

Set Up Sales Cloud Einstein

Salesforce, Spring '23



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SALES CLOUD EINSTEIN

Sales Cloud Einstein is like having your own data scientist within Salesforce. Einstein learns from your team's sales activities and CRM data, and then gives you intelligent insights and predictive scoring to help you grow your pipeline fast. Sales Cloud Einstein also helps you increase sales productivity with machine learning and business sentiment analysis.

To get a better understanding of what's offered with Sales Cloud Einstein, review [Sales Cloud Einstein](#) in Salesforce Help, and work with your Salesforce contact to figure out which features are best for your team.

Feature	What It Does	How It Helps
Einstein Activity Capture	Keeps your email and calendar applications in sync with Salesforce.	Track sales-related activity on records and generate insights.
Einstein Automated Contacts	Finds new contacts and opportunity contact roles to add to Salesforce.	Let reps spend less time on data entry and more time on sales.
Einstein Forecasting	Provides predictions about your teams forecasting amount at the end of a forecasting period.	Improve forecasting accuracy and track how your sales teams are doing.
Einstein Lead Scoring	Scores leads from 1 to 99 based on how well they fit your lead conversion patterns.	Prioritize leads and determine where to focus sales efforts.
Einstein Opportunity Scoring	Scores opportunities from 1 to 99 based on how likely they are to close.	Prioritize opportunities so you can focus on the deals that are more likely to close.
Einstein Opportunity Insights	Provides predictions, smart follow-ups, and key moments related to opportunities.	Use relevant updates to win more deals.
Einstein Account Insights	Highlights key business developments and key moments about accounts.	Stay informed about developments that affect customers.
Sales Analytics app	Provides dashboards about various Sales Cloud Einstein features.	Evaluate how well various Einstein features are working in your org. For more information, see CRM Analytics for Sales Cloud Einstein in the Salesforce Help
Inbox	Integrates email and calendar with Salesforce.	Help sales reps boost productivity and work smarter right from their inbox. For more information, see Inbox in the Salesforce Help .

PREPARE FOR SALES CLOUD EINSTEIN

Before you set up Sales Cloud Einstein feature, review information about data requirements and other considerations. Learn about sandbox support and how to run the readiness assessor.

[Data Requirements for Sales Cloud Einstein](#)

To generate the most reliable intelligence, you must meet data requirements for each Sales Cloud Einstein feature.

[Sales Cloud Einstein and Sandbox](#)

Review which Sales Cloud Einstein features are available in sandbox.

[Run the Sales Cloud Einstein Readiness Assessor](#)

Wondering whether you're ready for Sales Cloud Einstein or whether it can help your sales reps? Run the Sales Cloud Einstein Readiness Assessor to find out. We analyze your Salesforce implementation, in either a production or sandbox environment, and then send you a personalized report. The report tells you which Einstein features you're ready to use now and which ones require extra steps.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available for an extra cost in: **Enterprise, Performance, and Unlimited** Editions

Data Requirements for Sales Cloud Einstein

To generate the most reliable intelligence, you must meet data requirements for each Sales Cloud Einstein feature.



Tip: To check whether you meet the data requirements, [run the Sales Cloud Einstein Assessor](#).

Einstein Account Insights

- You must have at least 30 business accounts.

Einstein Opportunity Insights

- At least 20 opportunities must be closed in the last 6 months (180 days).
- The median lifespan of closed opportunities must be more than 7 days in the last 6 months (180 days).

Einstein Automated Contacts

- You must have at least 30 business accounts.
- If you use person accounts, at least 50 percent of accounts must be business accounts.

Einstein Activity Capture

- You must have at least 30 accounts, contacts, leads, or opportunities.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Einstein Lead Scoring

These requirements apply to each segment of leads you create during setup, including the All Leads (Default) segment.

- At least 1,000 leads must be created in the last 200 days.
- Of the leads created in the last 200 days, at least 120 must be converted to an account and contact.
- (Optional) Of the leads created in the last 6 months (180 days), at least 120 must be converted to an account and contact with an opportunity created at conversion time.

When you score all leads together without creating segments, and you don't have enough lead conversion data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough lead data, Einstein builds a scoring model with your data and uses the model with the better results.

Einstein Opportunity Scoring

- You must have at least 200 closed won opportunities in last 24 months, each with a lifespan of at least 2 days.
- You must have at least 200 closed lost opportunities in last 24 months, each with a lifespan of at least 2 days.
- Opportunity history shows an average of one update to each closed opportunity.
- Use the standard opportunity Stage field because it's used to calculate win rates, and win rates are used to generate scores. If you change the names of the opportunity stage picklist values, make sure that the values are mapped to the correct stage type: Open, Closed/Won, or Closed/Lost.
- If your win rate is extremely high or low, your scores could be skewed. For example, if your win rate is above 90 percent, you could get a large number of opportunities with scores above 90. To avoid skewed scores, make sure that opportunities are set to the correct closed stage. (A win rate is calculated by dividing the last two years of closed-won opportunities by all closed opportunities from that same period.)

If you don't have enough opportunity data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough opportunity data, Einstein builds a scoring model with your data and uses the model with the better results.

Einstein Forecasting

- Collaborative Forecasts must be enabled.
- You must work with opportunities in Salesforce for at least 12 months. Specifically, the opportunity history must show at least one update in each of the past 12 months.
- You must use a standard fiscal year. Standard fiscal years follow the Gregorian calendar, but can start on the first day of any month of the year.
- Forecasts must be measured by opportunity revenue. Predictions are generated for only the oldest activated opportunity revenue forecast type.
- Your forecast hierarchy must include at least one forecasting enabled user who reports to a forecast manager.
- The Amount field should be populated in at least 80 percent of open opportunities.

Sales Cloud Einstein and Sandbox

Review which Sales Cloud Einstein features are available in sandbox.



