

Einstein Business Analyst - Overview and Setup guide

Overview:

The App provides the structure for a Business Analyst or IT professional to create Records for Projects, Meetings, StakeHolders and Meeting Attendees so that professionals can manage end to end meetings. So the below Custom Objects would be found as part of the Einstein Business Analyst app:

1. Projects
2. Meetings
3. Meeting Attendees
4. StakeHolders

The App is designed to utilize Einstein generative AI to create User Stories and update the field "User Stories Generated" on the Object Meetings. It is designed to enable the generation of user stories from the field "Meeting transcript/Notes" on the Object "Meetings", which will be supplied as the Resolution for the prompt.

As of today, Einstein Prompts cannot be packaged as part of Managed packages. Hence step by step instructions have been provided to enable Einstein prompt builder and create the prompt. The content of the prompt in Prompt template workspace has also been documented as part of the steps which uses the fields from Meetings Object

A flow "Update Prompt text" has been created to update the prompt field which would be used in the prompt created.

Once the users enable Einstein prompt builder and create Prompt as per below instructions, the app will be ready to use.

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Setup Guide:

1. Enable Einstein Prompt Builder in your org using the below Salesforce documentation:
https://help.salesforce.com/s/articleView?id=sf.prompt_builder_enable.htm&type=5
2. Create Field Generation Prompt with details as below(for Object “Meeting” to be visible in Prompt builder, log out and log back in)

The screenshot shows the 'New Prompt Template' form in Salesforce. The form is titled 'New Prompt Template' and has a subtitle 'available for the template. [Learn more in Salesforce Help.](#)'. The form contains the following fields:

- * Prompt Template Type**: A dropdown menu with 'Field Generation' selected.
- * Prompt Template Name**: A text input field with the placeholder 'Enter a name...'.
- * API Name**: A text input field.
- Template Description**: A text input field with the placeholder 'Enter a template description...'.
- * Object**: A search input field with 'Meeting' entered and a magnifying glass icon.
- * Object Field**: A search input field with 'User Stories Generated' entered and a magnifying glass icon.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Next'.

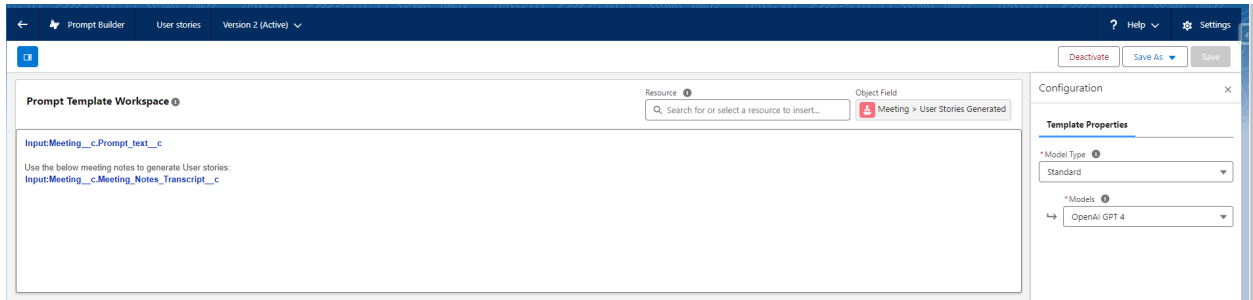
- Click on “Next”.
- Copy the below text into the Prompt Template workspace **<do not include any additional blank lines or spaces before or after the text. Make sure your prompt looks exactly like the below lines including the line spaces>**

{!\$Input:TheEinsteinBA__Meeting__c.TheEinsteinBA__Prompt_text__c}

Use the below meeting notes to generate User stories:

