High Velocity Sales Implementation Guide

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SET UP HIGH VELOCITY SALES

Use the Setup menu to get the guidance you need for setting up High Velocity Sales.

Set up High Velocity Sales in four high-level steps.

1. Enable High Velocity Sales and configure Einstein Activity Capture.
2. Assign relevant permission sets.
3. Configure features that are relevant for your company.
4. Educate sales managers and reps, and prompt them to finish setting up High Velocity Sales.

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up High Velocity Sales:

- Customize Application AND Modify All Data

CONSIDERATIONS FOR SETTING UP HIGH VELOCITY SALES

Before setting up High Velocity Sales, consider these requirements, limitations, and nuances for each feature.

EDITIONS

Available in: Lightning Experience

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General

- Enhanced Email must be enabled.
- No support in Experience Cloud sites.
- High Velocity Sales supports lead, contact, and person account records.
- Inbox and Einstein Lead Scoring are included with High Velocity Sales.
- Sales Dialer is available for an extra cost as an add-on license.
- High Velocity Sales can be deployed in scratch orgs, but the settings for the feature can't be updated through the scratch org definition file. Instead, configure settings directly in the High Velocity Sales app.
- High Velocity Sales is supported in sandbox orgs. If you're creating a sandbox from a production org that has HVS enabled, you must enable the product in Setup again. It's disabled in the sandbox org by default.

Table 1: User Permissions

Salesforce Admin or User Task	Preferences and Permissions Required
Set up High Velocity Sales	Customize Application, Modify All Data, Assign Permission Sets, and Manage Users
Use High Velocity Sales	Convert Leads, Send Email, Edit Tasks, and High Velocity Sales User (or High Velocity Sales Creator) permission set
Create sales cadences	High Velocity Sales Cadence Creator permission set
Manage the Activities dashboard and Lead Score dashboard	Analytics for Sales Cloud license (three permission sets included)
View the Analytics High Velocity Sales Performance Dashboards	High Velocity Sales User or High Velocity Sales Cadence Creator permission set
Use Dialer	Dialer Inbound, Dialer Outbound, and Dialer Minutes permission sets
Create email templates for sales cadences	Manage Public Lightning Email Templates
Create sales cadence folders	High Velocity Sales Cadence Creator permission set
Edit and manage private sales cadence folders	High Velocity Sales Cadence Creator permission set
View shared sales cadence folders	High Velocity Sales User or High Velocity Sales Cadence Creator permission set, plus view access to the shared folder
Edit shared sales cadence folders	High Velocity Sales User or High Velocity Sales Cadence Creator permission set, plus edit or manage access to the shared folder

Salesforce Admin or User Task	Preferences and Permissions Required
Manage other users' access to shared sales cadence folders	High Velocity Sales User or High Velocity Sales Cadence Creator permission set, plus manage access to the shared folder

Einstein Activity Capture

- Depending on which authentication method you use to connect Salesforce to your email and calendar application, Einstein Activity Capture users are prompted to connect their email and calendar to Salesforce or accept terms of service.
- Einstein Activity Capture users who don't use Inbox can't connect an account until they're added to a configuration.
- For events and contacts to sync, the connected email account must be the user's primary account (the email account on their Salesforce user record). It must not be an email alias, and it must be in the user principal name (UPN) format.
- Einstein Activity Capture works with all Saleforce-supported languages. But only ASCII characters are supported in email addresses.
- Einstein Activity Capture users can't delete emails that Einstein Activity Capture adds to Salesforce. Admins can delete past email and events that include a specific person based on their email address or username.
- If you use Salesforce Essentials Email-to-Case, make sure that the email address that you use to connect to Salesforce is different from the email address that you use to connect Einstein Activity Capture to Salesforce.
- You can't use Einstein Activity Capture and Lightning Sync at the same time.
- If using Lightning Sync or a version of Einstein Activity Capture without sync, we remove old configurations and settings before you create an Einstein Activity Capture configuration.
- When opportunities have no overdue tasks and Einstein Activity Capture is enabled, the alerts on Opportunity Kanban aren't shown.
- Activities that are captured by Einstein Activity Capture aren't stored in Salesforce, so they don't show up in standard Salesforce reports. Use the Activities dashboard to see a summary of sales activities that were added to Salesforce manually and by Einstein Activity Capture. You can also use Activity Metrics to get a complete picture of your activities.
- When Einstein Activity Capture is disabled, email tracking isn't displayed in Lightning Experience for emails sent from the Outlook or Gmail integration that aren't part of a sales cadence.
- To stop capturing the emails of a specific user, add them to an Einstein Activity Capture configuration with emails disabled. High Velocity Sales permission sets have the "Use Inbox" permission enabled by default. Users with the "Use Inbox" permission enabled can't be in a configuration that has email disabled because some Inbox features require email data. You can clone one of the standard HVS permission sets, disable the "Use Inbox" permission, and enable the "Use Einstein Activity Capture" permission. Then, assign the permission set to users whose emails you don't want captured. Add those users to a configuration that has emails disabled.

Email

- Automated emails have a daily org limit that is typically set to 5,000. For more information about this limit, see Mass Email Limitations. To increase the limit, contact Salesforce Customer Support.
- Each user has a daily limit of 1,000 automated emails.
- Email templates must be created in public folders for them to be accessible when creating sales cadences.
- Email templates used in sales cadences must have a blank Related Entity Type value and can only use merge fields for Sender, Recipient, or Organization.
- If an email is scheduled from a sales cadence, and the contact is either removed from the sales cadence or moved to another sales cadence, the scheduled email isn't sent. The sales cadence step returns to an active state. The draft email is deleted and no longer appears on the Scheduled Emails component.

- When scheduling an email to send later, use a Classic text email template, a Lightning email template, or an Email Template Builder email template.

Email Tracking

- Email tracking is optional in High Velocity Sales. We recommend setting the Email Tracking option in High Velocity Sales before creating sales cadences.
- If you turn email tracking off in High Velocity Sales, listener actions for email engagements aren't available to add to sales cadences. Active sales cadences that contain listener actions for email engagements no longer advance through those steps automatically.
- If you turn email tracking off in High Velocity Sales, email tracking is also off for all email sent from Lightning Experience. If you turn off Enable Email Tracking in Activity Settings in Salesforce setup, you also turn off email tracking for emails started from the Work Queue in High Velocity Sales.
- If you turn email tracking off in High Velocity Sales and your sales reps use the Work Queue in Outlook or Gmail, we recommend turning email tracking off in the integrations. To disable email tracking in the integrations, turn off the Email Tracking option on the Inbox Setup Assistant page in Setup.

