



Einstein Assistant Initiative

Key Components of Salesforce Einstein

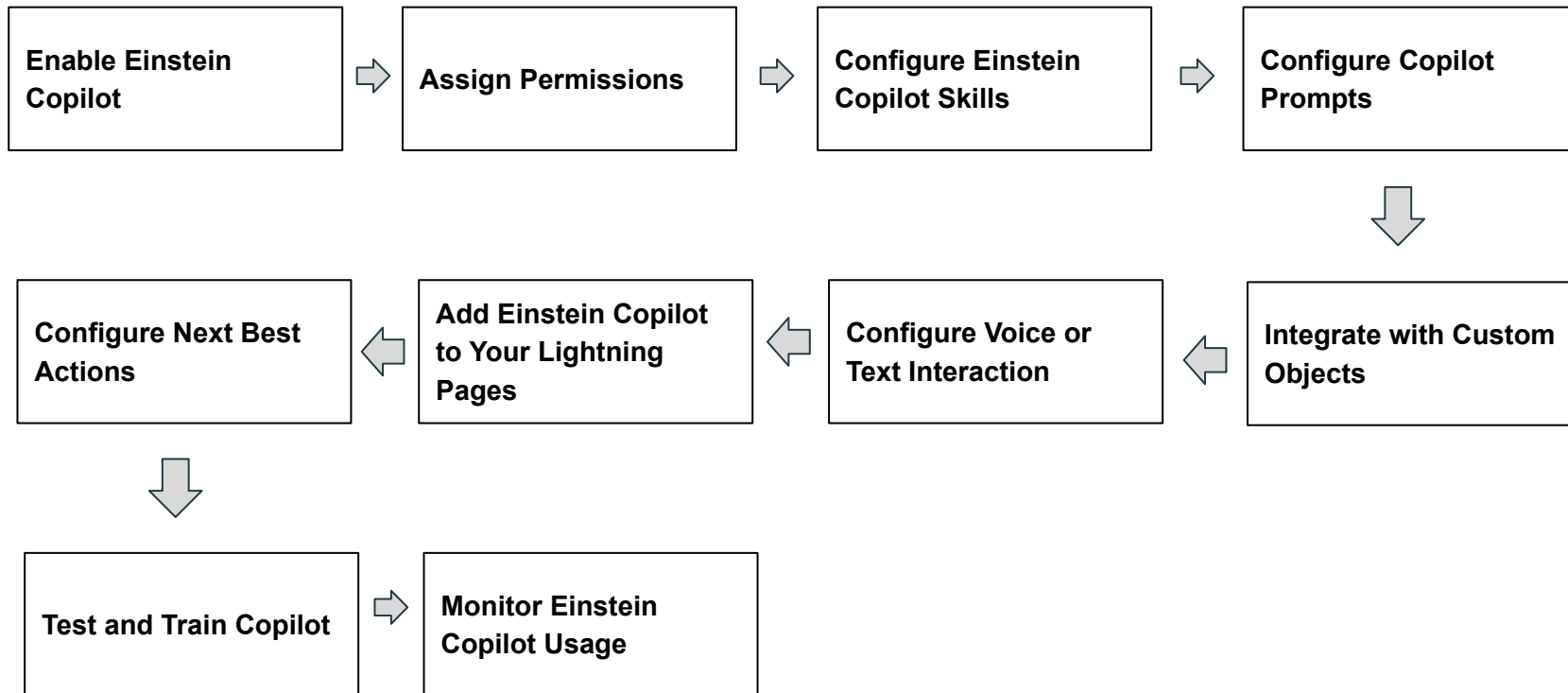
1. **Einstein Analytics:** Provides predictive insights and recommendations by analyzing large datasets.
2. **Einstein Prediction Builder:** Allows users to create custom AI models to predict outcomes using their own Salesforce data.
3. **Einstein Discovery:** Helps users automatically analyze data to discover hidden patterns and provide intelligent recommendations.
4. **Einstein Voice:** Voice-activated AI that helps users interact with Salesforce using voice commands.
5. **Einstein Vision and Language:** Allows developers to use pre-trained models to analyze images and language in Salesforce applications.
6. **Einstein Bots:** AI-driven chatbots that automate customer support and other interactions.
7. **Einstein Next Best Action:** Offers personalized recommendations based on customer data and behavior.