Tip:

- A sandbox environment is best suited for testing how Sales Cloud Einstein features work with architecture, workflows, and Lightning components. Because the data in a sandbox environment is limited, we recommend that you don't evaluate the performance of the Einstein model based on what you see in sandbox. Instead, evaluate the model in a production org that has the required amount of historical data. You can run the Sales Cloud Einstein Assessor in a sandbox to check which Sales Cloud Einstein features are ready to be turned on.
- Don't manipulate the sandbox data before running the Einstein readiness assessor. Doing so can result in the assessor incorrectly passing some of the requirements. For example, Einstein Opportunity Scoring requires opportunities to be at least two days old and have updates that reflect your actual business process. If your sandbox data doesn't include opportunity history and you then update opportunities on the same day that you added them to the sandbox, the assessor incorrectly evaluates the requirement as met. Then, if you turn on Opportunity Scoring in sandbox, you don't see scores. If you don't see scores in sandbox but believe that you fulfilled all the requirements, contact Salesforce Customer Support.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Feature	Sandbox Support	Notes
Einstein Account Insights	✓	Re-enable the feature in each new sandbox or when a sandbox is refreshed.
Einstein Opportunity Insights	✓	Re-enable the feature in each new sandbox or when a sandbox is refreshed.
Einstein Lead Scoring	✓	Einstein Lead Scoring requires at least six months of data, so make sure that you refresh the full sandbox. Re-enable the feature in each new sandbox or when a sandbox is refreshed.
Einstein Opportunity Scoring	✓	Einstein Opportunity Scoring requires at least six months of data, so make sure that you refresh the full sandbox. If you use Opportunity Scoring without Performance or Unlimited editions or Sales Cloud Einstein licenses, sandbox isn't supported. Re-enable the feature in each new sandbox or when a sandbox is refreshed.
Einstein Activity Capture	✓	Because sandbox is best for testing how Einstein Activity Capture works and how it

Feature	Sandbox Support	Notes
		looks, no data is copied from production to sandbox. After you set up Einstein Activity Capture in sandbox, any refresh of that sandbox turns off Einstein Activity Capture and removes all connected accounts from the sandbox.
Inbox	✓	
Recommended Connections	✓	Einstein Activity Capture is required.
Einstein Email Insights	✓	Einstein Activity Capture is required.
Sales Analytics	✓	
Einstein Forecasting		Einstein Forecasting requires two years of data, but sandbox environments support up to six months of data.
Einstein Automated Contacts <ul style="list-style-type: none"> Contact suggestions Opportunity contact role suggestions 		

Run the Sales Cloud Einstein Readiness Assessor

Wondering whether you're ready for Sales Cloud Einstein or whether it can help your sales reps? Run the Sales Cloud Einstein Readiness Assessor to find out. We analyze your Salesforce implementation, in either a production or sandbox environment, and then send you a personalized report. The report tells you which Einstein features you're ready to use now and which ones require extra steps.

The Sales Cloud Einstein Readiness Assessor can be run in production and sandbox orgs. Sandbox is best suited for testing Sales Cloud Einstein features in terms of architecture, workflows, and Lightning components. Because the data in sandbox is limited, we recommend that you don't evaluate the performance of the Einstein model based on what you see in sandbox. Instead, evaluate the model in a production org that has the required amount of historical data.

1. From Setup, enter *Assessors* in the Quick Find box, and then select **Sales Cloud Einstein Assessor** under Einstein Assessors.
2. Fill in the form and click **Generate Report**. If you're using a sandbox, click **Generate Report (Sandbox)**.

Alternatively, you can [go directly to the assessor](#) and follow the instructions to let Salesforce access your data.

EDITIONS

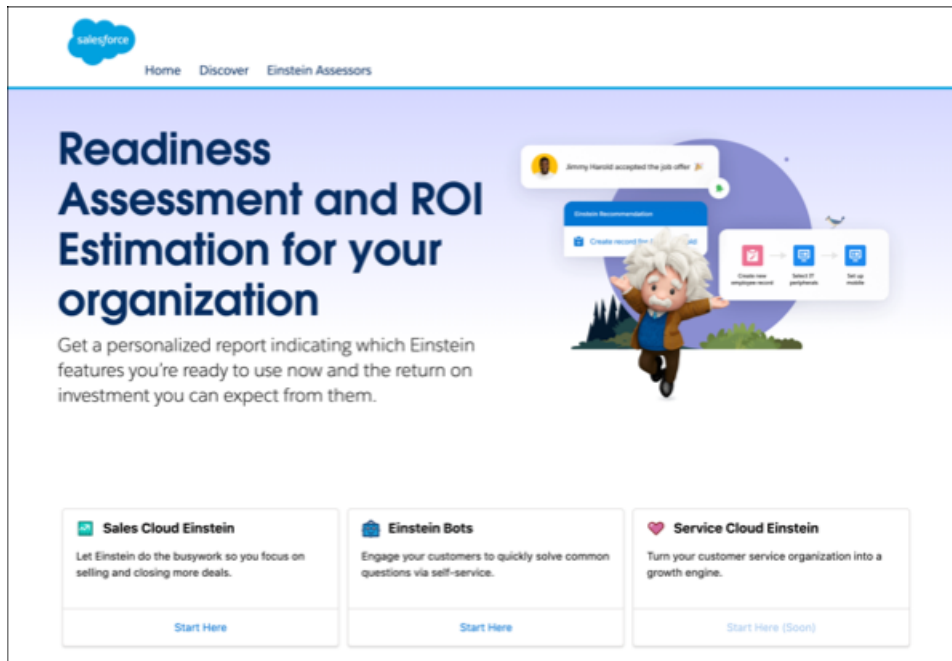
Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To run the Sales Cloud Einstein Readiness Assessor:

- Customize Application



When the assessment is done, we send you an email to let you know that your personalized Sales Cloud Einstein readiness report is available from the Files tab in Salesforce.

If you have problems running the readiness assessor, upgrade your browser to the latest version and try again.



Note:

- The Sales Cloud Einstein Readiness assessor isn't available for Salesforce Government Cloud customers.
- The Sales Cloud Einstein Readiness Assessor accesses Salesforce data from your account, contact, lead, user, and opportunity records to determine if your Salesforce org meets eligibility requirements for each Sales Cloud Einstein feature. The data, your administrator email address, and an authentication credential is saved and/or processed by Salesforce technologies built on Amazon Web Services and Heroku that offer different privacy and security standards. These third-party hosting providers don't store any personally identifiable information. This data is used to generate your personalized Sales Cloud Einstein Readiness Report. The authentication credential is deleted and access to your org's data is immediately revoked after the report is generated.

