



Einstein Copilot Hands-on Workshop

See What You Can
Do With an LLM and Lightning Flow



Attendee Guide

Disclaimer



The Salesforce products and features referenced in this workshop guide are subject to change at the discretion of Salesforce.com. Mention of specific products or features is intended for discussion purposes only and does not represent a guarantee of their availability. Please refer to Salesforce.com for the most current information on available products, editions, and functionality.



Important Note

Due to the trial nature of the provisioning for this workshop, all attendees are sharing a limited number of calls per minute and per hour. This constraint is a result of the generative services that power the Salesforce generative AI capabilities. You may encounter error messages such as "**Please try your request again later**" if you exceed these limits. In that case, please be patient and wait a few minutes before attempting your request again.

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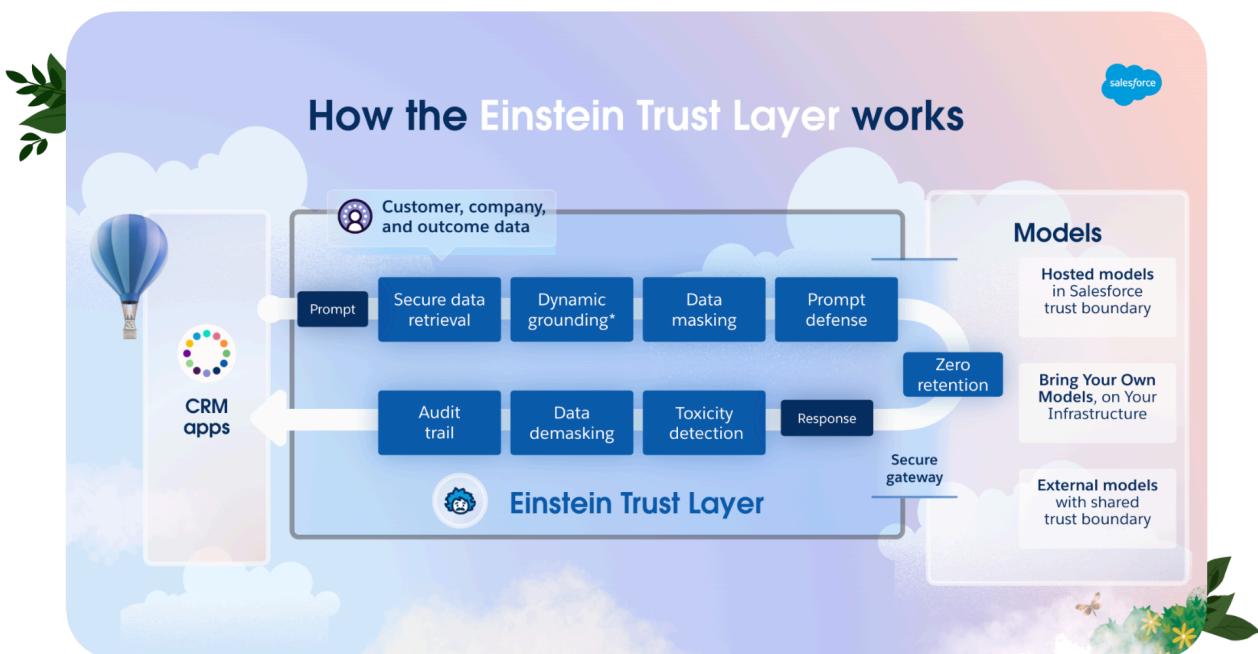
Scenario

Welcome to our introductory workshop on using Salesforce's new **Einstein Copilot** feature. In this hands-on session, we will walk through how to navigate and leverage Einstein Copilot standard actions.

As a seller for the fictional Springfield Nuclear Power Plant, we will use examples relevant to your duties like understanding your accounts and opportunities and summarizing your top accounts. We will get to try the standard actions and see firsthand how Einstein Copilot allows you to tap into AI without hard-coding responses. Our goal is that by the end of this workshop, you will feel comfortable using Einstein Copilot Builder to improve efficiencies and operations at your own organization through natural language interactions.

The exercises today will provide real-world practice with this innovative tool to make AI more accessible. As you review the image below, we will be focusing on **Secure Data Retrieval** and **Dynamic Grounding**.

We hope you enjoy this hands-on experience with Einstein Copilot!



Overview

In this exercise, we will demonstrate how Salesforce's Einstein Copilot can be used to get up to speed faster and make sellers more efficient.

Our example will utilize Springfield Nuclear Power accounts and opportunities. We will use the standard actions in Einstein Copilot to get familiar with the most relevant accounts and opportunities and dive deeper into them.

The AI will scan the Salesforce Org to surface the relevant information. It will return the requested account and opportunity information based on if it finds any of the search accounts.

This showcases how Einstein Copilot gives us an easy way to surface the rich customer data within CRM by leveraging a large language model (LLM). By utilizing standard actions, the AI can quickly get users up to date on their customers.

In this exercise, we are going to navigate to Einstein Copilot, and explore and query standard actions within Einstein Copilot Builder to get comfortable with surfacing customer data.

Perform the following steps:

Assumptions:

- Einstein Copilot** is configured within your Salesforce org

Exercise 1: Getting Started with Copilot

As noted previously, Astro the seller is new and wants to get up to speed on his territory quickly. To do so, you will navigate to Einstein Copilot and start using standard actions to surface relevant account and opportunity data.

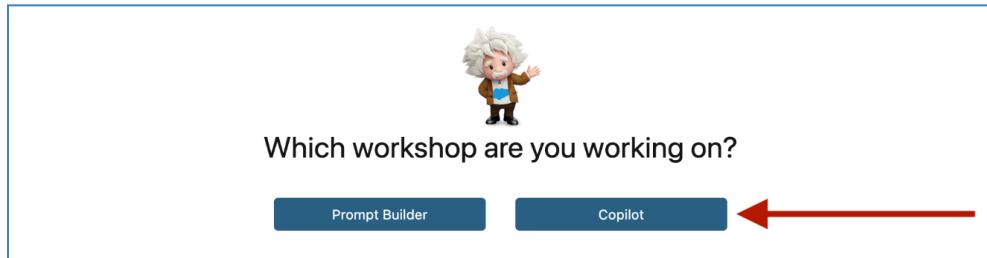
This approach will provide flexibility for Astro to surface the data he needs when he needs it.

Step 1: Enable Copilot

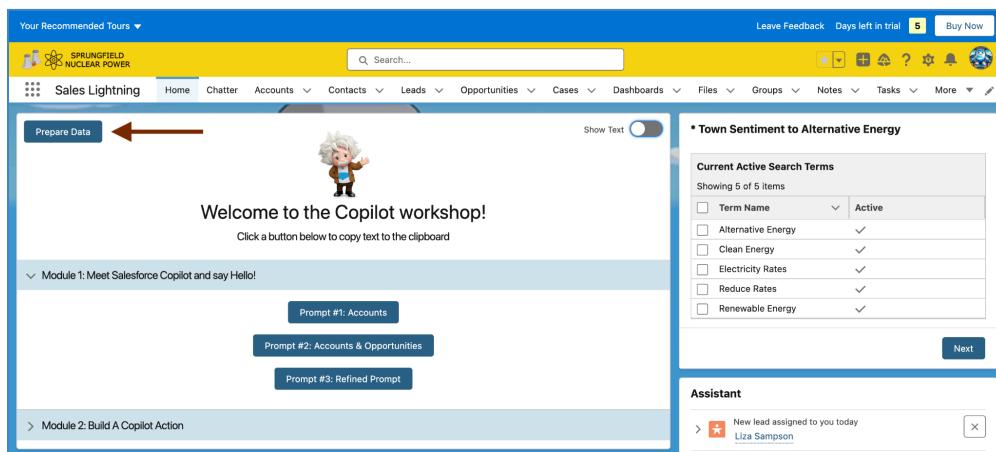
The first thing we need to do is enable Copilot. This is a requirement for the lab to proceed as intended.

Complete the following steps:

- Click **Copilot** in the Home page.

