



# Einstein Generative AI for Analytics

## Report Formula Creation (Pilot)

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# Einstein Generative AI Report Formula Creation

## About Einstein Generative AI

Einstein brings trusted generative AI technology to your business at scale with out-of-the-box capabilities across the Customer 360. You can choose from an ecosystem of public AI models, like OpenAI, one of the proprietary Salesforce models, or your own model to securely connect to your customer data. Salesforce built Einstein generative AI with trust at the forefront, requiring the privacy, compliance, and integrity of business data while using Large Language Models (LLMs).

**\*Note:** For the pilot of Report Formula Creation, there isn't an option to choose the model.

## Generative AI and Your Data

At Salesforce, trust is our #1 value. To keep your data secure, Salesforce has agreements in place with LLM providers, like OpenAI. You can leverage generative AI capabilities without your private data being used to train the LLM.

During the pilot, all feedback you provide about your experience with Report Formula Creation is shared only with Salesforce and is used only for pilot feedback.

## Trusted Generative AI

Salesforce generative AI solutions are designed, developed, and delivered based on five principles for trusted generative AI.

- **Accuracy:** We prioritize accuracy, precision, and recall in our models, and we back our model outputs up with explanations and sources whenever possible. We recommend that a human check model output before sharing with end users.
- **Safety:** We work to mitigate bias, toxicity, and harmful outputs in our models using industry-leading techniques. We protect the privacy of personally identifiable information (PII) in our data by adding guardrails around this data.
- **Honesty:** We ensure that the data we use in our models respects data provenance and we have consent to use the data.
- **Empowerment:** Whenever possible, we design models to include human involvement as part of the workflow.
- **Sustainability:** We strive towards building right-sized models that prioritize accuracy and reducing our carbon footprint.

Learn more at [Salesforce AI Research: Trusted AI](#).

# About Report Formula Creation

Get insights from your data faster with Einstein Generative AI Report Formula Creation in Lightning reports and Data Cloud reports. With Report Formula Creation, simply describe a calculation for a report, and Einstein Generative AI assesses the relevant data and creates the formula. With one click, users of any technical level can add powerful calculated fields into their reports.

Previously, creating formulas for calculated fields required an understanding of data models, objects and fields, available functions, and various limitations based on data types, and formula types. Now Einstein Generative AI greatly simplifies the task of customizing reports. Report Formula Creation lowers the bar in required expertise, unlocking formula building for new and nontechnical users. With the ability to quickly and efficiently create both row-level and summary formula fields from natural language descriptions, users can deliver more customized and compelling insights to meet their business needs.

## EDITIONS

Report Formula Creation is available in Lightning Experience.

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

## LICENSES

To use Einstein generative AI:

- EinsteinGPTPlatformAddOn

## USER PERMISSIONS

To use Report Formula Creation:

- RunReports

## ORG PERMISSIONS

To access Report Formula Creation:

- Reporting
- EGPTFormulaGeneration

Note: This feature is supported in English only.

# Report Formula Creation and Your Data

Report Formula Creation uses your data to add context and customization to your request (prompt), a method known as grounding. The Report Formula Creation feature references the data behind the report you're building.

Your data is used only to generate relevant outputs, and it trains only models that are hosted by Salesforce. No public data is used.

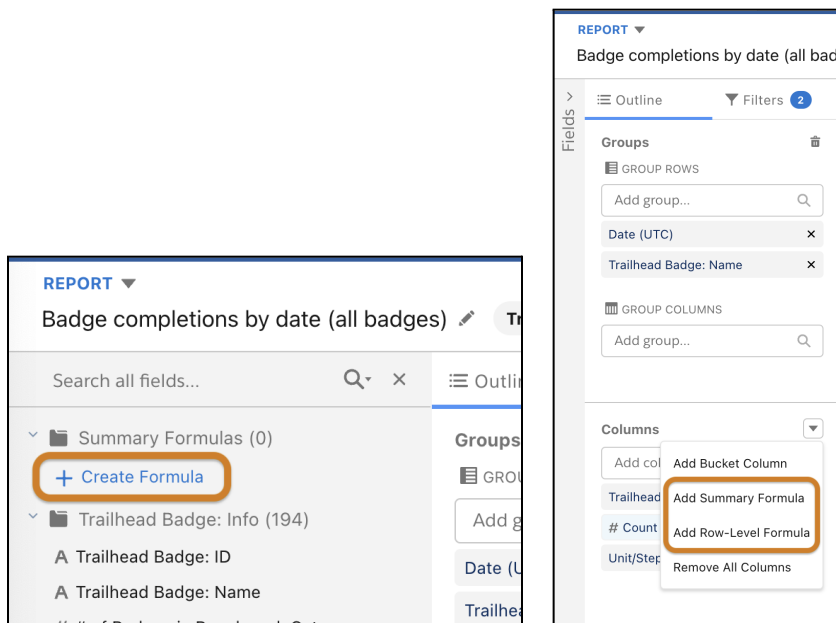
Data used in prompts is never stored outside of Salesforce. Your data stays inside Salesforce and isn't shared with the LLM. See [Generative AI and Your Data](#).

## Set Up Einstein Generative AI

From Setup, in the Quick Find box, enter `Einstein Generative AI`, and then select **Einstein Generative AI Setup**. Click the Einstein Generative AI toggle to set it to **On**.