Features to Customize Einstein Copilot

1. **Pre-Built Skills:** Use Salesforce's standard skills (e.g., create or update a record) without needing custom development.
2. **Custom Skills:** Build your own skills tailored to specific business needs, such as handling a custom object or performing a specialized action.
3. **Integration with Einstein Bots:** You can link Copilot to **Einstein Bots** to enable more conversational support for service teams, allowing it to handle common customer inquiries or requests.
4. **Voice and Text Configuration:** Depending on whether you're using Einstein Voice or a text-based interface (like chat), you can configure how Copilot responds and interacts with users.
5. **Next Best Action Integration:** Automatically suggest the most relevant next steps based on the user's actions and historical data, improving user engagement.
6. **Multilingual Support:** Configure Einstein Copilot to support multiple languages for global teams, ensuring Copilot can handle queries in different languages.

- **Prompt Builder:** A low-code prompt management tool that helps users create custom, reusable AI prompts in the flow of work, broadening the use of generative AI beyond conversational interfaces.
- **Copilot Builder:** A library of actions, or capabilities, that users can choose from to customize their AI assistant. For example, users can use it to configure their AI assistant to perform tasks like updating an account record or getting a shipping update.
- **Model Builder:** A capability that allows users to 'bring your own LLM' — including those from Anthropic, Hugging Face, Google, and OpenAI — to power custom Einstein Copilot functionality.

Steps to Configure Einstein Copilot in Salesforce



Einstein Copilot, your Salesforce conversational AI assistant

- Einstein Copilot places this conversational model across your Salesforce Platform by providing a context-friendly assistant.
- For example, if you're on a specific case record, Einstein Copilot will recognize that and even offer common suggestions like "summarize this record"—all based on the page you're looking at.
- It's an AI assistant with access to all of your enterprise data from the same location.

The screenshot displays the Salesforce Einstein Copilot interface. On the left, a contact record for **Corette Jaynes** is visible, showing details such as birthdate (10/17/1992), preferred name (Corette), and experience interests (Nightlife & Entertainment, Spa & Wellness). On the right, the Einstein Copilot chat window is open, featuring a cartoon character of Albert Einstein and the text "Let's chat!". The chat window includes a greeting: "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 the greeting are two suggested actions: "Summarize contact" and "Draft an email". At the bottom, there is a text input field labeled "Describe your task or ask a question..." with a send button.

Copilot is giving a summary of that account

Summarizing Corette not only on her contact information but also on related data, including custom data like the Booking and Guest Review objects

- When it gets a prompt, it processes that request to determine what the user is asking. It then refers to its library of actions to provide an answer.
- Einstein Copilot is capable of chaining those actions in order to generate a response.

The screenshot displays the Einstein Copilot interface. On the left, a contact profile for 'Corette Jaynes' is shown with tabs for 'Details', 'Related', and 'Activity'. The 'Details' tab is active, showing fields for Name, Birthdate, Preferred Name, Lead Source, Account Name, Next Check-in Date, Guest Type, and External Id. Below this is an 'Overview' section with a 'Guest Summary' and 'Description'. At the bottom is an 'Experience Interests' section with three interests: 'Nightlife & Entertainment', 'Spa & Wellness', and 'Golf'. On the right, the Einstein Copilot chat window is open, showing a conversation where the user asked for a summary of the contact. The AI assistant, Einstein, responded with a detailed summary of Corette Jaynes, including her contact information, interests, and booking history. The chat window also features a 'Suggested Actions' section with buttons for 'Summarize contact' and 'Draft an email', and a text input field for further prompts.

Contact: Corette Jaynes

Details | Related | Activity

▼ Contact Information

Name: Corette Jaynes | Account Name: Jaynes Household - 10835397

▼ Details

Birthdate: 10/17/1992 | Next Check-in Date: [blank]
Preferred Name: Corette | Guest Type: Family Fun Seekers
Lead Source: Corporate Booking | External Id: 10009361

▼ Overview

Guest Summary: [blank]
Description: [blank]

▼ Experience Interests

Interest 1: Nightlife & Entertainment | Interest 3: Golf
Interest 2: Spa & Wellness | Lifetime Experience Booking: 10

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?