Integration with Outlook and Gmail

- The Work Queue isn't always included in the email integration pane by default when High Velocity Sales is enabled. If you've already created a custom pane, or edited default email panes, add the Work Queue component using the Lightning App Builder. Then assign the pane to the user profiles of users who use the Work Queue.
- The My Feed tab in the Work Queue shows engagements and alerts for emails sent from the Work Queue and tracked emails sent from outside the Work Queue. That information is also shown in the Feed tab in the email integration pane. To prevent duplicate feeds for reps who use the Work Queue, use the Lightning App Builder to remove the Feed tab from the email integration pane. Assign that custom pane to High Velocity Sales users.
- In the Outlook integration, if a user deletes the Email to Salesforce address (the BCC address) or removes the tracking information from the email body, the email can't be tracked.
- If you turn email tracking off in High Velocity Sales and your sales reps also use the Work Queue in Outlook or Gmail, we recommend also turning email tracking off for the integrations. To disable email tracking in the integrations, turn off the Email Tracking option on the Inbox Setup Assistant page in Setup.
- Attachments in email templates aren't supported in the Outlook or Gmail integrations. The template text inserts without the attachment.
- Emails sent from the Work Queue in Outlook or Gmail can bypass Email Opt Out or individual privacy preferences set in Salesforce. Salesforce displays customers' email privacy settings, but it's up to sales reps to respect these preferences.
- In Outlook on the web, there are limitations to how emails are threaded if reps reply to or forward an email that's been logged to Salesforce from the Outlook Sent Items folder. If the sent email is part of an email thread, but isn't part of a previous sales cadence step, then the email isn't included in the thread. In this case, if the last email in the thread is the sent email, that email isn't considered the most recent in the thread.
- Making calls isn't supported in the Work Queue in the Outlook or Gmail integrations.
- Emails sent from the Outlook or Gmail integrations initially show as In Progress in the Work Queue.

Engagement and Alerts

- Alerts appear in the My Feed tab for 30 days. If an email open, reply, or link click occurs within 90 days of when an email was sent, a new alert appears.
- If you're using Einstein Activity Capture, email open, reply, and link click alerts appear for emails sent to excluded email addresses. These emails and their related alerts are visible only to the email sender.
- Deleting leads, contacts, emails, or email templates doesn't delete their related alerts.
- If multiple users connect the same mail account to Einstein Activity Capture, email reply alerts don't appear for that account.
- Email reply alerts appear only for Einstein Activity Capture users.
- For emails that aren't logged or are logged after they're sent, open and link click alerts appear in My Feed. However, users can't click these alerts to view the email content.
- When sales cadence emails are sent to sales cadence targets and other recipients, alerts appear in My Feed only for sales cadence targets.
- Clicking email reply alerts in My Feed opens the email in a new console tab.
- The My Feed tab loads more alerts in groups of 15 when you scroll. While alerts load, if new alerts occur an out-of-sync message can appear. To sync the tab, click **Refresh**.
- When a new engagement occurs, it can take from 3–10 minutes for the My Feed tab to prompt the user to refresh.
- When an email hard bounce occurs, it can take up to 10 minutes for the alert to appear.
- When an email has multiple recipients, engagement events are tracked for the email, but not for any individual recipient.
- Engagement data is available in the Sales Engagement component for emails and calls made in December, 2020 and later.

Work Queue

- The Work Queue is supported only in the split view in Lightning Console and in the Outlook and Gmail integrations.
- The Work Queue can show up to 1,000 prospects that belong to sales cadences at a time.
- If you change a sales cadence name, the new name doesn't appear in the Work Queue for currently pending steps. A workaround is to remove the sales cadence from the Work Queue view and then add it again.

Sales Cadences

- Only leads, contacts, and person accounts are supported in sales cadences.
- Users can include a lead, contact, or person account in only one active sales cadence at a time.
- Before merging duplicate records, be sure none of the records you're deleting are in a sales cadence.
- Tasks related to sales cadence steps are created and updated automatically. Users can't edit these tasks, but they can delete them after the sales cadence step has been completed.
- The maximum number of steps in a sales cadence is 100.
- The maximum length of a wait step is 60 days.
- You can add up to 200 targets to a sales cadence at once.
- When a lead converts, completed sales cadence tasks aren't transferred to the Activity Timeline of the new contact, account, or opportunity.
- Before managers can create branched sales cadences based on call outcomes, an admin must map your org's call result values in High Velocity Sales Setup.

- When pre-defining an email template for a sales cadence step, you can only use Lightning email templates.
- Users can't add targets when the sales cadence has an automated email as the first step and the number of targets will cause them to exceed their daily limit of automated email.
- The limit of active sales cadence targets is 150,000 per Salesforce org. You can request to increase the limit to 500,000 by contacting Salesforce Customer Support.
- The Sales Cadence field shouldn't be used on lead, contact, or account search layouts in Lightning Experience and Salesforce Classic, or on list views in Salesforce Classic.
- The Sales Cadence and Sales Cadence Assignee fields on lead, contact, and person account records can't be used to as field criteria in workflow rules and Process Builder.

Sales Cadence Folders and Sharing

- To grant access to sales cadences, share the folder, not the sales cadence itself.
- If a user loses access to a sales cadence folder, they lose access to all sales cadences in that folder.
- If a user loses access to a sales cadence, the user can't complete any in-progress steps from that sales cadence.
- Access to a sales cadence folder doesn't grant access to email templates used in that sales cadence. Email templates must be created in public folders to be accessible when creating sales cadences.
- Tableau CRM dashboards display all sales cadence metrics regardless of whether the user has access to the sales cadence.
- To ensure that your users can access sales cadence folders, make sure that the Enable Enhanced Folder Sharing for Reports and Dashboards critical update is activated in Setup.

Einstein Lead Scoring

- 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.

Third-Party Lead Scores

- If Einstein Lead Scoring is set up, leads are sorted by Einstein Lead Scores unless you have also configured a third-party lead scoring solution.
- For person accounts, custom number fields that relate to third-party scores can be configured in the object setup for contacts.

