadences each prospect is assigned to.

4. From Setup, enter `Sales Engagement` in the Quick Find box, and then select **Automated Actions**.

   To let your sales team build their own processes to manage cadence targets they own with simple if-this-then-that logic, turn on **Allow users to create automated actions**. Then adjust Sharing settings and permissions to let users and managers create automated actions.

You can turn off features that aren't required after enabling Sales Engagement, but we recommend keeping them on to get the most out of the product.

These Sales Engagement features aren't enabled by default. Turn them on if they're appropriate to your business.

- User Cadence Assignment Availability—In the Cadence Settings section of the Automate tab, this setting lets your Sales Engagement users choose when cadence tasks are assigned to them and appear in their To Do List and Work Queue. By setting their Cadence Assignment Availability in their profile, users have more control over their work and prevent cadence tasks from becoming overdue during times when they don't plan to work on cadences. Cadence step tasks for targets they own are only added during those hours. Tell users to add their available hours in the Cadence Settings section of their user profile.
- Always show Salesforce Log a Call Window—In the Cadence Call Settings section of the Call tab, this setting makes the Salesforce version of the Log a Call window appear at the start of each call, even if you use a third-party CTI solution. If you prefer to use the Log a Call window from your CTI solution, don't turn on this setting.
- Log Tasks from LinkedIn Steps—In the Cadence Settings section of the Automate tab, this setting lets Salesforce log tasks from LinkedIn cadence steps. This setting is recommended unless you use Activity Write Back from LinkedIn to log LinkedIn tasks.

ASSIGN PERMISSION SETS FOR SALES ENGAGEMENT USERS

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

Assign the permission sets for Sales Engagement. Also assign permission sets for optional features that are new to your Salesforce org, including Sales Dialer. You can also assign the permission set for full access to CRM Analytics dashboards.

1. From Setup, enter `Permission Sets` in the Quick Find box, and then select **Permission Sets**.
2. Verify that the Sales Engagement permission sets and other relevant permission sets are available.
   - In Enterprise Edition, look for the Sales Engagement Cadence Creator, Sales Engagement Quick Cadence Creator, and Sales Engagement User permissions.
   - In Unlimited and Performance Editions, look for the Sales Engagement Cadence Creator Included, Sales Engagement Quick Cadence Creator, and Sales Engagement User Included permissions. These permissions can only be assigned to users with the Salesforce standard user license.
   - In Professional and Enterprise Editions, look for the Sales Engagement Basic permission set.

   Salesforce orgs using Sales Engagement also get three CRM Analytics for Sales Cloud Sales Engagement licenses.

   If your company is using Lightning Dialer, also check for the Dialer Inbound, Dialer Outbound, and Dialer Minutes permission sets. If you want to use Einstein Conversation Insights, check for the Call Coaching User permission set.
3. Click each permission set you want to assign, and then click **Manage Assignments** to assign the permission set to users.

> Note: You can also assign permission sets per user. From Setup, enter `Users` in the Quick Find box, and then select **Users**. Click the name of individual users. In the Permission Set Assignments related list, click **Edit Assignments**.

We recommend that you make these assignments.

- Assign the Sales Engagement User or Sales Engagement User Included permission set to sales reps.
- Assign the Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permission set to sales managers and reps who need to create cadences.

  > Note: If you have assigned users a cloned or custom permission set created before Spring '23, you may need to add the Create and Edit Standard Cadences permission to the permission set again in Spring '23.
- Assign the Sales Engagement Quick Cadence Creator, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set to sales managers and reps who need to create quick cadences.
- Assign the Automated Action User permission to users who need to build their own processes to manage cadence targets they own.
- Assign the three CRM Analytics for Sales Cloud Sales Engagement permission sets to users who need edit access to the Activities and Lead Scoring dashboards.
- If you've turned on Limit Who Can Change Target Assignees in Setup, assign the Change Cadence Target Assignees permission to users who need to change target assignees.
- Assign the Dialer permission sets to new Sales Dialer users.

- Assign the Sales Engagement Conversation Insights permission set to sales managers who need to use Einstein Conversation Insights.
- Assign the Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permission set to users who need to create cadence folders. If they've been granted access, these users can edit folders shared with them and can manage other users' access to the shared folder. These users can edit, and manage user access to, their private folders.
- Assign the Sales Engagement User or Sales Engagement User Included permission set to users who need to view shared cadence folders. If they've been granted access, these users can edit folders shared with them and can manage other users' access to the shared folder. These users can't create folders, and they can't create or edit cadences.
- Assign the Sales Engagement Basic permission set to.users who will create quick cadences only.

If you have users who accessed Sales Engagement through an add-on license In Performance or Unlimited Edition before Summer '22, we recommend that you assign those users to the Sales Engagement User Included or Sales Engagement Cadence Creator Included permission, or custom permission set that includes one of them. To make these assignments, add the new permissions to your users before removing the old permissions. Beginning in Summer '22, you can't add users to the older Sales Engagement User or Sales Engagement Cadence Creator permissions.

Note: The Sales Engagement Cadence Creator (Enterprise Edition) and Sales Engagement Cadence Creator Included (Performance and Unlimited Editions) permission sets include all the permissions included with the Sales Engagement User (Enterprise Edition) and Sales Engagement User Included (Performance and Unlimited Editions) permission sets. There's no need to apply both the Sales Engagement Cadence Creator and the Sales Engagement User permission sets to any single user.

If you're making changes that apply to both types of users, make sure to update both permission sets.

SEE ALSO:

Configure Sales Engagement Features

CONFIGURE SALES ENGAGEMENT FEATURES

Set up Sales Dialer and Einstein Lead Scoring if they're new to your org. And make sure that you configure all other relevant features to get the most out of Sales Engagement.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

Configure Einstein Activity Capture Settings

After you turn on Sales Engagement, you can configure your Einstein Activity Capture settings, such as controlling which activities are added to Salesforce records and how they're shared.

Add Sales Engagement Components, Actions, and Fields to Page Layouts

To make Sales Engagement functions fully available to your sales team, add related components, actions, and fields to page layouts for leads, contacts, and accounts.

Set Up Sales Dialer for Sales Engagement

If you're using Sales Dialer for the first time, enable Sales Dialer in Setup. Make sure that you add the Phone item to the utility bar for the Sales Engagement app.

Define Call Result Values for Cadence Branching

Group call result values into categories to easily display the data in reports and use it as branching criteria for cadences.

Set Up Einstein Conversation Insights for Sales Engagement

If you're using Einstein Conversation Insights for the first time, enable Conversation Insights in Setup. Make sure that you set up relevant call insights after turning on the product.

