

salesforce

# 27 AI Apps That Will Deliver Value Today

AI Apps for Every Department



# Foreword

**AI is changing everything. Fast.**

What was impossible with custom app development just a few years ago is possible today – as long as you have the vision and the right tools.

Now that AI is in the picture, many IT leaders, developers, and admins are reimagining how they build productivity apps for their teams. They're exploring ways to extend AI across every department to streamline work and give customers easier access to quick, personalized service.

In this guide, you'll learn how AI is changing the world of custom app development and opening up new paths to enhanced collaboration, improved workflows, and freedom from manual and repetitive tasks. Then, we'll take a tour around your organization to see where 27 different AI apps can help you reduce manual workloads, improve day-to-day processes, and discover new opportunities to enhance customer experiences.

## **i** What makes someone a *Trailblazer*?

A Trailblazer is anyone who has a vision of doing something that hasn't been done before. They're innovators, testers, and “what if” thinkers who are bringing new digital experiences to life across industries.

They're also not afraid to do some exploring – which is exactly what we'll be doing in this guide.

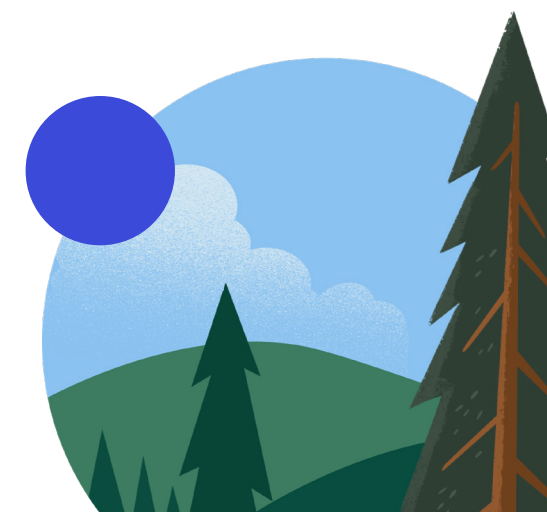
**Let's get started.**





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**Build AI apps powered  
by your business data —  
all with low-code tools**





# Build AI apps powered by your business data — all with low-code tools

Organizations across industries recognize that generative AI represents a generational opportunity to transform business. However, with so many competing priorities, many don't know where to begin, which tools to use, or what success looks like.

Before you start building AI apps on the Einstein 1 Platform, it's important to understand the possibilities – and rewards. Gaining this clarity can help you prioritize effectively, select the right tools, and set realistic expectations for your AI initiatives, ultimately paving the way for successful AI integration and innovation.

In this guide, we'll show you 27 inspiring AI apps built on the Einstein 1 Platform that can help jumpstart your journey into AI-native app development.



## Two industry leaders taking productivity to new levels with custom apps



**Goosehead Insurance uses Salesforce to develop solutions that improve client relationships and drive productivity.**

- A new direct-to-consumer quoting platform delivers insurance policy quotes in **under two minutes**.
- Aviator (developed using Heroku) generates policy quote comparisons and reduces quote generation time by **80%**.

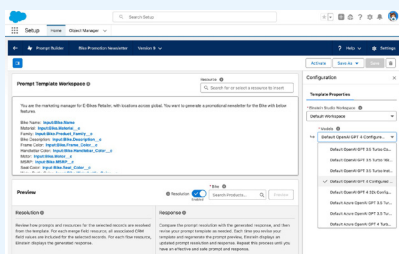


**Manufacturing systems provider BACA Systems built an AI-powered resource planning app on Salesforce to automate processes and help teams be more responsive to client needs.**

- Using Prompt Builder helped increase sales productivity by **2x**.
- The company set up a complete delivery management system that has saved between five and eight minutes per order – equivalent to **15 work days per month**.

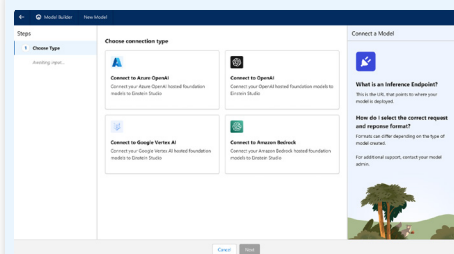
## What do you need to build AI apps?

Building AI apps requires a new toolchain optimized for creating conversational AI experiences, embedded AI prompts, and a combination of predictive and generative models grounded in your business data. It also means bringing AI into developer and admin experiences in a way that feels familiar, meeting teams where they already are so they can drive productivity from the start.



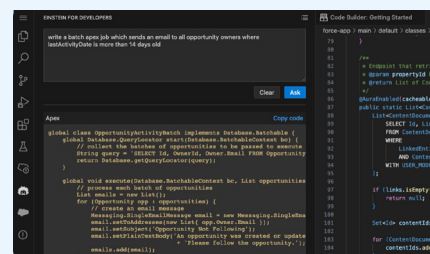
### Activate prompts in the workflows

Build custom prompts enriched with your data with Prompt Builder.



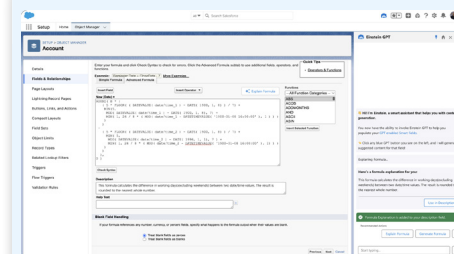
### Build or bring your own AI models

Deliver relevant AI with your ML, LLMs, or no-code models with Model Builder.



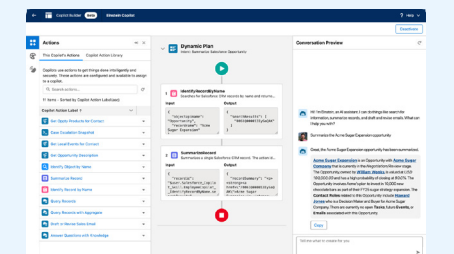
### Unleash developer productivity with generative AI

Empower developers to build faster – without compromising trust – with Einstein for Developers.



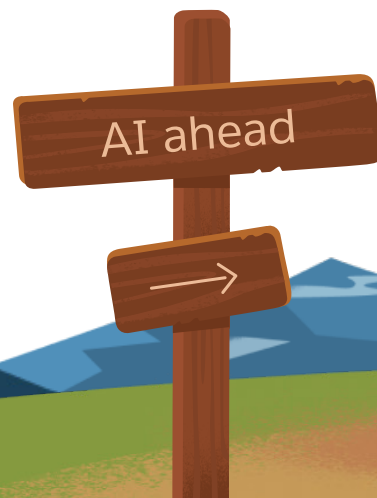
### Boost admin productivity with generative AI

Access unparalleled admin productivity with trusted AI through Einstein for Admins.



