



Setup

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Sales

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Einstein Bots for Sales
(Beta)

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Easily create and manage bots for your different sales channels. Looking for more Einstein Bots?

[Go to Einstein Platform](#)

Set Up Your Einstein Website Bot for Sales

1 Personalize the Conversation Experience

Your bot includes dialogs, flows, and other components that streamline sales conversations and automate tasks. To build better relationships with customers, explore included components and personalize them to reflect your brand's personality, voice, and tone.

[Learn More in Help](#)[Personalize in Bot Builder](#)

2 Route Customers to Your Sales Team

Create a Conversation Queue

Your bot includes Send to Record Owner, a routing flow that sends conversations from the bot to your team. Set up a queue that helps the routing flow distribute conversations among available sales team members. And if routing is unsuccessful, the queue assigns conversations to queue members.

[Learn More in Help](#)[Create a Queue](#)

Add the Queue to Your Bot's Routing Flows

To let your bot route conversations to team members, add your conversation queue to the Route to Bot flow.

[Go to Flow Builder](#)

Customize How Conversations Route to Your Sales Team

By default, your bot routes conversations to the record owner associated with the customer. Review the Send to Record Owner flow to start customizing how conversations route to your team.

[Learn More in Help](#)[Customize in Flow Builder](#)

Add Routing Flows to Your Bot's Rule Actions

To trigger routing, add the Send to Record Owner flow to your bot's Route Chat to Omni dialog. Add a Set Routing Type and Transfer rule action. Then set the routing type to Omni-Channel Flow and the route destination to the Send to Record Owner flow. When you're done making changes, save the bot.

[Go to Bot Builder](#) I'm done routing conversations to my sales team.

3 Let Your Sales Team Connect with Customers

Give Your Sales Team Access

Assign the Messaging User permission set license to your sales team so that they can engage in real-time conversations with qualified leads. Also, give this permission to sales leaders who supervise your sales team. You can always assign more users later.

[Assign Permission Set License](#)

Send Notifications When Customers Want to Connect

Notify your available sales team members that a customer wants to chat. Add a Flow action to your bot's Send Notification dialog, and then select the Email Notification to Owner or Chatter Notification to Owner action name. Set the input variables. When you're done making changes, save and activate the bot.

[Go to Bot Builder](#)

Automate Scheduling for Your Sales Team

Let your bot schedule sales calls for your team using Salesforce Inbox. When a customer's point-of-contact is unavailable, the bot sends that team member's available times in the chat window. Your customer selects a time, and a meeting is automatically scheduled.

[Set Up Inbox](#)

i To use Inbox, your sales team members must connect their Outlook or Google calendar to Salesforce. [Learn More in Help](#)

 I'm done letting my sales team connect with customers.

4 Start Chatting with Customers

Create a Messaging for In-App and Web Channel

Your bot includes Route to Bot, a routing flow that sends conversations from your website to the bot. A messaging channel gives those conversations a path to travel on. For the Flow Definition and Fallback Queue, select the Route to Bot flow and your conversation queue.

[Create Channel](#)

Connect the Messaging Channel to Your Website

Create and publish an embedded service deployment that connects your website to the messaging channel. After creating your deployment, you can customize messaging settings, branding, and more.

[Create Deployment](#)

Add Your Bot to Your Website

Let customers chat with your bot. First, make sure that your bot is activated and your deployment is published. Then copy your bot's code snippet. Go to your website and paste the snippet before the closing body tag on each web page where you want a chat button to appear.

[Copy Your Code Snippet](#) I'm ready to chat with my customers.