Sales Dialer

- Dialer features are available in Lightning Experience on the desktop only.
- No support in Experience Cloud sites.
- Users can now store up to 20 voicemail messages in Salesforce. Voicemail messages are limited to two minutes. The messages are saved as files in Salesforce, and they count toward your files storage quota.
- Call Monitoring is not supported in Salesforce Essentials.
- Outgoing calls are supported to the U.S. and Canada only.
- The Local Presence feature is only available in the U.S. and isn't available in Canada.
- Permission set groups aren't supported for Dialer permissions. Assign Dialer and Call Monitoring permission sets without using permission set groups.
- Dialer users can't have Service Cloud Voice permission sets or be part of a Salesforce call center.
- Phone numbers in dashboards can't be directly called with Dialer.
- The utility bar supports only one Phone item at a time.
- Users can't pop out (or pop in) the call panel from the utility bar during an active call.
- When users call a landline number that's busy, Dialer ends the call without ringing or a busy signal.
- Deactivated call result values aren't removed from the call panel. Delete any unneeded call result values instead.
- Users need the "Edit Task" permission to log calls. This permission isn't automatically included with some profiles, so users with those profiles can make calls, but those calls aren't logged.
- Users need a Dialer Inbound license to access personal Dialer settings from the call panel.
- If you're creating a sandbox from an org that already has voice calls, voice call records and voice call recordings are not copied over. To use Dialer in sandbox, you must enable it from Setup again.
- It isn't possible to make or receive live calls with Dialer in sandbox environments. You can make test calls and test automation that occurs after a call is made, such as the log a call task. For more details, see "Test Dialer Features in Sandbox."
- The records that can be added to call lists include leads, accounts, person accounts, and contacts. Call lists use the standard Phone field for these records.
- To use voicemail greetings, password protection can't be required by default for content deliveries. From Setup, enter Content Deliveries in the Quick Find box, then select Content Deliveries. Ensure that Password protection is required is not selected. This feature is available only to users with outbound and inbound calling access.
- Dialer users with the voicemail drop feature can store up to 10 prerecorded voicemail messages.
- With call monitoring, you can listen to only one sales rep at a time, and only outbound calls are monitored. You can't monitor calls that your sales reps receive. Monitored calls use double the minutes of a regular call, counting the call time for both the rep and manager.
- Dialer respects the **Do Not Call** field, and records with the field selected have one-click calling disabled.
- Call recordings are saved as files in Salesforce. An hour of recording takes up roughly 15 MB of storage space, and the same sharing rules apply to recordings as other files in Salesforce. Admins can delete call recordings from the Recording Management page in Setup.
- If required by law, users must notify the call recipient of call monitoring and/or recording and stop monitoring and/or recording upon request.
- Phone numbers are subject to availability, and numbers from all area codes may not be available.
- Every inbound license is allowed one dedicated number. To change it, an admin can release the number, and the Dialer user can then reassign themselves another number. Admins can release and replace, at most, a single number for each user each month.

- Before a user can use a custom phone number, the user must enter a provided code to verify it. Phone numbers that use a directory can't be verified.
- The same custom phone number can't be used for multiple users.
- If your org enabled High Velocity Sales before Dialer, add the Phone item to the utility bar for the High Velocity Sales app to use the feature. Orgs that already enabled Dialer have the item added to the utility bar automatically.
- High Velocity Sales users can't access the Call List feature from the call panel. This feature becomes part of the My List experience in Work Queue.
- To advance a sales cadence to the next step after a call, the call must be logged.

Einstein Conversation Insights

- Each Einstein Conversation Insights subscription includes up to 675 processed hours of calls per year. This limit is based on the total hours of all licenses, so an org with 10 licenses can process 6,750 call hours across all Einstein Conversation Insights users over 12 months.
- Salesforce employees can access and review this data, including recorded phone calls, for the purposes of improving and training the product.
- Conversation Insights dashboards are refreshed roughly every 8 hours by default, and it takes some time to create dashboards after initially enabling Conversation Insights.
- The recording is available as soon as it's uploaded to Salesforce. It can take up to an hour to process and analyze recorded calls based on the size of the recording. Each call recording file should contain only one call for processing. Einstein Conversation Insights doesn't support multiple calls in a single recording file.
- The Call Highlights email is sent if there are at least 3 calls with insights or relevant content in the previous day.
- If you're creating a sandbox from an org that already has voice calls, voice call records and voice call recordings aren't copied over. To use the feature in sandbox, you must enable Conversation Insights from Setup again.
- Connecting to a recording provider shares the email addresses of Salesforce users with the recording provider to match recorded calls with users.
- Conversation Insights is compatible with Sales Dialer and other supported partners.
- Conversation Insights does not record your calls. Rather, you connect it with your recording system. It is a customer's responsibility to manage consent and comply with local privacy requirements in the way calls are recorded. You can use Sales Dialer or one of our supported partners to record your calls.
- Conversation Insights is available only in English. Transcription accuracy is currently optimized for the North American accent. We constantly monitor the accuracy of the AI system and evaluate additional enhancements and additional accents/languages based on feedback and demand.
- Although High Velocity Sales (HVS) can be added to Service Cloud licenses, Einstein Conversation Insights is optimized for sales conversations. HVS remains applicable only to leads, contacts, and person accounts.
- If your org uses dataflows, make sure that existing dataflows don't set a default value for the ParentRoleId field on the UserRole object. This value restricts users from viewing voice calls owned by their subordinates based on the Salesforce role hierarchy.
- If Einstein Conversation Insights is enabled and High Velocity Sales users have connected Zoom accounts, their meeting content is processed and made available to their managers.
- Shield Platform Encryption is not supported.
- If an Einstein Conversation Insights license is removed during a call, Einstein Conversation Insights doesn't process the related call.
- MP3, FLAC, and WAV file types are supported.
- Call collections are limited to 100 items and 100 members for each call collection.

- When Service Cloud Voice and Conversation Insights are both turned on in the same production org, copying the production org to a sandbox turns off Conversation Insights and breaks the flow of data to the Service Cloud Voice Tableau CRM app. To restore the data flow, turn on Conversation Insights in the sandbox.
- The opportunity amount filter doesn't support the currency format or decimals. When entering a new value in the opportunity amount filter, tab out of the widget to update the dashboard with your changes.
- If your org is using Opportunity Matching, the user placing the call needs access to the related opportunity for it to be matched for voice calls. User access isn't required for opportunity matching with video calls.

Phone Integration Considerations for High Velocity Sales
Learn about considerations for each phone integration option for High Velocity Sales.

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EDITIONS

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Sales Dialer

When you use Sales Dialer with High Velocity Sales, these features are available:

- Automatic voice connectivity
- Click to dial for call steps from the Work Queue and My List
- Task logging
- Sales cadences advance automatically when calls are completed
- Sales cadence branching based on call result
- Automatic target exit from sales cadence based on call result
- Einstein Conversation Intelligence

Service Cloud Voice

When you use Service Cloud Voice with High Velocity Sales, these features are available:

- Automatic voice connectivity
- Click to dial for call steps from the Work Queue and My List
- Task logging
- Sales cadences advance automatically when calls are completed
- Sales cadence branching based on call result
- Automatic target exit from sales cadence based on call result
- Einstein Conversation Intelligence

Open CTI and High Velocity Sales

Partner solutions approved by Salesforce are listed on the AppExchange. More information about each third-party integration option is available on its partner solution page.

High Velocity Sales can support third-party computer telephony integration (CTI) providers if you're using Open CTI for Lightning Experience. For the best user experience, we highly recommend third-party providers use the available Open CTI methods for High Velocity Sales. More information about these methods is available in the Salesforce Open CTI Developer's Guide.

You can use your third-party Open CTI solution with High Velocity Sales if:

- Your Salesforce org is using Open CTI for Lightning Experience.
- Your CTI solution uses click-to-dial.
- The saveLog() Open CTI method is used to save a task with a call task type on the related record after the call.