### Extend your copilot with custom actions

Use familiar platform features to customize your copilot with Copilot Builder.



## Accelerate AI builds with Einstein Copilot and Agent Builder

Repurpose platform customizations into new, conversational AI actions

With new advancements in conversational AI, speed to market is critical. AI apps in Salesforce are designed for composability, meaning that they can be rapidly assembled from existing work.

For Einstein Copilot, you can easily repurpose existing Apex code, Flows, MuleSoft APIs, and Prompt Templates into Copilot Actions, making them conversationally invocable from Einstein Copilot. In this way, Salesforce

helps drive more value from the work you've already done, rather than introducing new frameworks for AI development.

Whether you're building with out-of-the-box or custom actions, Salesforce allows you to use your own trusted data and metadata to ensure accurate, reliable results that are unique to your organization.

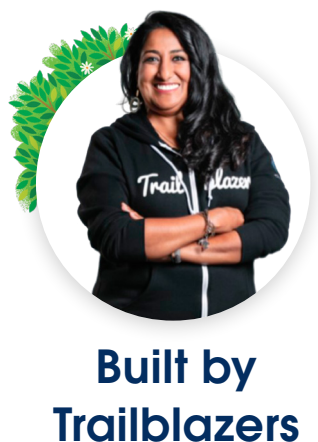


### Standard Actions (Out of the box)

Cloud Actions



Platform Actions



### Custom Actions



Apex



Flow



MuleSoft APIs



External Services



Prompt Builder



**Your  
trusted  
data and  
metadata**





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Explore the possibilities  
with **27 AI apps** you  
can deliver today

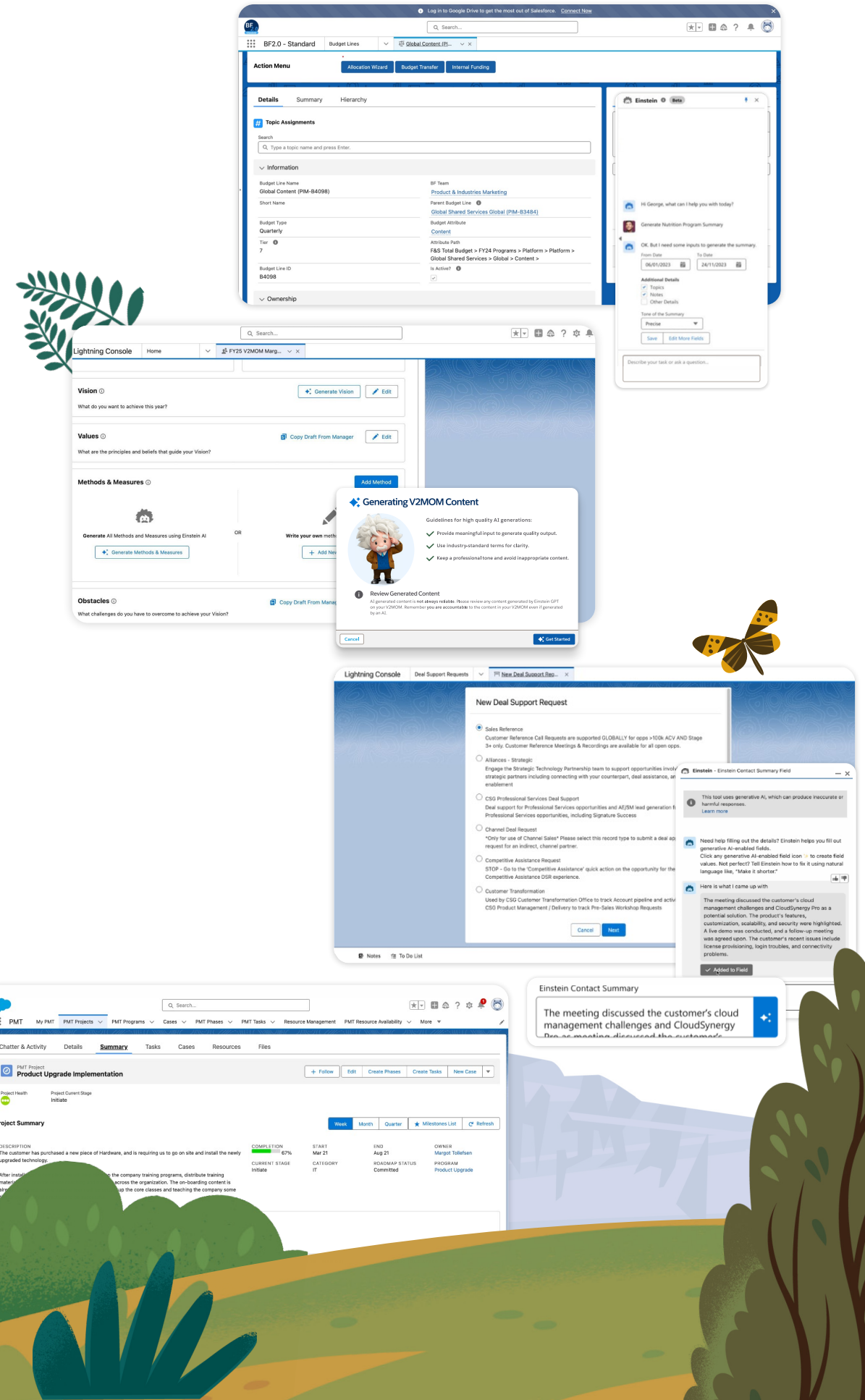




# Explore the possibilities with 27 AI apps you can deliver today

Discover internal and external AI app development use cases that improve employee and customer experiences.

It's time to put on your trailblazing boots and take a tour of your organization – a potential future version of your organization, that is. We'll stop at different departments to see how each team could use different custom AI apps to speed up their workflows, increase their access to information, and carve out more time for high-priority work.



## First stop: Legal



**Responsibilities:** Ensuring compliance with laws and regulations, managing contracts, and mitigating legal risks.

**Needs:** Legal teams want to **reduce manual workloads** so they can focus on strategic tasks that require a human perspective.