CONSIDERATIONS FOR SETTING UP SALES CLOUD EINSTEIN

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

General Considerations

- Sales Cloud Einstein is available only to users with standard Salesforce licenses.
- Sales Cloud Einstein isn't supported in Government Cloud and Government Cloud Plus organizations. Turning on Sales Cloud Einstein can send data outside the authorization boundary. Contact your Salesforce account executive for more details.
- When you set up Sales Cloud Einstein, Salesforce installs two packages in your org, SalesforceIQ Cloud and Sales Insights. Each package adds an associated integration user and profile. Salesforce uses these entities to provide insights to your org. If you update these entities, it can affect your org's ability to get insights. Depending on the Einstein features you turn on, these integration users can have full access to Accounts, Campaigns, Contacts, Leads, and Opportunities. These users don't modify your org's data and don't affect your Salesforce license usage.
- Platform encryption isn't currently supported with Sales Cloud Einstein.
- Some Sales Cloud Einstein features require users to connect a Microsoft® Exchange or Gmail™ account to Salesforce.
- Sales Cloud Einstein included in Sales Cloud Unlimited Edition provides analytics reporting using the CRM Analytics platform. When using this functionality, your license doesn't allow you to:
 - Build custom analytics apps or dashboards
 - Upload, access, or connect external data using the API with the exception of datasets provided with Sales Cloud Einstein
 - Import data from Salesforce standard or custom objects that aren't included in this feature

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Feature Considerations

- [Einstein Account and Opportunity Insights](#)
- [Einstein Automated Contacts](#)
- [Einstein Lead Scoring](#)
- [Einstein Opportunity Scoring](#)
- [Einstein Forecasting](#)
- [Einstein Activity Capture](#)
- [Salesforce Inbox](#)
- [Sales Analytics](#)

Considerations for Setting Up Einstein Opportunity and Account Insights

Before setting up Einstein Opportunity and Account Insights, consider these requirements, limitations, and nuances.

To use Einstein Account Insights, you must meet the data requirements.

- You must have at least 30 business accounts.

To use Einstein Opportunity Insights, you must meet the data requirements.

- At least 20 opportunities must be closed in the last 6 months (180 days).
- The median lifespan of closed opportunities must be more than 7 days in the last 6 months (180 days).

EDITIONS

Available in: Lightning Experience

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

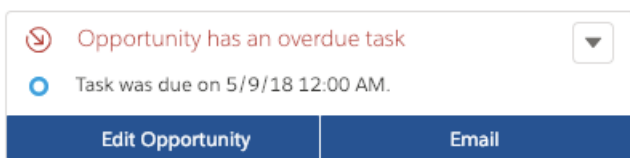
General

- It takes up to 24 hours before the initial batch of insights are available. If users see the Einstein Insights component and it's still empty after 24 hours, there aren't any insights available for their opportunities or accounts.
- We remove insights from the Einstein component when they're no longer relevant. For example, an insight about no communication with a prospect is removed after communication is reestablished.
- When you're using the email action from a news-based account insight in the full site, the email subject field isn't populated. In the Salesforce mobile app, the email action isn't available from news-based account insights.
- Account and opportunity insights are available with the Outlook and Gmail integrations.
- When Einstein Opportunity Insights is on, activity alerts aren't displayed in the Kanban view.
- The **Score** field in list views for Einstein Account Insights and Einstein Opportunity Insights is used by Salesforce to order insights by priority. This field isn't related to Einstein Opportunity Scoring or the **Opportunity Score** field.

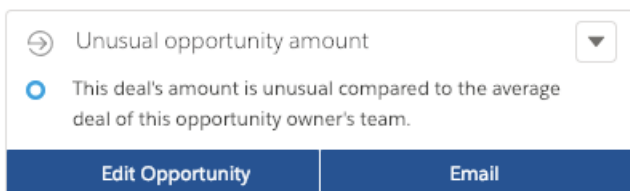
Field-level security

Some field-related information is exposed in Einstein insights even if you have restrictions placed on those fields with field-level security.

- For the `Opportunity has an overdue task` insight, we show the `task Due Date` field.



- For the `Unusual opportunity amount` insight, we don't show the `Amount` value, but we do process amount values and surface related information.



Access Requirements

Users need access to specific opportunity and account fields to see insights everywhere.

- On the Opportunity object, you need the `Name` and `Type` fields.
- On the Account object, you need the `Activity`, `Name`, `Title`, and `Type` fields.

Activity Data

- If you use Einstein Activity Capture, some opportunity-related insights are derived from emails and events. If an insight comes from a private email, the insight is public but the email content isn't displayed. Privacy settings are determined by the activity owner. To get the most out of Einstein Opportunity Insights, make sure that Einstein Activity Capture users [set their sharing settings to share activities with everyone](#).

Reporting

- Opportunity and account insights aren't available in standard reporting, but you can use them in custom report types.
- You can run reports only for the objects that insights are associated with. You can't run reports for insights based on what appears on the Home page.
- Insights that are removed from the Insights component don't show up in reports.

Considerations for Setting Up Einstein Automated Contacts

Before setting up Einstein Automated Contacts, consider these requirements, limitations, and nuances.

- You must have at least 30 business accounts.
- If you use person accounts, at least 50 percent of accounts must be business accounts.
- Einstein Automated Contacts isn't supported in sandbox environments.
- Suggestions are based on data from manually and automatically logged activities.
- Contact suggestions and opportunity contact role suggestions aren't available in standard reporting, but you can use them in custom report types.
- To add or decline contact suggestions, users need edit access on accounts.
- To add or decline opportunity contact role suggestions, users need edit access on opportunities, and read or edit access on contacts.
- When an opportunity contact role suggestion refers to a contact that a user doesn't have access to, the following happens. The user doesn't see the suggestion on the opportunity record. When the user views the complete list of suggestions (using the Einstein Opportunity Contact Role Suggestions item from the App Launcher), we show all suggestions but hide contact fields that the user doesn't have access to.
- Make sure that sales reps have access to contact fields, such as Email, Title, or Phone, so that they can see those fields with opportunity contact role suggestions.
- If required contact fields don't have a default value, errors can occur when contacts are automatically created. If an error occurs, the contact is shown to users as a suggestion.
- If the New Contact action for the Contact object is overridden through a custom Visualforce page or Lightning component, then the Add button on the contact suggestion doesn't always populate the contact record.