With these requirements, your Open CTI solution can work with High Velocity Sales. We highly recommend contacting to your CTI provider in order to implement the best user experience.

To create the best experience, your CTI provider can integrate the Open CTI methods for High Velocity Sales. When a third-party CTI solution doesn't use these methods, some features aren't available:

Feature	Available without High Velocity Sales CTI Methods?
Click-to-dial	Yes
Task logging	Yes, only if implemented by the CTI solution
Sales cadence advancement based on call completion	No
Sales cadence branching based on call result	No
Automatic target exit from sales cadence based on call result	No

In addition, when providers don't use the Open CTI methods, some details are lost.

- For sales cadences, the sales cadence doesn't move to the next step when the sales rep logs the call task. Sales reps must manually complete the step to advance the sales cadence.
- In My List, the call is removed from the list as soon as the sales rep clicks **Call**, even if the call isn't answered.

Einstein Conversation Intelligence can't be used without Open CTI, except with a custom integration. For more information about this option, contact Salesforce Support.

ENABLE HIGH VELOCITY SALES FEATURES

EDITIONS

Available in: Lightning Experience

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USER PERMISSIONS

To set up High Velocity Sales:
- Customize Application AND Modify All Data

Access High Velocity Sales settings from the Setup menu and enable High Velocity Sales features.

1. From Setup, enter `High Velocity Sales` in the Quick Find box, and then select **High Velocity Sales**.
2. To turn on High Velocity Sales, click **Make High Velocity Sales App Available to Users**.

   Turning on High Velocity Sales automatically enables several features, including

   - Enhanced Email
   - Email Tracking
   - Einstein Activity Capture
   - Automated Email—Allows sales cadence creators to include email steps that send the email automatically using a template.
   - Use LinkedIn Sales Navigator with Sales Cadences—If you have the native integration of LinkedIn Sales Navigator enabled, this setting lets sales managers add LinkedIn InMail and Connection Request steps to sales cadences.
   - Skip Weekends
   - Allow Email Template and Call Script Variant Testing—This setting lets sales managers try out different versions of an email template or call script on a single sales cadence step. On sales cadence records, they can compare the engagement results of each variant.
   - Change Sales Cadence Target Assignees—If you want to prevent this feature from being available to all High Velocity Sales users, you can optionally turn on Limit Who Can Change Target Assignees. Then assign the Change Sales Cadence Target Assignees permission to the users who need it.
   - Relate Opportunities to Sales Cadences

   You can turn off features that aren't required after enabling High Velocity Sales, but we recommend keeping them on to get the most out of the product.

After enabling High Velocity Sales, you can configure your Einstein Activity Capture settings, such as controlling which activities are added to Salesforce records and how they're shared.

Exclude Emails and Events from Being Added to Salesforce for All Users

When you add email addresses or domains to the Excluded Addresses list for your org, emails and events with those people or companies aren't added to the activity timeline of related Salesforce records. Events aren't added to the Salesforce calendar. And events aren't synced between Salesforce and the connected accounts. Your Excluded Addresses list applies to all Einstein Activity Capture users. Users can add more email addresses to their own Excluded Addresses lists.

Set Default Activity Sharing for Einstein Activity Capture Users

Select whether Einstein Activity Capture users share their emails and events with other users or keep them private. Users can change their activity sharing at any time from their personal settings.

Let Users Share Activities with Groups

Add the `Enable email and event sharing` field to group layouts. When the setting is selected on a private or unlisted Chatter group, the group members who use Einstein Activity Capture can share activities with all group members.

Exclude Emails and Events from Being Added to Salesforce for All Users

When you add email addresses or domains to the Excluded Addresses list for your org, emails and events with those people or companies aren't added to the activity timeline of related Salesforce records. Events aren't added to the Salesforce calendar. And events aren't synced between Salesforce and the connected accounts. Your Excluded Addresses list applies to all Einstein Activity Capture users. Users can add more email addresses to their own Excluded Addresses lists.

1. From Setup, enter `Einstein Activity Capture` in the Quick Find box, and then select **Settings**.
2. Click the **Excluded Addresses** tab.
3. Click **Add**.
4. Follow the prompts to update the Excluded Addresses list.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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

Available with Inbox, which is available for an extra cost in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To update the Excluded Addresses list:

- Customize Application OR Modify All Data

To view the Excluded Addresses list:

- View Setup and Configurations

Set Default Activity Sharing for Einstein Activity Capture Users

Select whether Einstein Activity Capture users share their emails and events with other users or keep them private. Users can change their activity sharing at any time from their personal settings.

> **Note:** Some Sales Cloud Einstein features generate business-related insights using emails captured by Einstein Activity Capture, including emails that aren't shared. However, the content of the emails and the usernames associated with them are hidden. Einstein Opportunity Insights and Einstein Automated Contacts are the Sales Cloud Einstein features that use these private emails.

1. From Setup, enter `Einstein Activity Capture` in the Quick Find box, then select **Settings** under Einstein Activity Capture.
2. Click the **Settings** tab.
3. Click **Edit Default** next to **Default Activity Sharing for New Users**.
4. Select a default option for new users.

   When activities are shared with everyone, others see full email and event details. When activities aren't shared with everyone, others see basic details, such as dates and names, and can request full access from the activity owner. "Everyone" means all Salesforce users at your company, but you can change it to mean only Einstein Activity Capture users. Go to the Settings tab within the Einstein Activity Capture settings.
5. Click **Save**.

When new users connect their account to Salesforce with Einstein Activity Capture, their activity sharing is the default that you selected. Users who have already connected their account to Salesforce aren't affected. However, if you set the Einstein Activity Capture default sharing setting to Don't Share, you can prevent new users, regardless of their own sharing settings, from changing it. From the Settings tab, turn on the **Enforce Default Activity Sharing for New Users** setting. Users can still share individual emails and events, and respond to sharing requests from other users.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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

Available with Inbox, which is available for an extra cost in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

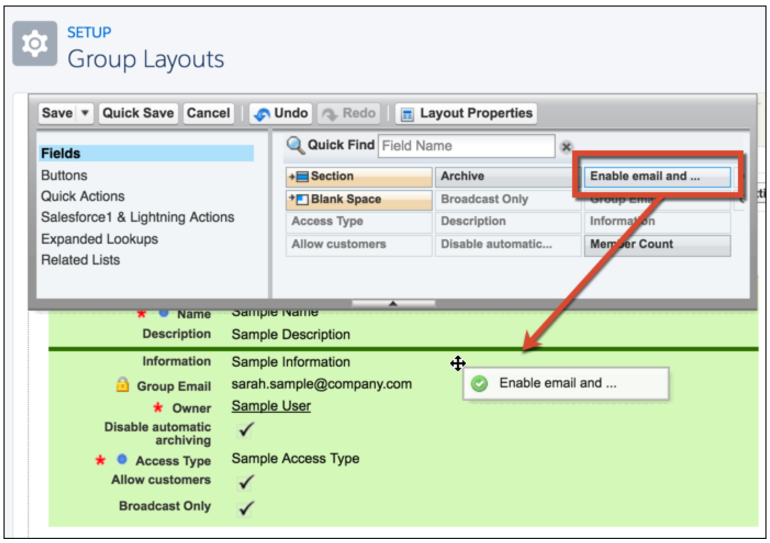
To set default activity sharing for new users:
- Customize Application OR Modify All Data

To view the Einstein Activity Capture setup pages:
- View Setup and Configurations

Let Users Share Activities with Groups

Add the `Enable email and event sharing` field to group layouts. When the setting is selected on a private or unlisted Chatter group, the group members who use Einstein Activity Capture can share activities with all group members.