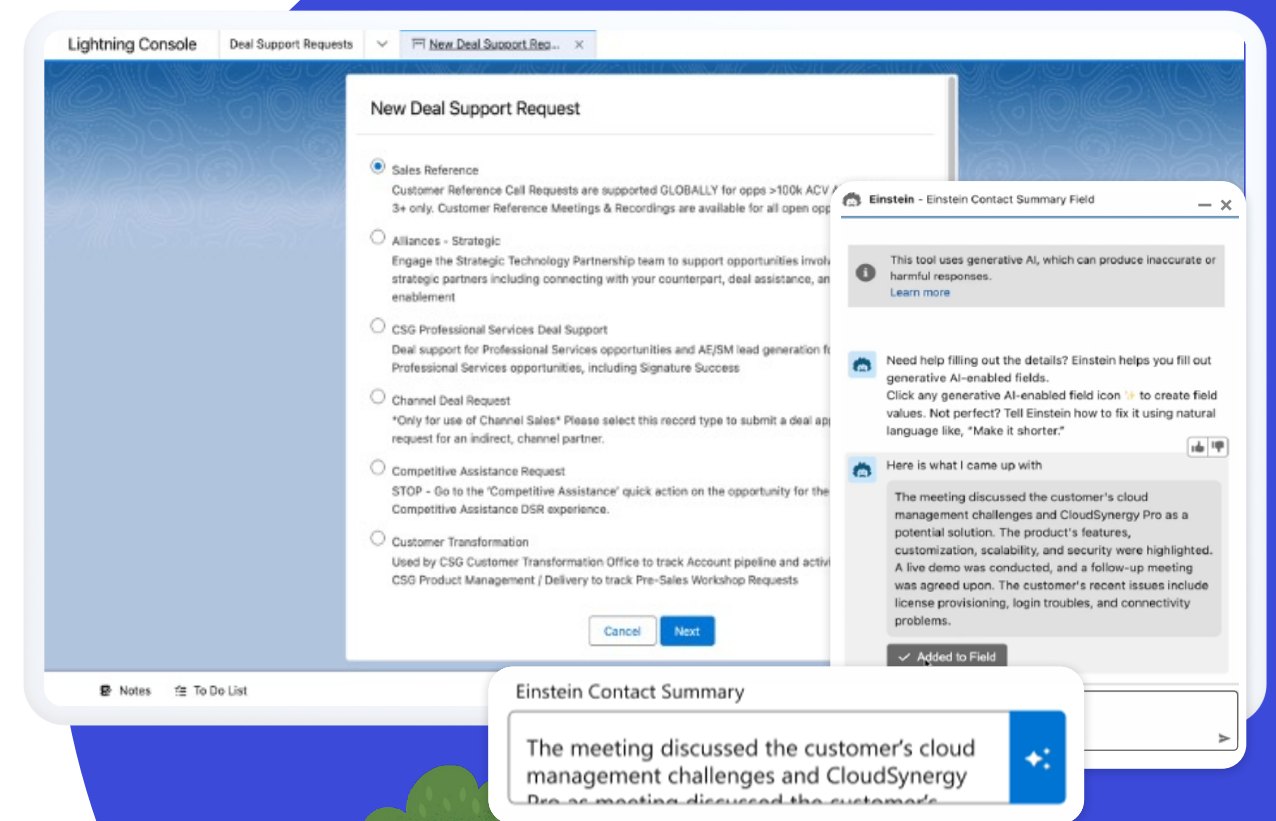
## AI app for Legal: Deal support request management app

**Challenge:** Lack of centralized request management and cross-functional visibility.

**What to do:** Build an AI app that facilitates and streamlines the submission, tracking, and management of requests to help support deals or transactions within the organization. Following submission, legal teams can jump in faster to redline conversations and summarize notes.

### What you need to build this app:

- Platform User Licenses
- Einstein 1 Studio (Prompt Builder)
- Einstein Copilot





# More AI app use cases for Legal



How custom AI apps can help lessen your legal team’s manual workloads:

Use case	Capabilities	Benefits
Contract redline and analysis	<ul style="list-style-type: none"><li>• Read and understand the terms and conditions of contracts.</li><li>• Highlight changes between different versions of contracts, identify potential issues, and suggest modifications based on predefined rules or past contracts.</li></ul>	<ul style="list-style-type: none"><li>• Save time and reduce the risk of human error.</li></ul>
Legal document generation	<ul style="list-style-type: none"><li>• Automatically generate legal documents such as contracts, agreements, and letters.</li><li>• Ensure that the generated documents are compliant with relevant laws and regulations.</li></ul>	<ul style="list-style-type: none"><li>• Streamline the document creation process and ensure consistency across all documents.</li></ul>
Legal reviews and approval	<ul style="list-style-type: none"><li>• Quickly review legal documents and identify potential issues or risks.</li><li>• Suggest approval or rejection based on the identified issues and the organization’s risk tolerance.</li></ul>	<ul style="list-style-type: none"><li>• Speed up the review process and help the legal team focus on more complex tasks.</li></ul>
Case research assistant	<ul style="list-style-type: none"><li>• Rapidly search through large volumes of legal documents, case laws, and legal databases to find relevant information for a particular case.</li><li>• Summarize information, highlight the key points, and ensure no important information is missed.</li></ul>	<ul style="list-style-type: none"><li>• Save a significant amount of time typically spent on research.</li></ul>



## Next stop: Human Resources



**Responsibilities:** Recruiting, training, managing employee relations, and ensuring compliance with labor laws and company policies.

**Needs:** HR teams want to **streamline operations** to check off long to-do lists while improving employee experiences.