Configure a Lead Scoring Solution

If you want help prioritizing your leads, set up Einstein Lead Scoring or a third-party scoring solution.

Customize the Work Queue

Select up to three fields to appear in the work queue so that your sales reps see the information at a glance.

Configure Einstein Activity Capture Settings

After you turn on Sales Engagement, you can configure your Einstein Activity Capture settings, such as controlling which activities are added to Salesforce records and how they're shared.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

Exclude Certain Emails and Events from Being Added to Salesforce

When you add email addresses or domains to the Excluded Addresses list for your org, emails and events with those people or companies aren't added to the activity timeline of related Salesforce records. Events aren't added to the Salesforce calendar. And events aren't synced between Salesforce and the connected accounts. Your Excluded Addresses list applies to all Einstein Activity Capture users. Users can add more email addresses to their own Excluded Addresses lists.

Set Default Activity Sharing for Einstein Activity Capture Users

Select whether Einstein Activity Capture users share their emails and events with other users or keep them private. Users can change their activity sharing at any time from their personal settings.

Let Users Share Activities with Groups

Add the `Enable email and event sharing` field to group layouts. When the setting is selected on a private or unlisted Chatter group, the group members who use Einstein Activity Capture can share activities with all group members.

Exclude Certain Emails and Events from Being Added to Salesforce

EDITIONS

Available in: Lightning Experience

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

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

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

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

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

When you add email addresses or domains to the Excluded Addresses list for your org, emails and events with those people or companies aren't added to the activity timeline of related Salesforce records. Events aren't added to the Salesforce calendar. And events aren't synced between Salesforce and the connected accounts. Your Excluded Addresses list applies to all Einstein Activity Capture users. Users can add more email addresses to their own Excluded Addresses lists.

1. From Setup, enter `Einstein Activity Capture` in the Quick Find box, and then select **Settings**.
2. Click the **Excluded Addresses** tab.
3. Click **Add**.
4. Follow the prompts to update the Excluded Addresses list.

USER PERMISSIONS

To update the Excluded Addresses list:

- Customize Application OR Modify All Data

To view the Excluded Addresses list:

- View Setup and Configurations

Set Default Activity Sharing for Einstein Activity Capture Users

EDITIONS

Available in: Lightning Experience

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

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

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

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

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

Select whether Einstein Activity Capture users share their emails and events with other users or keep them private. Users can change their activity sharing at any time from their personal settings.

USER PERMISSIONS

To set default activity sharing for new users:
- Customize Application OR Modify All Data

To view the Einstein Activity Capture setup pages:
- View Setup and Configurations

Note: Some Sales Cloud Einstein features generate business-related insights using emails captured by Einstein Activity Capture, including emails that aren't shared. However, the content of the emails and the usernames associated with them are hidden. Einstein Opportunity Insights and Einstein Automated Contacts are the Sales Cloud Einstein features that use these private emails.

1. From Setup, in the Quick Find box, enter `Einstein Activity Capture`, and then select **Settings** under Einstein Activity Capture.
2. Click the **Settings** tab.
3. Click **Edit Default** next to **Default Activity Sharing for New Users**.
4. Select a default option for new users.

   When activities are shared with everyone, others see full email and event details. When activities aren't shared with everyone, others see basic details, such as dates and names, and can request full access from the activity owner. "Everyone" means all Salesforce users at your company, but you can change it to mean only Einstein Activity Capture users. Go to the Settings tab within the Einstein Activity Capture settings.

5. Click **Save**.
   When new users connect their account to Salesforce with Einstein Activity Capture, the activity sharing that you selected is their default. Users who already connected their account to Salesforce aren't affected.
6. If you set the default sharing setting to Don't Share, you can prevent new users, regardless of their own sharing settings, from changing it. From the Settings tab, turn on the **Enforce Default Activity Sharing for New Users** setting. Users can still share individual emails and events, and respond to sharing requests from other users.
7. If you set the default sharing setting to Share with Everyone, emails that are identified as automated replies or having sensitive content are kept private. This protects users from inadvertently sharing sensitive information The email owner can later change the sharing setting to something less restrictive. If you want automated replies and sensitive emails to be shared, go to the Settings tab and turn off the **Prevent Automated Emails from Being Shared** and the **Prevent Sensitive Emails from Being Shared** settings.

Let Users Share Activities with Groups

EDITIONS

Available in: Lightning Experience

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

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

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

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

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

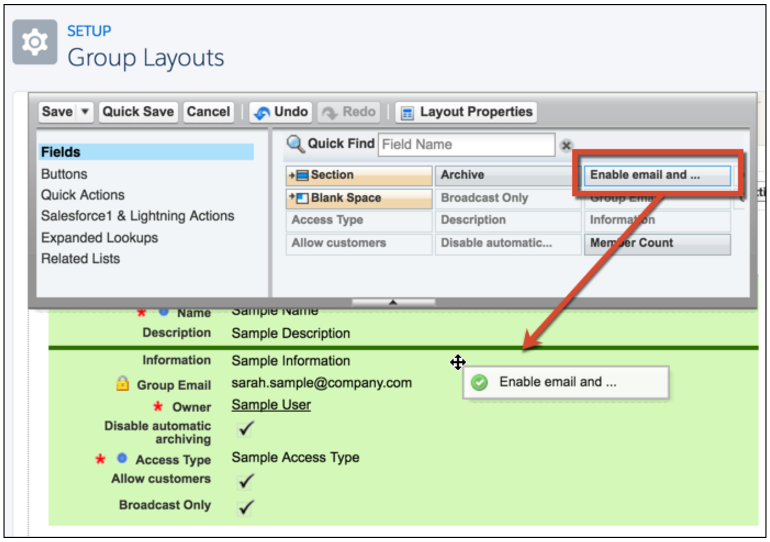
Add the `Enable email and event sharing` field to group layouts. When the setting is selected on a private or unlisted Chatter group, the group members who use Einstein Activity Capture can share activities with all group members.

USER PERMISSIONS

To edit group layouts:

- Customize Application

1. Make sure Chatter is enabled.
2. From Setup, enter *`Group Layouts`* in the `Quick Find` box, then select **Group Layouts**.
3. Add the `Enable email and event sharing` field to group layouts.



To use a group for sharing emails and events, the group's owner can select `Enable email and event sharing` on the group's settings. Then, Einstein Activity Capture users within the group can share their emails and events with all group members. Email and events appear in the activity timeline of related records, not in Chatter group feeds. When a user shares an individual email or event with a Chatter group and then deletes the group, the setting for the individual email or event is removed.

