

HOW TO LEVERAGE THE POWER OF AI IN SALESFORCE USING THE EINSTEIN FEATURES

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Introduction

In today's rapidly evolving digital landscape, leveraging artificial intelligence (AI) is no longer optional but a necessity for businesses striving to stay competitive. Salesforce's AI capabilities are transforming customer service by automating routine tasks, providing intelligent recommendations, and enabling more personalized interactions.

This whitepaper covers the key AI functionalities available in Salesforce, including Einstein Reply Recommendations, Chatbots, Case Classification and Wrap-Up, Next Best Actions, Article Recommendations, Conversation Mining, Einstein Knowledge Creation, Service Replies for Chat and Email, and Work Summaries. Each section outlines the benefits, preparation steps, prerequisites, and implementation guidelines for these features.

Understanding the potential challenges and data requirements is crucial for a successful AI integration. This whitepaper aims to equip you with the knowledge to navigate these challenges and leverage Salesforce's AI capabilities to drive significant improvements in response times, accuracy, and customer satisfaction while freeing up human agents to focus on more complex and value-added tasks.

Potential Challenges & suitable Feature

Challenge	Description	Einstein for Service Feature
Hard to strategize support time	Support agents often get caught up doing monotonous busywork. Today, agents need to categorize the case before sending it to an appropriate agent who's equipped to solve a particular inquiry. This can take valuable time that can be spent with the customer.	<p>Einstein Case Classification: This feature predicts field values for agents when a case is created. The predictions are based on data from cases.</p> <p>Einstein Case Routing: This feature uses your existing case routing logic to route cases that have been auto-updated by Einstein Case Classification.</p>
Closing cases takes time away from helping customers	At the end of a customer chat, agents must finish up the case before they can move on to helping the next customer.	<p>Einstein Case Wrap-Up: Einstein suggests values for case fields so that chat agents can focus on the customer and less on completing case summaries.</p>
Too much time is spent on other apps looking for the "right" reply	Every customer is unique and so are their messages. Company-to-customer communication isn't always streamlined, and customers can end up receiving different answers for the same question. To avoid this, agents spend a lot of time talking to other agents, writing sticky notes, or switching from template to template.	<p>Einstein Reply Recommendations: Agents receive recommendations on how to respond to a customer. These replies are preapproved by admins, and can be personalized by the agent before being sent to a customer.</p>
Difficulty in filtering help content	There are tons of knowledge articles in your Salesforce org. When a customer has a question that your agent can't answer off the top of their head, this might be the first place they go to. With all the articles to sort through, this can lengthen the time it takes to close a case.	<p>Einstein Article Recommendations: Agents receive article recommendations from their knowledge base when a case is created or updated. Your agents can either read these articles for themselves, or send them directly to customers.</p>
Lacking email responses to CSAT surveys	Agents rely on CSAT scores to develop and strengthen their customer relations.	<p>Einstein Next Best Action: When an agent helps a customer, they are prompted by Einstein to send a CSAT survey as soon as the case is closed.</p>

Data and License

Tool	Available In	Data Requirements	Customer Data and Salesforce Objects used	Requires Einstein for Service Add-On License?
Einstein Case Classification	Enterprise, Performance, and Unlimited	At least 400 closed cases from the last six months, but more than 400 is ideal 400 closed cases with a value in each field that you want to predict	Case	Yes, for full capability. The try Einstein version doesn't require the add-on license.
Einstein Case Routing	Enterprise, Performance, and Unlimited	1,000 cases 100 closed cases that used each field and value you want to predict	Case	Yes
Einstein Case Wrap-Up	Enterprise, Performance, and Unlimited. In Enterprise edition, the Digital Engagement license is required for Chat.	Same as Einstein Case Classification. Einstein Case Wrap-Up also requires Chat in your org.	Case, LiveChatTranscript	Yes, for full capability. The Try Einstein version doesn't require the add-on license.
Einstein Bots	Enterprise, Performance, Unlimited, and Developer	Two intents (customer's goal), with at least 20 utterances per intent (100 to 150 utterances per intent recommended)	Utterances selected by customer, Object used; MlIntentUtterance	No. For more channels, the Digital Engagement add-on license is required.
Einstein Article Recommendations	Enterprise, Performance, and Unlimited	(Required) Three knowledge articles (Recommended) 1,000 cases from the past 2 years (Recommended) 500 case-article attaches from the past 2 years	Default model doesn't use customer data. If enabled, customer-specific model uses Case, Article (Knowledge __kav), and Case Article.	No
Einstein Reply Recommendations	Enterprise, Performance, Unlimited, and Developer	1,000 closed English chat transcripts	LiveChatTranscript, QickText	Yes

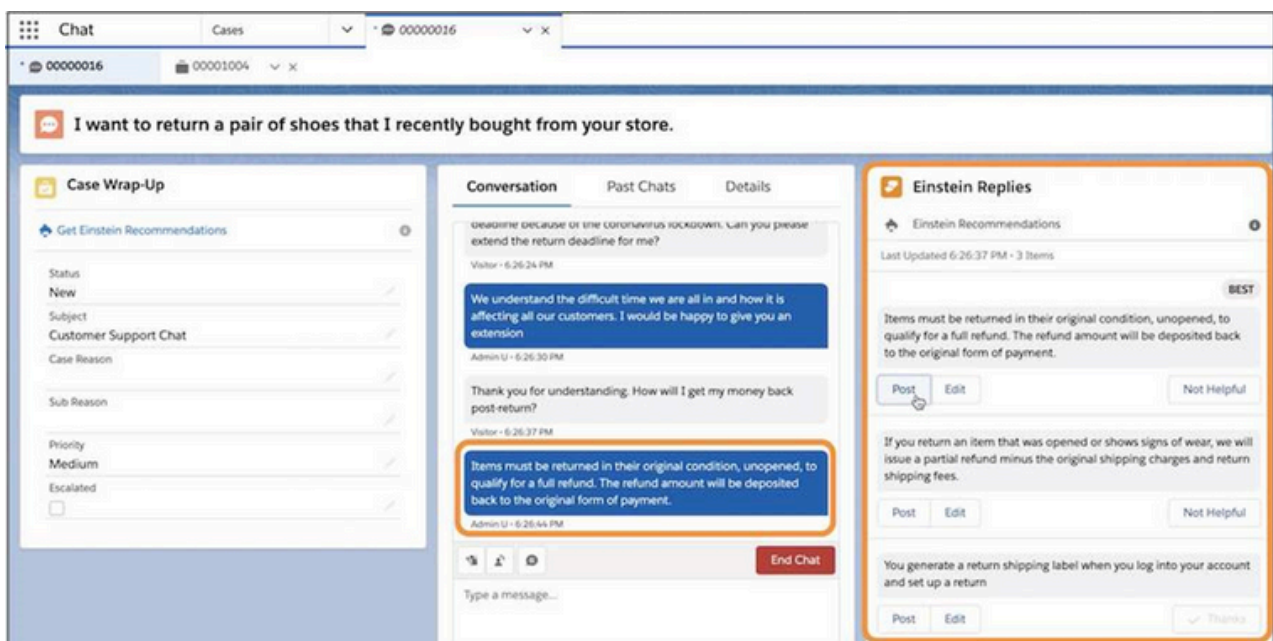
Data and License

Einstein Conversation Mining	Performance, Unlimited, and Developer Service Intelligence add-on		Case, ConvReasonReportDefinition, ConvReasonReportSegmentDef, ConversationReason, ConversationReasonExcerpt, ConversationReasonGroup, EmailMessage, LiveChatTranscript	
Einstein Knowledge Creation	Enterprise and Unlimited	1,000 cases 100 closed cases that used each field and value you want to predict	Case, CaseComment, Email, KnowledgeArticle (Knowledge__ka), KnowledgeArticleVersion (Knowledge__kav), LiveChatTranscript, MessagingSession	Yes
Einstein Service Replies for Chat	Enterprise and Unlimited		LiveChatTranscript, VoiceCall, Case, Knowledge, Email, MessagingSession, ConversationEntry	Yes
Einstein Service Replies for Email	Enterprise and Unlimited		Case, Knowledge, Email	Yes
Einstein Work Summaries	Enterprise and Unlimited		LiveChatTranscript, VoiceCall, Case, Knowledge, Email, MessagingSession, ConversationEntry	Yes

Overview of Einstein Reply Recommendations for Salesforce Service Cloud

Introduction

Einstein Reply Recommendations is an AI-powered tool that suggests replies to customer queries in real-time. These replies are generated using deep learning and natural language processing (NLP) from historical chat transcripts. By leveraging historical chat transcripts, it provides agents with suggested replies in real-time, allowing for quicker and more accurate responses.



Key Benefits

1. **Faster Response Times:** Agents receive the right recommendations quickly, reducing the time spent searching for responses.
2. **Improved Accuracy:** Recommendations are based on previous successful interactions, increasing the likelihood of accurate responses.
3. **Focus on Complex Issues:** By automating routine replies, agents can concentrate on more complex customer problems.
4. **Standardized Communication:** Ensures consistent and standardized communication across the support team.

5. **Efficient Chat Closure:** Speeds up the chat-closing process by providing ready-to-use replies.

Preparation

- At least 1,000 English chat transcripts are required for the AI to generate accurate recommendations.

Prerequisites

- License: Available in Enterprise, Performance, Unlimited, and Developer
- Einstein for Service Add-On required.

Implementation Steps



Step 1: Review Data Requirements

- Ensure you have at least 1,000 closed chat transcripts.
- The transcripts should be substantial enough to provide meaningful data for AI pattern detection.

Step 2: Turn on Einstein Reply Recommendations

- From Setup, in the Quick Find box, enter "Einstein Reply Recommendation," and select it.
- Click the toggle to enable Einstein Reply Recommendations.

Step 3: Build Your Model

- On the Einstein Reply Recommendations Setup page, click "Let's Go."
- If you don't have enough closed chats, Einstein will notify you.
- Click "Build Model" to start the process. Building can take up to 48 hours.