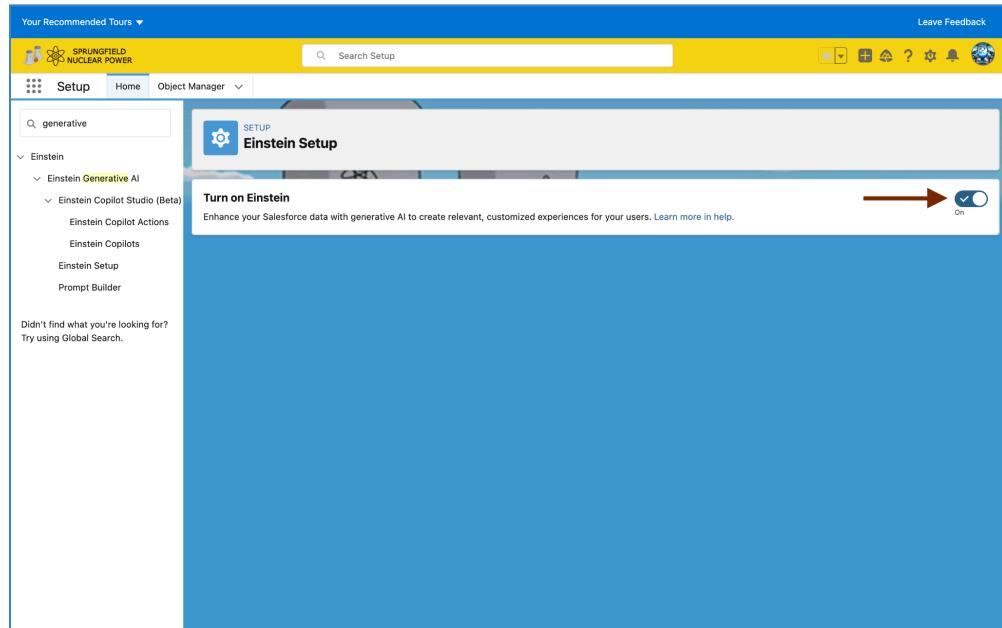


- Click **Prepare Data** in the Home page. A green **Success** banner will appear.
This will assign the relevant data to your User

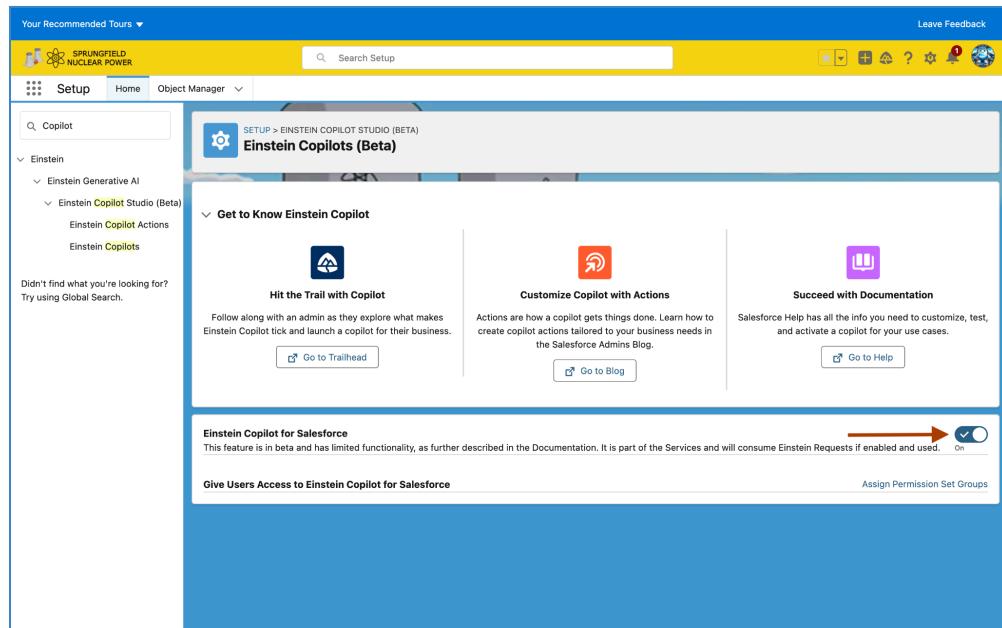


- Click the **Setup** icon and select **Setup**
This will take you to the Setup page for your org
- Enter **Generative** in the **Quick Find**
This will filter the list of options to show the Generative AI group

- Select **Einstein Setup** under the Generative AI group
This will filter the list of options to show the Copilot option
- Toggle the **Enable** button for Turn on Einstein



- Enter **Copilot** in the Setup Quick Find
This will filter the list of options to show the Copilot option
- Select **Einstein Copilots** under the **Einstein Copilot Studio (Beta)** group
Salesforce displays the Einstein Copilot list including options to explore this feature
- Toggle the **Enable** button for **Einstein Copilot for Salesforce**

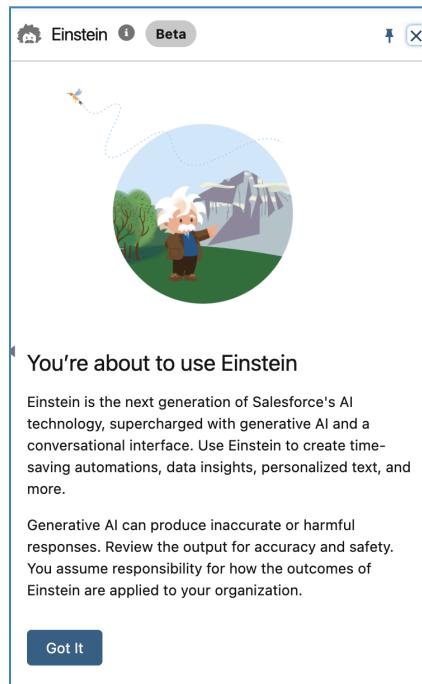




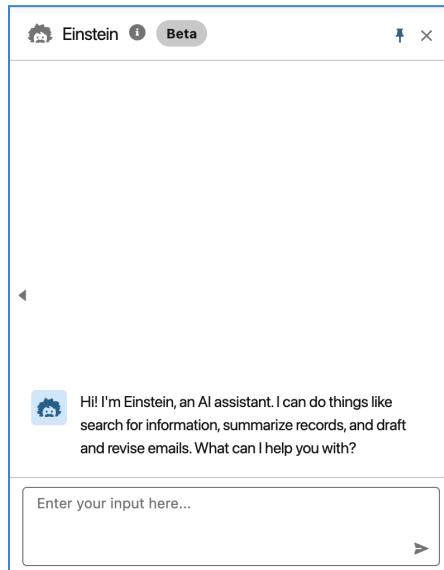
Note: Einstein Generative AI and Einstein Copilot **MUST** be enabled for Einstein Copilot to work as intended.

Verify Activation

- Click the App Launcher ☰ icon and search for **Sales**
- Select **Sales Lightning**.
- Click on the  **Einstein** icon in the top right corner
Einstein Copilot will pop-up



- Click **Got it** to continue
- If you see the following view, this means Einstein Copilot is Active.
Further action is not required.



Tip: If you see the following message "**There was a problem building the bot configuration. No valid version available**" this means Copilot is deactivated.

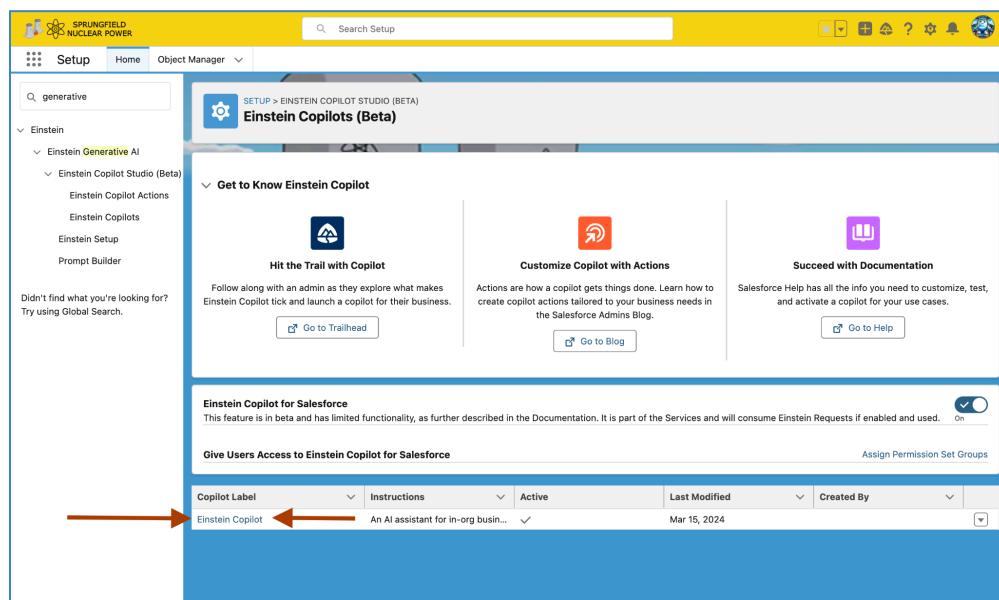
Step 2: Navigate Copilot

In this step, you will explore Einstein Copilot by testing prompts within Einstein Copilot Builder. The goal of this step is to get Astro more comfortable with using Copilot.

Copilot Builder

Go through these steps to navigate to Copilot Builder. If Einstein Copilot is active, skip the **last step** in this section.