Add Sales Engagement Components, Actions, and Fields to Page Layouts

To make Sales Engagement functions fully available to your sales team, add related components, actions, and fields to page layouts for leads, contacts, and accounts.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

Add the Sales Engagements Component to Record Pages

Add the Sales Engagements component to relevant record pages with the Lightning App Builder. With the Sales Engagements component, users can see which cadence a given prospect is in, their engagement activity, and also their progress within the cadence.

Add Cadence Actions to Page Layouts

If your org has customized Salesforce Mobile and Lightning Experience Actions for lead, contact, or person account records, add cadence actions to those objects' page layouts. Add the actions from the Object Manager.

Set Up Cadence Fields on Record Layouts

Add Cadence to one of the top Selected Fields to show users the related cadence on lead, contact, and person account records. Users can click the field to view the cadence record, where they can view all the steps in the cadence. And add Cadence Assignee to see which sales rep is working on the prospect.

Display Key Cadence Fields on List Views

Make sure that users can see the Cadence and Cadence Assignee fields in relevant list views. You can also create a list view that shows only records linked to a cadence.

Set Up Scheduled Email Management for Sales Engagement

As sales reps send emails to leads and contacts, they can schedule the emails so that they arrive at an optimal time. Set up the Scheduled Emails component so that reps can update the content of a scheduled email and change its scheduled date and time.

Add the Work Queue Component to Email Integration Panes for Outlook and Gmail

Sales reps can access the Sales Engagement Work Queue directly from the integrations with Microsoft® Outlook® and Gmail™. Add the Work Queue component to its own tab in a new or existing email application pane. Then assign the pane to your Sales Engagement users.

Add the Sales Engagements Component to Record Pages

Add the Sales Engagements component to relevant record pages with the Lightning App Builder. With the Sales Engagements component, users can see which cadence a given prospect is in, their engagement activity, and also their progress within the cadence.

1. From Setup, enter **Lightning App Builder** in the Quick Find box, and then select **Lightning App Builder**.
2. Click **Edit** for the Lightning page you want to modify, or create a new page.
   - For Sales Engagement, make sure you update relevant lead, contact, and person account pages.
   - If Relate Opportunities to Cadences is turned on, you can add the component to opportunity page layouts.
   - If Use Cadences for Collections is turned on, you can add the component to invoice page layouts.
3. Add the Sales Engagements component to the page's layout.
4. Save your changes.
5. If you're creating a new page, activate the page and assign it to Sales Engagement users.
6. Repeat the process for other relevant Lightning pages.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

Add Cadence Actions to Page Layouts

If your org has customized Salesforce Mobile and Lightning Experience Actions for lead, contact, or person account records, add cadence actions to those objects' page layouts. Add the actions from the Object Manager.

1. From Setup, enter **Object Manager** in the Quick Find box, and then select **Object Manager**.
2. Click the object you want to modify. For Sales Engagement, make sure that you update Lead, Contact, Person Account, and Opportunity.
3. Select **Page Layouts**, and then click the relevant page layout.
4. From the palette on the upper portion of the screen, click **Mobile & Lightning Actions**.
5. Drag these actions to the Salesforce Mobile and Lightning Actions section of the page layout. On the opportunity page layout, you can only use the Add to Sales Cadence action. Cadence actions aren't supported in the Salesforce mobile app.
   - **Add to Cadence**
   - **Remove from Cadence**
   - **Change Target Assignee**
   - **Pause Target**
   - **Resume Target**
6. Save your changes.
7. Repeat the process for other relevant objects. For Sales Engagement, make sure that you update Lead, Contact, and Person Account.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

Set Up Cadence Fields on Record Layouts

Add Cadence to one of the top Selected Fields to show users the related cadence on lead, contact, and person account records. Users can click the field to view the cadence record, where they can view all the steps in the cadence. And add Cadence Assignee to see which sales rep is working on the prospect.

1. From Setup, enter **Object Manager** in the Quick Find box, and then select **Object Manager**.
2. Click the object you want to modify. For Sales Engagement, make sure that you update Lead, Contact, and Person Account.
3. Select **Compact Layouts**, and then click **New**.
4. Enter a label for the compact layout. `Sales Engagement Compact Layout` works here.
5. Add **Cadence**, **Cadence Assignee**, **Cadence State**, **First Call Date**, and **First Email Date** as a few of the top Selected Fields.
6. Save your changes.
7. Click **Compact Layout Assignment** and then **Edit Assignment**.
8. Select the compact layout as the Primary Compact Layout, and then save your changes.
9. Repeat the process for other relevant objects. For Sales Engagement, make sure that you update Lead, Contact, and Person Account.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

Display Key Cadence Fields on List Views

Make sure that users can see the Cadence and Cadence Assignee fields in relevant list views. You can also create a list view that shows only records linked to a cadence.

1. Navigate to the list view where you want to expose the fields.

   If you're using the sales console, switch out of the split view to see the List View Controls.
2. Select the List View Controls dropdown, and then click **Select Fields to Display**.

   Not all list views are editable, such as the Recently Viewed list view.
3. Add Cadence and Cadence Assignee as a couple of the top Visible Fields.
4. Save your changes.
5. Repeat the process for other relevant list views.

   For Sales Engagement, update the lead, contact, and person account list views.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

Set Up Scheduled Email Management for Sales Engagement

As sales reps send emails to leads and contacts, they can schedule the emails so that they arrive at an optimal time. Set up the Scheduled Emails component so that reps can update the content of a scheduled email and change its scheduled date and time.

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

USER PERMISSIONS

To send email:

- Send Email permission and access to the record the email is sent from

To schedule an email to send later:

- Use Inbox user permission, available with a Sales Engagement, Sales Cloud Einstein, or Inbox license

  OR

  Sales Engagement Basic user permission

To edit a page layout:

- Customize Application

Enhanced email must be enabled.

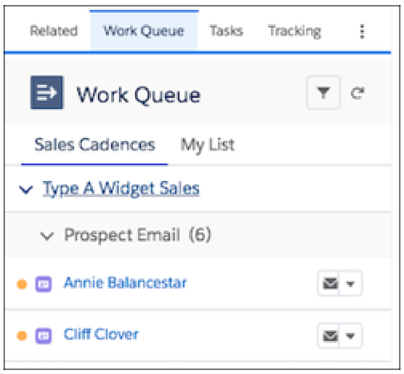
1. Go to an object home page or the Salesforce home page where you want sales reps to manage scheduled emails.
2. Click the gear icon and select **Edit Page**.
3. Add the Send Email Later - Pending List component to the page and save the change.