Step 4: Review and Publish Generated Replies

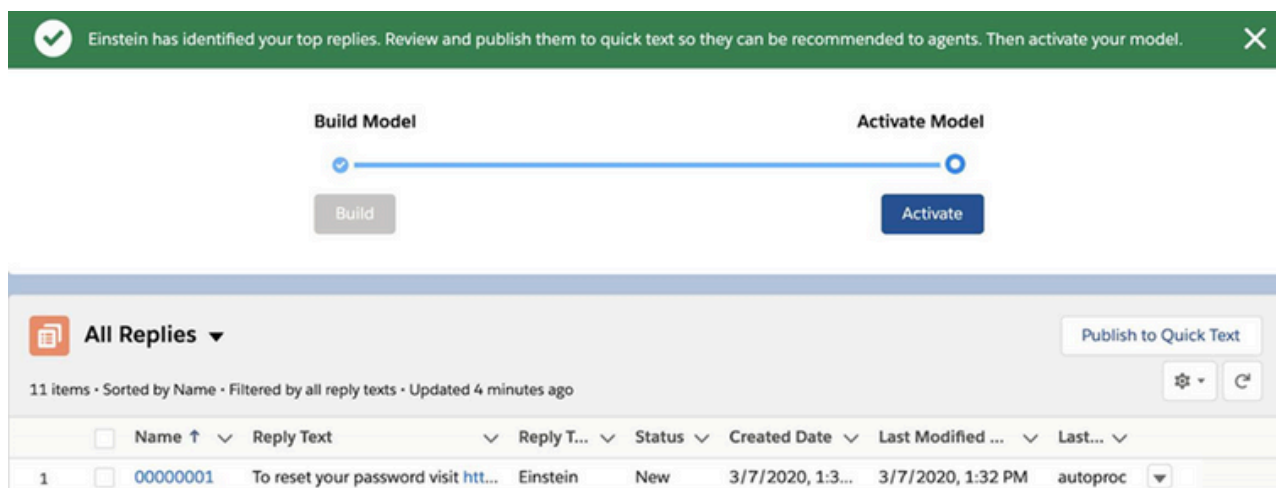
- After the model is built, review the list of generated replies.
- Ensure the replies:
 - Accurately represent your customer service policies.
 - Are up to date and relevant.
 - Do not contain sensitive information.
- Convert these replies to quick text for easy editing and publishing.
 - Assign category (e.g. „Greeting“)
 - Available for Einstein Reply Recommendation & searchable quick text
 - Publish multiple: edit all in Quick Text page after publishing
- Up to 100 replies can be generated

Step 5: Give Agents Access

- Assign the "Einstein Reply Recommendations User" permission set to your agents.
- Provide access to the quick text folder containing the published replies.

Step 6: Activate Your Model

- On the Einstein Reply Recommendations page in Setup, confirm that all desired replies are published.
- Click "Activate" to start using the recommendations.



The screenshot shows a green notification banner at the top: "Einstein has identified your top replies. Review and publish them to quick text so they can be recommended to agents. Then activate your model." Below this is a progress bar with "Build Model" on the left and "Activate Model" on the right. The "Build" button is disabled, and the "Activate" button is active. Below the progress bar is a table titled "All Replies" with 11 items. The first item is selected and has a "Publish to Quick Text" button next to it.

<input type="checkbox"/>	Name ↑	Reply Text	Reply T...	Status	Created Date	Last Modified ...	Last...
<input checked="" type="checkbox"/>	00000001	To reset your password visit htt...	Einstein	New	3/7/2020, 1:3...	3/7/2020, 1:32 PM	autoproc

Using and Improving Einstein Reply Recommendations

Agent Interaction

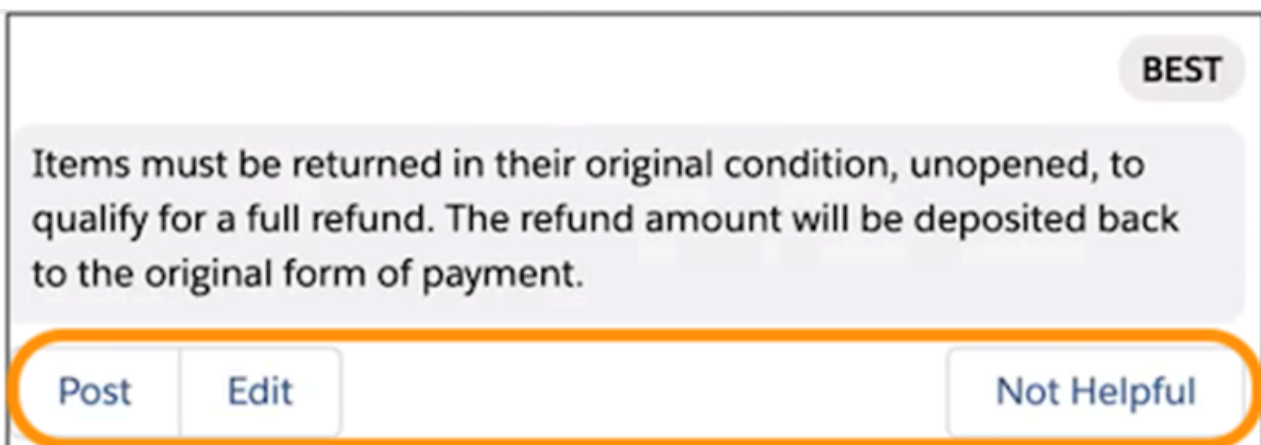
- Agents receive real-time reply recommendations during chats.
- They can edit replies before sending them to ensure relevance and accuracy.

Customizing Replies

- Update and customize replies regularly from the Quick Text tab to keep them relevant and engaging.
- Use merge fields for personalization.

Continuous Improvement

- Review and update quick text often.
- Allow agents to provide feedback by clicking "Not Helpful" under unsuitable replies to improve future recommendations.



Overview of Chatbots

Introduction

A chatbot is an application that simulates human conversation through text or voice interactions. It can be used for various customer interactions, reducing the need for human agents and providing immediate responses.

Chatbots and AI: Not all chatbots are connected to AI. The use of Natural Language Processing (NLP) and NLU in Salesforce Einstein Bots allows for smarter, more human-like interactions by learning from customer interactions.

Key Benefits

1. **Quick Case Deflection:** Chatbots can immediately answer specific customer queries, reducing the number of cases for support agents.
2. **Reduced Wait Times:** Customers receive instant responses, minimizing time spent in queues.
3. **Saved Time for Agents:** By handling simple inquiries, chatbots free up agents to focus on more complex issues.
4. **Efficient Redirects:** Chatbots can direct customers to the right resources quickly.
5. **Intelligent Responses:** With Natural Language Understanding (NLU), chatbots can provide appropriate responses and improve over time.

Preparation

Initial Planning Questions

1. Identify **Business Goals:** Determine what you want the bot to achieve (e.g., handle more support cases)
2. What routine issues should the chatbot resolve?
3. KPIs: Establish **KPIs** such as cases deflected, customer satisfaction, leads generated, and product purchases.
4. Do you have a set of knowledge base articles for common questions?
5. How many chatbots do you plan to create initially?
6. How will you set customer expectations about the bot's capabilities?

Choosing Bot Types

- **Menu-Based Bots:** Simple and structured, ideal for basic tasks.
- **NLP Bots:** Understand natural language, offering a more conversational experience.
- **Hybrid Bots:** Combine menu-based navigation with NLP for flexibility.

Content Planning

- **Bot Context:** Company name, industry, common customer service scenarios.
- **Bot Personality:** Name, personality traits, greetings, farewells, and responses.
- **Conversation Design:** Ensure the bot identifies itself as non-human, include menu options, and plan for openings, closings, and response delays.

Content Considerations

- **Openings:** Start with a question to engage the customer immediately.
- **Closings:** Use phrases like "Thank you" to end chats.
- **Response Delays:** Mimic human response times (2-4 seconds).
- **Emojis and Emoticons:** Use appropriately to convey warmth.
- **Text Style:** Choose fonts and text styles that align with your brand and clarify bot interactions.

Prerequisites

Required Licenses and Features

1. Service Cloud License.
2. Complete the Chat guided setup flow in Service Setup.

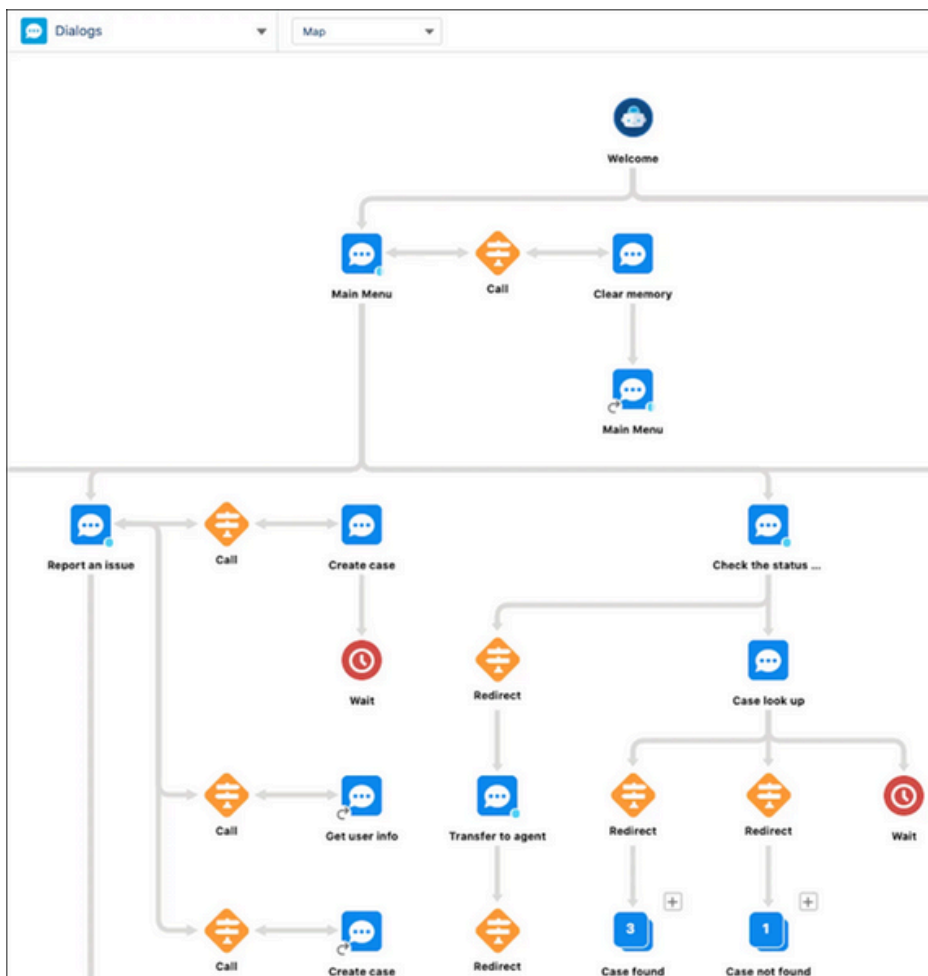
Implementation Steps

Enabling Einstein Bots

1. Go to Setup.
2. Enter Einstein Bots in the Quick Find box and select it.
3. Toggle the switch to enable Einstein Bots.
4. Accept the terms if you agree.
5. Click Create a New Bot, select Standard Bots and Intro Template, and complete the wizard.

Map Flows and States and Identify Key Dialogs

- Identify different bot subprocesses (e.g. introduction, transfer to agent, customer identification)
- ➔ become dialogs (conversation snippets)
- Mapping relationships between subprocesses
 - Encapsulated subprocesses
 - Connected subprocesses
 - Independent subprocesses



Implementing NLP Processing for Chatbots

- **Intent Models:** Core of NLP, linking user utterances to specific intents (requests).
- **Utterances:** Examples of what users might say, mapped to intents. Requires at least 3-5 intents with at least 20 utterances each for initial setup.

Best Practices:

- Balance utterances across intents to avoid model bias.
- Ensure utterances are unique and vary in length.