EDITIONS

Available in: Lightning Experience

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

Access Requirements

Users need access to specific opportunity and account fields to see insights everywhere.

- On the Opportunity object, you need the `Name` and `Type` fields.
- On the Account object, you need the `Activity`, `Name`, `Title`, and `Type` fields.

Considerations for Setting Up Einstein Lead Scoring

Before you set up Einstein Lead Scoring, consider these requirements and limitations.

General

- At least 1,000 leads must be created in the last 200 days.
- Of the leads created in the last 200 days, at least 120 must be converted to an account and contact.
- (Optional) Of the leads created in the last 6 months (180 days), at least 120 must be converted to an account and contact with an opportunity created at conversion time.

These requirements apply to each segment of leads you create during setup, including the All Leads (Default) segment.

When you score all leads together without creating segments, and you don't have enough lead conversion data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough lead data, Einstein builds a scoring model with your data and uses the model with the better results.

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

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Scoring Leads in Segments

- Data requirements for scoring all leads together also apply to individual lead segments.
- Each time you change Einstein Lead Scoring settings, Einstein updates the segment IDs for each lead segment, even if you score all your leads in a single segment. During these updates, some data in the CRM Analytics Lead Scoring Dashboard, including lead conversion rates, can be incorrect until Einstein updates your scores based on the new settings.
- When using segments or any other custom lead scoring settings, any new fields added to leads must be added manually to the list of included fields for each segment if you Einstein to consider them during scoring.


Using Filters

If you create lead segments using field filters, be aware of what happens when you delete or deactivate picklist field values.

- If you delete a picklist value from a standard field, you can't use the value to set up a field filter.
- If you deactivate a picklist value from a standard field, you can't use it to set up a field filter. However, existing field filters based on that value still work with lead records that contain the deactivated value.
- If you create a field filter using a standard field value and then delete that filtered value from the field, the filter still functions correctly. However, the field appears in Setup with a blank value.
- If you delete a picklist value from a custom field, it still appears in Setup, but any filter created with that value doesn't function.
- If you deactivate a picklist value from a custom field, it can still be used to set up a field filter.

Considerations for Setting Up Einstein Opportunity Scoring

Before setting up Einstein Opportunity Scoring, consider these requirements, limitations, and nuances.

 **Note:** Einstein Opportunity Scoring is available to users with a Sales Cloud Einstein license and eligible customers without a Sales Cloud Einstein license.

EDITIONS

Available in: Lightning Experience and Salesforce Classic.

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

Available to eligible customers for no extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Data Requirements and Access

- You must have at least 200 closed won opportunities in last 24 months, each with a lifespan of at least 2 days.
- You must have at least 200 closed lost opportunities in last 24 months, each with a lifespan of at least 2 days.
- Opportunity history shows an average of one update to each closed opportunity.
- Use the standard opportunity Stage field because it's used to calculate win rates, and win rates are used to generate scores. If you change the names of the opportunity stage picklist values, make sure that the values are mapped to the correct stage type: Open, Closed/Won. or Closed/Lost.
- If your win rate is extremely high or low, your scores could be skewed. For example, if your win rate is above 90 percent, you could get a large number of opportunities with scores above 90. To avoid skewed scores, make sure that opportunities are set to the correct closed stage. (A win rate is calculated by dividing the last two years of closed-won opportunities by all closed opportunities from that same period.)
- If you don't have enough opportunity data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough opportunity data, Einstein builds a scoring model with your data and uses the model with the better results.
- After you turn on Einstein Opportunity Scoring, it can take up to 48 hours to analyze your data, build a scoring model, and add scores to opportunities. You can check the status from the Einstein Opportunity Scoring setup page. If Einstein is still analyzing your data after 48 hours, turn off Einstein Opportunity Scoring and then turn it on again, or edit your settings.
- Depending on when you purchased Sales Cloud Einstein, Einstein Opportunity Scoring might be on by default. If it is, scores aren't available for opportunities that are related to a person account. To get scores on those opportunities, turn off Einstein Opportunity Scoring and then turn it on again.
- If you don't have any Sales Cloud Einstein licenses but your org meets specific requirements, all users with a Salesforce user license have access to scores on all opportunities. For information about your eligibility, contact Salesforce Customer Support.

Reporting

- Opportunity scores are available in standard reporting and in custom report types. Model factors, which are used to build scoring models, are available in custom report types. For examples, see [Create Custom Report Types for Einstein Opportunity Scoring](#).

Field-Level Security

- For each opportunity score, Einstein shows the factors that have contributed most to the score. The contributing factors that sales reps see alongside opportunity scores are dependent on the reps' field access. For example, reps who don't have access to the Amount field don't see factors that are based on amount. Keep in mind that factors include only field names, not field values. For example, the `Amount keeps going up` factor doesn't show amount values to any users.

Lightning Experience and Salesforce Classic

- In Lightning Experience, we show `Not Available` when there's no score. We show `Hidden` when a score isn't available because the user has limited access to opportunity scores. In Salesforce Classic, we show a blank value when there's no score *and* when a score isn't available due to limited user access. For details on why there's no score, see [Understand How Einstein Scores Your Opportunities](#).
- In Lightning Experience, when you use the Opportunity Score field in any type of filtering, use `null` in the filter criteria (when non-numeric values are allowed) to include opportunities that Einstein hasn't calculate a score for yet. Use `-1` in the filter criteria to include opportunities that don't have scores because of limited access to opportunity scores. In Salesforce Classic, for the same scenarios use `null` in the filter criteria (when non-numeric values are allowed).

Considerations for Setting Up Einstein Forecasting

Before setting up Einstein Forecasting, review the requirements and considerations.