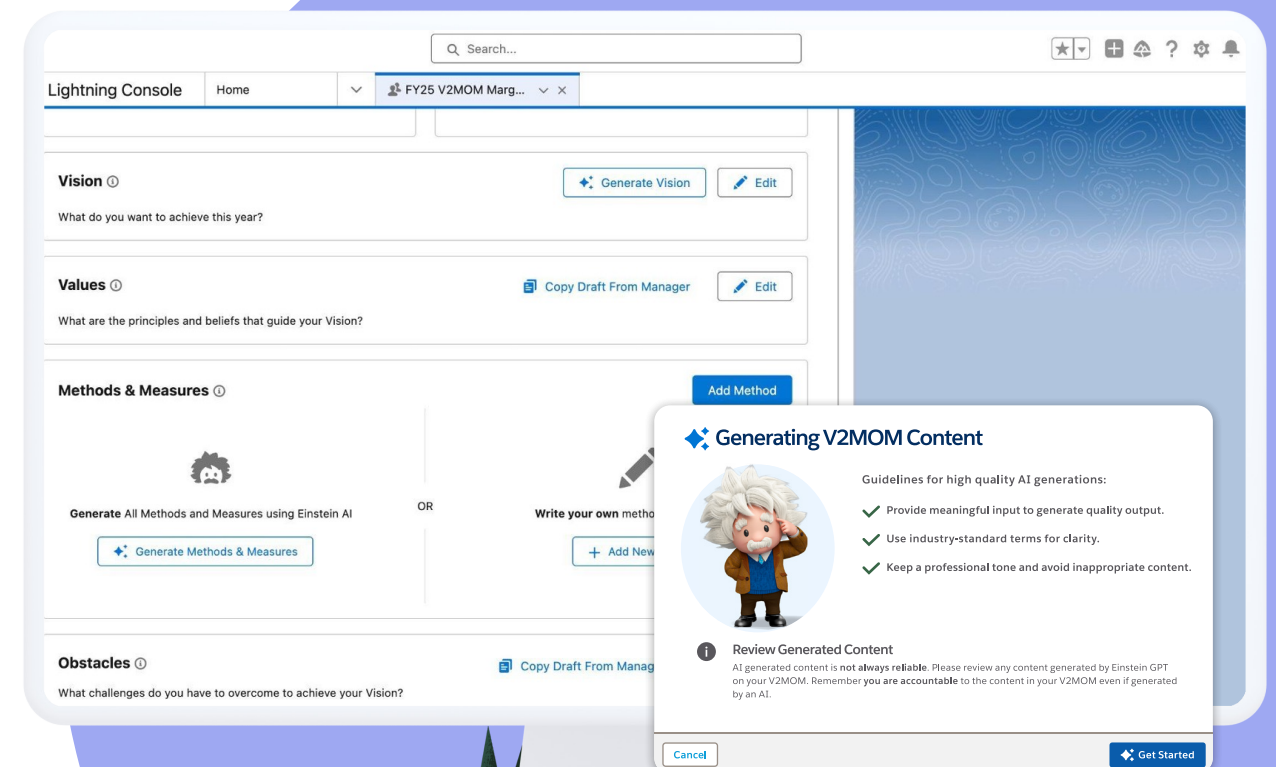
## AI app for HR: Goal setting and performing tracking

**Challenge:** Too much time is spent on crafting the Vision, Values, Methods, Obstacles, and Measures (**V2MOM**) framework and tracking progress to goal completion.

**What to do:** Build a V2MOM management app that simplifies employee goal setting and performance assessment.

### What you need to build this app:

- Platform User Licenses
- Einstein 1 Studio (Prompt Builder)
- Einstein Copilot







# More AI app use cases for HR



How custom AI apps can help HR teams streamline people operations:

Use case	Capabilities	Benefits
Recruiting and application tracking	<ul style="list-style-type: none"><li>• Quickly screen resumes and rank candidates based on their fit for the job.</li><li>• Track the status of each application and automatically update candidates on their application status.</li></ul>	<ul style="list-style-type: none"><li>• Reduce the manual workload for HR teams so they have more time to address high-priority needs.</li></ul>
Employee onboarding document generation	<ul style="list-style-type: none"><li>• Automatically generate necessary onboarding documents such as employment contracts, policy acknowledgments, and benefits enrollment forms.</li></ul>	<ul style="list-style-type: none"><li>• Streamline the onboarding process and ensure consistency across all documents.</li></ul>
Job candidate referral notification	<ul style="list-style-type: none"><li>• Automatically send notifications to employees when a candidate they referred applies for a job or progresses in the hiring process.</li></ul>	<ul style="list-style-type: none"><li>• Keep employees more engaged in the referral process while reducing the manual workload for HR teams.</li></ul>
Employee benefits management	<ul style="list-style-type: none"><li>• Provide employees with a user-friendly interface to view and manage their benefits.</li><li>• Generate recommendations for benefits based on employee preferences and life events.</li></ul>	<ul style="list-style-type: none"><li>• Streamline benefits management and make it easier for employees to understand and use their benefits.</li></ul>



## Next stop: Finance



**Responsibilities:** Managing financial resources, budgeting, financial reporting, and ensuring compliance with financial regulations.

**Needs:** Finance teams want to **grow and protect revenue** to expand their organization's market share and mitigate financial risks.

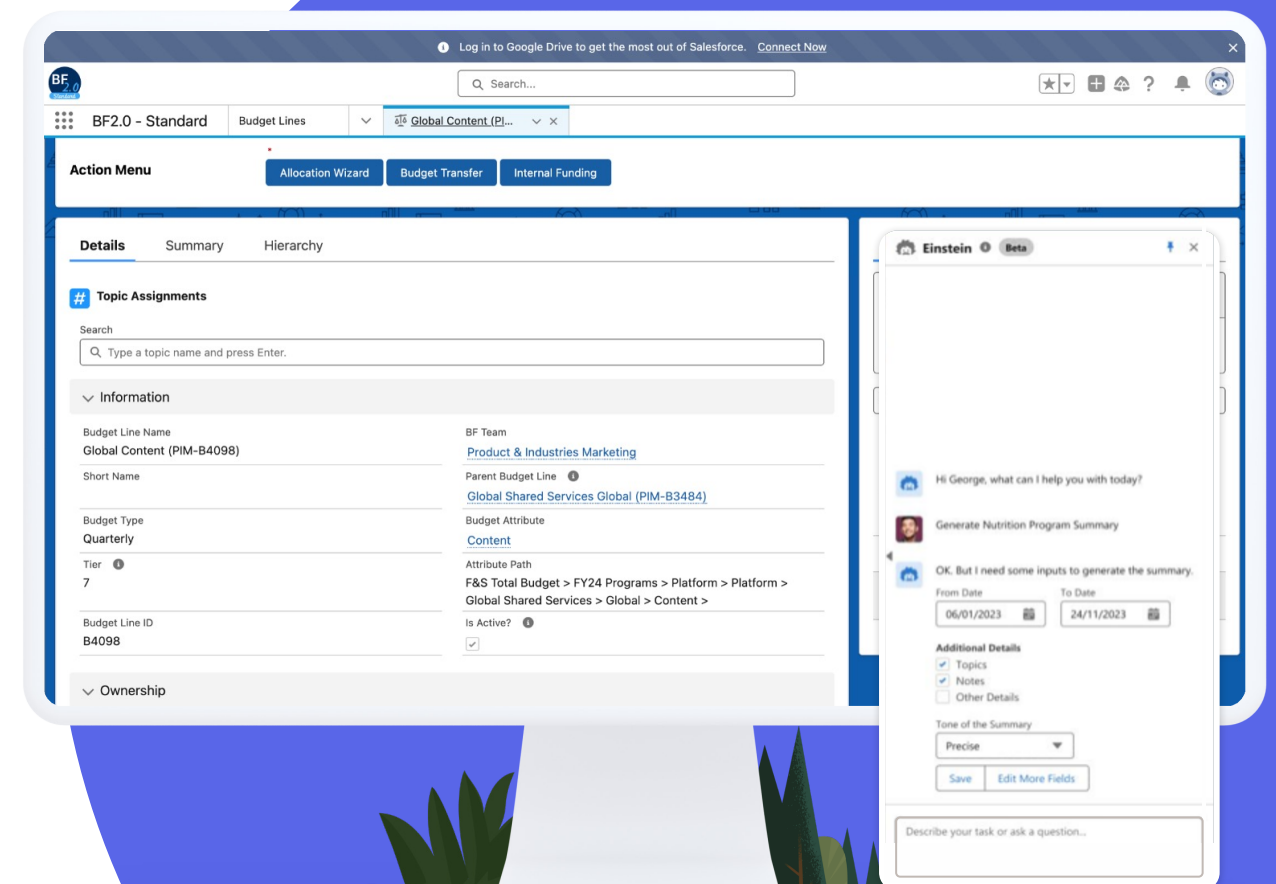
## AI app for Finance: Manage budget requests