Sourcing Utterances:

1. Crowdsourcing from customer service data
2. Input Recommender in Bot Builder
3. Intent sets from AppExchange
4. Data from Template Bot intent set

Building and Training the Bot:

1. Collect and upload utterances and intents.
2. Use Bot Training in Bot Builder to verify and classify data.
3. Regularly rebuild the model with new data.

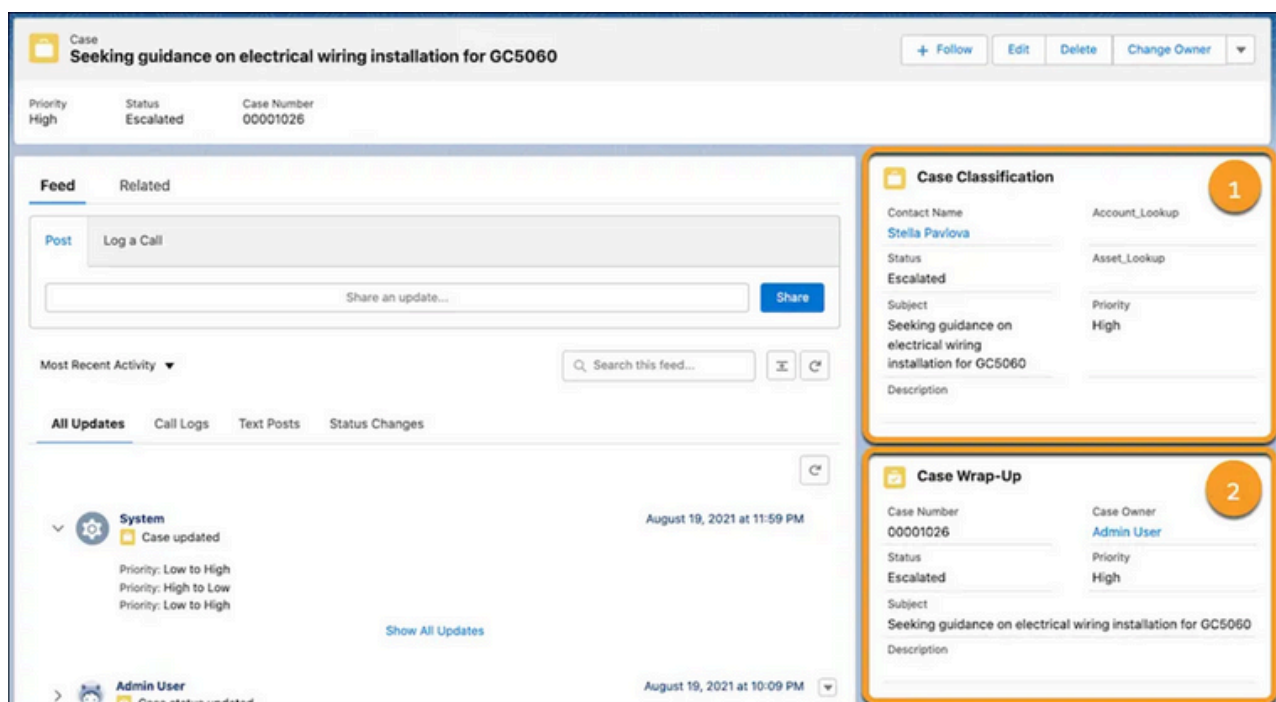
Post-Launch Management:

- Initially, the bot may only recognize exact matches but will improve over time.
- Monitor and update the model twice a month via the Model Management tab.

Overview of Classification Apps – Case Classification & Case Wrap-Up

Introduction

Case Classification and Case Wrap-Up analyze past cases to suggest what field values should be filled in new cases.



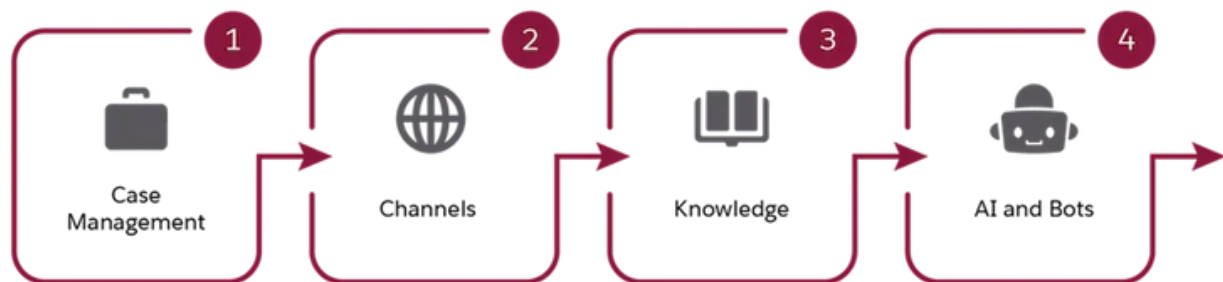
Key Benefits

- **Saved Time for Agents:** Reduces time spent on paperwork, allowing agents to focus on high-order tasks.
- **Improved Data Quality:** Enhances data accuracy on cases, reducing human error.
- **Faster Case Resolution:** Automates case routing, leading to quicker resolutions.
- **Better Customer Service:** Improved data accuracy and faster resolutions enhance customer satisfaction and loyalty.

Preparation

- **Determine Fields for Prediction:**
 - Useful fields include Case Reason, Language, Escalated, and Priority
 - Ensure at least 400 closed cases with values in these fields
 - Exclude fields that change over the life of a case, such as Case Status.
- **Best Practices for Data Preparation**
 - **Audit and Verify Data:** Ensure the accuracy of closed-case data and make necessary adjustments.
 - **Unified Field Values:** Simplify similar field values for clarity.
 - **Specific Field Values:** Avoid overloaded fields by creating specific values.
 - **Case Volume:** Ensure a sufficient number of closed cases (minimum 400, ideally 1,000).
 - **Check for biases:** characteristic, factor, group over/underrepresented

Prerequisites



- License: Available in Enterprise, Performance, and Unlimited – for full capacity Einstein for Service Add-On License
- For „Automate Value“ paid version of Einstein Case Classification
- Set up Case Management

Implementation Steps



Step 1: Enable Classification Apps

- From Setup, enter "Einstein Classification" in the Quick Find box and select it.
- Click the toggle to turn on Einstein Classification Apps.

Step 2: Configure Predictive Model

1. Create a Model:

- Click "Get Started" or "New" on the Einstein Classification setup page.
- Select an app, enter a model name, and click "Next".
- Select all case data or segment (eg particular business unit)

Want Einstein to provide predictions on all new cases?

Einstein looks at all closed cases created in the past 6 months that include a subject or description, and then predicts field values on all new cases. If you want, define a filter on closed cases to create a segment or subset of cases. Einstein analyzes only cases in your segment, and makes predictions only on new cases that meet your segment criteria.

Yes, use all case data
 No, focus on a segment (advanced option)

*Include Records That

Meet Custom Condition Logic

*Custom Logic

1 AND (2 OR 3)

*Field	*Operator	*Type	*Value
1 Priority	Does not equal	Picklist	Low
2 Escalated	Equals	Boolean	True

Einstein is here to help

Choose what fields to filter by

Base your segment on a record type or a similar field that indicates a case's business category. If you add multiple conditions, choose whether Einstein's recommendations should be based on cases that meet all or just one of the conditions. For example, have Einstein look at cases in the Enterprise unit in a particular region.

Understand how recommendations work

Einstein makes recommendations only on the new cases that match your segment criteria.

- Define Criteria to identify example cases

New Classification Model

Want Einstein to learn from all cases?

If you want specific cases to serve as examples, set your criteria. Einstein will learn only from cases that meet your criteria. If you defined a segment, your example cases come from your segment.

Yes, learn from all recently closed cases
 No, learn from specific cases (Advanced)

*Include Records That


Meet All Conditions

*Field
*Operator
*Type
*Value

AND
*Field
*Operator
*Type
*Value

+ Add Condition

Einstein is here to help



Why use example cases?

Most businesses won't define example cases. Unless you've done advance planning to identify your criteria, just select **Yes, learn from all recently closed cases**.

If you use example cases, review these reminders.

- Use cases whose completed fields and field values reflect your best practices. Einstein identifies data patterns in those cases to make predictions.
- Using example cases doesn't affect which cases get recommendations.

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Next

- Select fields to predict

New Classification Model

Add fields to predict


Which fields do you want your agents to get recommendations for? Add up to 10.

Priority × Escalated × Case Type ×

3 of 10 fields selected

	Label ↓	API Name	Controlling Field ⓘ	Data Type ⓘ
+	SLA Violation	SLAViolation_c		Picklist
+	Product	Product_c		Picklist
✓	Priority	Priority		Picklist
+	Potential Liability	PotentialLiability_c		Picklist
+	Language	Language		Picklist
✓	Escalated	IsEscalated		Checkbox
✓	Case Type	Type		Picklist
+	Case Reason	Reason		Picklist

Einstein is here to help



How do I decide which fields to select?

If you want Einstein to predict a particular field, add it to your model. However, there are various reasons that you might want to exclude a field. If a field isn't currently being used, or shouldn't be used as part of your best practices, don't include it in the model.

Do I have enough data?

To predict a field's value, Einstein needs closed cases with a value in that field. The more closed cases, the better!

High: >10,000 closed cases
 Medium: 1,000-10,000 closed cases
 Low: 400-1,000 closed cases
 Insufficient: <400 closed cases

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Next

- Order Models by priority
- If case matches multiple criteria: recommendations come for highest priority model

2. Build the Model:

- On the Einstein Classification Setup page, select the model name and click "Build".
- The process runs in the cloud and may take several hours.

Step 3: Configure Field Prediction Settings

Select a field and turn on:

- "Select Best Value" for agent to confirm
- "Automate Value" for autofill without agent confirmation (available in paid version Einstein Case Classification)
- Confidence levels differ

Step 4: Assign Permissions

1. From Setup, enter "Permission Sets" in the Quick Find box.
2. Select "Einstein Case Classification User" and click "Manage Assignments" to assign users.

Step 5: Add Classification Apps to the Service Console

1. In the Lightning App Builder, open the case record page.
2. Drag the Einstein Field Recommendations component onto the page.
3. Select "Case Classification" or "Case Wrap-Up" as the type and save changes.

Step 6: Activate the Model

1. On the model's Setup tab, click "Activate".

Step 7: Monitor Performance

1. Use the Performance dashboard to review prediction accuracy and adjust settings as needed.

Overview of Next best Actions

Introduction

Next best Actions provides personalized recommendations for the next best action to take with a customer. It integrates various data sources, predictive models, and business rules to suggest optimal actions, enhancing decision-making across sales, service, marketing, and commerce.

Key Benefits

- **Unified Insights:** Combines data from Salesforce and non-Salesforce sources for comprehensive insights.
- **Actionable Intelligence:** Provides timely recommendations tailored to specific roles and contexts.
- **Efficiency:** Automates actions based on recommendations, reducing manual processes and increasing productivity.