- Collaborative Forecasts must be enabled.
- You must work with opportunities in Salesforce for at least 12 months. Specifically, the opportunity history must show at least one update in each of the past 12 months.
- You must use a standard fiscal year. Standard fiscal years follow the Gregorian calendar, but can start on the first day of any month of the year.
- Forecasts must be measured by opportunity revenue. Predictions are generated for only the oldest activated opportunity revenue forecast type.
- Your forecast hierarchy must include at least one forecasting enabled user who reports to a forecast manager.
- The Amount field should be populated in at least 80 percent of open opportunities.
- Opportunity splits aren't supported. The forecast predictions are based on total revenue, not shared revenue.
- You must use the standard Opportunity object and the standard Close Date and Amount fields. Custom date fields aren't supported.
- You can use Einstein Forecasting only in production orgs, not sandboxes.
- Avoid setting field-level security on the Sales Insights Integration User Profile for opportunity fields that you want to use to optimize your predictions. It can impact your forecasting accuracy.
- If you plan to use field filters to segment your opportunities, be aware of what happens when you delete or deactivate picklist field values.
 - If you delete a picklist value from a standard field, you can't use the value to set up a field filter.

EDITIONS


Available in: Lightning Experience and Salesforce Classic

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

- If you deactivate a picklist value from a standard field, you can't use it to set up a field filter. However, existing field filters based on that value still work with opportunity records that contain the deactivated value.
- If you create a field filter using a standard field value and then delete the filtered value from the field, the filter still functions, but appears in Setup with a blank value.
- If you delete a picklist value from a custom field, it still appears in Setup, but any filter created with that value doesn't function.
- If you deactivate a picklist value from a custom field, it can still be used to set up a field filter.

SET UP SALES CLOUD EINSTEIN

Use the Sales Cloud Einstein Setup Assistant to get the targeted guidance you need for setting up the Sales Cloud Einstein features you want.

 **Note:** The following information is for Salesforce orgs with at least one Sales Cloud Einstein add-on license. If you're using Sales Cloud Einstein features with only Salesforce user licenses, see [Set Up Einstein Opportunity Scoring for Sales Cloud Users](#).

Select Who Can Use Sales Cloud Einstein

The Sales Cloud Einstein Included and Sales Cloud Included Bundle permission sets include the permissions for Sales Cloud Einstein features. The permission sets also includes dashboards, which are built on CRM Analytics. Assign a permission set to users.

Access the Sales Cloud Einstein Setup Assistant

The Setup Assistant is your guide to selecting Sales Cloud Einstein users and setting up features.

Enable Einstein Automated Contacts

Help reps spend even less time on data entry. Einstein Automated Contacts uses email and event activity to find new contacts and opportunity contact roles to add to Salesforce. Choose whether Einstein suggests the new data, which reps can add with just a couple of clicks, or adds it automatically.

Enable Einstein Account Insights

Einstein Account Insights helps you and your sales teams stay informed about business developments that affect relationships with customers. When insights are available, they appear on the Einstein Insights component.

Enable Einstein Opportunity Insights

Einstein Opportunity Insights gives your sales team relevant updates about opportunities, which can help win more deals. When insights are available, they appear in the Einstein Insights component on the Home page and opportunity records.

Enable Einstein Lead Scoring

Give your sales team access to scores that help them prioritize leads. Turn on Einstein Lead Scoring, and then select a lead conversion milestone to use, which leads to score, and which lead fields to consider during scoring.

Enable Einstein Opportunity Scoring

Give your sales team access to scores that help them focus on the right deals. When you set up Einstein Opportunity Scoring, you choose whether to have Einstein consider all opportunity records and opportunity fields or only a subset. If Einstein Opportunity Scoring is on by default, make sure that scores appear where you want, such as your customized opportunity page layouts and public list views.

Enable Einstein Forecasting

Provide your forecast managers with AI-powered intelligence that improves forecasting accuracy, predicts results, and tracks how sales teams are doing.

Troubleshoot Sales Cloud Einstein Setup Errors

When setting up Sales Cloud Einstein features, several important steps occur behind the scenes. If one of the steps isn't successful, one or more features can't be enabled. There are several ways to troubleshoot setup issues.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available for an extra cost in: **Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS

To set up Sales Cloud Einstein:

- Customize Application AND Modify All Data

Select Who Can Use Sales Cloud Einstein

The Sales Cloud Einstein Included and Sales Cloud Included Bundle permission sets include the permissions for Sales Cloud Einstein features. The permission sets also includes dashboards, which are built on CRM Analytics. Assign a permission set to users.

1. From Setup, enter *Permission Sets* in the Quick Find. Then, select **Permission Sets**.
2. Click the permission set you want to assign.

In Performance and Unlimited editions, assign the Sales Cloud Einstein Included or Sales Cloud Included Bundle to users. If you have users who accessed Sales Cloud Einstein through the Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence license before Summer '22, we recommend that you assign those users to the Sales Cloud Included or Einstein Activity Capture Included permission set, or a custom permission set that includes the Einstein Activity Capture permission. To make these assignments, assign the new permission set to your users before removing the old permission set. Beginning in Summer '22, you can't add users to the old Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence permission sets.

In Enterprise Edition, assign the Sales Cloud Einstein permission set to users.

3. Click **Manage Assignments** to assign the permission set to users.



Note:

- The Sales Cloud Einstein Included and Sales Cloud Included Bundle permission set include the permissions for most Sales Cloud Einstein features, plus access to dashboards. Account Insights and Opportunity Insights aren't included with Sales Cloud Einstein in Unlimited and Performance editions. Most permissions are enabled by default. To modify a permission set, clone it and edit the app permissions.
- The View Opportunity Scoring Model Factors permission, which lets users see the factors that are used to build opportunity scoring models, isn't enabled by default. Clone the Sales Cloud Einstein Included or Sales Cloud Included Bundle permission set. Then, enable the View Opportunity Scoring Model Factors permission and assign the permission set to users. Users who can view model factors can sometimes see the object data and object-related data used to build the models, regardless of their sharing settings.
- The Sales Analytics app also comes with Sales Cloud Einstein but isn't included in the Sales Cloud Einstein Included or Sales Cloud Included Bundle permission set. You must [set up permissions for the Sales Analytics App](#) separately.
- If you used Sales Cloud Einstein before Spring '18, you created a permission set with the Sales Cloud Einstein permission set license. New permissions were added to the permission set license in later releases. Make sure the permissions for all the Einstein features that you want to use, including analytics, are enabled in your permission set license.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS

To create permission sets:

- Manage Profiles and Permission Sets

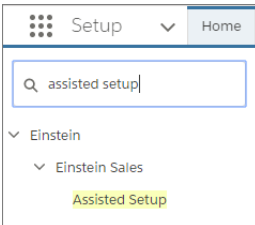
To assign permission sets:

- Assign Permission Sets

Access the Sales Cloud Einstein Setup Assistant

The Setup Assistant is your guide to selecting Sales Cloud Einstein users and setting up features.