   The Send Email Later - Pending List component creates a list of scheduled emails that have yet to send.

Add the Work Queue Component to Email Integration Panes for Outlook and Gmail

Sales reps can access the Sales Engagement Work Queue directly from the integrations with Microsoft® Outlook® and Gmail™. Add the Work Queue component to its own tab in a new or existing email application pane. Then assign the pane to your Sales Engagement users.

Give your reps the flexibility to work through their queue from their email application.



1. From Setup, enter `Integration` in the Quick Find box, then select **Outlook Integration and Sync** or **Gmail Integration and Sync**.
2. Expand **Let users access Salesforce records from Outlook/Gmail** and enable **Customize Content with App Builder**.
3. Under Email Application Panes, click **Create New Pane** and select **With Inbox Features**, or edit an existing pane in the list.
4. Click the Tabs component.

5. In the Tabs component properties, click **Add Tab**.
6. Click the tab and select **Custom** title.
7. Enter a descriptive title for the tab, such as Work Queue, or something that describes the queue for your sales reps, and click **Done**.
8. Keep the tab visible in both Compose and Read modes.

EDITIONS

Available in: Lightning Experience

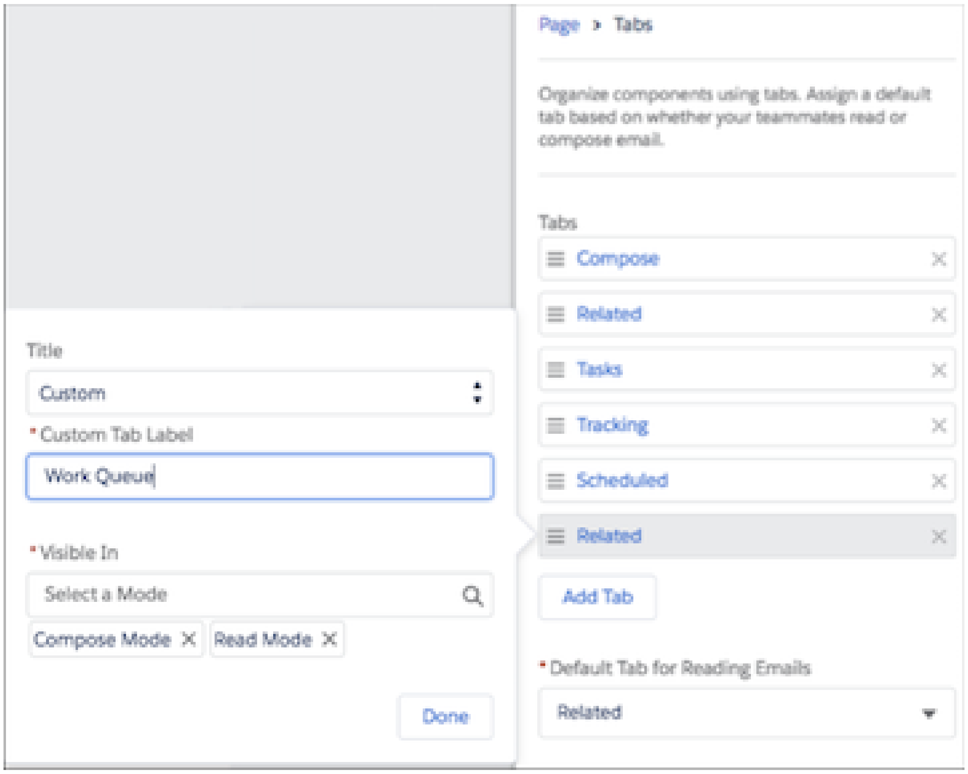
Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

USER PERMISSIONS

To set up the email integrations to use custom email application panes:
- Customize Application

To create and save Lightning pages in the Lightning App Builder:
- Customize Application

To view Lightning pages in the Lightning App Builder:
- View Setup and Configuration



9. Drag and move the tab in the Tabs list to where you want it to display.

   Tabs are listed from top to bottom in the order they display from left to right in the pane. To make sure that a tab is visible without extra clicks, place the tab in one of the first few positions.

10. Drag the Work Queue component to the tab.

    Tip: To track links in emails started from the Work Queue in Outlook, also add the Email Tracking component to a tab available in Compose mode.

    Tip: The My Feed tab in the Work Queue shows engagements and alerts for emails sent from the Work Queue and tracked emails sent from outside the Work Queue. That information is also shown in the Feed tab in the email integration pane. To prevent duplicate feeds for reps who use the Work Queue, use the Lightning App Builder to remove the Feed tab from the email integration pane.

11. Click **Save**.

12. Activate and assign the pane to the user profiles of reps who use Sales Engagement.

Set Up Sales Dialer for Sales Engagement

If you're using Sales Dialer for the first time, enable Sales Dialer in Setup. Make sure that you add the Phone item to the utility bar for the Sales Engagement app.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

Enable Sales Dialer

Turn on Dialer from the Dialer Settings page in Lightning Experience.

1. From Setup, enter `Dialer` in the `Quick Find` box, then select **Dialer Settings**.
2. Enable Dialer.

   Optionally, enable personal voicemail, prioritized call lists, voicemail drop, and other settings for your org as well.

   Note: You can turn on and manage more features under the **Dialer** node in Setup. Depending on your org, this may include local presence, call result tracking, and more.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Sales Dialer is available for an additional cost as an add-on license.

USER PERMISSIONS

To enable Dialer features:
- Customize Application

Add Dialer to the Utility Bar

Use the App Manager to make Dialer available from the utility bar at the bottom of the page. The utility bar gives your sales reps quick access to commonly used tools.

1. From Setup, enter `App Manager` in the `Quick Find` box, then select **App Manager**.
2. Edit an existing Lightning app or click **New Lightning App**. You can also upgrade a custom Classic app to a Lightning app.

   If available, the Lightning Sales app contains numerous options preconfigured for sales users.
3. On the Utility Items tab, click **Add Utility Item** and select **Dialer**.
4. On the User Profiles tab, make the app available to relevant user profiles.
5. Verify the other app details, including the app name, branding information, and available menu items.
6. Save your changes.

To verify your changes, from the App Launcher, find and open the app that has Sales Dialer enabled.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Sales Dialer is available for an additional cost as an add-on license.

USER PERMISSIONS

To enable Dialer features:
- Customize Application

Define Call Result Values for Cadence Branching

Group call result values into categories to easily display the data in reports and use it as branching criteria for cadences.