1. Make sure Chatter is enabled.
2. From Setup, enter *`Group Layouts`* in the `Quick Find` box, then select **Group Layouts**.
3. Add the `Enable email and event sharing` field to group layouts.



To use a group for sharing emails and events, the group's owner can select `Enable email and event sharing` on the group's settings. Then, Einstein Activity Capture users within the group can share their emails and events with all group members. Email and events appear in the activity timeline of related records, not in Chatter group feeds. When a user shares an individual email or event with a Chatter group and then deletes the group, the setting for the individual email or event is removed.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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

Available with Inbox, which is available for an extra cost in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To edit group layouts:

- Customize Application

ASSIGN PERMISSION SETS FOR HIGH VELOCITY SALES USERS

Assign the permission sets for High Velocity Sales. Also assign permission sets for optional features that are new to your Salesforce org, including Sales Dialer. You can also assign the permission set for full access to Tableau CRM dashboards.

1. From Setup, enter `Permission Sets` in the Quick Find box, and then select **Permission Sets**.
2. Verify that the High Velocity Sales Cadence Creator, High Velocity Sales User, and other relevant permission sets are available. Salesforce orgs using High Velocity Sales also get three Analytics for Sales Cloud licenses.

   If your company is using Lightning Dialer, also check for the Dialer Inbound, Dialer Outbound, and Dialer Minutes permission sets. If you want to use Einstein Conversation Insights, check for the Call Coaching User permission set.

3. Click each permission set you want to assign, and then click **Manage Assignments** to assign the permission set to users.

   Note: You can also assign permission sets per user. From Setup, enter `Users` in the Quick Find box, and then select **Users**. Click the name of individual users. In the Permission Set Assignments related list, click **Edit Assignments**.

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up High Velocity Sales:

- Customize Application AND Modify All Data

We recommend that you make these assignments.

- Assign the High Velocity Sales Cadence Creator permission set to sales managers and reps who need to create sales cadences.
- Assign the High Velocity Sales User permission set to sales reps.
- Assign the three Analytics for Sales Cloud permission sets to users who need edit access to the Activities and Lead Scoring dashboards.
- If you've turned on Limit Who Can Change Target Assignees in Setup, assign the Change Sales Cadence Target Assignees permission to users who need to change target assignees.
- Assign the Dialer permission sets to new Sales Dialer users.
- Assign the HVS Conversation Insights permission set to sales managers who need to use Einstein Conversation Insights.
- Assign the High Velocity Sales Cadence Creator permission set to users who need to create sales cadence folders. If they've been granted access, these users can edit folders shared with them and can manage other users' access to the shared folder. These users can edit, and manage user access to, their private folders.
- Assign the High Velocity Sales User permission set to users who need to view shared sales cadence folders. If they've been granted access, these users can edit folders shared with them and can manage other users' access to the shared folder. These users can't create folders, and they can't create or edit sales cadences.

Note: The HVS Cadence Creator permission set includes all the permissions included with the HVS User permission set. There's no need to apply both permission sets to any single user.

If you're making changes that apply to both types of users, make sure to update both permission sets.

SEE ALSO:

Configure High Velocity Sales Features

CONFIGURE HIGH VELOCITY SALES FEATURES

Set up Sales Dialer and Einstein Lead Scoring if they're new to your org. And make sure that you configure all other relevant features to get the most out of High Velocity Sales.

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up High Velocity Sales:

- Customize Application AND Modify All Data

Set Up Sales Dialer for High Velocity Sales

If you're using Sales Dialer for the first time, enable Sales Dialer in Setup. Make sure that you add the Phone item to the utility bar for the High Velocity Sales app.

Define Call Result Values for Sales Cadence Branching

Group call result values into categories to easily display the data in reports and use it as branching criteria for sales cadences.

Set Up Einstein Conversation Insights for High Velocity Sales

If you're using Einstein Conversation Insights for the first time, enable Conversation Insights in Setup. Make sure that you set up relevant call insights after turning on the product.

Set Up Einstein Lead Scoring for High Velocity Sales

If you're using Einstein Lead Scoring for the first time, enable and configure Einstein Lead Scoring in Setup.

Set Up Third-Party Prospect Scoring for High Velocity Sales

Configure third-party scores for person accounts, contacts, or leads. Show scores on records, and use scores to sort the Work Queue.

Add the Sales Engagements Component to Record Pages

Add the Sales Engagements component to relevant record pages with the Lightning App Builder. With the Sales Engagements component, users can see which sales cadence a given prospect is in, their engagement activity, and also their progress within the sales cadence.

Set Up Scheduled Email Management for High Velocity Sales

As sales reps send emails to leads and contacts, they can schedule the emails so that they arrive at an optimal time. Set up the Scheduled Emails component so that reps can update the content of a scheduled email and change its scheduled date and time.

Display Key Sales Cadence Fields on List Views

Make sure that users can see the Sales Cadence and Sales Cadence Assignee fields in relevant list views. You can also create a list view that shows only records linked to a sales cadence.

Set Up Sales Cadence Fields on Record Layouts

Add Sales Cadence to one of the top Selected Fields to show users the related sales cadence on lead, contact, and person account records. Users can click the field to view the sales cadence record, where they can view all the steps in the sales cadence. And add Sales Cadence Assignee to see which sales rep is working on the prospect.

Add Sales Cadence Actions to Page Layouts

If your org has customized Salesforce Mobile and Lightning Experience Actions for lead, contact, or person account records, add sales cadence actions to those objects' page layouts. Add the actions from the Object Manager.

Add the Work Queue Component to Email Integration Panes for Outlook and Gmail

Sales reps can access the High Velocity Sales Work Queue directly from the integrations with Microsoft® Outlook® and Gmail™. Add the Work Queue component to its own tab in a new or existing email application pane. Then assign the pane to your High Velocity Sales users.

Customize the Work Queue

Select up to three fields to appear in the work queue so that your sales reps see the information at a glance.