- Click the Setup  icon and search for **Copilot**, then select **Einstein Copilots**.
- Click on **Einstein Copilot** under the Copilot Label column

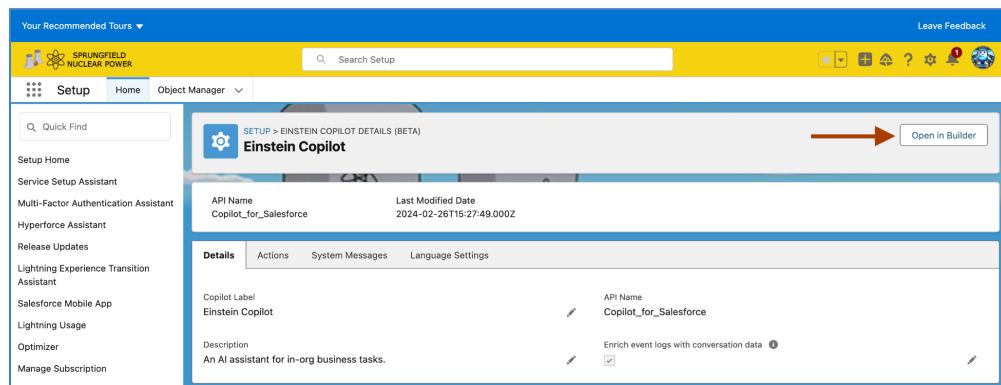


The screenshot shows the Salesforce Setup interface with the search bar set to 'generative'. Under the 'Einstein' category, 'Einstein Generative AI' is expanded, showing 'Einstein Copilot Studio (Beta)'. The main content area displays the 'Einstein Copilots (Beta)' page with sections like 'Get to Know Einstein Copilot', 'Hit the Trail with Copilot', 'Customize Copilot with Actions', and 'Succeed with Documentation'. Below this, there's a section for 'Einstein Copilot for Salesforce' with a note about it being in beta. At the bottom, a table lists a copilot entry with the 'Copilot Label' set to 'Einstein Copilot'. A red arrow points to this specific label.

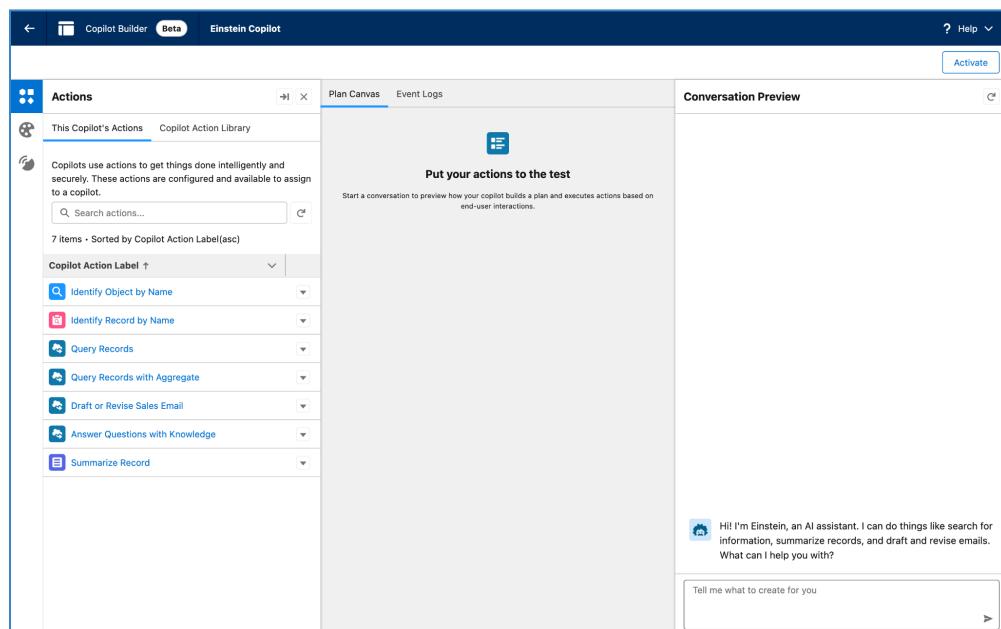


Pro Tip: Do not attempt to delete the pre-existing copilot. It will fail.

- Click the Open in Builder button in the top right corner



- You will be taken to the Einstein Copilot Builder page



- Click the **Activate** button to activate Einstein Copilot.
Skip this step if Einstein Copilot is already active.

Prompt #1: Accounts

Einstein Copilot Builder will show several key pieces of information after a prompt is executed. It can show:

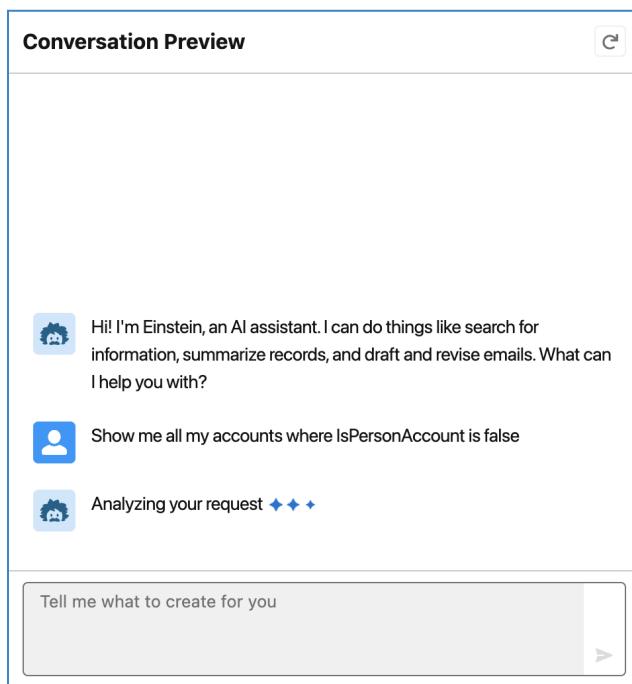
- The response to the prompt in the Conversation Preview panel
- The steps taken to obtain the response in the Plan Canvas

For this section, you will explore the Conversation Preview panel and the Plan Canvas section.

- In the **Conversation Preview** section, enter the following prompt:

Show me all my accounts where IsPersonAccount is false

- Press **Enter** or click the  arrow button to execute the prompt



- The results of the prompt are the following.
Keep in mind that results may vary.

 Hi! I'm Einstein, an AI assistant. I can do things like search for information, summarize records, and draft and revise emails. What can I help you with?

 Show me all my accounts where IsPersonAccount is false

 Sure, I have retrieved the list of accounts where IsPersonAccount is false.

Accounts

Account ID	001Hu000039OHF7IAO
Account Name	Rusty Burger
Account Phone	555-921-6785
Account ID	001Hu000039OHEsIAO
Account Name	Kwik-E-11
Account Phone	555-921-7775
Account ID	001Hu000039OHEplAO
Account Name	Joe's Tavern
Account Phone	555-921-9475

[View More](#)

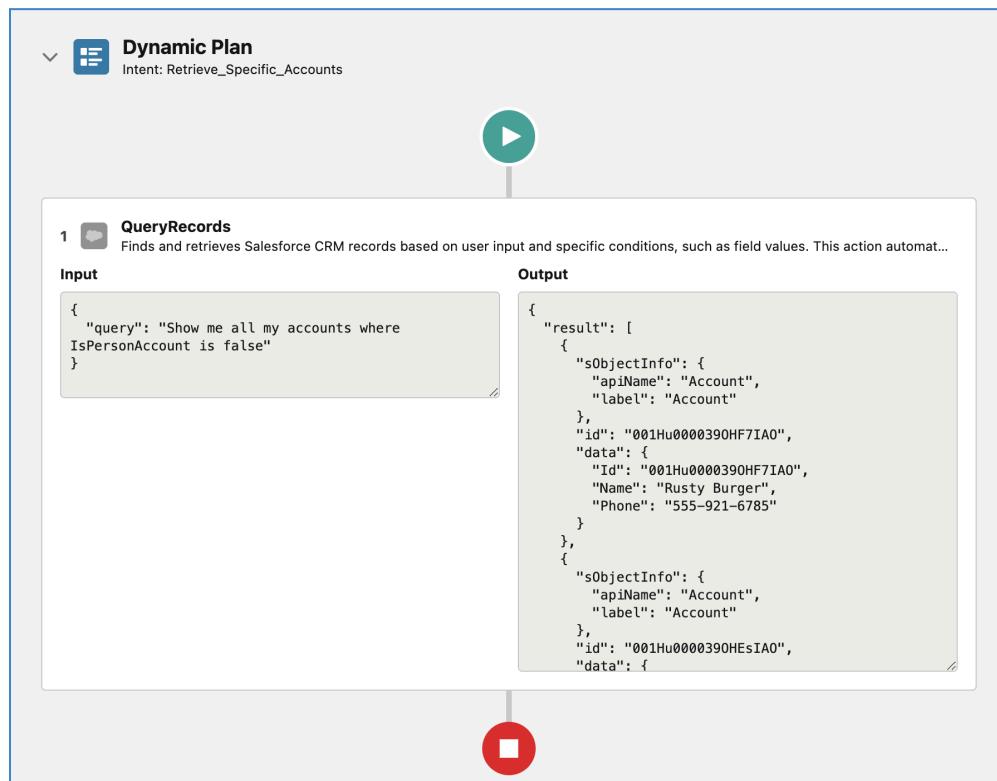
- The **Dynamic Plan** displays the Action Copilot executed

The Plan Canvas is the middle section in Copilot Builder.

The QueryRecords Standard Action was used to display the account information.

Important: Copilot comes with **Standard Actions** available for use out of the box. Standard Actions are pre-built skills. Similar to Standard Objects!