Applications:

Sales	Service	Marketing	Commerce
Send a notification to customer that contract is expiring	Send CSAT survey to customer who just called in	Put a campaign on hold based on poor predicted performance	Send customer with low engagement an email detailing highest recommended products
Upsell product or service to customer who meets requirements	Upsell product or service to customer who meets requirements	Send custom offer to customer based on likelihood to engage	Send different offers to different groups of customers based on average order value
Recommend how to allocate resources based on sales forecasts	Send an offer to customer with high-attrition risk	Send offers to customers who represent brand well on social media	Package bundled product recommendations based on purchase data

Remind if there's a new hot lead or a promise to follow-up with a customer	Send customer an inspection notice if items have a high chance of needing repair	Send discount to customer who abandoned cart on website	Send proper engagement to customer based on likelihood of returning an item
Send custom proposal to prospect based on likelihood to engage	Send custom engagement/message to customer with high chance of escalating case to social media	Recommend to add a particular customer to a specific campaign	Recommend to engage with customer based on length of time on website

Preparation

- 1. Identify Key Personas:** Determine the target personas for recommendations (e.g., sales reps, customer service agents).
- 2. Define Business Objectives:** Outline goals (e.g., upselling products, reducing churn, improving customer satisfaction).
- 3. Data Availability:** Ensure necessary data accessible within Salesforce, such as customer profiles, purchase history, and interaction logs.
- 4. Understand Use Cases:** Have a clear understanding of specific use cases where NBA can be applied (e.g., offering TV streaming service to internet subscribers).

Prerequisites

- License: Available in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer
- For full capacity Einstein for Service Add-On required

Implementation Steps

1. Define Recommendations

1. Access Recommendations:

- Navigate to **App Launcher**.
- Select **Recommendations**.

2. Create a New Recommendation:

- Click **New**.
- Enter **Name** and **Description**.
- Upload an **Image** (optional).
- Define **Acceptance** and **Rejection Labels**.
- Link to an **Action** if the user accepts the recommendation.

3. Activate the Recommendation:

- Ensure **Is Action Active** is checked.
- Activate the flow linked in the Action field if necessary.

2. Create Action Strategies

1. Access Action Strategies:

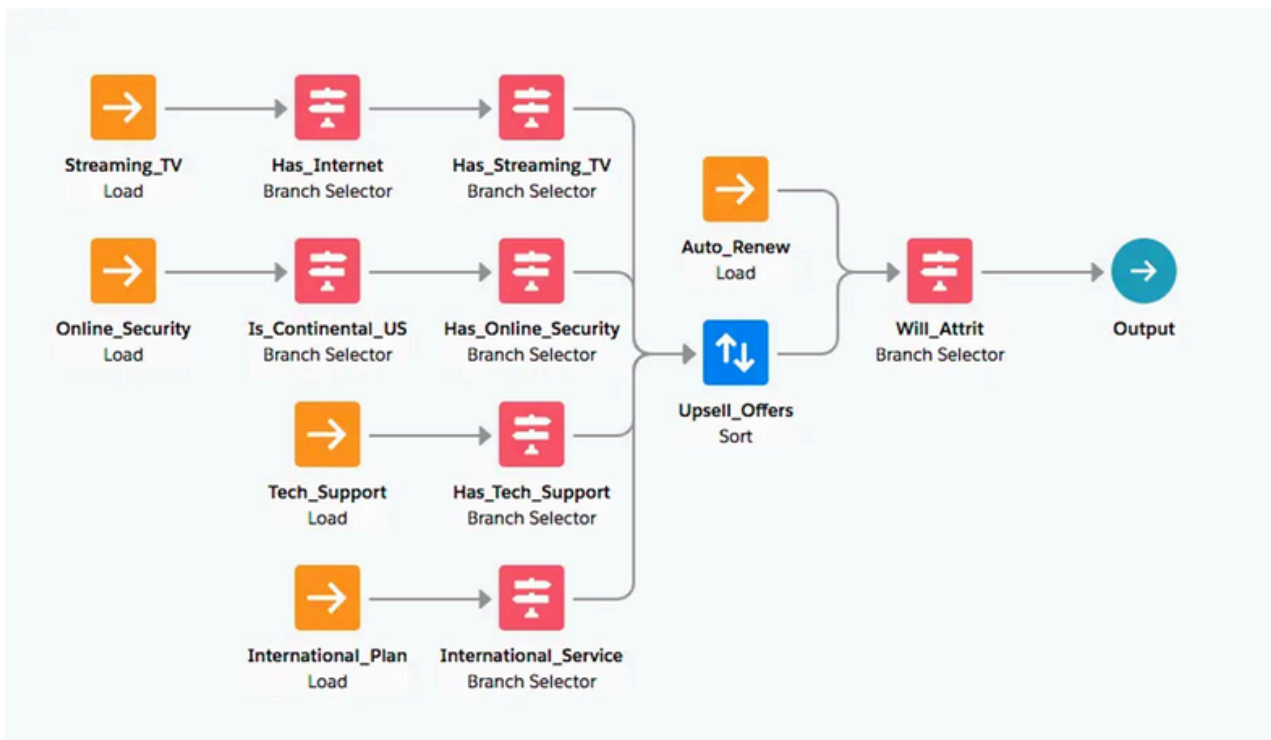
- Go to **Setup**.
- Enter **Next Best Action** in the Quick Find box.
- Select **Next Best Action**.

2. Create a New Strategy:

- Click **New Strategy**.
- Enter **Name, API Name, and Description**.
- Define the **Object Where Recommendations Display** (e.g., contacts, accounts, cases).

3. Build the Strategy:

- Use **Strategy Builder** to define nodes.
 - **Yellow Nodes:** Recommendations.
 - **Blue Nodes:** Filtering and sorting.
 - **Pink Nodes:** Branch logic.
 - **Teal Node:** Winning recommendation.
- Example: For a telecom sales rep, create nodes to check for internet service and filter out those with TV streaming.



3. Inject Intelligence into Action Strategies

1. Use Einstein Prediction Builder:

- Integrate predictive models (e.g., Likelihood_of_Attrition).

2. Add Intelligence Nodes:

- Insert nodes in the strategy to use prediction scores.
- Example: If Likelihood_of_Attrition \geq 20%, recommend auto-renew plan.

4. Display Recommendations

1. Use Lightning App Builder:

- Go to a **Contact Page**.
- Click **Setup** and then **Edit Page**.
- Drag the **Einstein Next Best Action Lightning Component** to the desired location on the page.
- Save the changes.

5. Activate Automation

1. User Interaction:

- Ensure the user can accept the recommendation.
- Example: When a customer accepts an auto-renew recommendation, a confirmation email is sent, and the contact record is updated.

2. Monitor and Adjust:

- Regularly review performance and adjust recommendations and strategies as needed.

Overview of Article Recommendations

Introduction

Article Recommendations is a feature that uses AI to recommend relevant knowledge articles to customer service agents. By leveraging natural language processing (NLP) and historical case data, Einstein can provide accurate and timely article suggestions, improving agent efficiency and customer satisfaction.

Key Benefits

- Increases agent morale by 75%.
- Improves first contact resolution by 82%.
- Saves time by quickly finding relevant articles from a large database.

Preparation

Required Data:

- **Knowledge Articles:** At least three articles in the Salesforce Knowledge base.
- **Closed Cases:** A minimum of 1,000 closed cases with at least one descriptive text field (e.g., Description).

Recommended Data:

- **Case-Article Attachments:** At least 500 instances where articles are attached to cases.
- Ensure descriptive fields are populated with relevant information.

Implementation Steps

Step 1: Enable Einstein Article Recommendations

1. Go to Setup in Salesforce.
2. In the Quick Find box, type "Einstein Article Recommendations" and select it.
3. Click the toggle to enable the feature.


Step 2: Create Your Model

1. Under Select Fields, click Select | Next.
2. Choose the supported languages you want to include in your model
3. (Dutch, English, French, German, Italian, Portuguese, Spanish).
4. Verify that your selected languages are active in your Knowledge settings.

Step 3: Select Fields for Einstein to Learn From

1. Select fields from cases that provide rich, descriptive data.
2. Rank these fields based on their importance.
3. Choose fields that might be updated.

Set Up Einstein Article Recommendations



Select Case Fields

To ensure that agents receive relevant article recommendations, choose case fields for Einstein to analyze.

Choose a primary field
 Select the text field with the most important content. This could be the default Subject field or a custom field.

* Primary field

Subject
▼

Choose supporting fields
 Select up to two text fields that capture the most useful information about your customers' issues, such as the case description. [Help Me Choose](#)

* Supporting fields

Available Fields

- Case ID
- Case Number
- Company
- Name
- Phone
- Subject

▶
◀

Selected Fields

- Description

▲
▼

i Rank the fields you select from most to least important. The field order tells Einstein what to look at first. Einstein builds your recommendation model based on combined content from these fields. [Learn More](#)

Back

✓
○
○

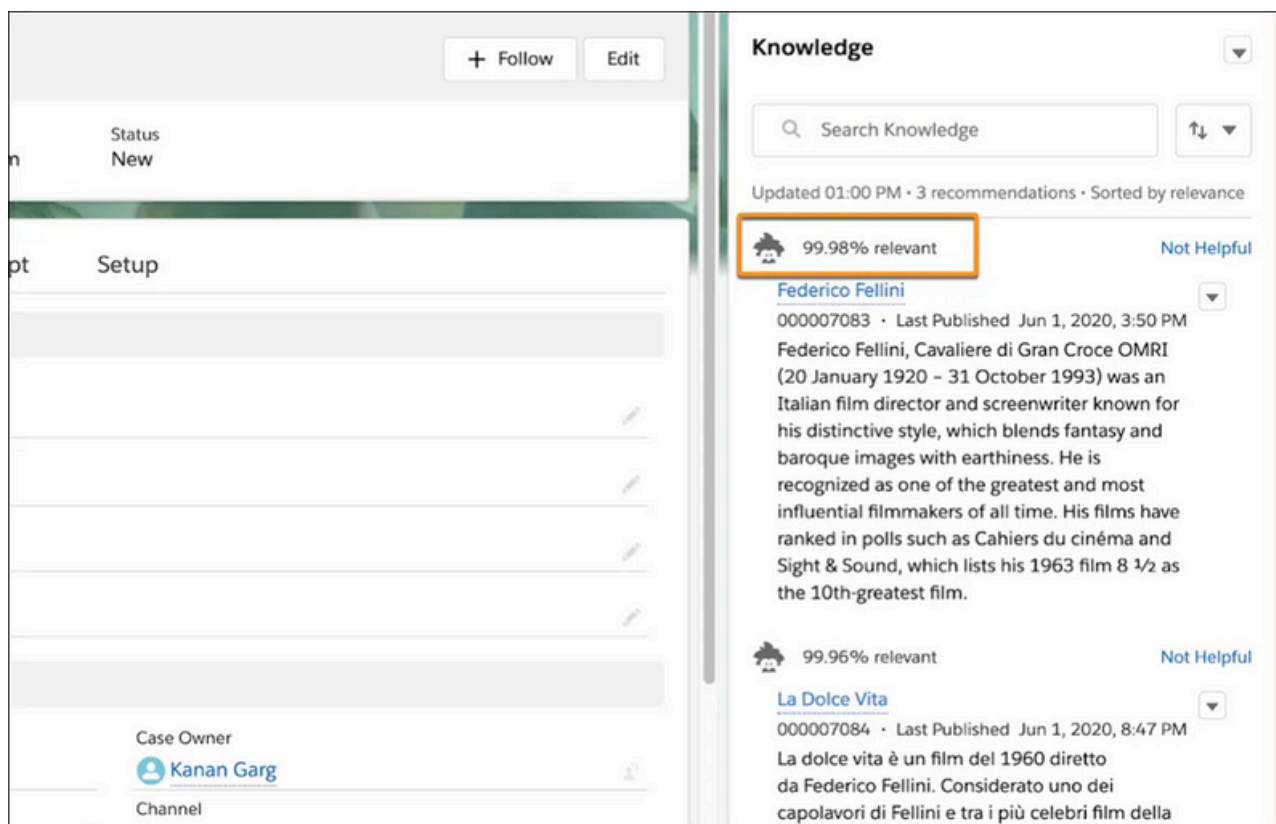
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Step 4: Build and Activate Your Model

1. Follow the prompts to build your Einstein model.
2. Activate the model once it's built.
3. Ensure agents have access to view and use the recommendations.

