

salesforce

Einstein Opportunity Scoring for Everyone

Salesforce, Spring '24



 @salesforcedocs


Last updated: January 12, 2024

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EINSTEIN OPPORTUNITY SCORING FOR EVERYONE

Artificial intelligence, which boosts sales with invaluable insights and predictions, is a must-have for sales teams competing in today's marketplace. If your org meets specific requirements, all Sales Cloud users have access to Salesforce's AI technology—Einstein—without an extra cost. Specifically, you have access to Einstein Opportunity Scoring. Review information about the feature. Plus, see how easy it is to get started with Einstein.

 **Note:** If you have questions as to whether your org meets the requirements for Sales Cloud Einstein features at no extra cost, talk to your Salesforce account executive.

The information in this guide is summarized in a short video.  [Watch Now](#) (English only)

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

EINSTEIN OPPORTUNITY SCORING

Let artificial intelligence help you and your team focus on the right opportunities so you can close more deals. Each opportunity is given a score, from 1 to 99, which is available on opportunity records and list views. If you use Collaborative Forecasts, opportunity scores are also available on the forecasts page. Plus, use scores with reports, Process Builder, and workflows. Einstein Opportunity Scoring is available to users with or without a Sales Cloud Einstein license.

Watch a Demo: [▶ Einstein Opportunity Scoring](#) (English only)

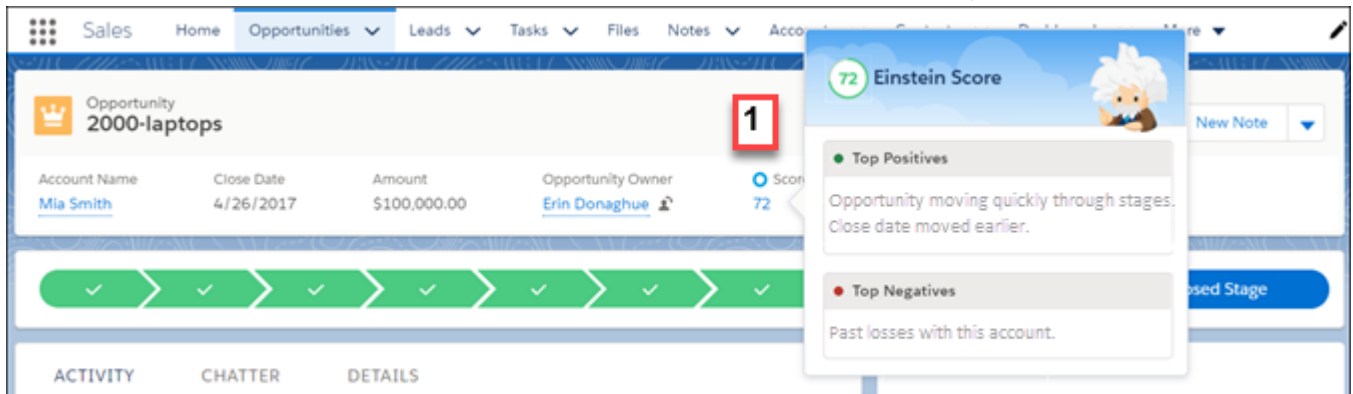
Opportunity scores tell you the likelihood that an opportunity will be won. For each opportunity score, Einstein shows the factors that have contributed the most to the score, both positively and negatively.

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

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



In Lightning Experience, the score is shown on the compact layout of opportunity records (1) or on the Details tab. Hover over the score to see a list of factors that contribute to the score. For example, a score could be relatively high because the opportunity is moving quickly through the stages compared to other opportunities.

In Salesforce Classic, the score is shown on the record detail of opportunity records. The contributing factors are shown.

Einstein Opportunity Scoring

Opportunities
All Opportunities ▾ New

32 items - Sorted by Opportunity Score - Updated a few seconds ago 2

| | OPPORTUNITY NAME | ACCOUNT NAME | OPPORTUNITY SCORE ↓ | AMOUNT | STAGE | CLOSE DATE |
|---|----------------------------|--------------------------|---------------------|--------------|--------------------|------------|
| 1 | Insightor Opp #wQJII | Ace Hardware | 97 | \$60,000.00 | Prospecting | 5/10/2017 |
| 2 | Insightor Opp #oQNwu | Insightor Account #b3SUt | 93 | | Prospecting | 5/13/2017 |
| 3 | 2000-laptops | Mia Smith | 92 | \$100,000.00 | Negotiation/Review | 4/26/2017 |
| 4 | Insightor Opp #CI3Ef | Insightor Account #wDW65 | 82 | | Prospecting | 8/10/2017 |
| 5 | Insightor Opp #CPn1H | Insightor Account #T6FjM | 78 | | Prospecting | 8/21/2017 |
| 6 | Global Media - 400 Widgets | Global Media | 78 | \$40,000.00 | Id. Decision Ma... | 1/11/2015 |
| 7 | Insightor Opp #DI4to | Ursa Major | 77 | \$650,000.00 | Negotiation/Review | 5/10/2017 |
| 8 | Insightor Opp #P89Qs | Insightor Account #8qF7f | 74 | | Prospecting | 8/21/2017 |

You can add the Opportunity Score field to any of your opportunity list views (2). If you don't see the score on public list views, ask your Salesforce admin to add it. In Lightning Experience, hover over the score in the list view to see the factors that contribute to the score. In Salesforce Classic, the contributing factors aren't available from the list views. Instead, navigate to the opportunity record detail page.