Selected "Summarize contact"

Alright, the record you requested has been summarized.

Corette Jaynes is associated with **Jaynes Household - 10835397** and can be reached at corettejaynes@example.com. This contact, who prefers to be called Corette, has a diverse range of interests including *Nightlife & Entertainment*, *Spa & Wellness*, and *Golf*. Corette is particularly interested in *Family Fun Seekers* experiences and was introduced to us through *Corporate Booking*.

Corette has participated in a variety of **Bookings** including the *Artisan Workshop Series*, *Farm-to-Table Cooking Class*, and *Aqua Fitness in Paradise*. Feedback from **Guest Reviews** indicates mixed experiences, with high praise for the *Tropical Snorkel Adventure* but less enthusiasm for the *Family Fun Putt-Putt and Infinity Pool Lounge*.

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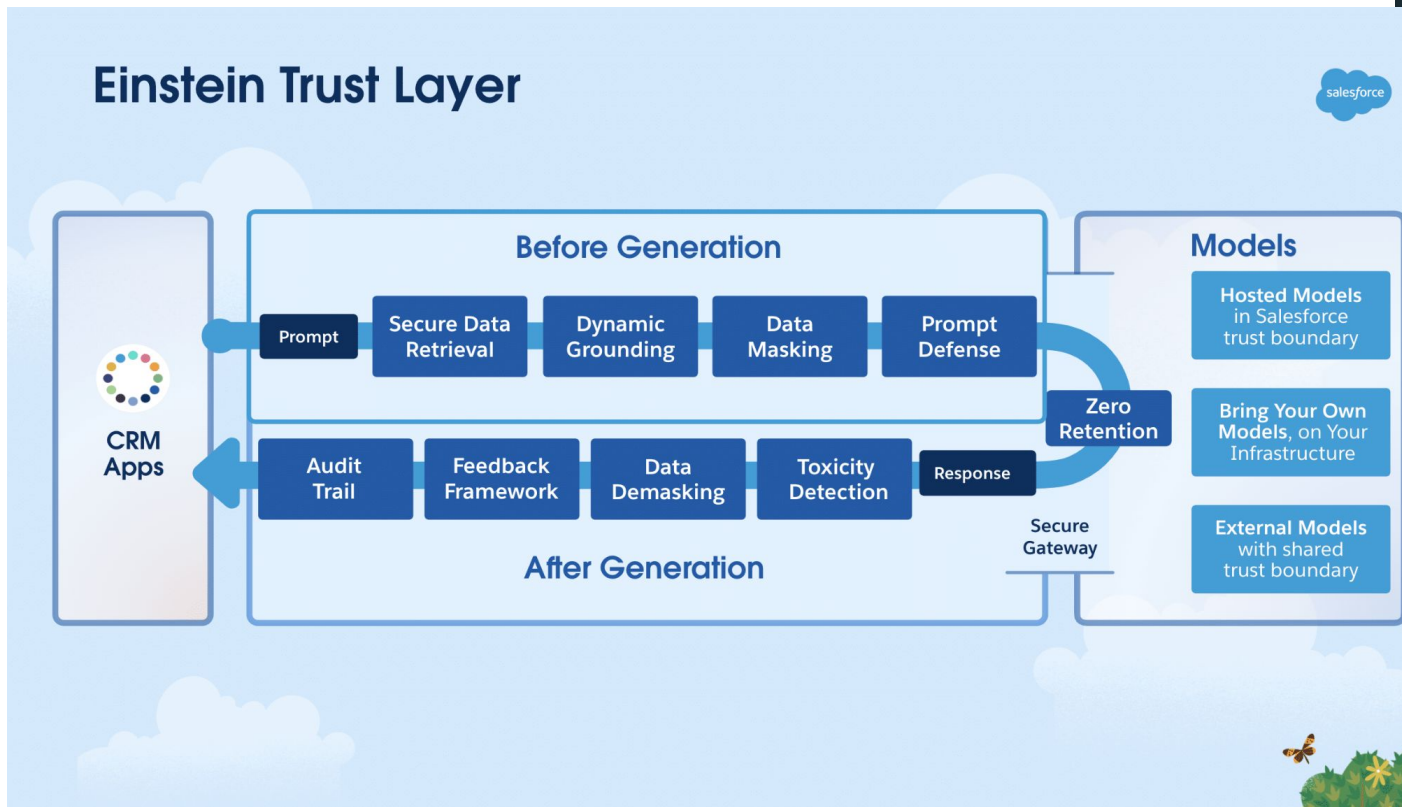
Suggested Actions