Step 5: Train Agents and Roll Out

1. Train your support team on how to use the recommendations.
2. Check relevance score and dismiss if „Not Helpful“ to improve model



5. Best Practices for Optimizing Recommendations

- **Consistent Data Entry:** Ensure agents consistently fill out case fields with detailed and relevant information.
- **Continuous Learning:** Encourage agents to attach useful articles and dismiss irrelevant ones to improve model accuracy.
- **Knowledge Base Expansion:** Regularly update and expand your knowledge base with new articles.
- **Review and Update Fields:** Periodically review the selected fields and update them as necessary to align with evolving customer inquiries.

6. Continuous Improvement and Feedback Mechanisms

Einstein Article Recommendations improve over time with continuous use and feedback.

Implement the following practices to ensure ongoing optimization:

- **Attach Articles:** Instruct agents to attach relevant articles to cases.
- **Dismiss Unhelpful Recommendations:** Encourage agents to dismiss irrelevant articles to refine future recommendations.
- **Update Case Fields:** Regularly update and review case fields to ensure they provide valuable data.
- **Monitor Model Performance:** Use the model scorecard to evaluate effectiveness and identify areas for improvement.

Overview of Conversation Mining

Introduction

Conversation Mining analyzes conversation data from various channels (email, chat, etc.) and extracts the primary reasons behind customer interactions.

Key Benefits

- **Uncover Top Contact Reasons:** Gain valuable insights into the most frequent reasons customers contact you, allowing you to prioritize and address their needs effectively.
- **Boost Bot Efficiency:** Identify suitable conversation topics for bot development, enabling you to automate repetitive inquiries and improve bot experiences.
- **Streamline Customer Service:** By understanding common contact reasons, you can optimize internal processes to resolve customer issues faster and enhance overall service quality.

Preparation

- **Telephony System:** If using specific integrations, ensure your telephony system is prepared for Conversation Intelligence.
- **Contact Lens:** Verify Contact Lens is enabled if applicable.

Prerequisites

- **Required Editions:** Ensure you have a Salesforce instance with the Service Intelligence add-on (available in Performance, Unlimited, and Developer Editions).
- **User Permissions:** Users require "Customize Application," "Modify Metadata," or "Manage Bots" permissions to build and manage reports.

Implementation Steps

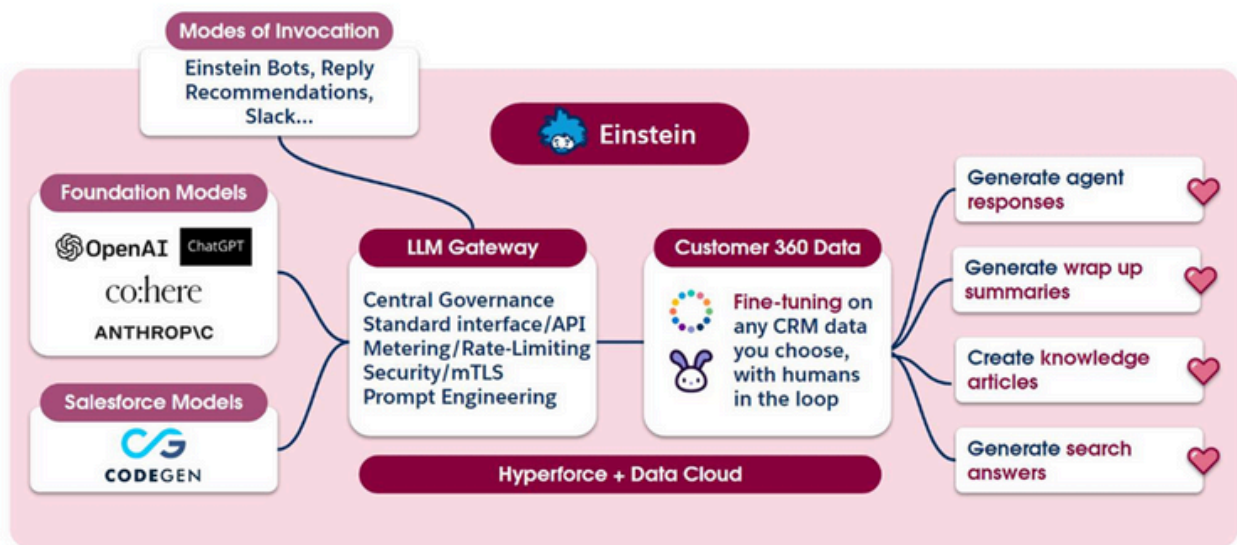
Step 1: Enable Einstein Conversation Mining

1. Go to Setup in Salesforce.
2. In the Quick Find box, type " Einstein Conversation Mining " and select it.
3. Click the toggle to enable the feature

Step 2: (Optional) Get reports on your Enhanced Conversations data

1. Turn on Data Cloud. When you turn on Data Cloud, your conversational data is stored in Data Cloud for your ECM reports.
2. To verify that it's ready for use, go to Data Cloud settings and review your data in Data Cloud.

Generative AI



Overview of Einstein Knowledge Creation

Introduction

Based on a customer conversation, Einstein drafts fluent, relevant knowledge articles that agents review, edit, and save. As your knowledge base develops, agents can quickly find answers to issues and address emerging customer pain points.

Key Benefits

- **Enhanced Agent Productivity:** AI-generated drafts reduce the time agents spend creating knowledge articles.
- **Improved Knowledge Base:** Continuous growth and optimization of the knowledge base with AI-driven insights.
- **Consistency and Quality:** Standardized responses and articles ensure high-quality information is shared across the team.
- **Multilingual Support:** Supports English, French, Italian, German, Japanese, and Spanish for drafting articles.

Preparation

- **Knowledge Settings:** Salesforce Knowledge must be enabled and set up in Lightning Experience.
- **Languages:** Ensure necessary languages are enabled in knowledge settings for multilingual support.

Prerequisites

- **Required Editions:** Available in Lightning Experience for Enterprise and Unlimited Editions with the Einstein for Service add-on.
- **User Permissions:** Assign the "Einstein Knowledge Creation" permission set to relevant agents, along with "Knowledge User" and "Manage Articles" permissions.

Implementation Steps

Step 1: Enable Einstein Knowledge Creation

1. Go to Setup.
2. Enter "Einstein Generative AI" in the Quick Find box.
3. Enable Einstein Generative AI.

Step 2: Assign Permissions

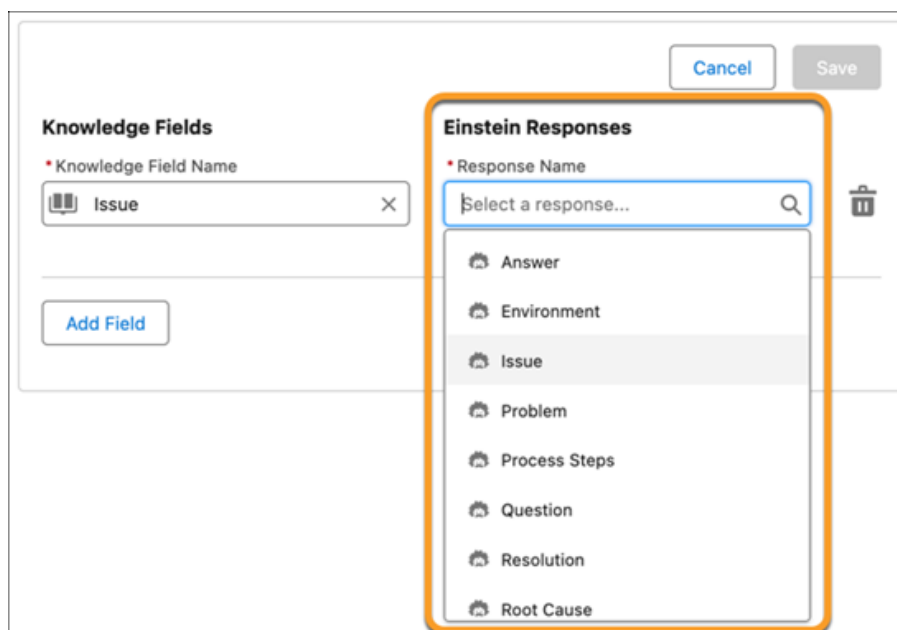
1. Assign the "Einstein Knowledge Creation" permission set to relevant agents.
2. Ensure agents also have the "Knowledge User" and "Manage Articles" permissions.

Step 3: Configure Knowledge Settings

1. Navigate to Knowledge Settings in Setup
2. Enable Knowledge Creation.
3. Ensure multilingual support by enabling the required languages.