1. From Setup, enter **Sales Engagement** in the Quick Find box, and then select **Sales Engagement Settings**.
2. Click the **Call** tab.
3. In the Cadence Call Settings section, edit the Define Call Results for Branching section and enable the feature.
4. Enter the call result values used by your org next to the related call result categories.

   If your org is using Lightning Dialer, click the **Edit Call Result Values** link to confirm or modify your org's current call result values.

   Note: Make sure you enter the call result values correctly.
5. Click Save.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

Set Up Einstein Conversation Insights for Sales Engagement

If you're using Einstein Conversation Insights for the first time, enable Conversation Insights in Setup. Make sure that you set up relevant call insights after turning on the product.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

Turn On Einstein Conversation Insights

Enable Einstein Conversation Insights from the General Settings page in Setup.

1. From Setup, enter *`Einstein Conversation Insights`* in the `Quick Find` box, then select **General Settings**.
2. Turn on Conversation Insights.

   The Conversation Insights Readiness indicator displays when the related dashboards are available. This process can take some time, so continue with the next steps until they're available.

   Troubleshooting Dashboard Creation Issues

   You can resolve some dashboard creation problems from the Analytics Setup page. For more persistent issues, reach out to Salesforce Customer Support.

   From Setup, enter *`Analytics`* in the `Quick Find` box, then select **Auto-Installed Apps** under the Apps section.

   If the Conversation Intelligence app isn't successfully installed, click the Requests tab. Select the drop-down menu for the Conversation Intelligence request and click View Log.

   The log describes what caused the Analytics app installation to fail. Resolve the issue then retry the installation from the drop-down menu.

EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Performance** and **Unlimited** Editions, and for an additional cost in **Enterprise Edition**

USER PERMISSIONS

To enable Einstein Conversation Insights:
- Customize Application

Error Message	Related Issue and Solution
Something went wrong while executing the Sync_Lead node: Field [ScoreIntelligenceId] is not available. Verify that the field exists and that the Analytics Cloud Integration User profile has Read level access on the field.	Some fields aren't accessible for reporting. Make sure Data Sync is enabled and have your Analytics admin (with a CRM Analytics Growth Admin or CRM Analytics Plus Admin license) open up field visibility from Analytics Data Manager. Data Sync is enabled by default in most orgs, but you may need to turn it on. From Setup, enter `Analytics` in the `Quick Find` box, then select **Settings**. Select Enable Data Sync and Connections if it's not enabled and save your changes. If you're an Analytics admin, navigate to the Connect node in the Analytics Data Manager and open the related object in the SFDC_LOCAL connection. Address problems of field visibility based on the errors reported, and retry the installation from the Auto-Installed Apps page.
Something went wrong while executing the Sync_Lead node: Field [ScoreIntelligenceId] is not available. Verify that the field exists and that the Analytics Cloud Integration User profile has Read level access on the field.	This error can occur if Lead Scoring was turned on-and-off in sandbox, and this sandbox environment was copied to production prior to enabling Einstein Conversation Insights. Turn Lead Scoring back on in your production environment to fix this issue.
Something went wrong while executing the Sync_Lead node: Fields [FirstEmailDateTime, FirstCallDateTime] are not available. Verify that the fields exists and that the Analytics Cloud Integration User profile has Read level access on the fields.	This error can occur if Sales Engagement was turned on-and-off in sandbox, and this sandbox environment was copied to production prior to enabling Einstein Conversation Insights. Turn Sales Engagement back on in your production environment to fix this issue.

Connect Voice Recording Providers

Connect at least one recording provider to use Einstein Conversation Insights.

Einstein Conversation Insights can analyze recordings from different products. For a list, see Recording Providers. For information about connecting video recording providers, see Connect Video Recording Providers.

There are additional setup steps and requirements to connect Dialpad, RingCentral, Aircall, or Amazon Connect. For more information, see Integrate Voice Connectors with Einstein Conversation Insights.

> **Note:** To use other recording providers, inquire about implementing an API solution to connect your provider. More information can be found in Einstein Conversation Insights API Setup for Recording Providers.

Make sure that Dialer or your telephony solution is enabled. For more information about enabling Sales Dialer, see Set Up Sales Dialer.

See Phone Integration Considerations for Sales Engagement for information about integrating your phone provider with Sales Engagement.

1. From Setup, enter **Einstein Conversation Insights** in the Quick Find box, and then select **General Settings**.
2. On the Settings page, connect a voice recording provider.
3. Click **Connect**.

EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Performance** and **Unlimited** Editions, and for an additional cost in **Enterprise Edition**

USER PERMISSIONS

To enable Einstein Conversation Insights:
- Customize Application

Set Up Call Insights

Define call insights related to mentions of competitors and products that are important to your Salesforce org. And create custom insights for when words or phrases relevant to your teams are mentioned.

> **Note:** You can create up to 100 custom insights. Each insight can have a maximum of 25 keywords, with each keyword limited to 255 characters.

1. From Setup, enter **Call Insights** in the Quick Find box, and then select **Call Insights**.
2. From the Standard tab, enter the competitors and products that are important to your teams.

   Be conscious of the keywords and phrases that you select to avoid flagging sensitive information and to ensure the trust, safety, and privacy of your employees and customers. Limit words that could inadvertently or inappropriately affect people based on gender, religion, race, sexual orientation, income level, or any other sensitive category.

   Similarly, limit keywords that could be construed as surveilling or monitoring your employees. This feature isn't a tool to assess employee satisfaction, gauge performance, or define normative behaviors.
3. From the Custom tab, define insights for words or phrases that are relevant to your teams.

   To prevent incorrect classification, avoid keywords already covered by automatic insights. For example, mentions about payment and purchase orders are already covered by the Pricing Mentioned insight, and shouldn't be used for a new custom insight.

EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Performance** and **Unlimited** Editions, and for an additional cost in **Enterprise Edition**

USER PERMISSIONS

To enable Einstein Conversation Insights:
- Customize Application

Configure a Lead Scoring Solution

If you want help prioritizing your leads, set up Einstein Lead Scoring or a third-party scoring solution.

Set Up Einstein Lead Scoring for Sales Engagement

If you're using Einstein Lead Scoring for the first time, enable and configure Einstein Lead Scoring in Setup.

Set Up Third-Party Prospect Scoring for Sales Engagement

Configure third-party scores for person accounts, contacts, or leads. Show scores on records, and use scores to sort the Work Queue.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

Set Up Einstein Lead Scoring for Sales Engagement

If you're using Einstein Lead Scoring for the first time, enable and configure Einstein Lead Scoring in Setup.