Set Up Sales Dialer for High Velocity Sales

If you're using Sales Dialer for the first time, enable Sales Dialer in Setup. Make sure that you add the Phone item to the utility bar for the High Velocity Sales app.

Enable Sales Dialer

Turn on Dialer from the Dialer Settings page in Lightning Experience.

Add Dialer to the Utility Bar

Use the App Manager to make Dialer available from the utility bar at the bottom of the page. The utility bar gives your sales reps quick access to commonly used tools.

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up High Velocity Sales:

- Customize Application AND Modify All Data

Enable Sales Dialer

Turn on Dialer from the Dialer Settings page in Lightning Experience.

1. From Setup, enter `Dialer` in the `Quick Find` box, then select **Dialer Settings**.
2. Enable Dialer.

   Optionally, enable personal voicemail, prioritized call lists, voicemail drop, and other settings for your org as well.

   Note: You can turn on and manage more features under the **Dialer** node in Setup. Depending on your org, this may include local presence, call result tracking, and more.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Sales Dialer is available for an additional cost as an add-on license.

USER PERMISSIONS

To enable Dialer features:

- Customize Application

Add Dialer to the Utility Bar

Use the App Manager to make Dialer available from the utility bar at the bottom of the page. The utility bar gives your sales reps quick access to commonly used tools.

1. From Setup, enter `App Manager` in the `Quick Find` box, then select **App Manager**.
2. Edit an existing Lightning app or click **New Lightning App**. You can also upgrade a custom Classic app to a Lightning app.

   If available, the Lightning Sales app contains numerous options preconfigured for sales users.
3. On the Utility Items tab, click **Add Utility Item** and select **Dialer**.
4. On the User Profiles tab, make the app available to relevant user profiles.
5. Verify the other app details, including the app name, branding information, and available menu items.
6. Save your changes.

To verify your changes, from the App Launcher, find and open the app that has Sales Dialer enabled.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Sales Dialer is available for an additional cost as an add-on license.

USER PERMISSIONS

To enable Dialer features:
- Customize Application

Define Call Result Values for Sales Cadence Branching

Group call result values into categories to easily display the data in reports and use it as branching criteria for sales cadences.

1. From Setup, enter **High Velocity Sales** in the Quick Find box, and then select **High Velocity Sales**.
2. Edit the Define Call Results for Branching section and enable the feature.
3. Enter the call result values used by your org next to the related call result categories.

   If your org is using Lightning Dialer, click the **Edit Call Result Values** link to confirm or modify your org's current call result values.

   Note: Make sure you enter the call result values correctly.
4. Click Save.

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up High Velocity Sales:
- Customize Application AND Modify All Data

Set Up Einstein Conversation Insights for High Velocity Sales

If you're using Einstein Conversation Insights for the first time, enable Conversation Insights in Setup. Make sure that you set up relevant call insights after turning on the product.

Turn On Conversation Insights

Enable Einstein Conversation Insights from the General Settings page in Setup.

Connect Recording Providers

Connect at least one recording provider to use Einstein Conversation Insights.

Set Up Call Insights

Define call insights related to phone mentions of competitors and products that are important to your Salesforce org. And create custom insights for when words or phrases relevant to your teams are mentioned.

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up High Velocity Sales:

- Customize Application AND Modify All Data

Turn On Conversation Insights

Enable Einstein Conversation Insights from the General Settings page in Setup.

1. From Setup, enter *`Conversation Insights`* in the `Quick Find` box, then select **General Settings**.
2. Turn on Conversation Insights.

   The Conversation Insights Readiness indicator displays when the related dashboards are available. This process can take some time, so continue with the next steps until they're available.

EDITIONS

Available in: Lightning Experience

Available with Einstein Conversation Insights, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

Connect Recording Providers

EDITIONS

Available in: Lightning Experience

Available with Einstein Conversation Insights, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To enable Einstein Conversation Insights:
- Customize Application

Connect at least one recording provider to use Einstein Conversation Insights.

Einstein Conversation Insights is compatible with Sales Dialer and other supported partners. Make sure that Dialer or your telephony solution is enabled.

> Note: If you don't see your telephony solution listed, it's possible that it isn't integrated with Conversation Insights. For more information, see Phone Integration Considerations for High Velocity Sales.

For information about adding Zoom as a recording provider, see Set Up Zoom Integration.

1. From Setup, enter **Conversation Insights** in the Quick Find box, and then select **General Settings**.
2. On the Settings page, connect a recording provider.
3. Click **Connect**.

Set Up Call Insights

EDITIONS

Available in: Lightning Experience

Available with Einstein Conversation Insights, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To enable Einstein Conversation Insights:
- Customize Application

Define call insights related to phone mentions of competitors and products that are important to your Salesforce org. And create custom insights for when words or phrases relevant to your teams are mentioned.

1. From Setup, enter **Call Insights** in the Quick Find box, and then select **Call Insights**.
2. From the Standard tab, enter the competitors and products that are important to your teams.

   Be conscious of the keywords and phrases that you select to avoid flagging sensitive information and to ensure the trust, safety, and privacy of your employees and customers. Limit words that could inadvertently or inappropriately affect people based on gender, religion, race, sexual orientation, income level, or any other sensitive category.

   Similarly, limit keywords that could be construed as surveilling or monitoring your employees. This feature isn't a tool to assess employee satisfaction, gauge performance, or define normative behaviors.
3. From the Custom tab, define insights for words or phrases that are relevant to your teams.

   To prevent incorrect classification, avoid keywords already covered by automatic insights. For example, mentions about payment and purchase orders are already covered by the Pricing Mentioned insight, and shouldn't be used for a new custom insight.

Set Up Einstein Lead Scoring for High Velocity Sales

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up High Velocity Sales:
- Customize Application AND Modify All Data

If you're using Einstein Lead Scoring for the first time, enable and configure Einstein Lead Scoring in Setup.

1. From Setup, enter **Einstein Lead Scoring** in the Quick Find box, and then select **Einstein Lead Scoring**.
2. On the Settings page, click **Get Started**.
3. Read the introduction, and then click **Next**.
4. Choose the lead conversion milestone that matches your business practices. Does your sales team create opportunities when they convert leads, or do they simply convert leads to accounts and contacts? Then click **Next**.
5. Choose whether you want Einstein to score all your leads or only leads that meet criteria you specify. To score only certain leads, click **Score only leads that meet my criteria**. Otherwise, click **Next**.

   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

6. Choose whether you want Einstein to include all your lead fields during lead score analysis. To exclude specific fields, click **No, ignore certain fields (Advanced)**, and then deselect the fields you want to ignore. Otherwise, click **Next**.

   Some businesses use fields that don't affect a lead's chance of converting. For example, you might have a field that indicates the reason a lead didn't convert. Telling Einstein to ignore those fields yields more accurate lead scores. Before ignoring a field, make sure that the field doesn't affect the lead's chance of converting. Ignoring fields that affect score analysis decreases the accuracy of your lead scores. If you are uncertain about whether to ignore a particular field, contact Salesforce Customer Support.