Summarize contact | Draft an email

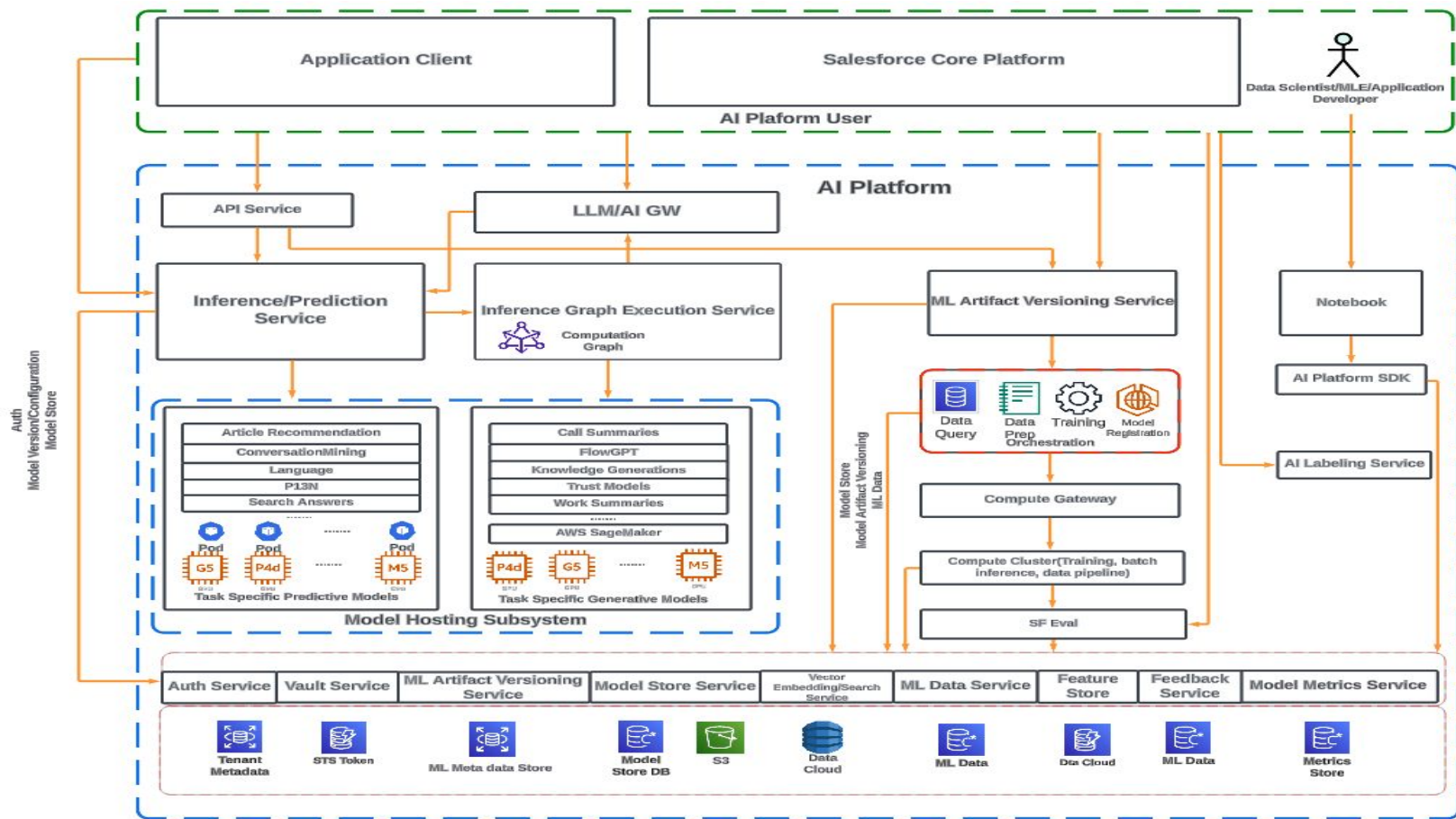
Describe your task or ask a question...