Forecasts
Admin User ▾ Settings Refresh

| MONTHS | CLOSED ONLY | COMMIT FORECAST | BEST CASE FORECAST | OPEN PIPELINE |
|--------------------|------------------|--------------------|--------------------|------------------|
| Total: 3 Months | USD 1,407,421.00 | USD 2,984,930.42 | USD 6,914,018.42 | USD 5,506,597.42 |
| > November FY 2017 | USD 686,737.00 | USD 1,017,637.00 / | USD 2,156,608.00 / | USD 1,469,871.00 |
| > December FY 2017 | USD 690,838.00 | USD 1,371,647.42 / | USD 3,175,336.42 / | USD 2,484,498.42 |
| > January FY 2018 | USD 29,846.00 | USD 595,646.00 / | USD 1,582,074.00 / | USD 1,552,228.00 |

Admin User Team • Total: 3 Months • All Forecast Categories 3

| OPPORTUNITY NAME | ACCOUNT NAME | OPPORTUNITY SCORE | AMOUNT ↑ | CLOSE DATE | STAGE | PROBABILITY (%) | FORECAST CATEGORY |
|----------------------------|------------------------|-------------------|--------------|------------|----------------|-----------------|-------------------|
| Tech Labs - Add-On B... | Tech Labs | 97 | USD 2,997.00 | 12/06/2017 | Proposal/Quote | 75% | Best Case |
| Employnet - Services - ... | Employnet | 93 | USD 3,000.00 | 12/06/2017 | Needs Analysis | 35% | Best Case |
| Larry Baxter - New Bu... | Baxter, Larry | 82 | USD 3,999.00 | 11/16/2017 | Proposal/Quote | 75% | Best Case |
| Advanced Communic... | Advanced Communicat... | 78 | USD 5,000.00 | 11/15/2017 | Needs Analysis | 35% | Best Case |
| Larry Baxter - Add-On ... | Baxter, Larry | 78 | USD 6,499.00 | 01/10/2018 | Proposal/Quote | 75% | Best Case |
| Haven Enterprises - N... | Haven Enterprises | 82 | USD 7,992.00 | 11/20/2017 | Proposal/Quote | 75% | Best Case |

If you use Collaborative Forecasts, admins can add opportunity scores to the opportunity list on the forecasts page (3).

Understand How Einstein Scores Your Opportunities

Learn about the process Einstein uses to predict which opportunities are most likely to be won.

Einstein Opportunity Scoring uses data science and machine learning to score your opportunities so that you can prioritize them. By using machine learning, Einstein Opportunity Scoring provides a simpler, faster, and more accurate solution than traditional rule-based scoring approaches.

 **Tip:** For a deeper dive into Einstein Opportunity Scoring, check out the [Model Card](#).

The Scoring Model

To predict which opportunities are most likely to be won, Einstein analyzes your and your team's past closed opportunities (both closed-won and closed-lost) to build a scoring model. The criteria used in the analysis includes the following.

- Each opportunity's record details (both standard and custom fields), history, and related activities
- The related account's record details and some record history
- Details about the related products, quotes, and price books

During setup, Salesforce admins can choose whether to have Einstein consider all opportunity records and custom fields or only a subset. When Einstein builds the scoring model, the omitted records and fields are ignored.

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.

Once a month, or whenever the admin updates the settings, Einstein reanalyzes the opportunity data and the model is refreshed. Opportunity scores are updated every few hours.

Factors That Contribute to Scores

For each opportunity score, Einstein shows the factors that have contributed most to the score, both positively and negatively. Sometimes, an opportunity has a score but doesn't show any factors. This could be because there are too many minor factors for any of them to help understand how the score was calculated. Or, it could be because the factors are complex and, therefore, too difficult to summarize.

Factors are based on your CRM data and accurately contribute to the score, even if they seem counterintuitive. For example, a deal with an enterprise customer requires extra steps, such as legal review and a longer negotiation process. These extra steps delay the close date. But, because the delayed close date signals that the deal is progressing, the delay is associated with a higher score. However, for a deal with an SMB customer that doesn't include extra steps, a delayed close date is associated with a lower score.

When Scores Don't Appear

A score might not appear on a particular opportunity for one of the following reasons.