**Challenge:** Fragmented data stored in spreadsheets and emails is causing siloed and inefficient budget management.

**What to do:** Build an AI budget management app that will offer greater visibility with intelligent updates and approvals.

### What you need to build this app:

- Platform User Licenses
- Einstein 1 Studio (Prompt Builder)
- Einstein Copilot



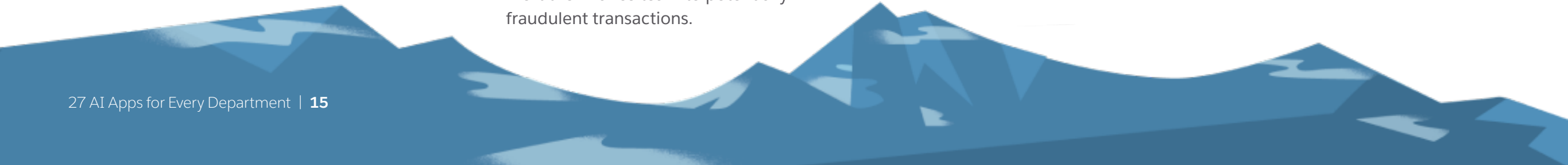


# More AI app use cases for Finance



How custom AI apps can help finance teams grow and protect revenue:

Use case	Capabilities	Benefits
Collections email generation	<ul style="list-style-type: none"><li>Automatically identify which customers are late on their payments.</li><li>Generate and send personalized email reminders to these customers.</li></ul>	<ul style="list-style-type: none"><li>Reduce the finance team’s manual workload and improve the collections process’s efficiency.</li></ul>
Budget analysis and management	<ul style="list-style-type: none"><li>Analyze past spending patterns and provide insights into areas where costs could be reduced.</li><li>Helped create and manage budgets, track spending against these budgets, and alert the finance team when spending is likely to exceed the budget.</li></ul>	<ul style="list-style-type: none"><li>Identify cost-saving opportunities and take more control of spending.</li></ul>
Automatic forecasts creation	<ul style="list-style-type: none"><li>Use historical financial data to predict future revenue, expenses, and cash flow.</li><li>Aid the finance team in planning and decision-making.</li></ul>	<ul style="list-style-type: none"><li>Optimize resource allocation and enhance financial strategies.</li></ul>
Fraud detection and protection	<ul style="list-style-type: none"><li>Analyze financial transactions and identify patterns that could indicate fraudulent activity.</li><li>Alert the finance team to potentially fraudulent transactions.</li></ul>	<ul style="list-style-type: none"><li>Enable a faster response to fraudulent activity and prevent revenue loss.</li></ul>



## Next stop: IT



**Responsibilities:** Managing IT infrastructure, cybersecurity, software development, and technical support for business operations.

**Needs:** IT teams want to **develop apps quickly and confidently** so they can deliver on project deadlines without facing constant delays or bottlenecks.

