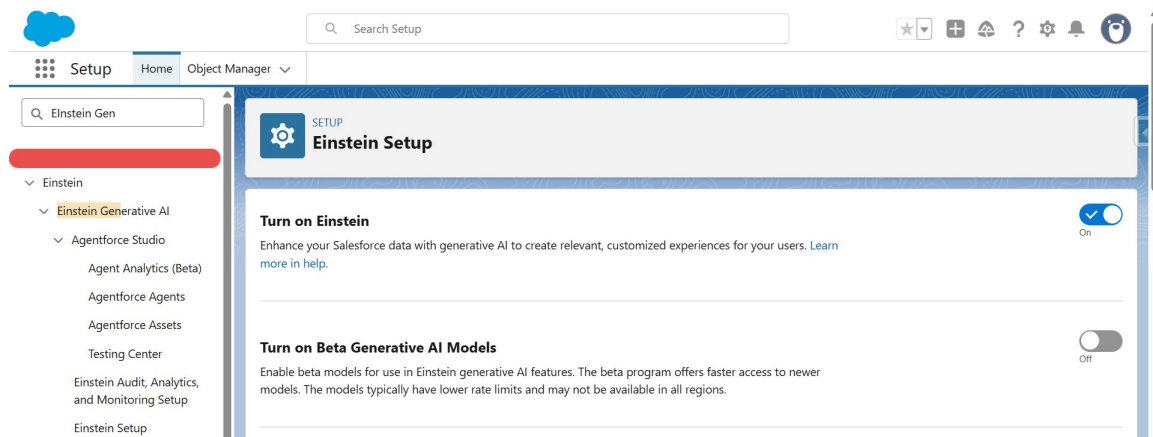


1. Enable Einstein Features

Steps:

1. Log in to your Salesforce org where the package will be installed.
2. Click the ⚙ Gear icon (top-right corner) → Select Setup.
3. In the Quick Find search box, type “Einstein Gen”.
4. Click Einstein Setup under the Einstein section.
5. Turn ON Einstein setup by following the on-screen instructions.

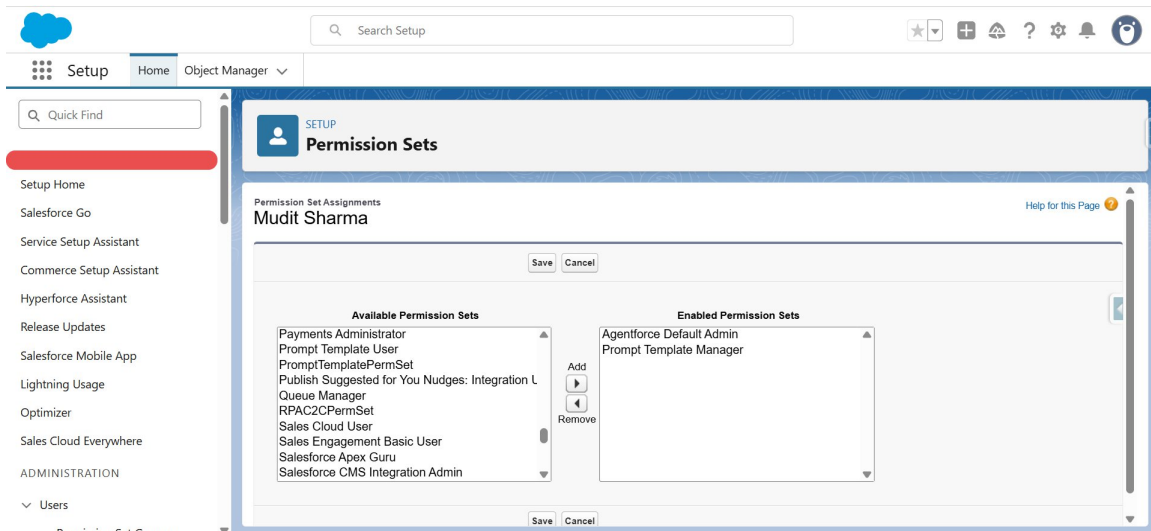


2. Assign Required Permission Sets

After enabling Einstein, assign the following permission sets to the users who will use or configure the package.

Steps:

1. Go to Setup → In the Quick Find box, type Users → Click Users.
2. Open the user record (for example, the Admin user).
3. Scroll down to the Permission Set Assignments related list and click Edit Assignments.
4. Add the following permission sets:
 - Prompt Template Manager
 - Agentforce Default Admin
5. Click Save.



3. Enable Notes

Steps:

1. From Setup, click the ⚙️ Gear icon → Setup.
2. In the Quick Find box, type Note.
3. Click Notes Settings.
4. Check the box “Enable Notes”.
5. Click Save.