## Use Report Formula Creation

1. Click **Edit** on a report.  
**Note:** A report must be saved before running the Einstein Generative AI Report Formula Builder.
2. Open the formula builder window. Select **Create Formula** in the Fields panel, or select **Add Summary Formula** or **Add Row-Level Formula** in the Columns menu.



3. In the formula builder window, select the **Einstein** tab.

The screenshot shows the 'Edit Row-Level Formula Column' window. The 'Einstein' tab is selected in the top-left navigation bar. The main area is divided into two columns. The left column contains the Einstein interface, including a header with the Einstein logo and name, a brief description of the tool, a 'Suggested Formula Prompts' section with three buttons, a warning icon and text about generative AI, and a 'Describe your formula...' text box with a right-pointing arrow. The right column contains the formula builder fields: 'Column Name' (with a red border and error message 'Column Name is required.'), 'Description', 'Formula Output Type' (set to 'Number'), 'Decimal Points' (set to '2'), and a 'Formula' text area with a toolbar and a 'Validate' button. At the bottom right are 'Cancel' and 'Apply' buttons.

4. Select a suggested formula, or click Refresh to see more suggestions. Or, in the text entry box, describe the calculation that you want, and then click the arrow to pass it to Einstein. See [Example Requests](#).

This screenshot shows the same 'Edit Row-Level Formula Column' window, but with a suggested formula selected. The 'Suggested Formula Prompts' section now has a blue highlight on the prompt: 'What is the probability of closing the opportunity within the next 7 days?'. Below this prompt is a detailed explanation of the formula's logic and the actual formula text: `CASE(CLOSE_DATE - TODAY() < 7, PROBABILITY, 0)`. An 'Insert Formula' button is located below the explanation. The 'Describe your formula...' text box now contains the text of the selected prompt. The rest of the interface, including the 'Column Name' field and the 'Formula' text area, remains the same as in the previous screenshot.

5. After Einstein responds with a formula, take a moment to evaluate it.

If the formula isn't what you want, you can start over. Enter a new request, or scroll up and click **Refresh** for more suggestions from Einstein. For this pilot, follow up questions aren't supported. See [Troubleshooting and Feedback](#).

6. If the formula looks good, click **Insert Formula**. Einstein adds the Column Name and Description along with the formula.

The screenshot shows the 'Edit Row-Level Formula Column' interface. On the left, under the 'Einstein' tab, there are several AI-generated formula suggestions. The selected suggestion is: 'What is the probability of closing the opportunity within the next 7 days?'. Below this, a detailed explanation of the formula is provided: 'This formula calculates the probability of closing the opportunity within the next 7 days. It compares the difference between the close date and today's date to 7. If the difference is less than 7, it returns the probability value; otherwise, it returns 0.' The formula itself is: `CASE(CLOSE_DATE - TODAY() < 7, PROBABILITY, 0)`. The main editor on the right shows this formula being entered. Above the editor, there are fields for 'Column Name' (set to 'Opportunity Probability for Next') and 'Description' (set to 'Calculates the probability of clo:'). Below these are 'Formula Output Type' (set to 'Number') and 'Decimal Points' (set to '2'). At the bottom of the dialog, there are 'Validate' and 'Apply' buttons.

7. After you've inserted the formula, click **Validate**.
8. After checking all of the information that Einstein inserted, click **Apply**.

**!** **Important:** This tool uses generative AI, which is known to include inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for the output when making business decisions.



## Example Requests

Make requests to Einstein in your natural language. In your request, describe the formula you want in simple terms. Often a question about your business is the best approach. Here are a few examples.

For row-level formulas:

- How many days did it take each opportunity to close?
- Which case subjects contain the word "widget"?
- As defined by a customer satisfaction (CSAT) score, which customers are satisfied or upset?

For summary formulas:

- After deducting taxes and expenses, what are our net earnings?
- What percentage of our opportunities are attributable to each lead source?
- In which month did we do the most business last year?

For more inspiration, check out these resources on formulas and formula functions:

- [Evaluate Report Data with Formulas](#)
- [50+ Salesforce Formula Examples](#)
- [Go-To Formula Functions from the Awesome Admin Community](#)

## Limitations

Formulas suggested by Einstein are subject to the limitations of reports.

- See [Get the Most Out of Row-Level Formulas: Tips, Limits, and Limitations](#).
- See [Get the Most Out of Summary Formulas: Tips, Limits, and Limitations](#) and [Summary Formulas with Joined Reports](#).
- For Data Cloud, see [Data Cloud Reports and Dashboards: Limits and Limitations](#).

## Troubleshooting and Feedback

Generative AI uses Large Language Models (LLMs) to generate the output. Because LLMs are trained by other organizations, the output isn't always what you expect. If the output doesn't meet your expectations, you can generate a new output by starting over. The generated output from the previous attempt isn't saved and the new output replaces it.

If the description in your request to Einstein doesn't provide enough information or the relevant information needed for the context, Einstein lets you know. In this case, try entering another description.

We encourage you to provide feedback about Einstein's responses and your experience with the pilot feature. Your feedback is shared only with Salesforce and is used only for pilot feedback. Thank you!