1. From Setup, enter **Einstein Lead Scoring** in the Quick Find box, and then select **Einstein Lead Scoring**.
2. On the Settings page, click **Get Started**.
3. Read the introduction, and then click **Next**.
4. Choose the lead conversion milestone that matches your business practices. Does your sales team create opportunities when they convert leads, or do they simply convert leads to accounts and contacts? Then click **Next**.
5. Choose whether you want Einstein to score all your leads or only leads that meet criteria you specify. To score only certain leads, click **Score only leads that meet my criteria**. Otherwise, click **Next**.

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

   The following field data types also can't be used in lead field filters.

   - Address
   - Date
   - Datetime

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

- Double
- Encrypted String
- Geolocation
- Multipicklist
- Reference— However, the RecordTypeId reference field is supported.
- Text Area
- Time

6. Choose whether you want Einstein to include all your lead fields during lead score analysis. To exclude specific fields, click **No, ignore certain fields (Advanced)**, and then deselect the fields you want to ignore. Otherwise, click **Next**.

   Some businesses use fields that don't affect a lead's chance of converting. For example, you might have a field that indicates the reason a lead didn't convert. Telling Einstein to ignore those fields yields more accurate lead scores. Before ignoring a field, make sure that the field doesn't affect the lead's chance of converting. Ignoring fields that affect score analysis decreases the accuracy of your lead scores. If you are uncertain about whether to ignore a particular field, contact Salesforce Customer Support.

7. Wait while Einstein confirms that your company's data works with the settings you've chosen.
8. When Einstein finishes confirming your settings, click **Score Leads**.
9. Using the Lightning App Builder, make sure that the Einstein Lead Scoring component was added to Lightning pages for leads. In Salesforce Classic, add the Lead Score field to lead page layouts. The Lead Score field can't be used on the same page layout as the Lead Score Distribution or Conversion Rate by Lead Score report components.
10. After scores are available, add the Lead Score field to public lead list views. Salesforce automatically adds this field to default list views.

It takes up to 24 hours for lead scores to be available. Sales Cloud Einstein users see scores and factors on the Einstein Scoring component.

To see the component, users need read access to the Company, Phone, and Email fields on leads.

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

Set Up Third-Party Prospect Scoring for Sales Engagement

Configure third-party scores for person accounts, contacts, or leads. Show scores on records, and use scores to sort the Work Queue.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

Note: If Einstein Lead Scoring is set up, the Work Queue sorts leads automatically by lead score. Even if you're using Einstein Lead Scoring, you can configure third-party scores for contacts or person accounts separately. For more information about adding Einstein lead scores to Sales Engagement, see Set Up Einstein Lead Scoring for Sales Engagement.

1. Create a custom number field on the lead or contact object. For person accounts, configure a custom number field in the object management settings for contacts.
2. Configure the custom number field with your integrated third-party application to populate scores.
3. From Setup, enter **Sales Engagement** in the Quick Find box, and then select **Sales Engagement**.
4. Next to the object for which you want to add custom scores, click **Edit**.
5. From the object's custom score dropdown, select the custom number field that's configured as the third-party score. Users see this field as a sorting option in the Work Queue.

Customize the Work Queue

Select up to three fields to appear in the work queue so that your sales reps see the information at a glance.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Sales Engagement:
- Customize Application AND Modify All Data

1. From Setup, select **Object Manager**, and then click the name of the entity whose layout you want to edit.
2. Click **Compact Layouts**, and click the name of the layout you want to customize.
3. Click **Edit**.
4. In the **Selected Fields** column, the first three fields represent the data that displays in the work queue. Change the order of the fields so that the fields you want to display are one of the first three fields listed.

   Cadence isn't supported as a field for the work queue. If it's one of the first three fields, the fourth field appears in its place.
5. Click **Save**.

You can customize different fields for each record type.

SET UP AN OPTIONAL SALES PROSPECTING BOT

Admins can enable an optional Einstein Bot for Sales Engagement. Build and manage a Sales Prospecting Bot to ease the load on your sales reps. Bots can handle information collection and answer frequently asked questions so sales reps can spend their time on more complex tasks.

The Sales Prospecting Bot template covers common use cases for sales prospects. Each use case appears in the bot's Main Menu, which directs users down different paths in the bot depending on what they select. The Sales Prospecting Bot template also includes prebuilt flows that handle the creation, assignment, and look-up of Salesforce records. For example, the Connect with Sales dialog skill includes a flow to create a lead.

EDITIONS

Available in: Lightning Experience

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

Sales Prospecting Bot Requirements

Before you get started with the Sales Prospecting Bot template, confirm that you meet these requirements.

1. Obtain a Chat or Messaging license. Then enable Chat and Omni-Channel.
2. Add the Omni-Channel widget to the Sales Engagement console app.
3. Create an Experience Cloud site for your bot.
4. Enable Lightning Knowledge if you want your bot to serve knowledge articles to customers.
   a. To do more than read knowledge articles, your sales reps need a Knowledge User license. Assign permissions to users who publish, archive, delete, and manage articles.

EDITIONS

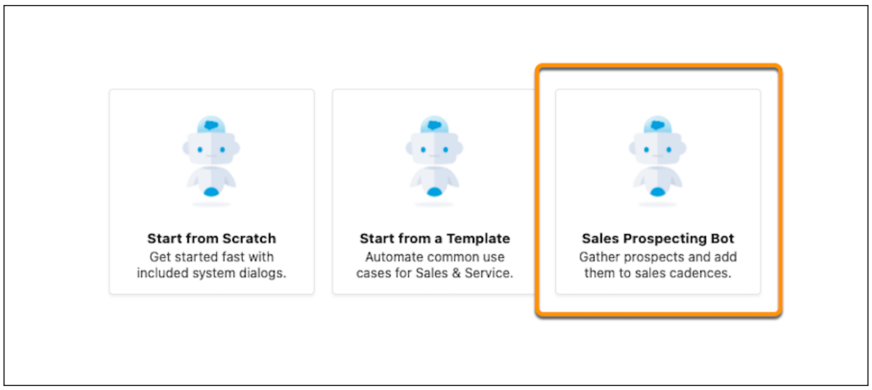
Available in: Lightning Experience

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

Get Started with the Sales Prospecting Bot

Create a fully featured bot with the Sales Prospecting Bot template. Ease the load on your sales reps with the bot's prebuilt flows and included intent data.

1. From Setup, in the Quick Find box, enter `Einstein Bots`, and then select **Einstein Bots** under Service Cloud Einstein. To get started with Einstein Bots, click the toggle and accept the terms. Then click **Try Einstein**.
2. Launch the Guided Setup Flow from the Einstein Bots main page. For your first bot, click **Create a New Bot**. Otherwise, click **New**.
3. Select **Sales Prospecting Bot** from the options provided. Click **Next**.