7. Wait while Einstein confirms that your company's data works with the settings you've chosen.
8. When Einstein finishes confirming your settings, click **Score Leads**.
9. 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.
10. After scores are available, add the Lead Score field to public lead list views. Salesforce automatically adds this field to default list views.

It takes up to 24 hours for lead scores to be available. Sales Cloud Einstein users see scores and factors on the Einstein Scoring component.

To see the component, users need read access to the Company, Phone, and Email fields on leads.

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

Set Up Third-Party Prospect Scoring for High Velocity Sales

Configure third-party scores for person accounts, contacts, or leads. Show scores on records, and use scores to sort the Work Queue.

Note: If Einstein Lead Scoring is set up, the Work Queue sorts leads automatically by lead score. Even if you're using Einstein Lead Scoring, you can configure third-party scores for contacts or person accounts separately. For more information about adding Einstein lead scores to High Velocity Sales, see Set Up Einstein Lead Scoring for High Velocity Sales.

1. Create a custom number field on the lead or contact object. For person accounts, configure a custom number field in the object management settings for contacts.
2. Configure the custom number field with your integrated third-party application to populate scores.
3. From Setup, enter **High Velocity Sales** in the Quick Find box, and then select **High Velocity Sales**.
4. Next to the object for which you want to add custom scores, click **Edit**.
5. From the object's custom score dropdown, select the custom number field that's configured as the third-party score. Users see this field as a sorting option in the Work Queue.

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise** and **Unlimited**Editions

USER PERMISSIONS

To set up High Velocity Sales:
- Customize Application AND Modify All Data

Add the Sales Engagements Component to Record Pages

Add the Sales Engagements component to relevant record pages with the Lightning App Builder. With the Sales Engagements component, users can see which sales cadence a given prospect is in, their engagement activity, and also their progress within the sales cadence.

1. From Setup, enter **Lightning App Builder** in the Quick Find box, and then select **Lightning App Builder**.
2. Click **Edit** for the Lightning page you want to modify, or create a new page. For High Velocity Sales, make sure you update relevant lead, contact, and person account pages. If Relate Opportunities to Sales Cadences is enabled, you can add the component to opportunity page layouts.
3. Add the Sales Engagements component to the page's layout.
4. Save your changes.
5. If you're creating a new page, activate the page and assign it to High Velocity Sales users.
6. Repeat the process for other relevant Lightning pages.

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up High Velocity Sales:
- Customize Application AND Modify All Data

Set Up Scheduled Email Management for High Velocity Sales

As sales reps send emails to leads and contacts, they can schedule the emails so that they arrive at an optimal time. Set up the Scheduled Emails component so that reps can update the content of a scheduled email and change its scheduled date and time.

1. Go to an object home page or the Salesforce home page where you want sales reps to manage scheduled emails.
2. Click the gear icon and select **Edit Page**.
3. Add the Send Email Later - Pending List component to the page and save the change.

   The Send Email Later - Pending List component creates a list of scheduled emails that have yet to send.

EDITIONS

Available in: Lightning Experience in **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions in orgs with Salesforce Inbox and Enhanced Email enabled.

Available with Inbox, which is available for an extra cost in: **Essentials**, **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To send email:
- Send Email permission and access to the record the email is sent from

To schedule an email to send later:
- Use Inbox user permission, available with a High Velocity Sales, Sales Cloud Einstein, or Inbox license

To edit a page layout:
- Customize Application

Display Key Sales Cadence Fields on List Views

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up High Velocity Sales:

- Customize Application AND Modify All Data

Make sure that users can see the Sales Cadence and Sales Cadence Assignee fields in relevant list views. You can also create a list view that shows only records linked to a sales cadence.

1. Navigate to the list view where you want to expose the fields.

   If you're using the sales console, switch out of the split view to see the List View Controls.

2. Select the List View Controls dropdown, and then click **Select Fields to Display**.

   Not all list views are editable, such as the Recently Viewed list view.

3. Add Sales Cadence and Sales Cadence Assignee as a couple of the top Visible Fields.
4. Save your changes.
5. Repeat the process for other relevant list views.

   For High Velocity Sales, update the lead, contact, and person account list views.

Set Up Sales Cadence Fields on Record Layouts

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up High Velocity Sales:

- Customize Application AND Modify All Data

Add Sales Cadence to one of the top Selected Fields to show users the related sales cadence on lead, contact, and person account records. Users can click the field to view the sales cadence record, where they can view all the steps in the sales cadence. And add Sales Cadence Assignee to see which sales rep is working on the prospect.

1. From Setup, enter **Object Manager** in the Quick Find box, and then select **Object Manager**.
2. Click the object you want to modify. For High Velocity Sales, make sure that you update Lead, Contact, and Person Account.
3. Select **Compact Layouts**, and then click **New**.
4. Enter a label for the compact layout. `HVS Compact Layout` works here.
5. Add **Sales Cadence**, **Sales Cadence Assignee**, **Sales Cadence State**, **First Call Date**, and **First Email Date** as a few of the top Selected Fields.
6. Save your changes.
7. Click **Compact Layout Assignment** and then **Edit Assignment**.
8. Select the compact layout as the Primary Compact Layout, and then save your changes.
9. Repeat the process for other relevant objects. For High Velocity Sales, make sure that you update Lead, Contact, and Person Account.

Add Sales Cadence Actions to Page Layouts

If your org has customized Salesforce Mobile and Lightning Experience Actions for lead, contact, or person account records, add sales cadence actions to those objects' page layouts. Add the actions from the Object Manager.

1. From Setup, enter **Object Manager** in the Quick Find box, and then select **Object Manager**.
2. Click the object you want to modify. For High Velocity Sales, make sure that you update Lead, Contact, and Person Account.
3. Select **Page Layouts**, and then click the relevant page layout.
4. From the palette on the upper portion of the screen, click **Mobile & Lightning Actions**.
5. Drag these actions to the Salesforce Mobile and Lightning Actions section of the page layout.
    - **Add to Sales Cadence**
    - **Remove from Sales Cadence**
    - **Change Target Assignee**
    - **Pause Target**
    - **Resume Target**
6. Save your changes.
7. Repeat the process for other relevant objects. For High Velocity Sales, make sure that you update Lead, Contact, and Person Account.

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

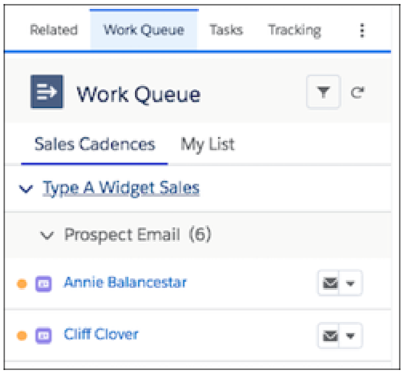
To set up High Velocity Sales:

- Customize Application AND Modify All Data

Add the Work Queue Component to Email Integration Panes for Outlook and Gmail

Sales reps can access the High Velocity Sales Work Queue directly from the integrations with Microsoft® Outlook® and Gmail™. Add the Work Queue component to its own tab in a new or existing email application pane. Then assign the pane to your High Velocity Sales users.