- The scores haven't been calculated yet because Einstein Opportunity Scoring was recently enabled. It can take around 48 hours before scores are available.
- A previously scored opportunity is closed, so the score is removed.
- The admin excluded the opportunity from Einstein's scoring process. If the opportunity was previously scored, the score is removed.
- The opportunity was added less than six hours ago.

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- Einstein couldn't calculate scores because you don't have enough opportunity data. To check your data, run the Sales Cloud Einstein Assessor.
- If Opportunity Scoring was turned on by default, scores aren't available for opportunities that are related to a person account. To get scores for those opportunities, turn off Einstein Opportunity Scoring and then turn it on again.

When Scores Aren't Recalculated

A previously scored opportunity is more than three months past its closed date. Einstein gives the opportunity a default score of 5.

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.

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.

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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).

SET UP EINSTEIN OPPORTUNITY SCORING FOR SALES CLOUD USERS

Einstein Opportunity Scoring, which is part of the Sales Cloud Einstein product suite, is available to eligible customers at no extra cost. Turn on Einstein and we take care of the rest.

Note:

- For customers without the Sales Cloud Einstein license, Einstein Opportunity Scoring is available on a rolling basis starting in the Spring '20 release. For details about timing and eligibility, contact your Salesforce account executive.
 - Opportunity scores are available in both Salesforce Classic and Lightning Experience, but you have to turn on Einstein in Lightning Experience.
 - When you don't have any Sales Cloud Einstein licenses, Einstein Opportunity Scoring isn't available in sandbox or for Salesforce Government Cloud customers.
 - If you're missing the option to enable Einstein Opportunity Scoring, contact Salesforce Customer Support.
1. To get started with Einstein, follow the in-app prompts. Or, from Setup in Lightning Experience, enter *Assisted Setup* in the Quick Find. Then, select **Assisted Setup** under Einstein Sales.
 2. Confirm that you understand what happens when you turn on Einstein.
 3. Click **Turn It On**. If needed, review and accept the terms. Here's what happens next.
 - We analyze your teams' past opportunities to build a scoring model. Building a model can take anywhere from a few hours to a few days, depending on how much data you have. The model, which is refreshed at regular intervals, is used to generate scores.
 - We add the Score field to your standard and custom opportunity page layouts. If you use full view as your default record view, scores don't always appear in the layout's first section.
 - We add the Opportunity Score field to the Recently Viewed list view. Add the field to public opportunity list views and ask your sales teams to add it to their own opportunity list views.
 - We assign the Sales Cloud Einstein For Everyone permission set to all users who have a Salesforce user license. Users see scores after they're generated. You can remove access for individual users through the permission set.
 - We create a Sales Insights Integration user and assign it to a user profile of the same name. Although you see the user and profile listed in your org, they're used only behind the scenes.
-  **Tip:** If you don't see scores a few days after turning on Einstein, review information about how Einstein scores your opportunities. If you still need help, contact Salesforce Customer Support for assistance.
4. To customize the scoring model, go to the Einstein Opportunity Scoring setup page and click **Review Settings**.
 - a. Read the introduction, and then click **Next**.
 - b. 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**.
 - c. 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 ignore, and click **Next**.
 - d. Review your settings. Then, click **Start** to begin the scoring process.

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USER PERMISSIONS

To turn on Einstein Opportunity Scoring For Everyone:

- Customize Application AND Modify All Data

Set Up Einstein Opportunity Scoring for Sales Cloud Users

It can take up to 48 hours to analyze your data, build a new scoring model, and update scores. To check the status, return to the Einstein Opportunity Scoring setup page.

MANAGE SALES CLOUD USERS' ACCESS TO EINSTEIN FEATURES

Einstein Opportunity Scoring, which is part of the Sales Cloud Einstein product suite, is available to eligible customers at no extra cost. Access is available through the Sales Cloud Einstein For Everyone permission set. Review who has access to the permission set, what's included, and how to manage user assignments.

The Sales Cloud Einstein For Everyone permission set is intended for users who don't have a Sales Cloud Einstein license. For details about whether the permission set is available to you, contact your Salesforce account executive.

The Sales Cloud Einstein For Everyone permission set includes the following permissions.

| Permission | Description | Enabled by Default |
|--|---|--|
| Use Einstein Opportunity Scoring | Lets users see opportunity scores, which indicate which deals are more likely to close. | Yes |
| View Opportunity Scoring Model Factors | Lets users see all factors used by Opportunity Scoring to build scoring models. Scoring models are used to score individual records. 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. | No. Clone the Sales Cloud Einstein For Everyone permission set, enable the permission, and assign the permission set to users. |

1. From Setup, enter *Permission Sets* in the Quick Find. Then, select **Permission Sets**.
2. Click the Sales Cloud Einstein For Everyone permission set.
3. Click **Manage Assignments**. Add and remove assignments, as needed.

EDITIONS

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USER PERMISSIONS

To create permission sets:

- Manage Profiles and Permission Sets

To assign permission sets:

- Assign Permission Sets