



# Generative Canvas for Lightning



@salesforcedocs  
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# GENERATIVE CANVAS FOR LIGHTNING

## Boost Sales with a Generative Canvas

### EDITIONS

Available in:

- Enterprise
- Performance
- Unlimited

Improve your sales outcomes and better prepare for client meetings by asking questions and finding answers using a generative canvas. Generative canvases harness AI to streamline data analysis and insight generation for sales professionals. You can enable your sales team to quickly identify strategic opportunities and optimize customer interactions, significantly reducing the time spent on research.



**Important:** Generative AI can produce inaccurate or harmful responses. Review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

## Prerequisites

If you haven't already, enable [Einstein Generative AI](#).

## Install Generative Canvas

### USER PERMISSIONS

To install packages:

- Download AppExchange Packages

The installation steps are the same as for any AppExchange package, with the exception of assigning a permission to your users so they can create a canvas. You can also add a Lightning Web Component (LWC) for generative canvas to your page layouts.

1. Go to the [AppExchange listing](#).
2. On the listing page, click **Get It Now**.
3. Select your environment type: production or sandbox.
4. Enter any requested information, agree to the terms and conditions, and then click **Confirm and Install**.

5. Enter the requested information. The password to install the package is GenCanvasSF2024.
6. To review the package components, click **View Components**.
7. In Enterprise, Unlimited, Performance, and Developer Editions, select which user type can access the package. For more details, review [Determine Which Users Can Access a Package](#).
8. Click **Install**.
9. Assign the Generative Canvas user permission to your users.
10. [Enable Lightning Web Security](#).

Admins can also:

- Add the Generative Canvas LWC to the account, opportunity, or other pages.
- In settings:
  - Change which LLM the canvas uses
  - Opt to have users choose from prompts instead of inputting free-form questions. You can select from a list of prompts to include as well as add your own prompts.

## Get Started with Generative Canvas

### USER PERMISSIONS

To modify a generative canvas:

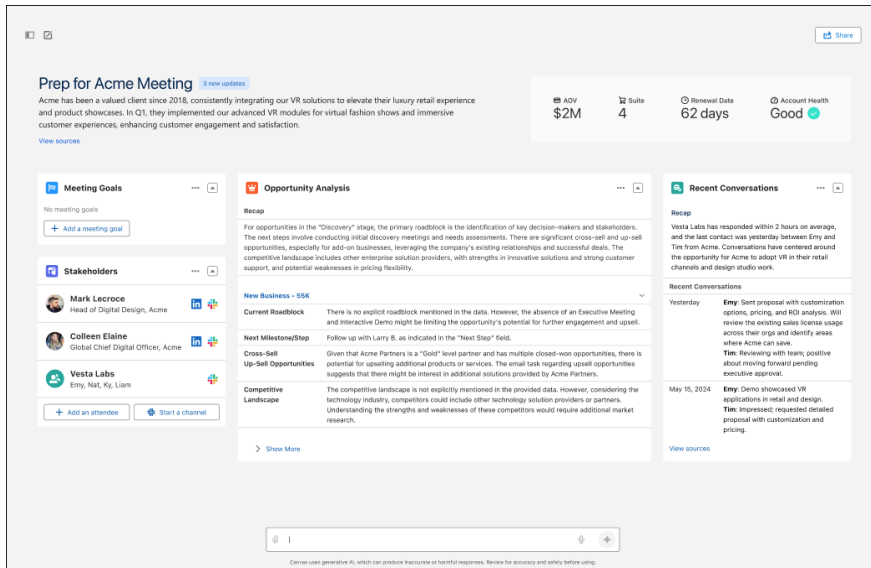
- Generative Canvas

Generative canvases are designed to be intuitive and take advantage of large language models' (LLMs') ability to understand natural language. Select one of the suggested questions or ask your own and it gathers info and generates responses. Unlike a traditional copilot, the responses display in tiles across a canvas, making it easier to gather everything you need in one place.

Based on how your org is set up, you have a couple options to access canvases.

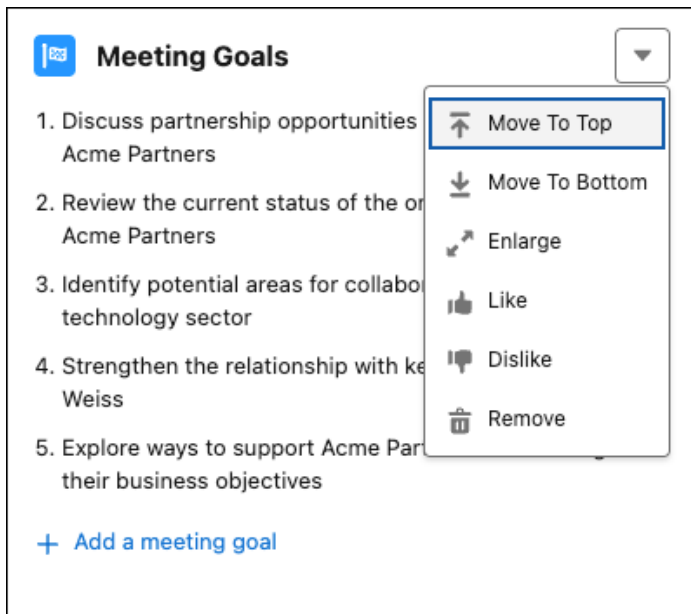
- From Seller Home or pages with the added component, click **Launch** on the Launch Generative Canvas tile.
- From the App Launcher, click **Generative Canvas**.

You can select from one of the suggested prompts or ask your own question. When you ask questions, the generated content appears in individual sections on the canvas.

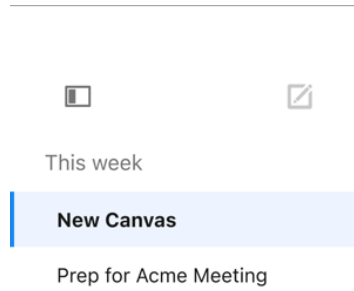


The suggested prompts change based on the account context and your seller profile. When you create your own prompts, you can ask for just about anything, such as an analysis of an opportunity or what's in the news about the client. Every response is captured on the canvas.

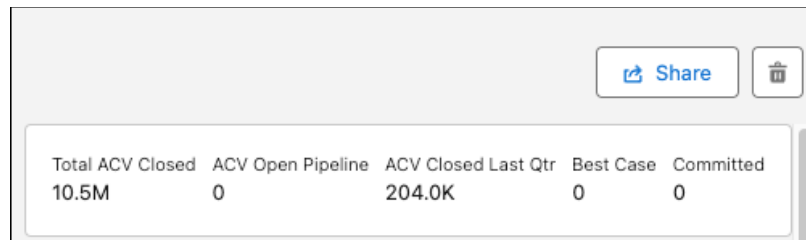
Highlight what you most want to see and move around the content on the canvas. Change the order, move them to different parts of the canvas, or enlarge or shrink the sections. To rearrange the sections, click the drag icon on a section and drag it. To move a section, click the dropdown arrow and select from the options. This same menu also lets you enlarge or shrink the section, remove it, and provide feedback on the generated response.



The LLM generates a name for your canvas and it's automatically saved, so you can add to it over time. To find your previous canvases, view the left panel. To open a canvas, click the canvas name.



To remove a canvas you no longer need, open it from the left panel, and then click the trash can. You can also share your canvases with others. To share a canvas, click **Share**, search for and select the users to share with, and click **Share**.



You can also access your canvases on your mobile devices, giving you access to your sales prep while you're on the go.