4. Give your bot a name. This name is visible to customers, so select something that fits your company's voice and tone. You can edit this name later on the Bot Overview page.
5. Select your bot's primary language. Click **Next**.
6. Select your bot's actions. You can include **Company and Products**, **Connect with Sales**, or both. Each action creates a dialog and adds it to the bot Main Menu. Click **Next**.
7. Select an Embedded Service Deployment for your bot. Each bot requires a unique deployment. Selecting a deployment that is already in use can disrupt other services. If you don't link a deployment, the Bot Preview page doesn't automatically work.
8. To start intent model training, click **Proceed** and then **Finish**. The intent model requires a few hours to build. Until the model is built, text input into the bot isn't processed for intent. When the Model Management page is updated with metrics, the intent model is ready to use.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application OR Modify Metadata OR Manage Bots

To create a sales prospecting bot:

- Sales Engagement User or Sales Engagement User Included

  OR

  Sales Engagement Cadence Creator Included

Set Up Omni-Channel for Your Sales Prospecting Bot

Set up Omni-Channel so your sales prospecting bot can intercept leads and pass them to your sales reps in real time. That way, your reps can assist your leads more effectively and close sales faster

With Omni-Channel, leads are automatically routed or “pushed” to sales reps assigned to the associated queue. After you create a service channel, routing configuration, presence statuses, and a presence configuration, you associate them with a queue that contains sales prospects.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

Create a Service Channel for Your Sales Prospecting Bot

Set up a service channel for your sales prospecting bot that turns your incoming prospects into Lead work records. That way, Omni-Channel can route your bot’s leads to sales reps.

Create a Routing Configuration for Your Sales Prospecting Bot

Routing configurations let you determine how work items are routed to your reps. Create a routing configuration for your sales prospecting bot that prioritizes the relative importance and size of leads That way, leads are handled accordingly, and work is evenly distributed to your sales reps.

Create a Presence Status for Your Sales Prospecting Bot

Presence statuses indicate if a sales rep is online and available to receive prospects. Create a presence status for your sales prospecting bot that includes your service channel. That way, reps that are assigned to this presence status can receive your bot’s incoming leads.

Create a Presence Configuration for Your Sales Prospecting Bot

Use a presence configuration to limit how much work a sales rep can take on. That way, incoming leads from your sales prospecting bot’s are evenly distributed to your reps. You can set up multiple configurations for different groups of reps.

Create a Service Channel for Your Sales Prospecting Bot

Set up a service channel for your sales prospecting bot that turns your incoming prospects into Lead work records. That way, Omni-Channel can route your bot's leads to sales reps.

1. From Setup, in the Quick Find box, enter `Service Channels`, select **Service Channels**, and then click **New**.
2. For the `Service Channel Name` field, enter `Leads`.
3. For the `Salesforce Object` field, select `Lead`.
4. Specify the remaining settings for your service channel and save your changes.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

Create a Routing Configuration for Your Sales Prospecting Bot

Routing configurations let you determine how work items are routed to your reps. Create a routing configuration for your sales prospecting bot that prioritizes the relative importance and size of leads That way, leads are handled accordingly, and work is evenly distributed to your sales reps.

1. From Setup, in the Quick Find box, enter `Routing Configurations`, select **Routing Configurations**, and then click **New**.
2. For the `Routing Configuration Name` field, enter `Sales Routing — Leads`.
3. For the `Units of Capacity` field, enter `1`.
4. Specify the remaining settings for your routing configuration and save your changes.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

Create a Presence Status for Your Sales Prospecting Bot

Presence statuses indicate if a sales rep is online and available to receive prospects. Create a presence status for your sales prospecting bot that includes your service channel. That way, reps that are assigned to this presence status can receive your bot's incoming leads.

1. From Setup, in the Quick Find box, enter `Presence Statuses`, select **Presence Statuses**, and then click **New**.
2. For the `Status Name` field, enter *`Available - Lead`*.
3. For the status option, select **Online**. The Online status lets reps who use this presence status receive new work items.
4. Add the Leads service channel to the Available Channels list.
5. Save your changes. To add more statuses, repeat the steps. For example, you can create a Busy presence status to indicate that a rep is unavailable and can't receive incoming prospects.
6. Give reps access to your presence statuses through permission sets or profiles.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

Create a Presence Configuration for Your Sales Prospecting Bot

Use a presence configuration to limit how much work a sales rep can take on. That way, incoming leads from your sales prospecting bot's are evenly distributed to your reps. You can set up multiple configurations for different groups of reps.

1. From Setup, in the Quick Find box, enter `Presence Configurations`, select **Presence Configurations**, and then click **New**.
2. For the `Presence Configuration Name` field, enter *`Leads`*.
3. Indicate the maximum units of work a sales rep can take on. If you set the `Units of Capacity` field to *`1`* in your routing configuration, each work item is 1 unit.
4. To automatically accept work assignments that are pushed to a sales rep, select **Automatically Accept Requests**.
5. Specify the remaining settings for your presence configuration.
6. Save your changes. To add more presence configurations, repeat the steps.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:
- Customize Application

Set Up a Prospect Queue for Your Sales Prospecting Bot

Assign your sales prospecting bot's incoming leads to sales reps automatically with a prospect queue. When a new Lead work item is assigned to the prospect queue, Omni-Channel attempts to route it to a sales rep using your routing configuration.

1. From Setup, in the Quick Find box, enter `Queues`, select **Queues**, and then click **New**.
2. For the `Label` field, enter *Leads*.
3. Select the routing configuration that you created when you set up Omni-Channel for your bot.
4. If you use divisions, select the queue's default division.
5. Add the Lead object to the queue.
6. Add your sales reps as queue members. The members are assigned records from this queue. Members can be individuals, roles, public groups, territories, connections, or partner users. Guest users can't be queue members.
7. Save your changes.

Create Assignment Rules for Your Sales Prospecting Bot's Prospect Queue
Use lead assignment rules to add your sales prospecting bot's leads to your prospect queue automatically.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create or change queues:
- Customize Application AND Manage Public List Views

To change queues created by other users:
- Customize Application AND Manage Public List Views AND Manage Users

Create Assignment Rules for Your Sales Prospecting Bot's Prospect Queue

Use lead assignment rules to add your sales prospecting bot's leads to your prospect queue automatically.