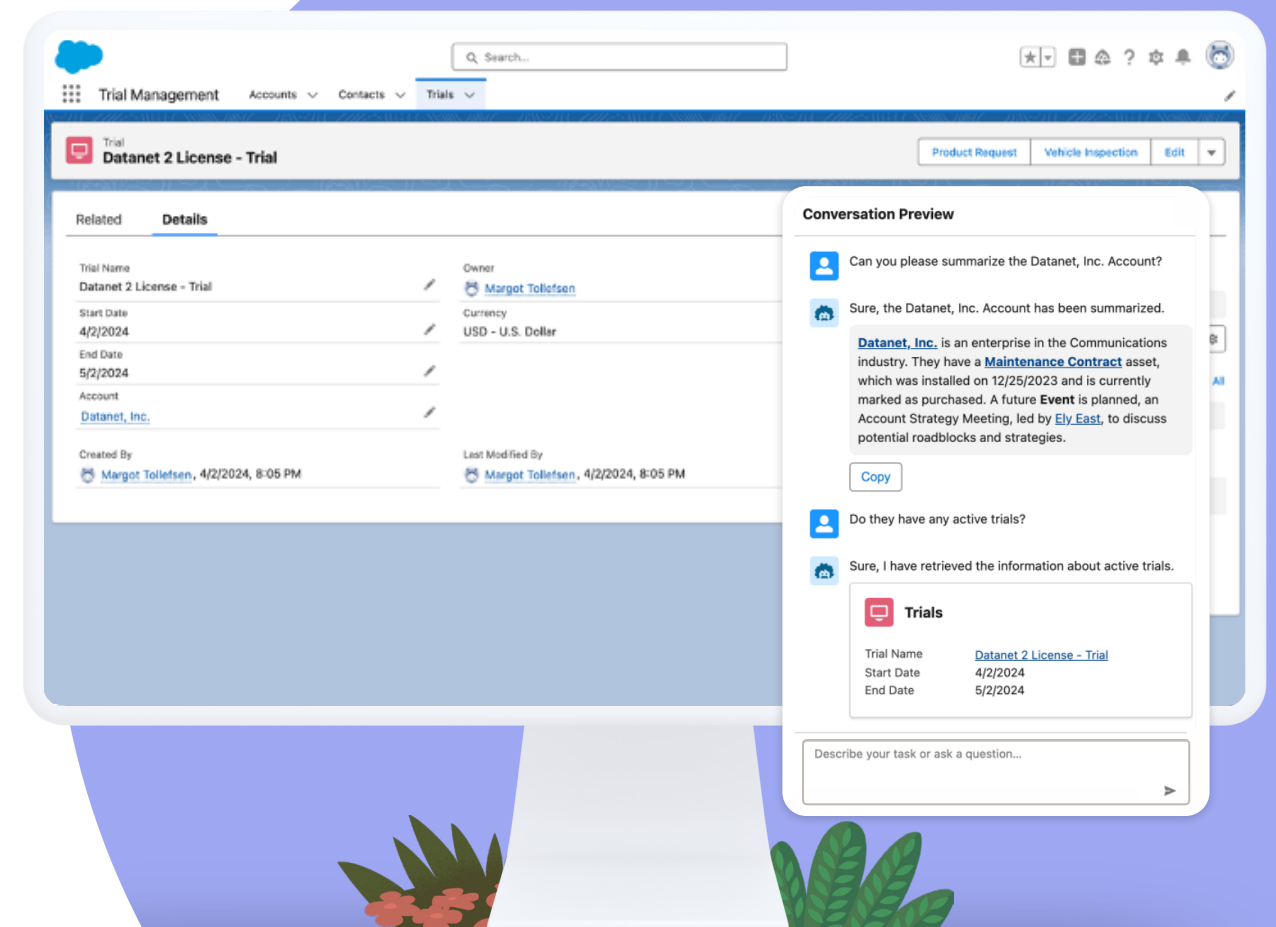
## AI app for IT: Trial management app

**Challenge:** Sales Ops teams are struggling with siloed channels, leading to poor product trial experiences for customers.

**What to do:** Build an AI app that helps manage the process of tracking trials and provisioning access to a SaaS platform, as well as monitoring trial usage and supporting trial users throughout their evaluation period.

### What you need to build this app:

- Platform User Licenses
- Einstein 1 Studio (Prompt Builder)
- Einstein Copilot





## Next stop: IT



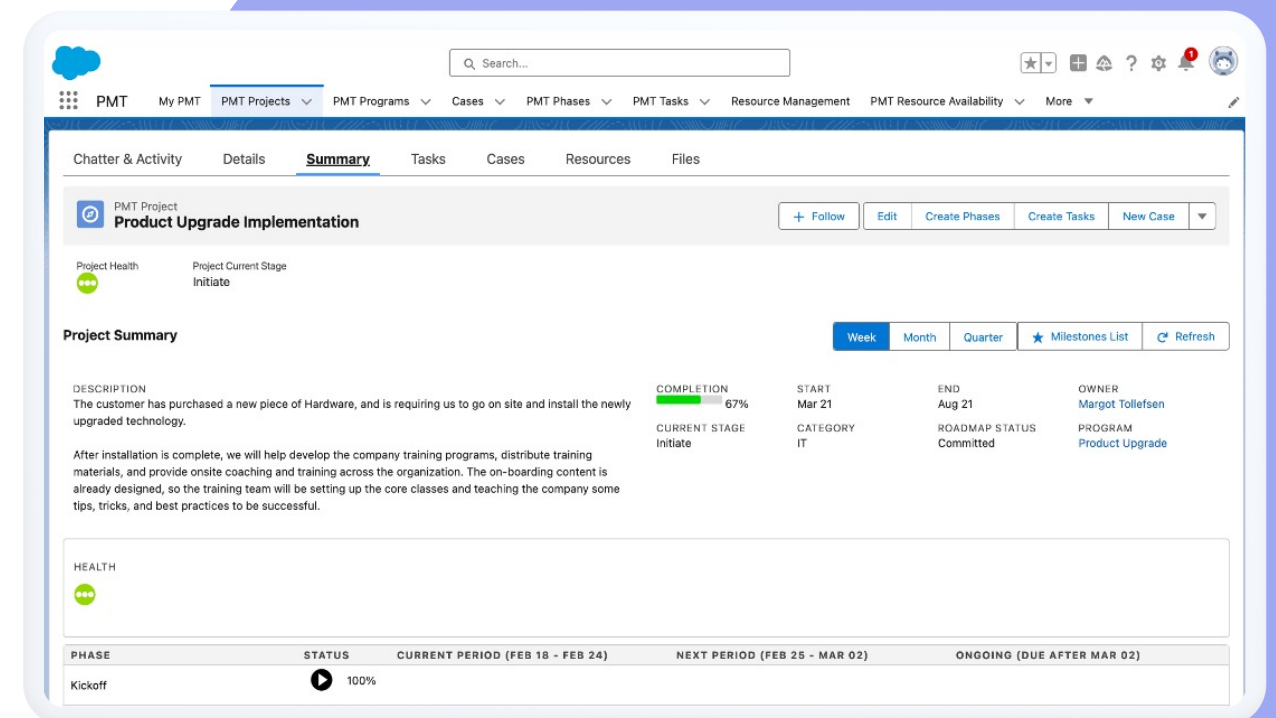
### AI app for IT: Project management app

**Challenge:** IT project management teams struggle with redundant and manual tracking tools on top of siloed data and lack collaboration across the project delivery lifecycle.

**What to do:** Build an AI project management app that streamlines project planning, enhances collaboration, and simplifies post-sale processes.

#### What you need to build this app:

- Platform User Licenses
- Einstein 1 Studio (Prompt Builder)
- Einstein Copilot



## More AI app use cases for IT



How custom AI apps can help IT free up time so they can build and deploy faster:

Use case	Capabilities	Benefits
Internal IT help desk	<ul style="list-style-type: none"><li>• Quickly understand and categorize incoming support requests.</li><li>• Automatically route requests to the appropriate team or individual or provide automated responses for common issues.</li></ul>	<ul style="list-style-type: none"><li>• Speed up customer response times and free up IT staff to focus on more complex tasks.</li></ul>
Inventory asset management	<ul style="list-style-type: none"><li>• Predict future inventory needs based on historical data and current trends.</li><li>• Track the usage of IT assets and alert the team when it's time to upgrade or replace them.</li></ul>	<ul style="list-style-type: none"><li>• Ensure that IT resources are used efficiently and that the team always has the assets it needs.</li></ul>
User feedback summaries	<ul style="list-style-type: none"><li>• Analyze user feedback and identify common themes or issues.</li><li>• Generate a summary report highlighting key feedback points.</li></ul>	<ul style="list-style-type: none"><li>• Give IT teams a deeper context to understand user needs so they can prioritize improvements.</li></ul>
General and administrative bug tracking and remediation	<ul style="list-style-type: none"><li>• Identify which bugs to fix based on their potential impact and their complexity.</li><li>• Suggest potential fixes based on past bug reports.</li></ul>	<ul style="list-style-type: none"><li>• Help IT teams fix bugs quickly and efficiently.</li></ul>

## Final stop: Anywhere



The wonderful thing about custom AI apps is that you can develop them for any task and with any team. Wherever your organization needs more efficiency and fewer manual processes, there's an opportunity for AI app development.