Step 4: Map Knowledge Fields

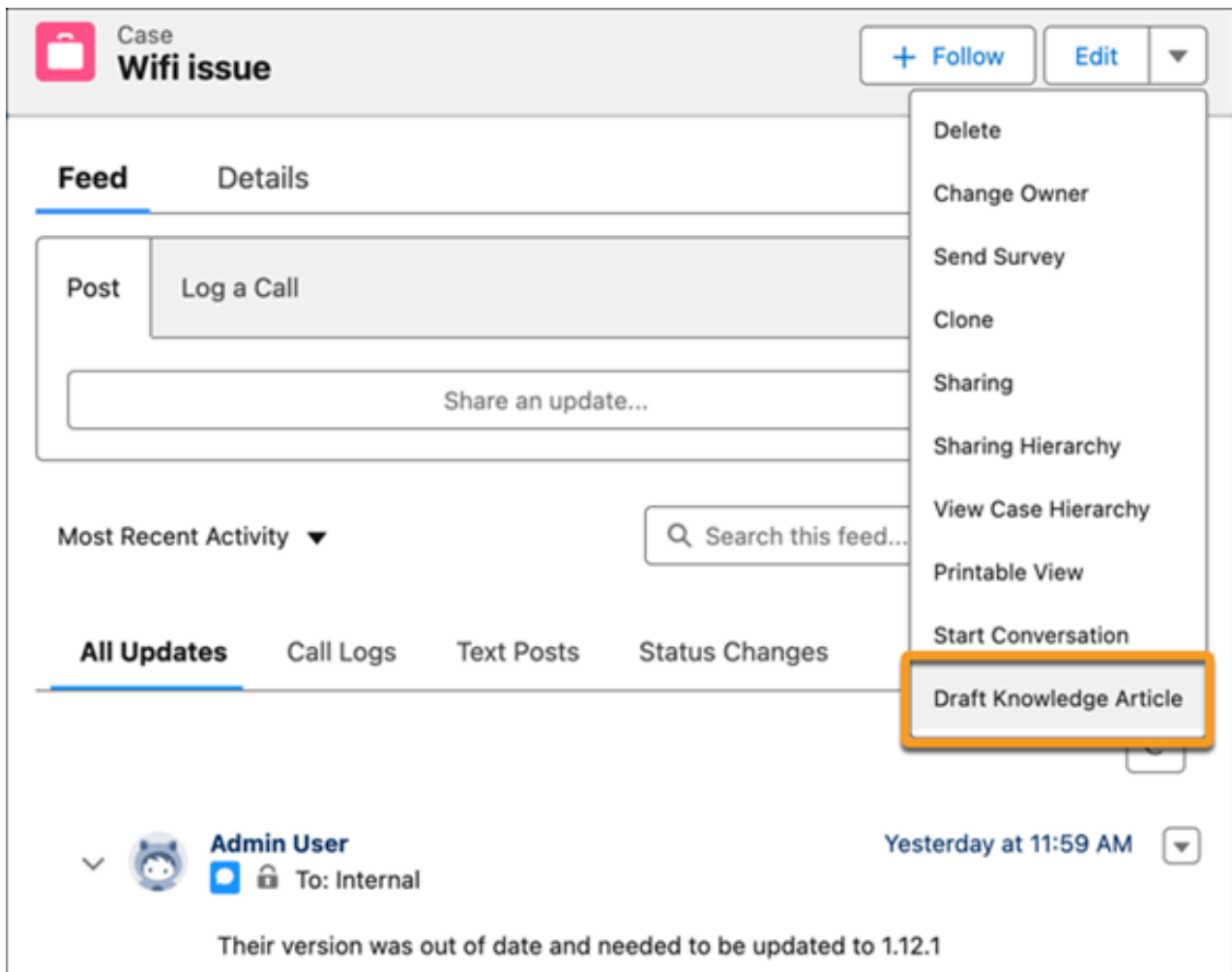
1. Review the [glossary of response types and field mappings](#).
2. Navigate to the Knowledge Creation setup page
3. Map the AI-generated responses to the appropriate Knowledge fields for each record type.



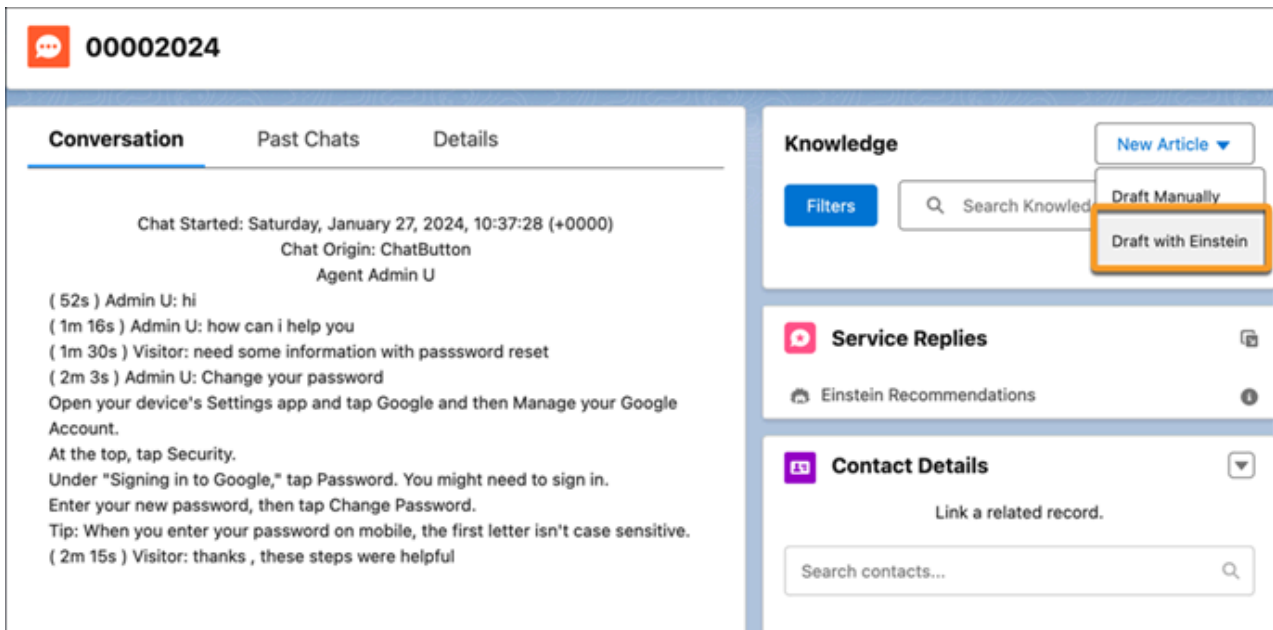
Step 5: Draft and Save Knowledge Articles

1. Draft Articles from Case Page:

- On the Case page, select the "Draft Knowledge Article" quick action from the dropdown menu.
- Alternatively, use the Knowledge component to draft an article.



The screenshot shows a Salesforce Case page for a "Wifi issue". At the top right, there are buttons for "+ Follow" and "Edit". Below the case title, there are tabs for "Feed" and "Details". The "Feed" tab is active, showing a "Post" section with a "Log a Call" button and a "Share an update..." text input field. Below the feed, there is a "Most Recent Activity" section with a search bar "Search this feed...". At the bottom of the feed, there are tabs for "All Updates", "Call Logs", "Text Posts", and "Status Changes". A dropdown menu is open over the "All Updates" tab, listing various actions: "Delete", "Change Owner", "Send Survey", "Clone", "Sharing", "Sharing Hierarchy", "View Case Hierarchy", "Printable View", "Start Conversation", and "Draft Knowledge Article". The "Draft Knowledge Article" option is highlighted with an orange border. At the bottom of the page, there is a user profile for "Admin User" with a timestamp "Yesterday at 11:59 AM" and a notification: "Their version was out of date and needed to be updated to 1.12.1".



00002024

Conversation Past Chats Details

Chat Started: Saturday, January 27, 2024, 10:37:28 (+0000)
Chat Origin: ChatButton
Agent Admin U

(52s) Admin U: hi
(1m 16s) Admin U: how can i help you
(1m 30s) Visitor: need some information with password reset
(2m 3s) Admin U: Change your password
Open your device's Settings app and tap Google and then Manage your Google Account.
At the top, tap Security.
Under "Signing in to Google," tap Password. You might need to sign in.
Enter your new password, then tap Change Password.
Tip: When you enter your password on mobile, the first letter isn't case sensitive.
(2m 15s) Visitor: thanks , these steps were helpful

Knowledge New Article ▾

Filters Draft Manually Draft with Einstein

Service Replies 🔒

Einstein Recommendations ⓘ

Contact Details ▾

Link a related record.

1. Review and Edit Drafts:
 - Review the AI-generated draft.
 - Edit and format the text as needed.
 - Save the article as a draft.



Draft a Knowledge Article

Review content

 This tool uses generative AI, which can produce inaccurate or harmful responses. Check the output for accuracy and safety before using.

RTA

Salesforce Sans ▾ 12 ▾  **B** *I* U 

Resolution

1. Step 1: Access your router settings
2. Step 2: Check for available updates

1. Submit for Approval and Publish:

- Agents with Publish permissions review and approve the draft.
- Publish the article from the Knowledge component.

Step 6: Ensure Quality Control

1. Implement an approval process to review AI-generated articles before publishing.
2. Use permissions to control which agents can publish articles directly and which must submit their articles for approval.

Overview of Einstein Service Replies for Chat and Email

Introduction

Einstein Service Replies uses generative AI to create and recommend relevant replies to agents during chat and messaging sessions. This feature ensures that Einstein AI uses your unique **knowledge articles** and **case history** to add context and personalization to customer communications.

Key Benefits

- **Enhanced Personalization:** Responses are tailored based on your unique knowledge base and case history.
- **Improved Efficiency:** AI-generated drafts save time for agents, allowing them to focus on higher-value tasks.
- **Consistency:** Ensures consistent and accurate information is provided to customers.
- **Scalability:** Easily scales with your growing knowledge base and case history.

Preparation

1. **Assess Current Data:** Evaluate your current knowledge articles and case records to ensure they are comprehensive and up-to-date.
2. **Define Objectives:** Clearly define what you aim to achieve with Einstein's AI-driven responses (e.g., faster resolution times, improved customer satisfaction).
3. **Identify Key Fields:** Determine which fields in your knowledge articles and case records are critical for grounding.
4. **Important Considerations**
 - **Field Level Security:** Users will only see grounded responses for fields they have access to. Ensure proper field-level security settings.
 - **Supported Field Types:** Service AI Grounding supports String and Text Area type fields. Encrypted fields are not supported for grounding or predictions.
 - **Indexing:** Indexing times can vary; plan accordingly to ensure minimal disruption.

Prerequisites

- **Required Editions:** Available in Lightning Experience, Enterprise, and Unlimited Editions with the Einstein for Service add-on.
- **Salesforce Knowledge:** Must be enabled and set up in Lightning Experience.

Implementation Steps

Step 1: Enable Service AI Grounding

1. **Navigate to Setup:** From Setup, enter "Service AI Grounding" in the Quick Find box.
2. **Turn On Grounding:** Select Service AI Grounding and toggle the feature on.

Step 2: Configure Grounding with Knowledge

Knowledge Fields
Grounding with Knowledge Active

Edit

Required Fields

Help Einstein find the right information. Select the required Knowledge fields for Einstein to use for grounding.

- Title

Title
- Summary

Answer

Additional Fields

3 Items • Sorted by Field Label

Field Label	Field Name	Type	
<script>alert(1)</scrip...	script_alert_1_script__c	TEXTAREA	+
Answer	Answer__c	TEXTAREA	+
Article Number	ArticleNumber	STRING	+

1. Select Knowledge Fields:

- In the Service AI Grounding Setup, go to the Knowledge tab and click Edit.
- Under Required Fields, select the Title Field and Summary Field. These are essential for grounding on the Knowledge Article object.
- Optionally, replace the default Title field with a custom field, if needed.