1. For the Lead object's `Lead Source` field, add `Sales Bot` as a custom picklist value.
2. From Setup, in the Quick Find box, enter *`Lead Assignment Rules`*, select **Lead Assignment Rules**, and then click **New**.
3. For the `Name` field, enter *`Sales Prospecting Bot`*.
4. To activate the assignment rule, select **Active**. Then click **Save**.
5. Click your new assignment rule, then under Rule Entries, click **New**.
6. For the `Sort Order` field, enter *`1`*.
7. For the rule criteria, select the **Lead: Lead Source** field and **equals** operator.
8. From the value picklist, select **Sales Bot**.
9. Assign the lead to your prospect queue and save your changes.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To view assignment rules:
- View Setup AND Configuration

To create or change assignment rules:
- Customize Application

Add a Cadence for Your Sales Prospecting Bot

Create a cadence for your sales prospecting bot called Sales Bot Cadence. That way, you can guide sales reps that are assigned to bot-generated leads through a scheduled sequence of prospect outreach activities.

1. In the Sales Engagement app, select **Cadences** from the Navigation menu. Then click **New Cadence**.
2. For the `Name` field, enter *`Sales Bot Cadence`*. Your bot's cadence must be named Sales Bot Cadence.
3. Select the **Public Cadences** folder, then click **Save**.
4. Add steps to your cadence. To send prospects to another cadence when they finish this one, click the **End** step. Turn on **Exit to linked cadence**, and then choose an active cadence.
5. When you're finished adding steps and ready to start assigning prospects to the cadence, click **Activate**.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create cadences:

- Sales Engagement Cadence Creator

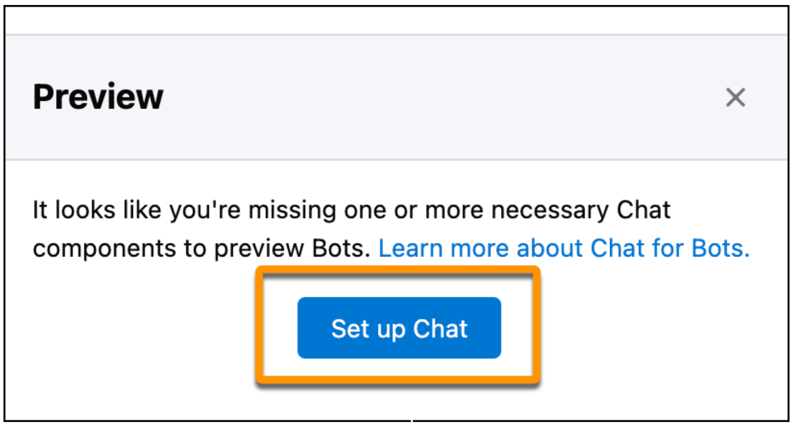
  OR

  Sales Engagement Cadence Creator Included

Deploy Your Sales Prospecting Bot

Your sales prospecting bot can connect to many different endpoints, expanding the ways that you communicate with your customers. To get started, activate your sales prospecting bot and set up embedded chat.

1. From Setup, in the Quick Find box, enter `Einstein Bots`, select **Einstein Bots** under Service Cloud Einstein, and then select your sales prospecting bot.
2. On your bot's overview page, click **Activate**. Then click **Preview**.
3. To set up embedded chat for your sales prospecting bot, click **Set up Chat**. Then click **Start**.



4. Create a chat queue, create a routing configuration, and adjust your reps' chat workload. Add your Experience Cloud site's URL. You can find your site's URL on the All Sites page in Setup. Select Sales, and choose an offline support option. Then click **Finish**.
5. Click **Next** and then **Done**.
6. To preview your bot, click the Chat button in Preview.

Deploy Your Bot to Your Experience Cloud Site

Add your sales prospecting bot to an existing Experience Cloud site to increase case deflection and user engagement.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To deploy a sales prospecting bot:
- Manage User Profiles AND Run Flows AND Permission Sets

To add, edit, or delete channels:
- Customize Application

Deploy Your Bot to Your Experience Cloud Site

Add your sales prospecting bot to an existing Experience Cloud site to increase case deflection and user engagement.

To get started, deploy your bot to your Experience Cloud site. You can also deploy your bot to Chat channels (in-app and web) and SMS, Facebook Messenger, and WhatsApp channels. To add your bot to a conversation channel, see Deploy Your Bot to Your Channels.

> Note: You can create multiple bots, but an Experience Cloud site can only have one active bot.

1. From Setup, in the Quick Find box, enter `All Sites`, and select **All Sites**. Then click **Builder** next to your site.
2. From Settings, select **Security & Privacy**. Ensure that your security Level is **Relaxed CSP**, then under Trusted Sites for Scripts, click **Add Trusted Site**.
3. For the `Name` field, enter *`Sales Prospecting Bot`*.
4. For the URL field, enter your bot's Chat API Endpoint, and omit *`/chat/rest/`*. You can find your bot's Chat API endpoint on the Chat Settings page in Setup.
5. Select **Active**, then click **Add Site**.
6. To add and configure the chat component on the site, open the Components panel, and then search for *`Embedded Service Chat`*. Add the Embedded Service Chat component to the Template Footer region of your site's home page.
7. Label your chat button, and specify the remaining settings.
8. To test your bot from a sales rep's perspective, test your embedded chat window.
9. Before you deploy your bot on your live Experience Cloud site, add knowledge articles with your company and product information. To serve knowledge articles with your bot, you must add the summary field to the Knowledge object's page layout.
10. To deploy the bot on your live Experience Cloud site, click **Publish**, and then click **Got It**.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

  Be a member of the site AND an experience admin, publisher, or builder in that site

START USING THE SALES ENGAGEMENT APP

With Sales Engagement set up, your sales managers and reps can start using the app by creating cadences and adding prospects to them.

Get Started Managing Sales with Sales Engagement

Start using Sales Engagement by navigating to the app and creating your first cadence.

1. From the App Launcher, find and open **Sales Engagement**.
2. Click the banner at the top of the page to start using Einstein Activity Capture.

   If you're new to Dialer, click the banner to select a Dialer number.
3. Switch to the split view in console.
4. Create and activate a cadence.
5. Add prospects to a cadence.

Check out additional resources.

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USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

Get Started Selling to Prospects with Sales Engagement

Start using Sales Engagement by navigating to the app and adding prospects to cadences, which makes them appear in your Work Queue.

1. From the App Launcher, find and open **Sales Engagement**.
2. Set up Einstein Activity Capture.

   If you're new to Dialer, click the banner to select a Dialer number.
3. Switch to the split view in console.
4. Add leads, contacts, or person accounts to your Work Queue.

Check out additional resources.

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To set up Sales Engagement:

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