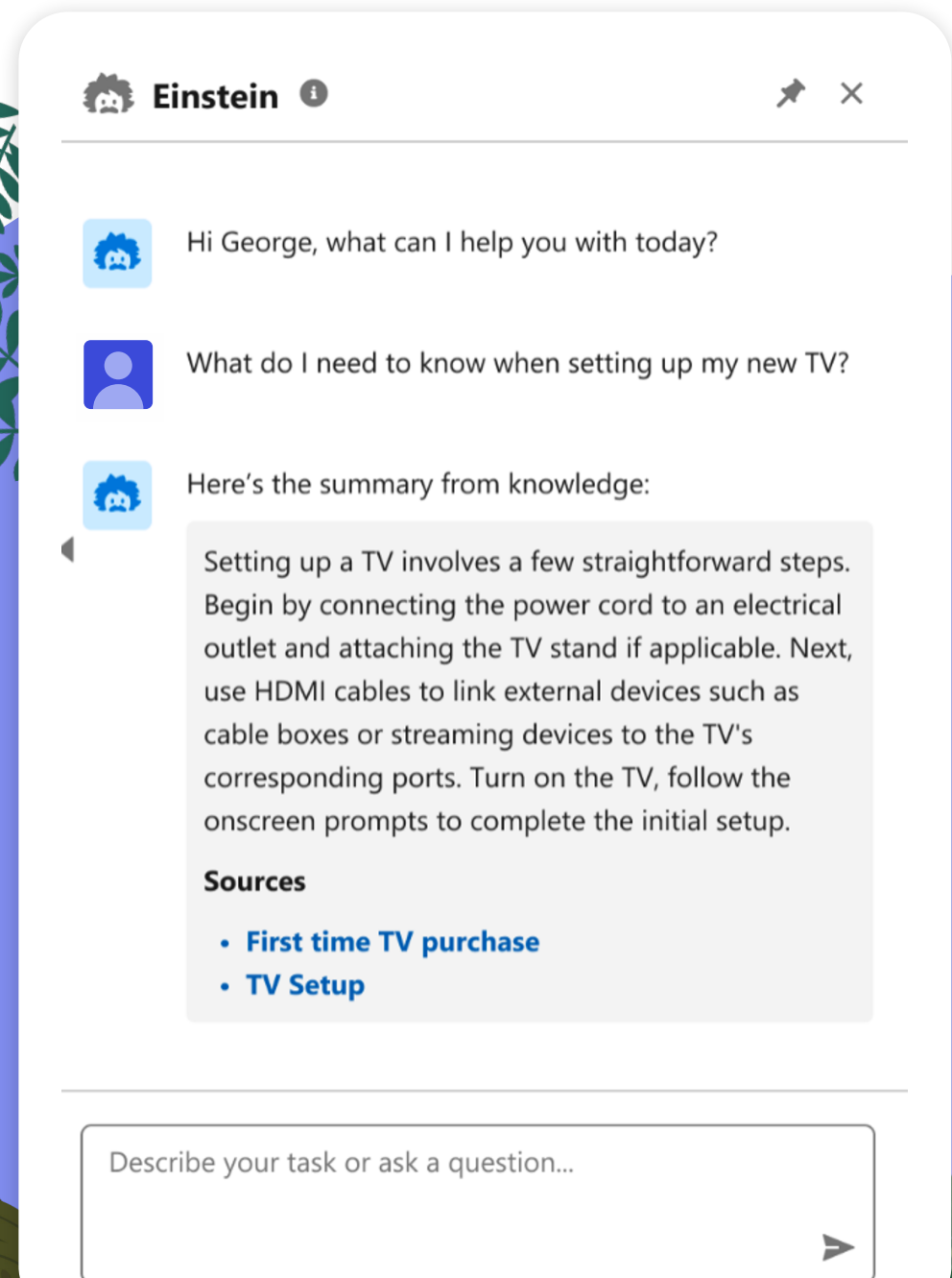
### AI app for service: Answer questions with knowledge

**Challenge:** Service agents need greater company and case-specific data access to better serve customers.

**What to do:** Elevate employee and customer AI app use cases by grounding them in unstructured knowledge, allowing users to search through internal knowledge databases and find company and case-specific information quickly.