Click the bottom right corner  to expand the Output Response result

Prompt #2: Accounts & Opportunities

- In the **Conversation Preview** section, enter the following prompt and execute it:

Show me all my accounts with open opportunities

- The results of the prompt are the following:

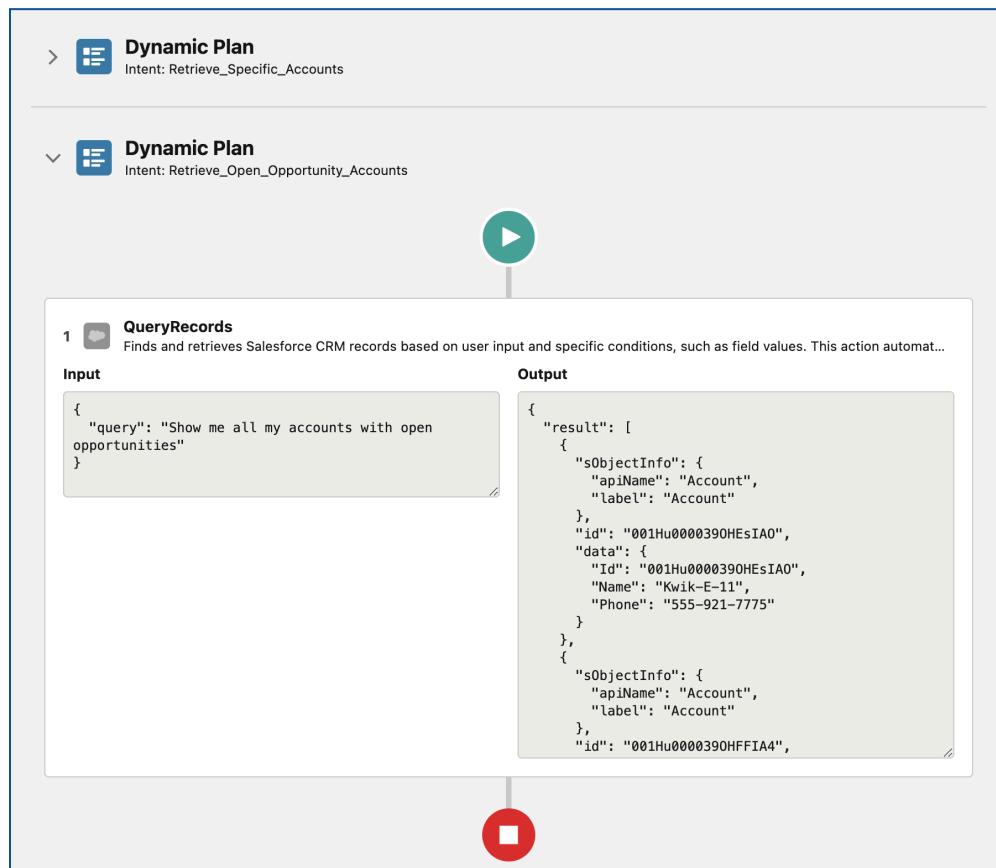
The screenshot shows a Microsoft Copilot conversation. The user's input is "Show me all my accounts with open opportunities". The AI response is "Sure, I have retrieved the list of your accounts with open opportunities." Below this, there is a table titled "Accounts" listing three accounts with their details:

Account ID	Account Name	Account Phone
001Hu000039OHEsIAO	Kwik-E-11	555-921-7775
001Hu000039OHFFIA4	Sprungfield High School	555-721-9791
001Hu000039OEHlIAO	Dungeon & Dragon Baseball Card Shop	555-821-1698

At the bottom of the list is a "View More" button.

- The **Dynamic Plan** displays the Action Copilot executed

The QueryRecords Standard Action was used to display the account information.



Prompt #3: Refined Prompt

Based on the results from the previous section, you will further refine the prompt. The iterative process of querying a prompt is also known as prompt engineering.

- In the **Conversation Preview** section, enter the following prompt and execute it:

Summarize the second account on the list and format the output to make it easy to read, separate it into relevant sections based on the data returned

- The result of the prompt is the following.
Keep in mind that results may vary.

User

Summarize the second account on the list and format the output to make it easy to read, separate it into relevant sections based on the data returned

Action Copilot

Alright, the second account on the list has been summarized and formatted for easy reading.

Sprungfield High School is an *Education* industry account, managed by [Admin User](#). With a workforce of *130 employees*, the account has an average annual spend of *USD 86,000.00*. **Opportunities** related to the account include [Teachers need coffee too](#), which is currently in the *Qualification* stage.

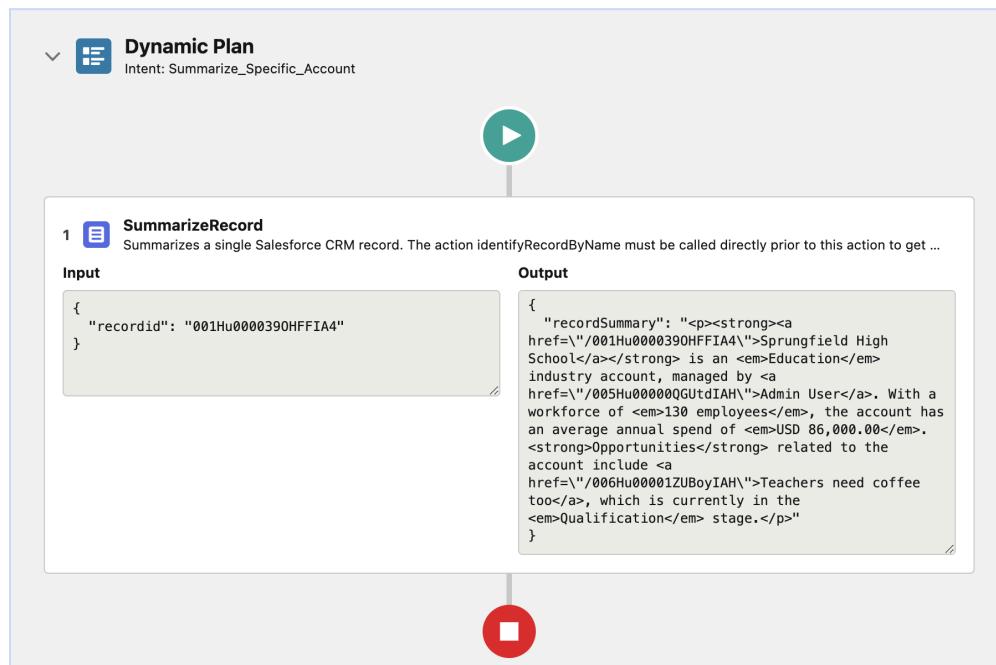
Copy

- The **Plan Canvas** displays the Action Copilot executed
The SummarizeRecord Standard Action was used to summarize the specified account.



Note: In the example below, the RecordId “001Hu000039OHFFIA4” aligns with the **Sprungfield High School** account.

In your environment, the RecordId will differ. This is expected behavior.

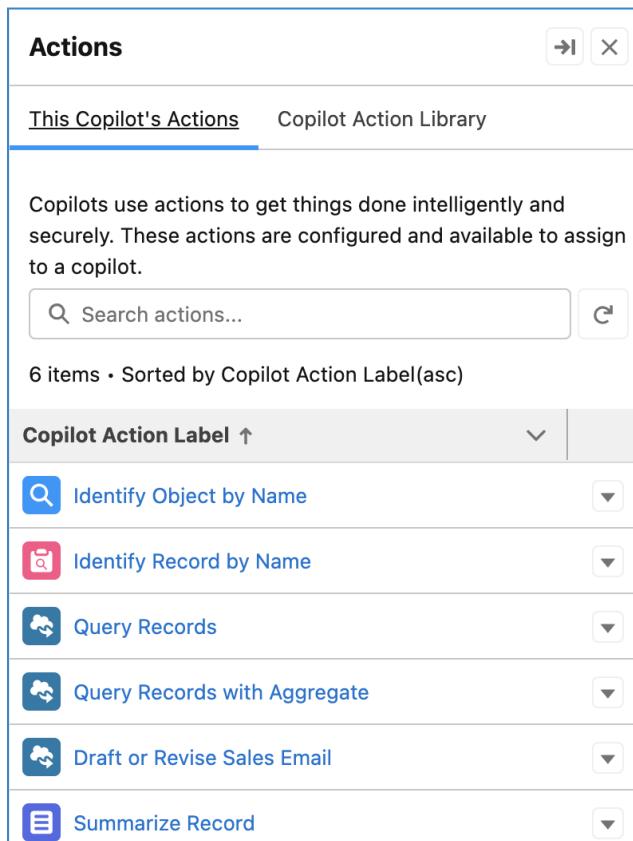


Step 3: Exploring Standard Actions

You will explore the Standard Actions available out of the box with Copilot. Standard Actions are pre-built skills, or Actions, that Einstein Copilot can leverage to execute a task.

- Click the  button

The panel shows the Copilot Actions available for this Copilot and the collection of Copilot Actions in the library.