The Einstein 1 Trust Layer

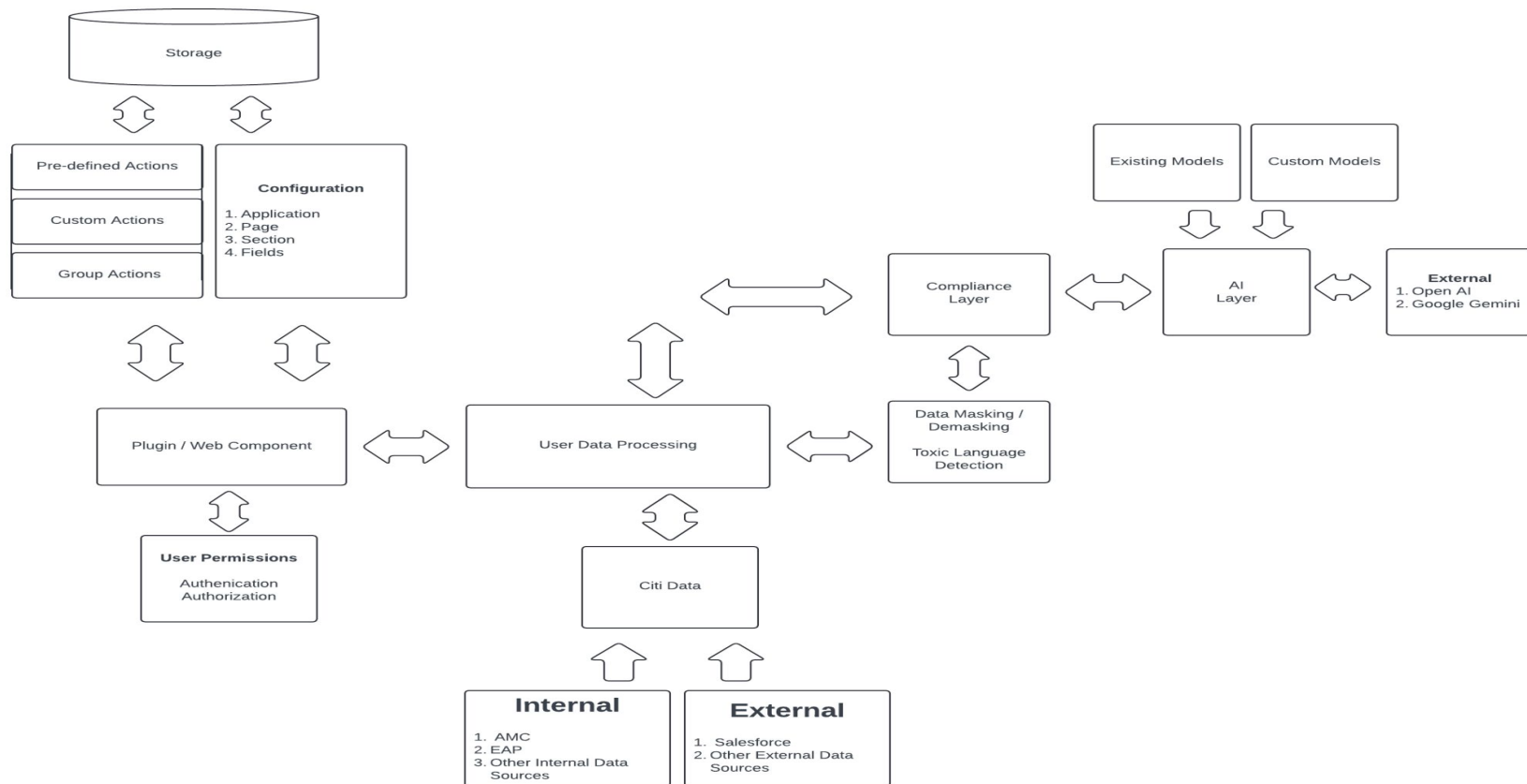
1. Your enterprise data will not be seen, kept, or used by any model powering Einstein Copilot for training.
2. The same security layer that enforces field-level security on the platform is used by Einstein Copilot.
3. On the return, responses are audited and monitored for toxicity and the models are adjusted accordingly.



Salesforce - AI Platform architecture



Proposed Architecture / Framework



Thank
you