{!\$Input:TheEinsteinBA__Meeting__c.TheEinsteinBA__Meeting_Notes_Transcript__c}

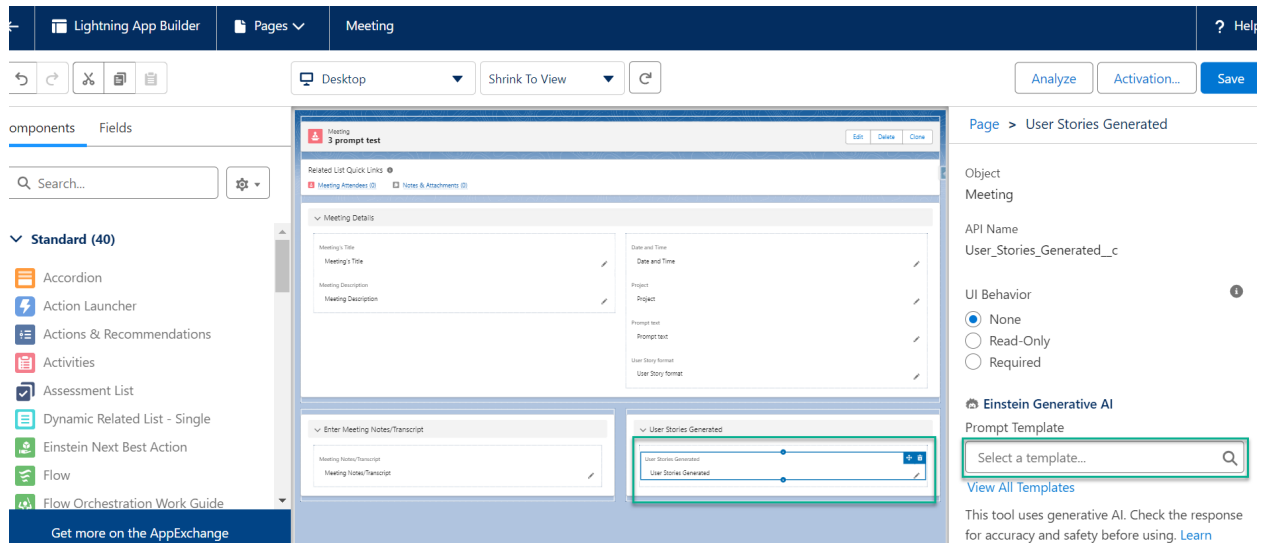
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- **Make sure to select “OpenAI GPT 4” as the model on the right side panel.**
- Save and activate the prompt.

3. Edit Lightning page of Meeting record.

Click on “User stories Generated” field and select the prompt you created from the available Prompts as shown below. Save and click back button.



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- To use, just click on the Edit button and then the AI button on the User Stories Generated field. The response would be in the form of User stories.

The screenshot shows the Einstein Business Analyst interface. At the top, there's a header with a red icon, the text 'Meeting 3 prompt test', and buttons for 'Edit', 'Delete', and 'Clone'. Below the header, there's a section for 'Enter Meeting Notes/Transcript' with a text area containing two paragraphs of meeting notes. To the right, there's a section for 'User Stories Generated' with a text area and a green box highlighting an 'AI' button.

This screenshot is similar to the previous one but includes a 'User Story format' field at the top right. The 'Enter Meeting Notes/Transcript' section has a text area with meeting notes. The 'User Stories Generated' section has a text area and a green box highlighting an 'AI' button.

- Click on “Use” to copy them into the User stories field.

This screenshot shows the Einstein Business Analyst interface with a modal window titled 'Einstein - User Stories Generated Field'. The modal displays four generated user stories: 'As a Marketing Manager, I need to track campaign performance and customer engagement metrics so that I can improve our marketing efforts.', 'As a Marketing Manager, I need the ability to assess and prioritize leads based on their engagement and likelihood to convert so that I can manage leads effectively.', 'As a UX/UI Designer, I need to focus on creating an intuitive and user-friendly interface so that the application is easy to navigate and responsive across devices.', and 'As a UX/UI Designer, I need to consider accessibility features to ensure it's usable for all team members so that the application is inclusive and accessible.' A green box highlights the 'Use' button at the bottom of the modal. The background interface shows the 'Enter Meeting Notes/Transcript' and 'User Stories Generated' sections.

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6. The User stories generated will be in csv format. You can just copy paste them into any spreadsheet like Excel or google spreadsheet and should be ready to use.