Actions

This Copilot's Actions Copilot Action Library

Copilots use actions to get things done intelligently and securely. These actions are configured and available to assign to a copilot.

Search actions...

6 items • Sorted by Copilot Action Label(asc)

Copilot Action Label ↑

Action	Label
Identify Object by Name	Identify Object by Name
Identify Record by Name	Identify Record by Name
Query Records	Query Records
Query Records with Aggregate	Query Records with Aggregate
Draft or Revise Sales Email	Draft or Revise Sales Email
Summarize Record	Summarize Record

- Click the  button to edit Copilot

Copilot needs to be deactivated to add Actions. Similar to Flow!

Adding Standard Actions to Copilot



Note: The day of your workshop, your instruction may specify a **"different Standard Action"** than shown in the following step.

- Click the Copilot Action Library tab
- Click the downward arrow next to the Answer Questions with Knowledge Action, and click **Assign to Copilot**

Actions	
This Copilot's Actions	Copilot Action Library
Copilots use actions to get things done intelligently and securely. These actions are configured and available to assign to a copilot.	
<input type="text" value="Q Search actions..."/> C	
11 items - Sorted by Copilot Action Label(asc)	
Copilot Action Label ↑	
Answer Questions with Knowledge	Assign to Copilot
Case Troubleshooter	Assign to Copilot
Draft or Revise Sales Email	▼
Explore Conversation	▼
Get Record Fields and Values	▼
Identify Object by Name	▼
Identify Record by Name	▼
Query Records	▼

Actions	
This Copilot's Actions	Copilot Action Library
Copilots use actions to get things done intelligently and securely. These actions are configured and available to assign to a copilot.	
<input type="text" value="Q Search actions..."/> C	
11 items - Sorted by Copilot Action Label(asc)	
Copilot Action Label ↑	
Answer Questions with Knowledge	Assign to Copilot
Case Troubleshooter	Assign to Copilot
Draft or Revise Sales Email	▼
Explore Conversation	▼
Get Record Fields and Values	▼
Identify Object by Name	▼
Identify Record by Name	▼
Query Records	▼

Standard Action #1: Summarize Record

- Click on [Summarize Record](#) in the Copilot Action Library
This will take you to the Standard Action configuration page

Copilot Action Configuration

A copilot uses a large language model (LLM) to determine when to launch an action in a conversation. Enter instructions to tell the LLM how to use your action, inputs, and outputs. To help you get started, we copied over details from the reference action. [Learn more about how to write copilot action instructions in Salesforce Help.](#)

After you create your action, you can add it to a copilot and test and iterate on your instructions.

Copilot Action Label
Summarize Record

Copilot Action Instructions ⓘ
Summarizes a single Salesforce CRM record. The action `identifyRecordByName` must be called directly prior to this action to get a single record ID as input. You must call `summarizeRecord` only if the user explicitly asks for a summary (e.g: 'Summary', 'Recap', 'Highlights'). This action should be called only when there isn't a more specific summarization action.

Require user confirmation ⓘ

Inputs	Outputs
1 Record ID Instructions ⓘ The single ID of a Salesforce CRM record to create the summary for. For example <code>recordId, record_id, recordIds[0], accountId</code> . Advanced Settings <ul style="list-style-type: none"> Data Type: lightning__recordIdType Require input: <input checked="" type="checkbox"/> Collect data from user: <input type="checkbox"/> Mask personally identifiable information (PII): <input type="checkbox"/> 	1 Record Summary Instructions ⓘ The rich text summary that was created for the specified record. Advanced Settings <ul style="list-style-type: none"> Data Type: lightning__richTextType Filter from copilot action: <input type="checkbox"/> Show in conversation: <input checked="" type="checkbox"/> Mask personally identifiable information (PII): <input type="checkbox"/>

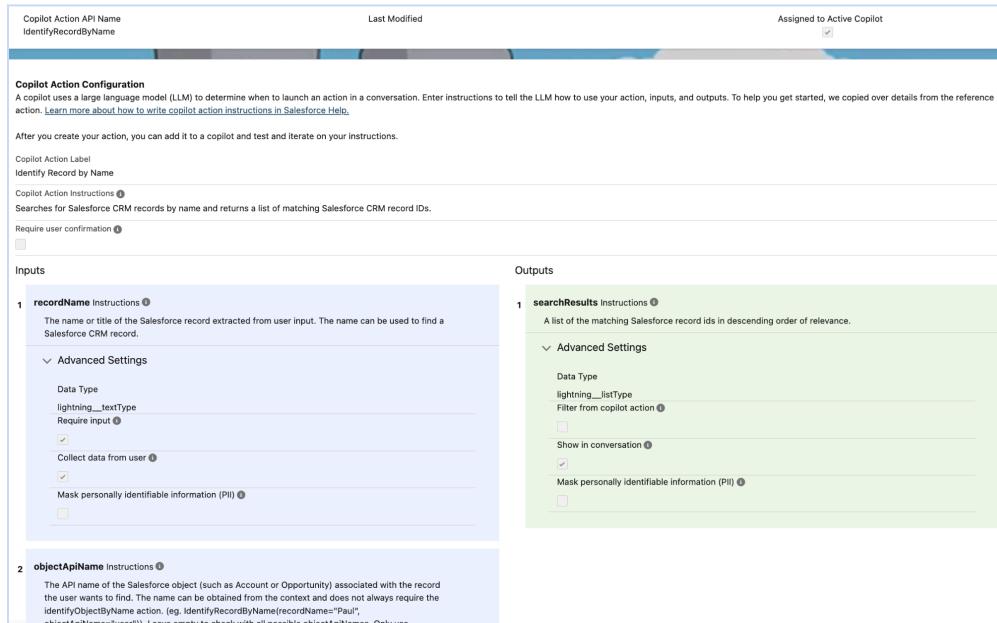
- The following are **Configuration Details**. No action is required.

Variable	Field	Instructions	Explanation
Copilot Action Instructions		Summarizes a single Salesforce CRM record. The action <code>identifyRecordByName</code> must be called directly prior to this action to get a single record ID as input. You must call <code>summarizeRecord</code> only if the user explicitly asks for a summary (e.g: 'Summary', 'Recap', 'Highlights'). This action should be called only when there isn't a more specific summarization action.	This Salesforce Action requires another action. The <code>identifyRecordByName</code> action will yield the required Record ID.
Inputs	Record ID	<i>The single ID of a Salesforce CRM record to create the summary for. For example recordId, record_id, recordIds[0], accountId.</i>	A Record ID is required for this Action to execute
Outputs	Record Summary	The rich text summary that was created for the specified record.	The requested summary will be in a rich text format

Standard Action #2: Identify Record by Name

The Identify Record by Name Standard Action is referenced by the Summarize Record Action. In this section, you will explore the Standard Action.

- Click to go **back** in the browser 
- Click the  button
- Click on  **Identify Record by Name** in the Copilot Action Library



The screenshot shows the configuration page for the 'IdentifyRecordByName' copilot action. At the top, there are fields for 'Copilot Action API Name' (set to 'IdentifyRecordByName'), 'Last Modified' (empty), and 'Assigned to Active Copilot' (checkbox checked). Below this is the 'Copilot Action Configuration' section, which includes instructions for the LLM to determine when to launch the action. It also lists 'Copilot Action Label' (Identify Record by Name) and 'Copilot Action Instructions' (Searches for Salesforce CRM records by name and returns a list of matching Salesforce CRM record IDs). There's a note about requiring user confirmation (checkbox unchecked). The main area is divided into 'Inputs' and 'Outputs'. The 'Inputs' section contains a step for 'recordName' with instructions: 'The name or title of the Salesforce record extracted from user input. The name can be used to find a Salesforce CRM record.' It also includes an 'Advanced Settings' section with 'Data Type' (lightning__textType), 'Require input' (checkbox checked), and options for 'Collect data from user' (checkbox checked) and 'Mask personally identifiable information (PII)' (checkbox checked). The 'Outputs' section contains a step for 'searchResults' with instructions: 'A list of the matching Salesforce record ids in descending order of relevance.' It includes an 'Advanced Settings' section with 'Data Type' (lightning__listType), 'Filter from copilot action' (checkbox checked), 'Show in conversation' (checkbox checked), and 'Mask personally identifiable information (PII)' (checkbox checked).

- The following are **Configuration Details**. No action is required.