Give your reps the flexibility to work through their queue from their email application.



1. From Setup, enter `Integration` in the Quick Find box, then select **Outlook Integration and Sync** or **Gmail Integration and Sync**.
2. Expand **Let users access Salesforce records from Outlook/Gmail** and enable **Customize Content with App Builder**.
3. Under Email Application Panes, click **Create New Pane** and select **With Inbox Features**, or edit an existing pane in the list.
4. Click the Tabs component.

5. In the Tabs component properties, click **Add Tab**.
6. Click the tab and select **Custom** title.
7. Enter a descriptive title for the tab, such as Work Queue, or something that describes the queue for your sales reps, and click **Done**.
8. Keep the tab visible in both Compose and Read modes.

EDITIONS

Available in: Lightning Experience

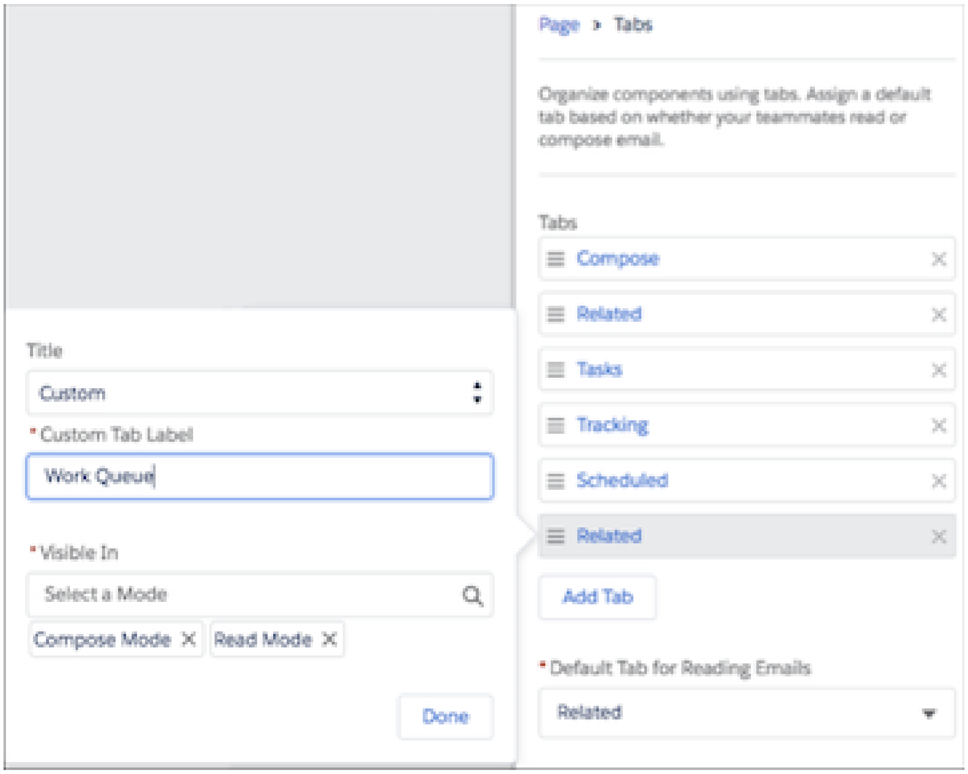
Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up the email integrations to use custom email application panes:
- Customize Application

To create and save Lightning pages in the Lightning App Builder:
- Customize Application

To view Lightning pages in the Lightning App Builder:
- View Setup and Configuration



9. Drag and move the tab in the Tabs list to where you want it to display.

   Tabs are listed from top to bottom in the order they display from left to right in the pane. To make sure that a tab is visible without extra clicks, place the tab in one of the first few positions.

10. Drag the Work Queue component to the tab.

    Tip: To track links in emails started from the Work Queue in Outlook, also add the Email Tracking component to a tab available in Compose mode.

    Tip: The My Feed tab in the Work Queue shows engagements and alerts for emails sent from the Work Queue and tracked emails sent from outside the Work Queue. That information is also shown in the Feed tab in the email integration pane. To prevent duplicate feeds for reps who use the Work Queue, use the Lightning App Builder to remove the Feed tab from the email integration pane.

11. Click **Save**.

12. Activate and assign the pane to the user profiles of reps who use High Velocity Sales.

Customize the Work Queue

Select up to three fields to appear in the work queue so that your sales reps see the information at a glance.

1. From Setup, select **Object Manager**, and then click the name of the entity whose layout you want to edit.
2. Click **Compact Layouts**, and click the name of the layout you want to customize.
3. Click **Edit**.
4. In the **Selected Fields** column, the first three fields represent the data that displays in the work queue. Change the order of the fields so that the fields you want to display are one of the first three fields listed.

   Sales Cadence isn't supported as a field for the work queue. If it's one of the first three fields, the fourth field appears in its place.
5. Click **Save**.

You can customize different fields for each record type.

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited**Editions

USER PERMISSIONS

To set up High Velocity Sales:

- Customize Application AND Modify All Data

TELL YOUR TEAM TO SET UP THEIR HIGH VELOCITY SALES APP

You're nearly finished! Now you just need your users to complete a few tasks to finish setting up High Velocity Sales at the user level. We've provided some resources to help them get started.

Get Sales Managers Started with High Velocity Sales
Start using High Velocity Sales by navigating to the High Velocity Sales app and creating your first sales cadence.

Get Sales Reps Started with High Velocity Sales
Start using High Velocity Sales by navigating to the High Velocity Sales app and adding prospects to your work queue.

Get Sales Managers Started with High Velocity Sales

Start using High Velocity Sales by navigating to the High Velocity Sales app and creating your first sales cadence.

1. From the App Launcher, find and open **High Velocity Sales**.
2. Click the banner at the top of the page to start using Einstein Activity Capture.

   If you're new to Dialer, click the banner to select a Dialer number.
3. Switch to the split view in console.
4. Create and activate a sales cadence.
5. Add prospects to a sales cadence.

Check out additional resources.

EDITIONS

Available in: Lightning Experience

Available with High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

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Get Sales Reps Started with High Velocity Sales

Start using High Velocity Sales by navigating to the High Velocity Sales app and adding prospects to your work queue.

1. From the App Launcher, find and open **High Velocity Sales**.
2. Set up Einstein Activity Capture.

   If you're new to Dialer, click the banner to select a Dialer number.
3. Switch to the split view in console.
4. Add leads, contacts, or person accounts to your Work Queue.

Check out additional resources.

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