2. Add Additional Fields:

- Under Additional Fields, select any other fields you want Einstein to consider for grounding. Ensure these fields are unique and not repeated as required fields.
- Click Save to finalize the field selection.

3. Activate Grounding for Knowledge Records:

- Toggle the grounding to Active. Einstein will begin indexing your published Knowledge Articles, which can take several hours depending on the size of your knowledge base. New articles are indexed once every 24 hours.

Step 3: Configure Grounding with Cases

1. **Navigate to Setup:** From Setup, enter "Service AI Grounding" in the Quick Find box.
2. **Turn On Grounding:** Select Service AI Grounding and toggle the feature on.

Choose Objects and Fields for Grounding

Choose the Knowledge or case fields Einstein should use as a source. Then activate the object for grounding.

Knowledge
Case

Case Fields

Grounding with Cases Active

Edit

Required Fields

Help Einstein find the right information. Select the required Case fields for Einstein to use for grounding.

- Subject

Name
▼
- Description

Case Number
▼

Additional Fields

1 Items - Sorted by Field Label

Field Label	Field Name	Type	Selected
Case Number	CaseNumber	STRING	+
Company	SuppliedCompany	STRING	✓
Description	Description	TEXTAREA	+
Internal Comments	Comments	TEXTAREA	+

1. Select Case Fields:

- In the Service AI Grounding Setup, go to the Case tab and click Edit.
- Under Required Fields, select the Subject Field and Description Field. You can choose the default fields or custom fields that best represent the case information.
- For instance, replace the default Subject field with a custom field like Contact Reason if it better suits your needs.

2. Add Additional Fields:

- Under Additional Fields, select other fields for Einstein to use in grounding. These fields should be unique and not repeat the required fields.
- Click Save to confirm your selections.

3. Activate Grounding for Case Records:

- Toggle the grounding to Active. Einstein will start indexing your cases, which can take several hours depending on the number of cases.

4. Include Case Comments and Emails:

- In the Additional Object Grounding Options, select Include Case Emails and Include Case Comments to incorporate these elements into the grounding process.

Additional Object Grounding Options

Select additional sources options to ground on for this object

- Include Case Emails
- Include Case Comments

Overview of Einstein Work Summaries

Introduction

At the end of a conversation between an agent and customer, Einstein predicts and fills a summary, issue, and resolution. Agents can then review, edit, and save these summaries.

Key Benefits

- **Time Savings:** Reduces the time agents spend on summarizing conversations.
- **Efficiency:** Enhances service productivity by providing quick, AI-generated summaries.
- **Consistency:** Ensures consistent documentation of case summaries.
- **Scalability:** Easily scales with your service channels.

Preparation

- **Languages:** English, Spanish, French, German, Italian, and Japanese

Prerequisites

- **Required Editions:** Available in Lightning Experience, Enterprise, and Unlimited Editions with the Einstein for Service add-on.
- **Einstein Generative AI:** Must be enabled.
- **Data Cloud:** Ensure Data Cloud is provisioned and set up in your org.

Implementation Steps

Step 1: Enable Features

1. Enable Einstein Generative AI:

- From Setup, enter Einstein Setup in the Quick Find box.
- Enable Einstein Generative AI.
- Use Einstein Trust Layer to personalize data privacy controls

2. Enable Work Summaries:

- From Setup, enter Work Summaries in the Quick Find box.
- Enable Einstein for Service: Work Summaries.

Step 2: Use Summaries in Einstein Copilot (Beta)

1. Enable Einstein Copilot:

- From Setup, enter Copilot Setup in the Quick Find box.
- Enable Einstein Copilot.

2. Configure Copilot Settings:

- Use the copilot detail page and the Copilot Builder to view and define copilot settings (event logs, system messages, and conversational style)
- Assign permission sets to users to interact with Copilot.
- Set up and launch Einstein Copilot.

3. Enable Summarize Record Copilot Action:

- Turn on the Summarize Record action in Einstein Copilot settings.
- Ensure agents have access to this action through the appropriate permission sets.

Step 3: Select Channels for Summaries

Enhanced Messaging, Voice, Live Chat and Email:

- Configure Work Summaries for each channel separately.
- Assign permission sets to agents for accessing summaries.

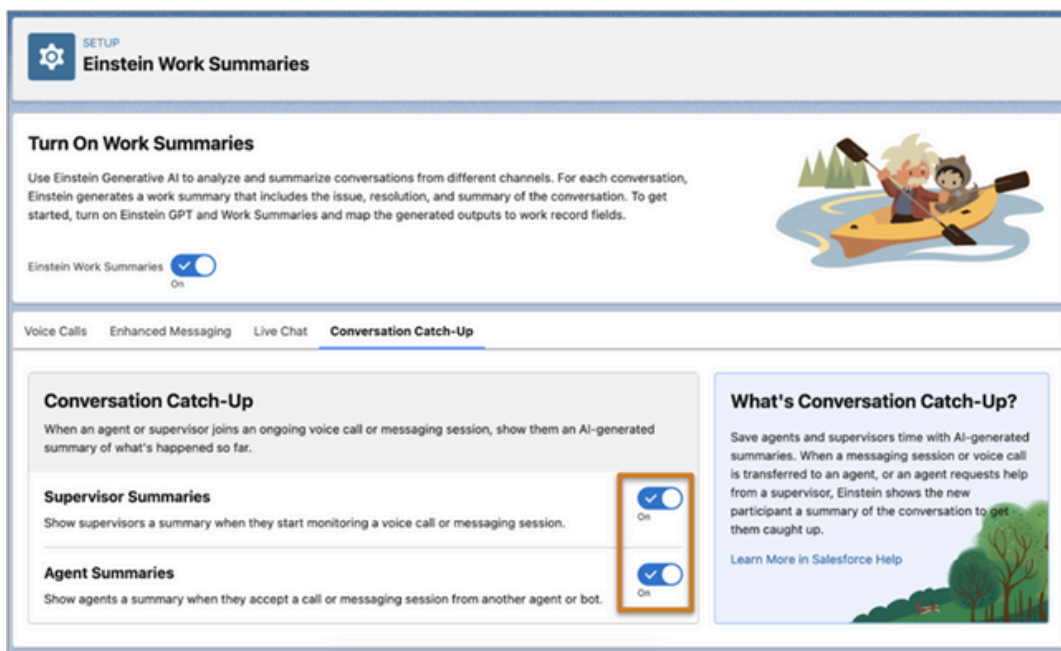
Step 4: Real-Time Summaries with Conversation Catch-Up

Summaries appear when:

- Agent accepts a transferred voice call or messaging session.
- Agent accepts a messaging session from a bot.
- Supervisor clicks Monitor from the Omni Supervisor dashboard to respond to an escalation or agent flag raise.

1. Enable Conversation Catch-Up:

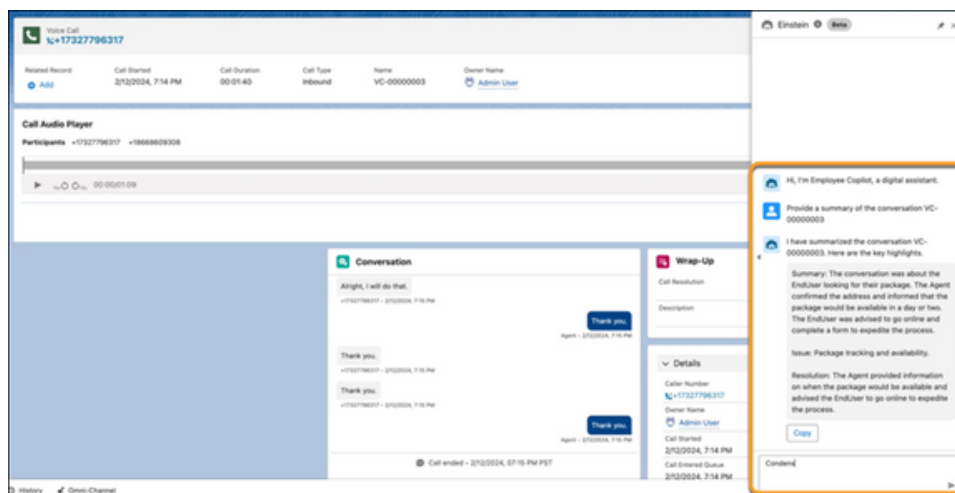
- From Setup, enter Work Summaries in the Quick Find box.
- Turn on Conversation Catch-Up for agents and supervisors.



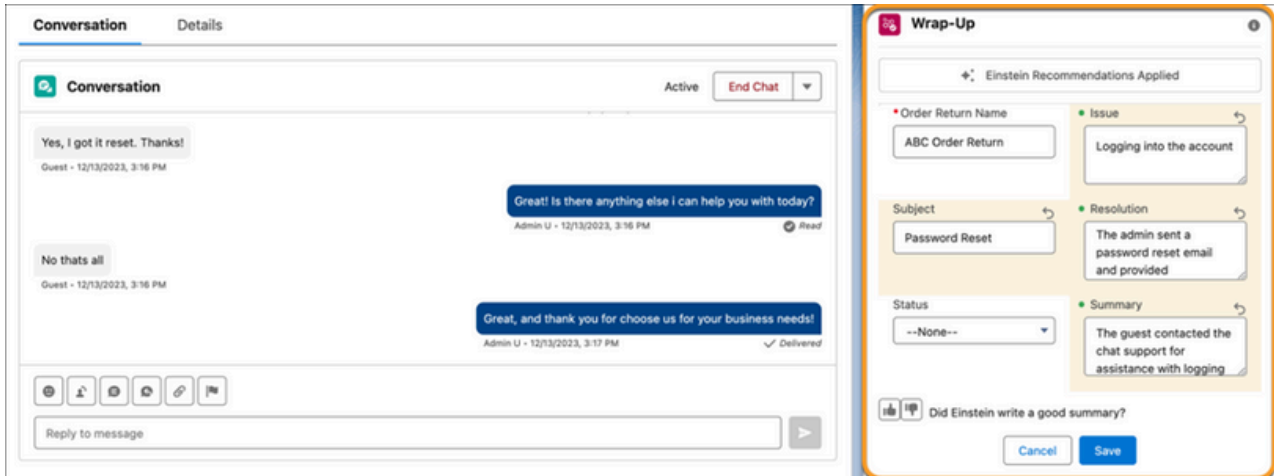
Step 5: Use Work Summaries in the Console