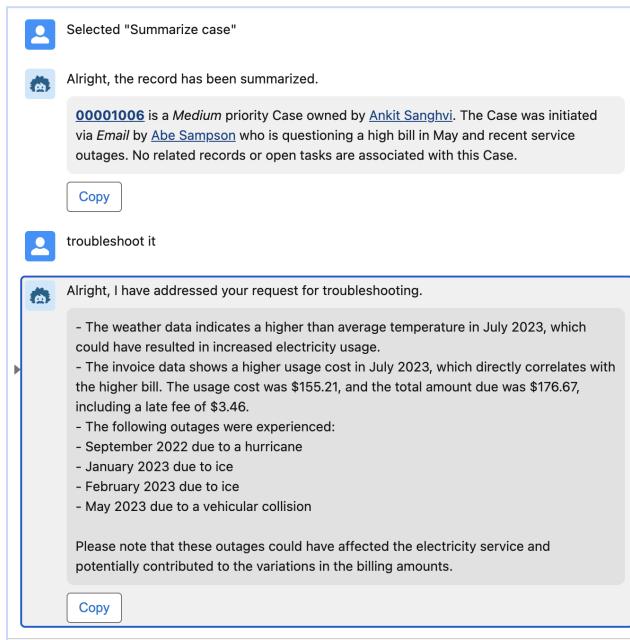
Variable	Field	Instructions	Explanation
Copilot Action Instructions		Searches for Salesforce CRM records by name and returns a list of matching Salesforce CRM record IDs.	
Inputs	recordName	The name or title of the Salesforce record extracted from user input. The name can be used to find a Salesforce CRM record.	Based on a User input, the name will be matched to a CRM record

Variable	Field	Instructions	Explanation
Inputs	objectApiName	<p>The API name of the Salesforce object (such as Account or Opportunity) associated with the record the user wants to find.</p> <p>The name can be obtained from the context and does not always require the <u>identifyObjectByName</u> action. Leave empty to check with all possible objectApiNames.</p> <p>Only use objectApiName field if a particular objectApiName type has been identified for this record in earlier step, otherwise leave empty to increase recall and query all objectApiNames by default</p>	This input is used along with the recordName input to best-match the CRM record the User referenced in the prompt
Outputs	searchResults	A list of the matching Salesforce record ids in descending order of relevance.	The output could include multiple results and they will be ranked in order of relevance

Exercise 2: Build A Copilot Action

In this step, you will create a custom action that helps troubleshoot a customer case. The custom action will be assigned to Einstein Copilot.

The final response will look as follows. Results may vary.



Provided Metadata

The following items are provided and will be used for this exercise:

- Prompt Builder Template: “Troubleshoot Case Prompt”
 - Provides the context around the data to the LLM
- Flow: “Case Troubleshooter Grounding”
 - Used to call out to external APIs to dynamically ground the prompt
- Flow: “Case Troubleshooter”
 - Provides a flow that a Copilot custom action can interact with

Step 1: Review the Prompt Flow

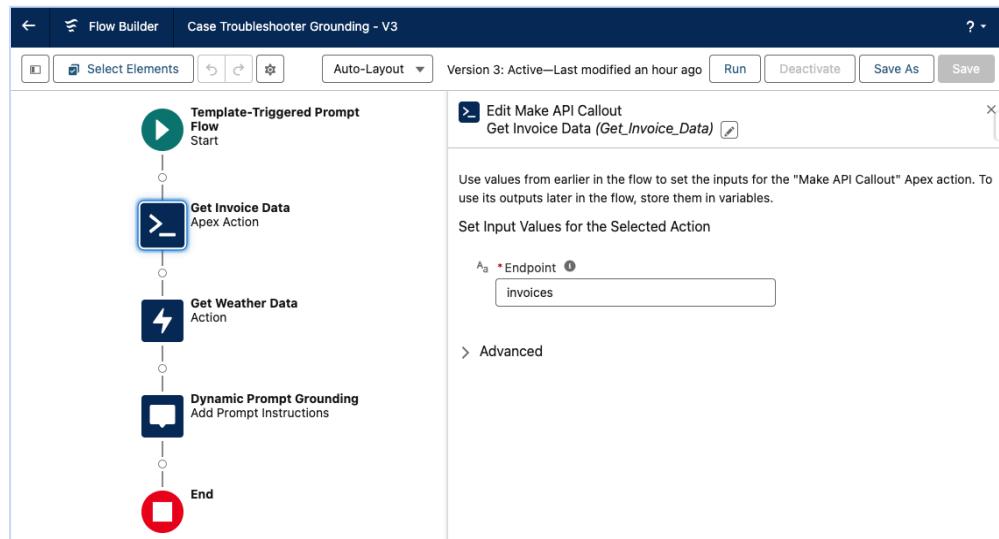
In this step, you will review the Case Troubleshooter Grounding Case.

- Click the **Setup** icon and select **Setup**
- Type **Flows** in the **Quick Find**
- Select **Flows** under the **Process Automation** group
Salesforce displays the Flows list
- Click the **Case Troubleshooter Grounding** flow

The screenshot shows the Salesforce Setup interface with the 'Flows' tab selected. On the left, there's a sidebar with 'Flows' and 'Identity' sections. The main area is titled 'SETUP Flows' and shows a table of 'Flow Definitions'. The table has columns for 'Flow Label', 'Process Type', 'Package State', 'Last Modified By', and 'Last Modified...'. One row, 'Case Troubleshooter Grounding', is highlighted with a red arrow pointing to it.

Flow Label	Process Type	Package State	Last Modified By	Last Modified...
* Get Committee Minutes	Prompt Flow	Unmanaged	Timothy Miles	3/15/2024, 8:50 A...
* Get Committee Notes	Prompt Flow	Unmanaged	Timothy Miles	3/15/2024, 8:50 A...
* Meeting Minutes Example	Screen Flow	Unmanaged	Timothy Miles	3/15/2024, 8:50 A...
* Retrieve Prompt Search Terms	Prompt Flow	Unmanaged	Timothy Miles	3/15/2024, 8:50 A...
* Screen Flow for Town Sentiment	Screen Flow	Unmanaged	Timothy Miles	3/15/2024, 8:50 A...
* Town Sentiment to Alternative Energy	Screen Flow	Unmanaged	Timothy Miles	3/15/2024, 8:50 A...
Account Triggered Flow	Auto-launched Flow	Unmanaged	Ismelda Rocio Corr...	3/15/2024, 8:50 A...
AllAboutBurns	Auto-launched Flow	Unmanaged	Timothy Miles	3/15/2024, 8:50 A...
Basic Approval Request	Flow Orchestration...	Managed-Install...		
BurnsCharter	Prompt Flow	Unmanaged	Timothy Miles	3/15/2024, 8:50 A...
Case Troubleshooter	Auto-launched Flow	Unmanaged	Ismelda Rocio Corr...	3/15/2024, 8:50 A...
Case Troubleshooter Grounding	Prompt Flow	Unmanaged	Ismelda Rocio Corr...	3/15/2024, 8:50 A...
Change Case Owner to Incident Owner	Screen Flow	Managed-Install...		
Close Change Request & Related Issues	Screen Flow	Managed-Install...		
CMS: Check Whether Any Step is Completed	Evaluation Flow	Managed-Install...		
CMS: Notify Content Author	Screen Flow	Managed-Install...		
CMS: Review Content	Screen Flow	Managed-Install...		

- Examine each element in the flow
 - Get Invoice Data** uses an invocable Apex action to call out to an external API that's simulating an ERP system and returns customer billing data
 - Get Weather Data** uses an HTTP Callout in flow to call a simulated weather API that returns actual vs historical average weather data by month
 - Dynamic Prompt Grounding** is the string that will be returned to any prompt template that uses this flow. In this case we are returning the invoice and weather data and are just encapsulating them in a pseudo-xml format to help the model delineate between the data sources



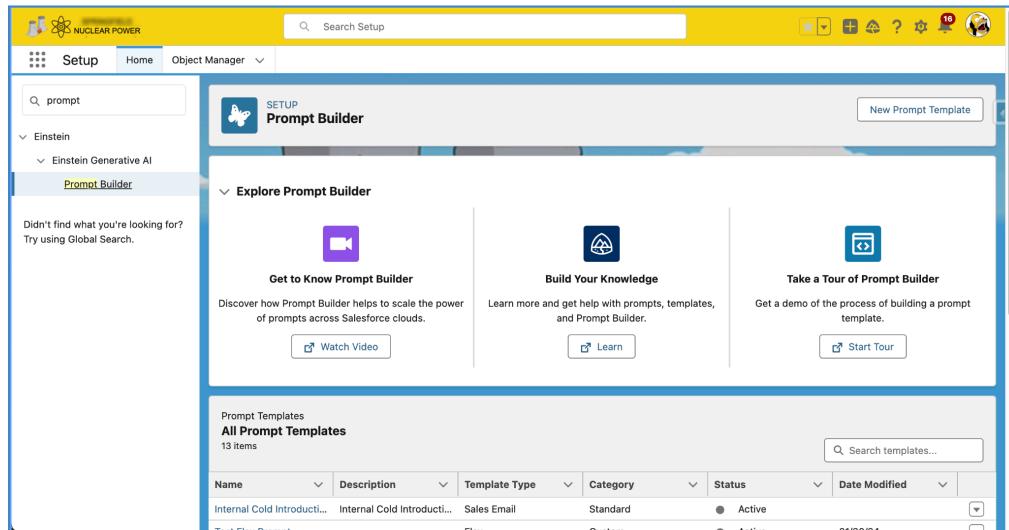
- Close the **Case Troubleshooter Grounding** flow browser tab

Do not save any changes if prompted. You should be back on the Setup tab with the list of flows

Step 2: Populate the Prompt Template

In this step, you will edit the prompt template, or instructions, used in the Flow in the previous step.

