Einstein Activity Capture

Add every email & event to Salesforce.

sales cloud einstein
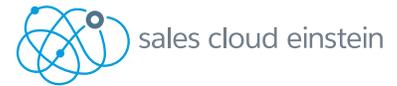
In today's digital-first world, customers increasingly prefer to communicate with salespeople through emails.[1] In fact, the average rep spends 28 hours per week reading and answering emails. It's the channel reps use to schedule important meetings, share information, and negotiate deals.

However, email is a data silo because it doesn't connect to the systems companies use to collaborate and run their businesses. As a result, all too often the emails and calendar events exchanged with customers stay trapped in the inboxes of individual sales reps.

Einstein Activity Capture connects to Gmail or Office 365, automatically syncing all of your team's customer communications to Salesforce. When reps send and receive emails and calendar events, Einstein Activity Capture adds the messages to appropriate records in Salesforce – no manual data entry required. All of the captured messages are visible in Activity Timeline within Salesforce, providing context for your entire team so they can help close the deal.

"Teams using Einstein Activity Capture have saved more time, closed business quicker, and identified new opportunities.."

Sean Giancola
Chief Revenue Officer, *New York Post*

Once your team's activity data is flowing into Salesforce, Sales Cloud Einstein analyzes the data stream. Machine learning algorithms uncover Einstein Opportunity and Account Insights that guide reps to the next best action. Then activity reporting enables managers to discover why top reps are winning, so they can coach the rest of the team.

How Einstein Activity Capture Works

To get started, connect a Gmail or Office 365 account, and Einstein Activity Capture will begin by logging historical emails and calendar events from up to six months back for Gmail and up to two years back for Office 365. Then, going forward, Einstein Activity Capture will work in the background to passively capture every email or calendar event sent or received. The captured emails and events are all displayed in the Activity Timeline, providing a history of the team's relationship with a customer.

Once collected, Einstein Activity Capture associates emails and events with the right records in Salesforce, including Leads, Contacts, Accounts, Person Accounts, and Opportunities. It looks at the email addresses of the sender and all recipients and finds matching records within Salesforce, including records mapped through relationships.

Privacy

To protect privacy and ensure confidential messages aren't shared across the organization, Einstein Activity Capture has built-in controls at the user and admin level. Users can adjust the sharing settings to determine who in their organization can see the contents of emails or events. Admins can blacklist specific domains or email addresses to prevent Einstein Activity Capture from collecting messages from sensitive sources – for example an investor or board member.

Top Benefits

- **Supercharge Einstein with comprehensive activity data**

- **Spend time selling, not logging data**

- **Coach reps with activity data insights**

Top Features

- **Automatic Email and Calendar Sync** – Capture every email/meeting created in Gmail or Office 365

- **Activity Reporting** – Provide data-driven rep coaching with an activity leaderboard

- **Fast & Easy Setup** – Connect to Gmail and Office 365 and Einstein does the rest

- **Sharing Settings** – Adjust who can see your emails and events to ensure privacy

1. McKinsey & Company: "The social economy: Unlocking value and productivity through social technologies." 2012.

Activity Timeline
Get visibility into the history of a customer relationship.
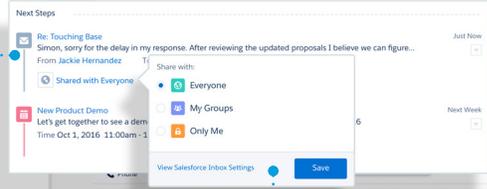
Sharing Settings
Adjust who in your org can see the message's contents.
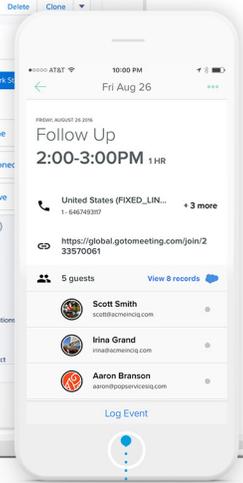
Email & Calendar Sync
Capture all customer communications in Salesforce.

Technical Specifications	
Email Server Compatibility	
Google Gmail	✓
Microsoft Office 365	✓
Microsoft Exchange	✗
Historical Email Capture	
Google Gmail	Up to 6 months of past data
Microsoft Office 365	Up to 2 years of past data

Sales Cloud Einstein includes Einstein Lead Scoring, Einstein Opportunity & Account Insights, and Einstein Activity Capture, and is $50 per user per month. Existing customers with Sales Cloud Lightning CRM SKU or Service Cloud Lightning CRM SKU EE/UE will be able to subscribe to Sales Cloud Einstein (Spring '17). New customers will be able to subscribe to Sales Cloud Einstein with the Lightning Sales Cloud SKU and the Lightning CRM SKU at EE/UE. New customers will not be able to subscribe to Sales Cloud Einstein with the Lightning Service Cloud SKU. Sales Cloud Einstein Spring '17 is available in English only.

For More Information
Contact your account executive to learn how we can help you accelerate your CRM success.

Corporate Headquarters
The Landmark @ One Market Street
Suite 300
San Francisco, CA 94105
United States
1-800-NO-SOFTWARE
www.salesforce.com

Global Offices
Latin America   +1-415-536-4606
Japan   +81-3-5785-8201
Asia / Pacific   +65-6302-5700
EMEA   +4121-6953700