1. Access Summaries:

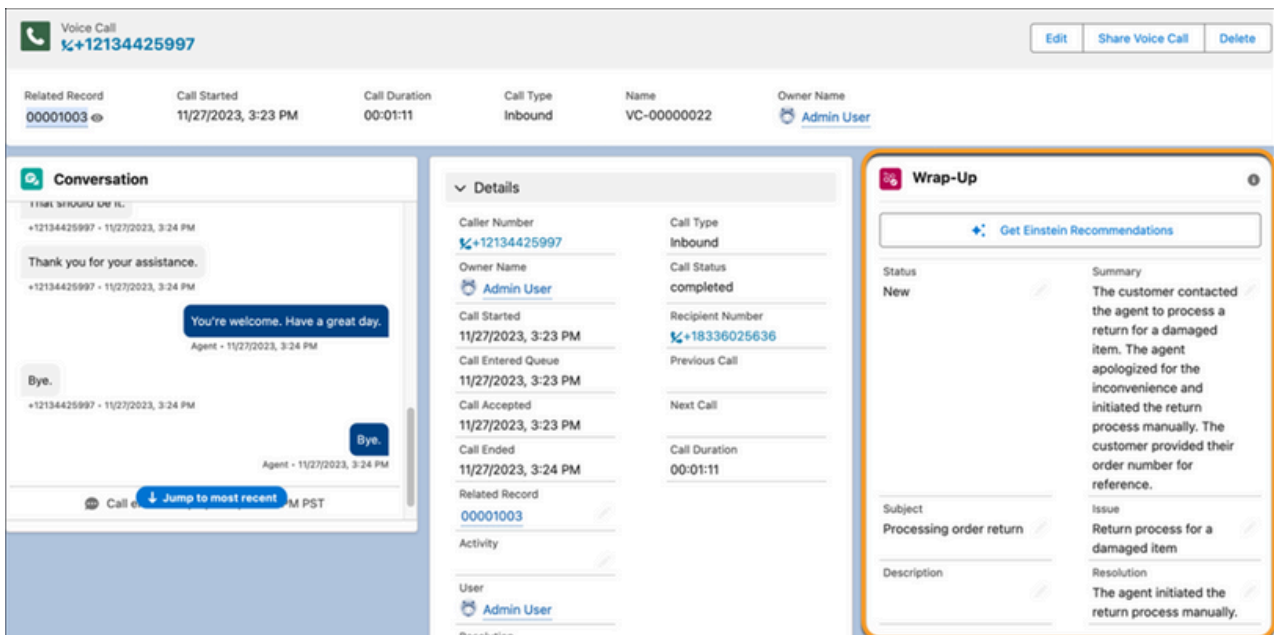
- **For copilot:** Use natural language requests in the Einstein panel.



- **For voice, messaging, and chat sessions:** Use the Wrap Up component in the Lightning Service Console.

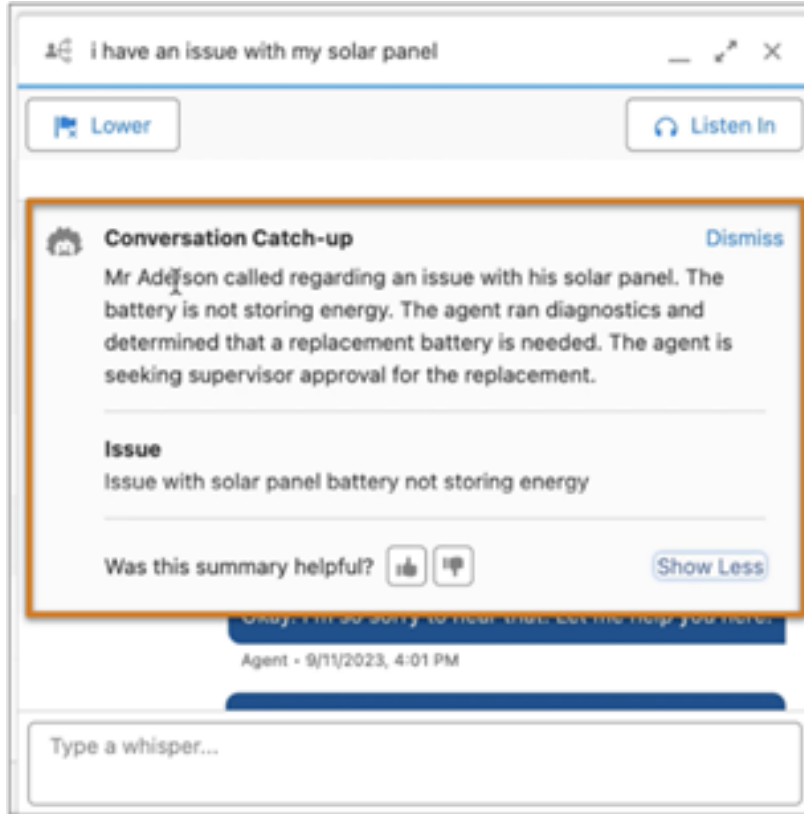


- **For Voice calls:** Einstein automatically generates a summary at the end.

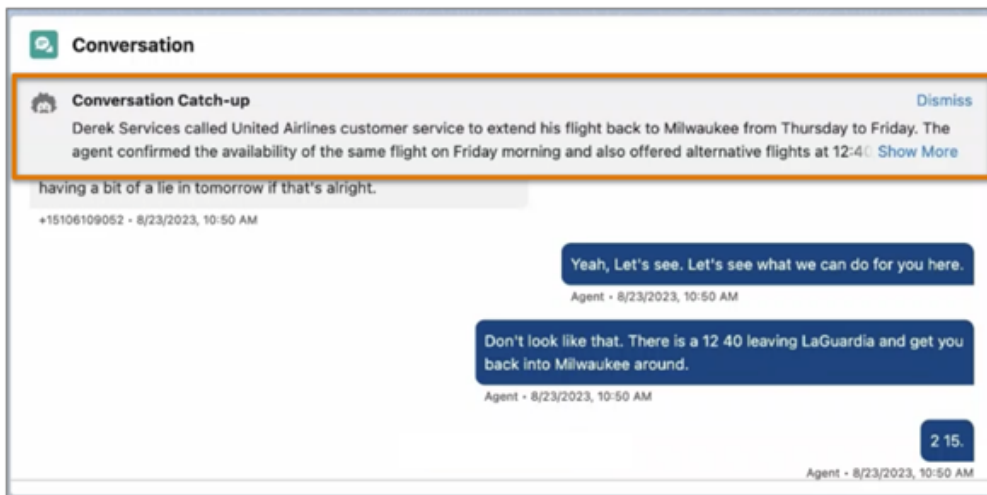


- **For email:** Use the Einstein Email Summaries component on the case record page.
- **For Conversation catch up:**

1. Supervisor monitoring



2. Agent view

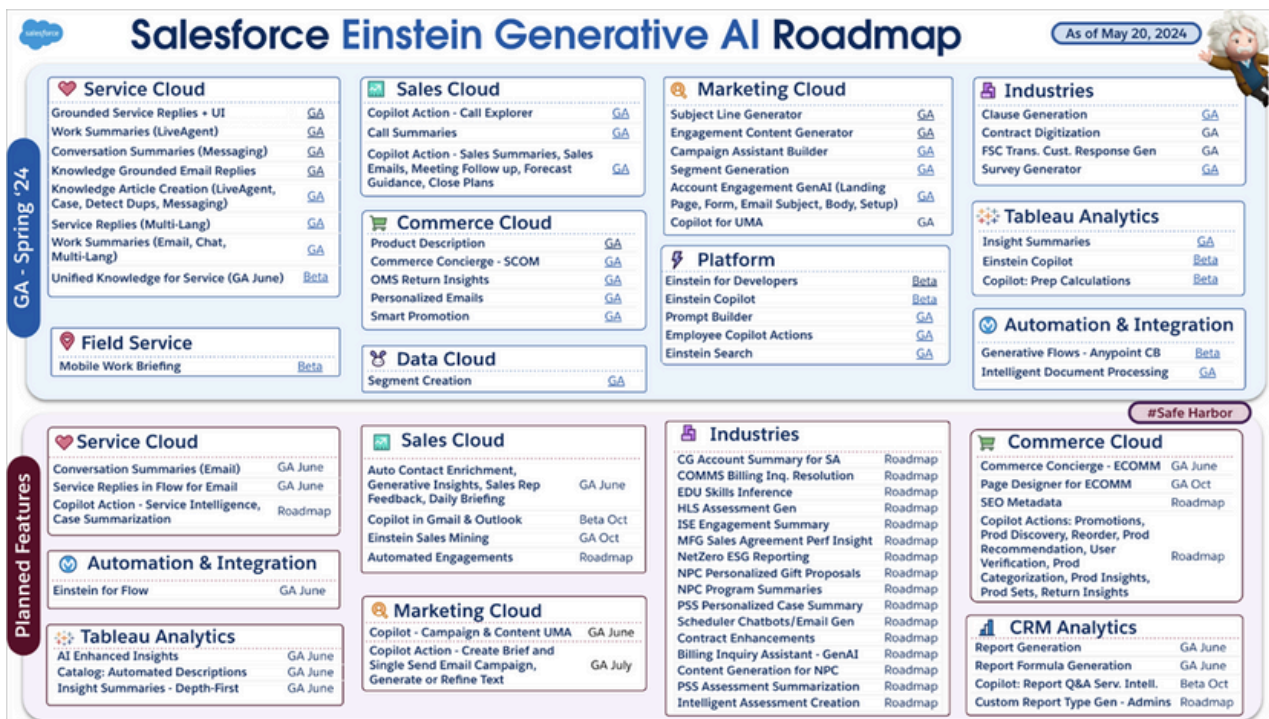


Step 6: Share Insights

1. **Generate Reports:**

- Use Einstein Generative AI and Feedback Data reports to share insights with your team.
- Install the Einstein Generative AI Audit and Feedback Data Reports package if needed.

Future Feature



Summary

Salesforce's AI features offer transformative potential for customer service by automating routine tasks, providing intelligent recommendations, and enabling personalized interactions. By implementing these tools, your organization can achieve faster response times, higher accuracy, and greater customer satisfaction, while allowing human agents to focus on more complex issues.

Key Takeaways:

- **Einstein Reply Recommendations:** Enhance agent efficiency with AI-suggested responses.
- **Chatbots:** Provide 24/7 customer support and reduce agent workload.
- **Case Classification & Wrap-Up:** Automate case categorization and summarization for improved management.
- **Next Best Actions:** Guide agents with intelligent recommendations for optimal decision-making.
- **Article Recommendations:** Help agents resolve issues quickly with relevant knowledge articles.
- **Conversation Mining:** Gain insights from customer interactions to refine service strategies.
- **Einstein Knowledge Creation:** Streamline documentation with AI-generated knowledge articles.
- **Service Replies for Chat and Email:** Automate and enhance chat and email responses.
- **Work Summaries:** Improve case review efficiency with AI-generated summaries.

Harnessing the power of AI in Salesforce can transform your customer service operations, driving efficiency, accuracy, and customer satisfaction. To get started on your AI journey, contact us today for a consultation. Our team of experts will guide you through the implementation process, ensuring a seamless transition and maximum ROI. Connect with us on LinkedIn or visit our website to learn more about how we can help you leverage AI for your business success.

Contact Us Today!

Website: <https://www.liongate.de/de/>

LinkedIn: <https://www.linkedin.com/company/liongate-ag/>

By integrating Salesforce's AI features, you can unlock new levels of productivity and customer satisfaction. Let's take this journey together!

Contact Us Today!



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Consultant



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