1. From Setup, enter *Assisted Setup* in the Quick Find box, then select **Assisted Setup** under Einstein Sales.



The setup page shows all the steps you need for Sales Cloud Einstein deployment, including how to assign Einstein to users.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To access the Sales Cloud Einstein Setup Assistant:

- Customize Application AND Modify All Data

Enable Einstein Automated Contacts

Help reps spend even less time on data entry. Einstein Automated Contacts uses email and event activity to find new contacts and opportunity contact roles to add to Salesforce. Choose whether Einstein suggests the new data, which reps can add with just a couple of clicks, or adds it automatically.

1. From Setup, enter *Assisted Setup* in the Quick Find box, and then select **Assisted Setup** under Einstein Sales.

The Sales Cloud Einstein setup page shows all the steps you need for Sales Cloud Einstein deployment, including how to assign Einstein to users.

2. Click **Set Up** next to Einstein Automated Contacts.
3. On the Setup page, enable the types of data you want to suggest to users.
4. Select whether you want Einstein to automatically add new data or suggest it to users.
Suggestions appear in the Einstein Insights component, so make sure that the Assistant component was added to the Home page and the Einstein Insights component was added to account and opportunity Lightning pages.
5. Make sure users have proper access to accounts, contacts, and opportunities.
To add or decline contact suggestions, users need edit access on accounts. To add or decline opportunity contact role suggestions, users need edit access on opportunities, and read or edit access on contacts.
6. Make sure users have proper field-level security for the Lead Source field on contacts. The Lead Source field is used to create the Added By Einstein list view.
7. To avoid errors when contacts are created, make sure that:
 - All required contact fields have a default value.
 - Einstein users have proper field-level security on all standard contact fields.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To enable Einstein Automated Contacts:

- Customize Application AND Modify All Data

Enable Einstein Account Insights

Einstein Account Insights helps you and your sales teams stay informed about business developments that affect relationships with customers. When insights are available, they appear on the Einstein Insights component.

1. Make sure users have access to the **Name**, **Title**, and **Type** fields on the Account object.
2. From Setup, in the Quick Find box, enter *Assisted Setup*, and then select **Assisted Setup** under Einstein Sales.
The Sales Cloud Einstein setup page shows all the steps you need for Sales Cloud Einstein deployment, including how to assign Einstein to users.
3. Click **Set Up** next to Einstein Account Insights.
4. On the Settings page, turn on Account Insights.
5. Using the Lightning App Builder, make sure that the Assistant component is added to the Home page and the Einstein Insights component is added to account Lightning pages.

EDITIONS

Available in: Lightning Experience

Available with the Sales Cloud Einstein add-on license, which is available for an extra cost in **Performance** and **Enterprise** Editions.

USER PERMISSIONS

To enable Einstein Account Insights:

- Customize Application AND Modify All Data

Enable Einstein Opportunity Insights

Einstein Opportunity Insights gives your sales team relevant updates about opportunities, which can help win more deals. When insights are available, they appear in the Einstein Insights component on the Home page and opportunity records.

1. Make sure users have access to the **Name** and **Type** fields on the Opportunity object.
2. From Setup, in the Quick Find box, enter *Assisted Setup*, and then select **Assisted Setup** under Einstein Sales.
The setup page shows all the steps you need for Sales Cloud Einstein deployment, including how to assign Einstein to users.
3. Click **Set Up** next to Einstein Opportunity Insights.
4. On the Settings page, turn on Opportunity Insights.
5. Using the Lightning App Builder, make sure that the Assistant component is added to the Home page and the Einstein Insights component is added to opportunity Lightning pages.
6. After insights are available, add the Top Insight field to public opportunity list views. Tell your sales reps to add the Top Insight field to their opportunity list views.



Tip: To get all types of Einstein Opportunity Insights, enable Einstein Activity Capture. Then, tell Einstein Activity Capture users to share their emails and events with everyone.

EDITIONS

Available in: Lightning Experience

Available with the Sales Cloud Einstein add-on license, which is available for an extra cost in **Performance** and **Enterprise** Editions.

USER PERMISSIONS

To enable Einstein Opportunity Insights:

- Customize Application AND Modify All Data

Enable Einstein Lead Scoring

Give your sales team access to scores that help them prioritize leads. Turn on Einstein Lead Scoring, and then select a lead conversion milestone to use, which leads to score, and which lead fields to consider during scoring.

1. Go to Setup. In the Quick Find box, enter *Einstein Lead Scoring*, and select **Einstein Lead Scoring** under **Einstein Sales**.

2. Turn on Einstein Lead Scoring.

3. Choose whether to use default settings or custom settings.

If you choose default settings, Einstein looks for leads converted to accounts and contacts, scores all of your leads together, and considers all lead fields during scoring. When using default settings, you can skip the remaining steps and click **Score Leads**.

4. If you chose custom settings, on the Conversion Milestone page, choose the lead conversion milestone (accounts and contacts or opportunity creation) that matches your business practices. Does your sales team simply convert leads to accounts and contacts, or do they create opportunities when they convert leads? Then click **Save & Next**.

5. On the Lead Segments page, choose whether you want Einstein to score all of your leads together, or only certain segments of your leads that meet criteria you specify. To score segments of your leads separately, click **Segments of Leads**. Otherwise, click **Save & Next**.