- Type **Prompt** in the Quick Find
- Select **Prompt Builder** under the **Einstein Generative AI** group
Salesforce displays the Prompt Builder list including options to explore this feature

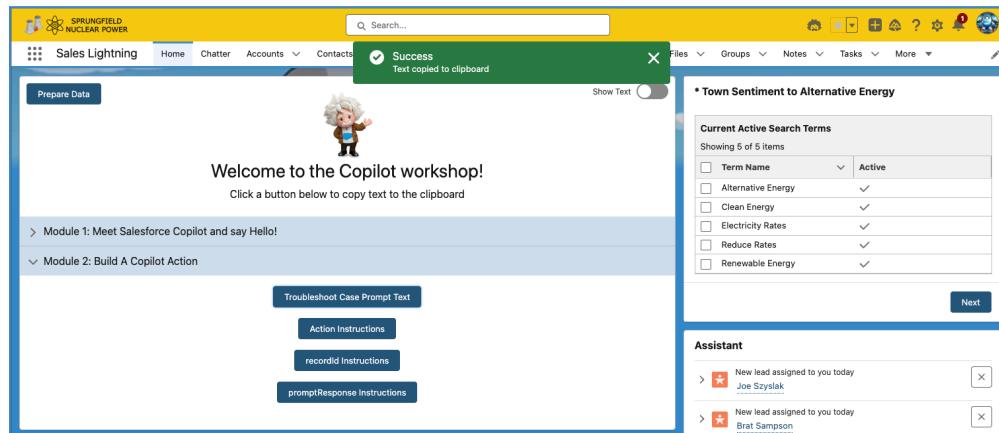


- Click the **Troubleshoot Case Prompt** template
Leave this tab open

Name	Description	Template Type	Category	Status
Troubleshoot Case Prompt	Flex	Custom	Active	

- Open another Tab and navigate to App Launcher > Sales Lightning > Home tab
- Expand the **Module 2: Build A Copilot Action** section
- Click **Troubleshoot Case Prompt Text**

The prompt text is copied to your clipboard for you



- Navigate to the **Setup** browser tab
- Paste the text from your clipboard into the prompt text area

Prompt Template Workspace

Resource ⓘ

Search for or select a resource to ins

You are an expert focusing on troubleshooting a billing issue for a utility company. Please deeply analyze the provided data and prioritize correlations in the data sets to the customer's issue. If weather data is provided, focus heavily on the weather data correlation. If outages are mentioned, specifically list any outages experienced in a separate table (designated by "outage_reason" in the data) with the month it occurred and the reason why. Respond in a with a bulleted list. BE BRIEF. BE CONCISE. Do not make recommendations. All dollar figures should be formatted to 2 decimal places.

Case Subject: **Input:Case.Subject**

Description: **Input:Case.Description**

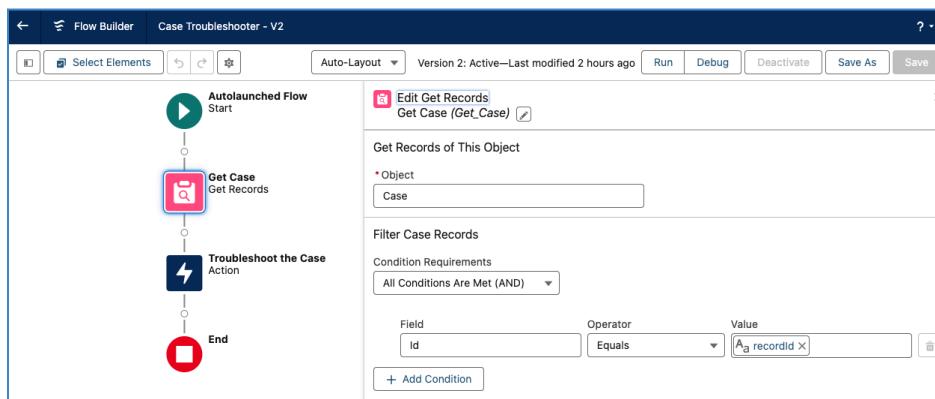
<data>

Flow: Case_Troubleshooter_Grounding

- Click **Save As**
- Click **Save as a New Version**
- Click **Activate**
- Click **Home** on the **Setup** tab

Step 3: Review the Case Troubleshooter Flow

- Type **Flows** in the Quick Find
- Select **Flows** under the **Process Automation** group
- Click **Case Troubleshooter** flow
- Examine each element in the flow
 - Get Case** uses the **recordId** passed from Copilot to retrieve the correct case
 - Troubleshoot the Case** calls the **Troubleshoot Case Prompt** template by passing the case to it and returning the prompt response to Copilot



- Close the **Case Troubleshooter** flow browser tab
Do not save any changes if prompted. You should be back on the Setup tab with the list of flows

Step 4: Create a New Copilot Action

- Type **Copilot** in the Quick Find
- Select **Einstein Copilot Actions** under the **Einstein Copilot Studio (Beta)** group

- Click **New Copilot Action**
- Select the following:
 - Reference Action Type = **Flow**
 - Reference Action = **Case Troubleshooter**

Create a Copilot Action

Connect an existing action

Actions are how a copilot gets things done. To create a copilot action, start with the functionality you already have in Salesforce, such as flows or prompt templates. Select an action you want the copilot action to reference, and then configure it for use with a copilot.

* Reference Action Type: Flow

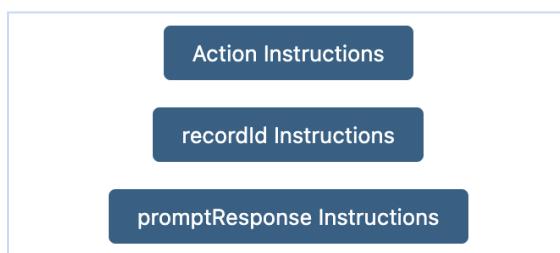
* Reference Action: Case Troubleshooter

* Copilot Action Label: Case Troubleshooter

* Copilot Action API Name: Case_Troubleshooter

Cancel **Next**

- Click **Next**
- In another Tab and navigate to App Launcher > **Sales Lightning** > Home tab
You may already have an open Tab.
- Expand the **Module 2: Build A Copilot Action** section
- Use the shortcut buttons to automatically copy values to the clipboard and paste into the corresponding fields in **Build a Copilot Action**



- Select the following options:
 - Inputs > Check **Require Input**
 - Inputs > Check **Collect data from user**

Outputs > Check Show in conversation

Create a Copilot Action

*Copilot Action Instructions

Troubleshoots a single Salesforce CRM Case record. Requires a single Case record ID as input for Case_Troubleshooter. You MUST return promptResponse to the user. Do not use this to summarize a record. This should ONLY be used when a user specifically asks for troubleshooting a case.

Inputs	Outputs
recordId 1 recordId	promptResponse 1 promptResponse
Instructions Case record Id to be used for troubleshooting. Example: caseld, recordId, recordId	Instructions Prompt response that must be returned to the user
Data Type lightning__textType	Data Type lightning__textType
<input type="checkbox"/> Require input	<input type="checkbox"/> Filter from copilot action
<input checked="" type="checkbox"/> Collect data from user	<input checked="" type="checkbox"/> Show in conversation
<input type="checkbox"/> Mask personally identifiable information (PII)	<input type="checkbox"/> Mask personally identifiable information (PII)

Back Finish

- Click Finish
- Type Copilot in the Quick Find
- Select Einstein Copilots under the Einstein Copilot Studio (Beta) group
- Click the Einstein Copilot

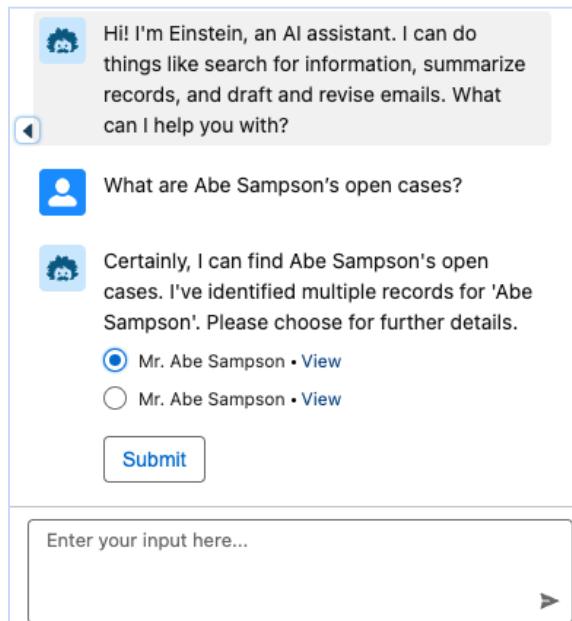
Copilot Label	Instructions	Active
Einstein Copilot	An AI assistant for in-org bu...	✓

- Click [Open in Builder](#)
- Click the Copilot Action Library tab

- Click Deactivate on the Copilot [Deactivate](#)
Copilot may already be deactivated from the previous exercise
- Click OK to complete deactivation
- Click the dropdown next to Case Troubleshooter
- Click Assign to Copilot
- Click Activate

Step 5: Let's Test it Out!