Why would you want to score segments of your leads separately? Let's say you have domestic leads and international leads. Their conversion patterns could have significant differences. If you use the Country field to put them in different segments, Einstein can calculate more accurate scores based on those patterns. Define your segments based on the criteria that make sense for your business.

6. If you want Einstein to score segments of your leads separately, click **Add Segment**.

- a. Give the segment a name of up to 80 characters.
- b. Choose whether to include records that meet all of your conditions or any of your conditions.
- c. To add filter criteria for the segment, click **Add Condition** and then choose a field, operator, type and value.

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

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

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

- d. Add any other conditions you want the segment to meet.

EDITIONS

Available in: Lightning Experience and Salesforce Classic.

Available with Sales Cloud Einstein, which is available for an extra cost in:

Enterprise, Performance, and **Unlimited** Editions

USER PERMISSIONS

To enable Einstein Lead Scoring:

- Customize Application
- AND
- Modify All Data
- AND
- View All Profiles

- e. Repeat the process for any additional lead segments you want to create. You can create up to 35 segments.

Leads that don't meet the conditions for any segment are ignored when Einstein builds the predictive model.

- f. If you created more than one lead segment, drag them into priority order. If a lead falls into multiple segments, Einstein scores it as part of the highest priority segment.
- g. When you're done adding segments, click **Save & Next**.

7. On the Included Fields page, choose whether you want Einstein to include all your lead fields when building the predictive model for each lead segment. By default, Einstein includes all lead fields. To include only certain fields, click **Include Fields...** and then deselect the fields you don't want Einstein to include. When you're done, click **Next**.

Why would you tell Einstein not to include some fields? Some businesses use fields that don't affect a lead's chance of converting. For example, you could have a field that indicates the reason a lead didn't convert. Telling Einstein to exclude those fields yields more accurate lead scores. Before excluding a field, make sure that the field doesn't affect the lead's chance of converting. Excluding fields that do affect score analysis decreases the accuracy of your lead scores. If you're uncertain about whether to exclude a particular field, include it and then check the Einstein Lead Scoring dashboard to see what effect it has on your scores.

If you tell Einstein to score all leads together in the All Leads (Default) segment, Einstein includes any new fields you add to leads automatically. If you create lead segments, add any new fields to your segments manually in Setup. If you decide to delete an included field from the Lead object, exclude the field from all segments and wait for Einstein to update your scores before deleting it.

8. On the Review Settings page, confirm your choices. If you want, you can edit them.

9. When you're done, click **Score Leads**.

Einstein analyzes your teams' past converted leads to build a scoring model for each lead segment. It can take up to 48 hours to analyze your data, build a scoring model for each lead segment, and add scores to leads. To check the status, return to the Einstein Lead Scoring setup page.

When you score all leads together without creating segments, and you don't have enough lead conversion data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough lead data, Einstein builds a scoring model with your data and uses the model with the better results.

10. Using the Lightning App Builder, make sure that the Einstein Lead Scoring component was added to Lightning pages for leads. In Salesforce Classic, add the Lead Score field to lead page layouts. The Lead Score field can't be used on the same page layout as the Lead Score Distribution or Conversion Rate by Lead Score report components.

To see the Einstein Lead Scoring component, users must have read access to the Company, Phone, and Email fields on leads.

11. After scores are available, add the Lead Score field to public lead list views. Salesforce automatically adds this field to default list views.



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

If you want to update your lead scoring setup, your changes become draft settings until you click **Score Leads** again. You can save your draft settings and update them as often as necessary before using them to score leads.

If you choose to change your Einstein Lead Scoring settings, and CRM Analytics Data Sync is also enabled, you can see errors during data sync. These errors occur because the ScoreIntelligence field on leads is unavailable for data sync while Einstein rebuilds your lead scoring model. The data sync errors resolve when the model is rebuilt, and updated scores appear on lead records.


If you previously turned off Einstein Lead Scoring and are turning it back on, update settings in the Einstein Lead Scoring app in Analytics Studio.

1. In Analytics Studio, click the **Einstein Lead Scoring** app.
2. Click **Reconfigure app**. If you don't see that link, click **New version available**.

3. Read the message about overwriting existing customizations, and then select **It's OK to overwrite current app and any customizations**.
4. Click **Continue**.

Enable Einstein Opportunity Scoring

Give your sales team access to scores that help them focus on the right deals. When you set up Einstein Opportunity Scoring, you choose whether to have Einstein consider all opportunity records and opportunity fields or only a subset. If Einstein Opportunity Scoring is on by default, make sure that scores appear where you want, such as your customized opportunity page layouts and public list views.

 **Note:** If you use Sales Cloud Einstein features without any Sales Cloud Einstein add-on licenses, and it's your first time setting up Einstein Opportunity Scoring, see [Set Up Einstein Opportunity Scoring for Sales Cloud Users](#).

1. To open the Einstein Opportunity Scoring setup page, do one of the following.
 - In Lightning Experience, from Setup, enter *Assisted Setup* in the Quick Find box, and then select **Assisted Setup**. Then, click **Set Up** next to Einstein Opportunity Scoring.
 - In Salesforce Classic, from Setup, enter *Einstein Opportunity Scoring* in the Quick Find box, and then select **Einstein Opportunity Scoring**.
2. Read the introduction, and then click **Next**.
3. Choose whether to have Einstein consider all opportunity records or only a subset when building the scoring model. Then, click **Next**. If needed, define the conditions, and click **Next**.

When you give Einstein only a subset of opportunities to look at, it can yield more accurate scores. For example, if you use external systems to create opportunities that are closed rather quickly, those opportunities don't reflect the normal opportunity lifecycle and can skew your scores.

When defining conditions, you can use up to 100 fields. The CurrencyIsoCode field isn't available. The following field data types aren't supported.

- Address
 - Date
 - Datetime
 - Double
 - Encrypted String
 - Geolocation
 - Multipicklist
 - Reference (However, the RecordTypeId reference field is supported.)
 - Text Area
 - Text Area
 - Time
4. Choose whether to have Einstein consider all opportunity custom fields when building the scoring model. Then, click **Next**. If needed, deselect the fields you want Einstein to exclude, and click **Next**.

EDITIONS

Available in: Lightning Experience and Salesforce Classic.

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

Available to eligible customers for no extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up Einstein Opportunity Scoring:

- Customize Application AND Modify All Data AND View All Profiles

Exclude fields from the model only if you're sure they aren't part of the opportunity lifecycle. For example, you can safely exclude automatically generated fields, such as IDs and dates. Mistakenly excluding influential fields makes opportunity scores less accurate. If you're unsure about whether to exclude a certain field, err on the side of caution and include the field.

5. Review your settings. Then, click **Start** to begin the scoring process.

It can take up to 48 hours to analyze your data, build a scoring model, and add scores to opportunities. To check the status, return to the Einstein Opportunity Scoring setup page. If you don't have enough opportunity data to build your own predictive model, Einstein uses a global model. The global model uses anonymous data from many Salesforce customers. When you accumulate enough opportunity data, Einstein builds a scoring model with your data and uses the model with the better results.

6. Make sure that the Opportunity Score field is on your opportunity page layouts.
 - In Lightning Experience (Grouped view), add the Opportunity Score field to your customized opportunity page layouts. Salesforce automatically adds this field to default compact layouts.
 - In Lightning Experience (Full view), Salesforce automatically adds the Opportunity Score field to the Details section of your default and custom layouts.
 - In Salesforce Classic, add the Opportunity Score field to your customized page layouts for opportunities. Salesforce automatically adds this field to the Details section of default page layouts.
7. By default, the Opportunity Score field is on the Recently Viewed list view for opportunities, but add it to public opportunity list views. To get the most out of Einstein Opportunity Scoring, ask your sales teams to add this field to their own opportunity list views.
8. If you use Collaborative Forecasts, add the Opportunity Score field to the opportunity list on the forecasts page.
9. Add the Opportunity Score field to your opportunity reports where appropriate.

Enable Einstein Forecasting

Provide your forecast managers with AI-powered intelligence that improves forecasting accuracy, predicts results, and tracks how sales teams are doing.

 **Important:** To enable users for Einstein Forecasting, make sure they're enabled to use Collaborative Forecasting and are assigned as a forecast manager.

1. From Setup, enter *Assisted Setup* in the Quick Find box, and then select **Assisted Setup**. The setup page shows all the steps you need for Sales Cloud Einstein deployment, including how to assign users.
2. Click **Set Up** next to Einstein Forecasting.
3. Click **Enable**.
4. Read the introduction, and then click **Next**.
5. Choose whether to have Einstein consider all opportunity records or only a subset when building the predictive model. Then, click **Next**. If needed, define the criteria, and click **Next**.
6. Choose whether to have Einstein consider all custom opportunity fields when building the predictive model. Then, click **Next**. If needed, deselect the fields you want Einstein to ignore, and click **Next**.
7. Review your settings. Then, click **Save**.
8. If you customized the Home page, add the performance chart to it.

EDITIONS


Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS

To enable Einstein Forecasting:

- Customize Application AND Modify All Data

 **Note:** Einstein uses your data to create your custom predictive model. If organization-wide sharing is set to Private for the User object, to extract relevant information, you might need to give a couple profiles access to users. Make sure the Analytics Cloud Security User and Analytics Cloud Integration User profiles have the View All Users system permission.

Troubleshoot Sales Cloud Einstein Setup Errors

When setting up Sales Cloud Einstein features, several important steps occur behind the scenes. If one of the steps isn't successful, one or more features can't be enabled. There are several ways to troubleshoot setup issues.

If you still have issues after following the troubleshooting steps, contact Salesforce Customer Support.

EDITIONS

Available in: Lightning Experience and Salesforce Classic.

Available with Sales Cloud Einstein, which is available for an extra cost in:

Enterprise, Performance, and Unlimited Editions

Verify the Integration User Profile Details

Sales Cloud Einstein creates an integration user and assigns it an integration user profile. We updated the names of the integration user, profile, and connected app. If you purchased Sales Cloud Einstein before April 15, 2019, the old and updated names are listed in your org. When troubleshooting setup issues, refer only to the updated names and IP addresses.

Integration User Name	Integration User Profile Name	Connected App
Sales Insights Integration	Sales Insights Integration User	OIQ_Integration

Supported IP Addresses	
35.155.249.183	44.225.239.10
35.160.107.125	44.225.27.211
35.163.185.97	44.226.10.160
35.163.211.82	44.226.28.151
35.163.248.132	44.226.81.25
35.164.15.153	52.26.247.68
35.164.61.92	52.40.129.165
35.165.218.130	52.40.253.214
44.224.239.117	54.148.110.202
44.224.5.68	54.200.204.60
44.225.115.174	54.214.184.254
44.225.191.69	54.69.64.221
100.21.158.232	100.21.112.198

Confirm that the integration user profile:

- Is assigned to the integration user.

- Has read access to the relevant objects and fields. For example, for Einstein Lead Scoring to determine which fields are important to your lead conversion patterns, the integration profile needs access to all lead fields.
- Has a supported login IP addresses assigned. See table.
- Has access to the connected app. Here's how to check access.
 1. From Setup, enter *Profiles* in the Quick Find box, and then select **Profiles**.
 2. Click the **Sales Insights Integration User** profile.
 3. From the Connected App Access section, confirm that the profile has access to the OIQ_Integration connected app.

Verify the Connected App Details

Sales Cloud Einstein features use a connected app to create a secure connection between Salesforce data and our sales intelligence infrastructure.

- Confirm that the app is installed.
 1. From Setup, enter *Installed Packages* in the Quick Find box.
 2. Confirm that the Sales Insights package is listed under Installed Packages.
 3. If you don't see the package in the list, download it from the [Salesforce App Installation page](#).
- Confirm that the connected app has the correct OAuth policy and user profile assigned.
 1. From Setup, enter *Connected Apps* in the Quick Find box, and then click **Manage Connected Apps**.
 2. Click the **OIQ_Integration** app.
 3. From the OAuth Policies section, confirm that the Permitted Users field is set to **Admin approved users are pre-authorized**.
 4. From the Profiles related list, confirm that the Sales Insights Integration User profile is assigned.