- In **Sales Lightning**, click the **Home** tab
- Click the  in the top right corner to open the **Copilot Sidebar**
*Refresh the browser tab if  In the **Copilot Sidebar** type “What are Abe Sampson’s open cases?” and press **Enter***
- Select the first Mr. Abe Sampson record and click **Submit**



The screenshot shows the Copilot Sidebar in Sales Lightning. At the top, there is a message from Einstein: "Hi! I'm Einstein, an AI assistant. I can do things like search for information, summarize records, and draft and revise emails. What can I help you with?". Below this, a user asks: "What are Abe Sampson's open cases?". Einstein responds: "Certainly, I can find Abe Sampson's open cases. I've identified multiple records for 'Abe Sampson'. Please choose for further details." Two options are shown: "Mr. Abe Sampson • View" (selected) and "Mr. Abe Sampson • View". At the bottom of the sidebar is a "Submit" button. Below the sidebar is a large input field with placeholder text "Enter your input here..." and a right-pointing arrow.

- Click Case Number **00001006**
The case will be opened in the background
- Click **Summarize case**
- In the **Copilot Sidebar** type “troubleshoot this case” and press **Enter**
Einstein Copilot response may vary

The screenshot shows the Einstein troubleshooting interface. At the top, it says "Einstein" with a "Beta" button. Below that, there's a message from the bot: "troubleshoot this case". The user responds: "Sure, the case troubleshooting has been completed." A detailed analysis follows:

Here's the analysis of your data:

Weather Data Correlation:
- In July 2023, the actual average temperature was 98, which is significantly higher than the historical average of 84. This could have contributed to increased electricity usage for cooling purposes.

Outages Experienced:
- September 2022: Outage due to a hurricane.
- January 2023: Outage due to ice.
- February 2023: Outage due to ice.
- May 2023: Outage due to a vehicular collision.

Billing Analysis:
- The total amount due for May 2023 was

How can I help?

[Summarize case](#)

Enter your input here... ➤

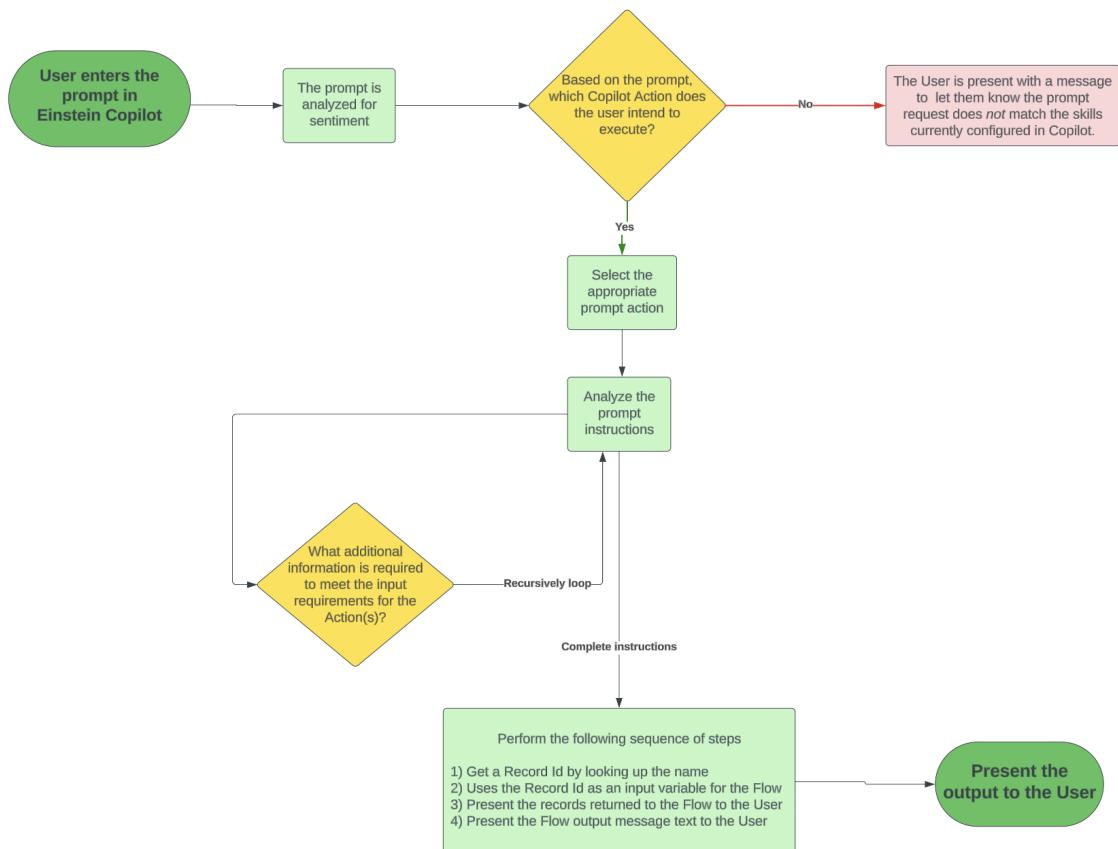
Complete!

Optional: Technical Deep Dive

The following section dives deeper into Einstein Copilot. This section is a short compilation of some of the tips and tricks when using Copilot along with general “good to know” information.

Logic Diagram for Copilot

This diagram walks you through the general logic Einstein Copilot executes behind-the-scenes. The analysis of the intent of the User is a critical piece in executing the prompt. This diagram is read from left to right and top to bottom.



Note: Einstein Copilot is currently in Beta. *Future looking statement* This logic diagram could potentially change with the GA release of the solution.

Output Types

Einstein Copilot supports various output types. They are the following:

- Record list
- Single record
- Selected Single Record
- Rich text
- Input Record Info

Record List

Opportunities

Opportunity Name: Vandelay Widgets
Account Name: Vandelay Industries
Stage: Value Proposition
Amount: \$100,000
Close Date: 8/12/23

Opportunity Name: Urban Sombreros
Account Name: J. Peterman Company
Stage: Prospecting
Amount: \$90,000
Close Date: 8/23/23

Opportunity Name: Festivus Pole
Account Name: Vandelay Industries
Stage: Value Proposition
Amount: \$80,000
Close Date: 8/30/23

[View More](#)

Single Record

Vandelay Industries

Account Name: Acme Industries
Stage: Proposal / Quote
Amount: \$100,000
Close Date: 10/29/23
Opportunity Owner: Elaine Benes

[Edit Record](#)

Select Single Record

Acme corp LTD France + View
 Acme global opportunity 2023 + View
 Acme opportunity EMEA renewal revisited... + View
 APAC Acme Renewal + View
 EMEA Acme new business + View
 None of these

[Select](#)

Rich Text

8921 Wyndam Ave, San Francisco, CA - \$2,400,000
4 bed, 3 bath residence measuring 2,200 sqft. Initially listed at \$2,550,000, it has been on the market for 45 days and shown to 50 agents. Recent home sales in the area averaged \$2,320,000. This summary is shortened by a human to fit on the slide better.

Input Record Info

Close Date: 9/1/2023
Account Name: Vandelay Industries
[Save](#) [Edit More Fields](#)

Error Message “This action failed”

When	If you encounter the error message “ This Action failed ” and use a Flow and/or Invoked Apex Method.
Scenario	You created a Custom Action that invokes a Flow. The Flow updates an account record. However, a validation rule does not permit the account to be updated. Then you’ll see the error message above.
Fix	Return an error message back to Einstein Copilot. Within your Flow create a fault path, and include the fault message in the output variable the action will use. Without returning the context, the User will not “know” why Copilot failed to respond to the request.

Want to learn more?

As the capabilities of Salesforce Data Cloud continue to expand, Salesforce is providing a growing set of enablement offerings to help customers maximize the value of the platform. A wide range of resources are now available to learn more about getting started with Data Cloud and utilizing its advanced features for analytics and data science.

Trailhead

There are many courses on **Trailhead** to help you get up to speed.
Check out some Trailmixes [here](#).



Documentation

[Einstein Copilot Information Page](#)

See a demo and find additional information about Salesforce Einstein Copilot.



[Salesforce Ben](#)

Interesting article about Salesforce Einstein Copilot and a quick primer how it works



[Salesforce Blog](#)

Interesting blog post about Einstein Copilot and walks through relevant use cases for administrators working with AI.



Where Do We Go From Here?

Data Cloud does the heavy lifting to unify data from different sources into complete customer profiles. With unified data established, we can then leverage automation tools like Data Action to easily trigger workflows and processes based on changes to that unified data. The power of Data Cloud is bringing disparate data together, so we can then activate it using the same declarative tools we're accustomed to in Salesforce.

There are many courses on **Trailhead** to help you get up to speed.



Ready to take your data unification to the next level? Reach out to your Account Executive today to schedule a customized session with our Technical Architects. Together, we'll explore how Data Cloud can solve your specific data challenges and demonstrate the possibilities firsthand. Imagine what you could accomplish with a complete 360-degree customer view. Let's make it happen!