#### What you need to build this app:

- Einstein 1 Studio (Prompt Builder)
- Einstein Copilot
- Salesforce Knowledge



## Final stop: Anywhere



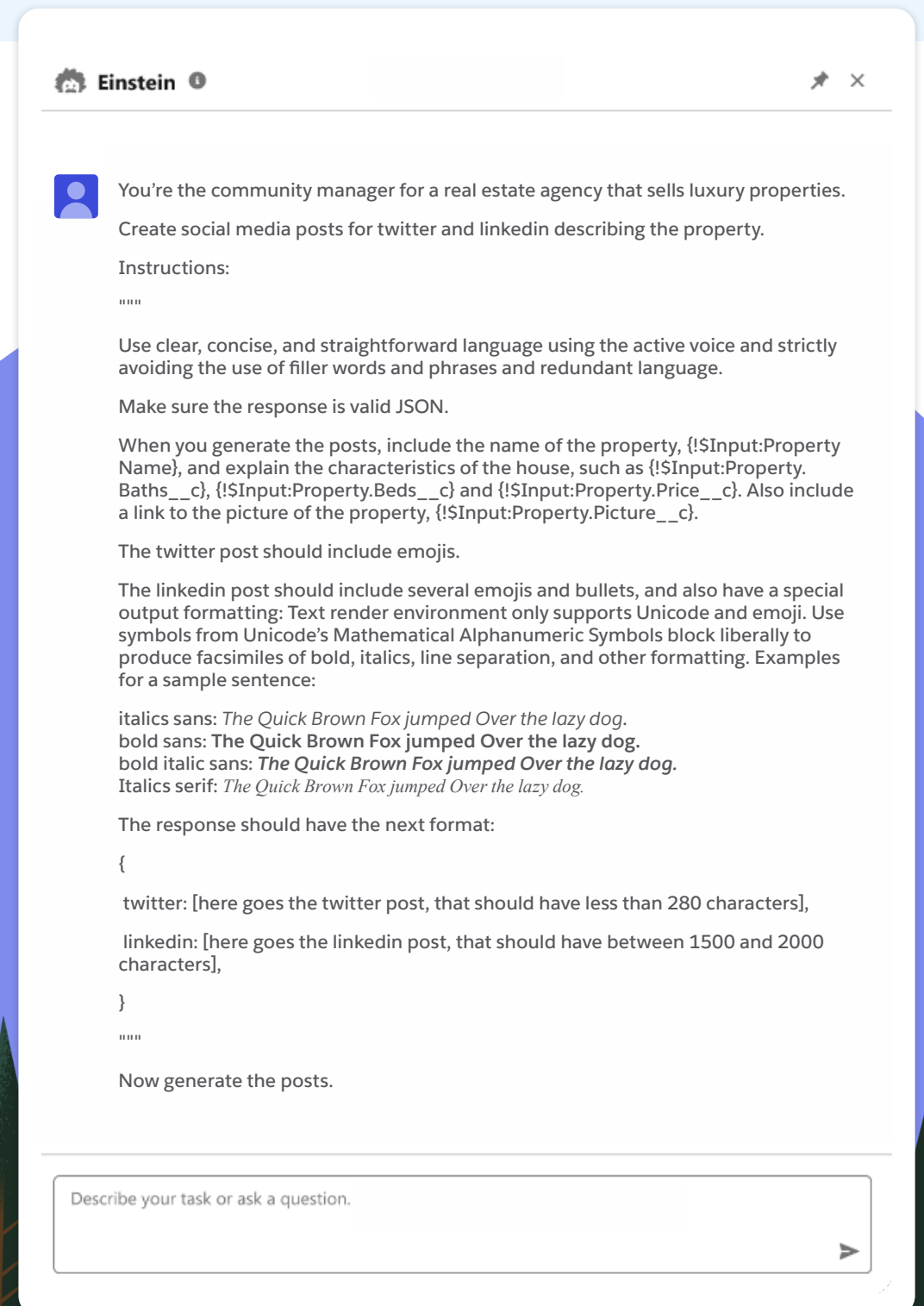
### AI app for social: Generate social media posts

**Challenge:** Repetitive promotional activities drive down team productivity and steal time from other tasks.

**What to do:** Build an AI app that can quickly generate posts for multiple channels while following specific guidelines like character count, formatting, and custom field inputs.

#### What you need to build this app:

- Einstein 1 Studio (Prompt Builder)



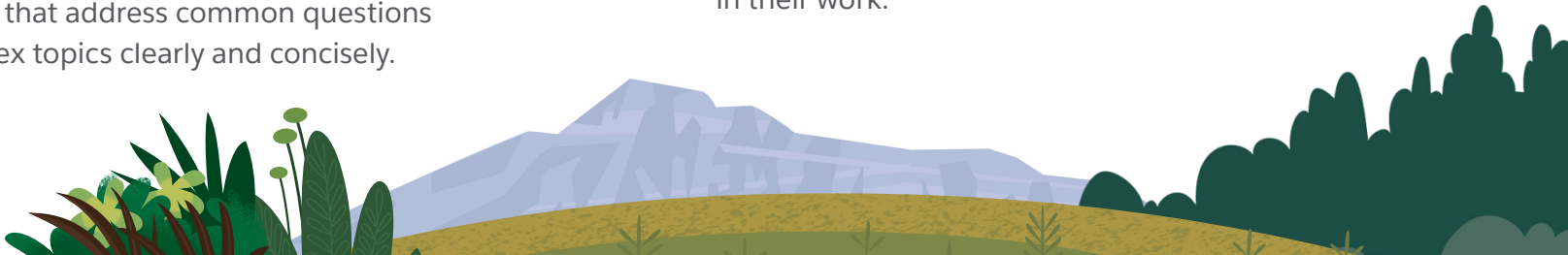


# Final stop: Anywhere



## More AI apps for any department

Use case	Capabilities	Benefits
Email inbox message prioritization	<ul style="list-style-type: none"><li>Understand the content and context of each email in a user’s inbox.</li><li>Prioritize emails based on their urgency, importance, or relevance to what the user is currently working on.</li></ul>	<ul style="list-style-type: none"><li>Save employees from tedious administrative tasks so they can refocus their attention on value-adding activities.</li></ul>
Guest experience management	<ul style="list-style-type: none"><li>Rapidly analyze guest feedback and behavior data to better understand individual tastes and preferences.</li><li>Offer personalized recommendations to improve each guest’s experience.</li></ul>	<ul style="list-style-type: none"><li>Help employees deliver tailored service according to different tastes, building stronger guest relationships.</li></ul>
Conference planning and management	<ul style="list-style-type: none"><li>Automate tasks such as scheduling, attendee management, and venue selection.</li><li>Create schedules that let attendees make the most of their conference experience by analyzing their preferences and availability.</li></ul>	<ul style="list-style-type: none"><li>Automate portions of the planning process to ensure all the moving parts progress at the required pace.</li></ul>
Knowledge articles generation	<ul style="list-style-type: none"><li>Analyze various sources such as customer inquiries, product documentation, and employee feedback.</li><li>Generate articles that address common questions or explain complex topics clearly and concisely.</li></ul>	<ul style="list-style-type: none"><li>Help employees get fast, accurate answers to their questions and avoid hitting information bottlenecks in their work.</li></ul>





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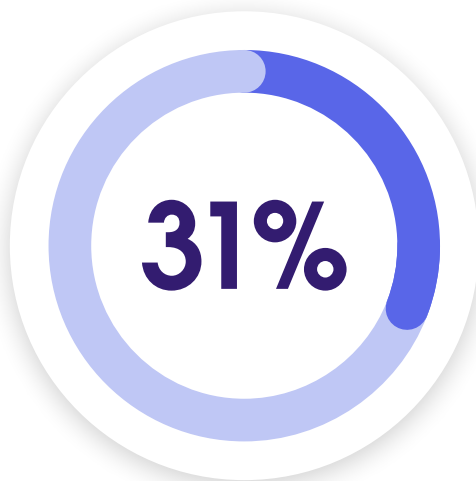
# Build for the future with the Salesforce Einstein 1 Platform



## Build for the future with the Salesforce Einstein 1 Platform

This tour of your future organization only represents a fraction of AI's possibilities for app development. More use cases are surfacing daily, presenting boundless opportunities to solve business problems and build transformative experiences for your employees and customers.

Organizations can leverage Einstein 1 Platform capabilities to customize use cases or extend pre-built functionalities to other business areas. By helping teams connect and optimize their data – and providing the security capabilities and low-code tools to accelerate development – the Einstein 1 Platform gives teams of different sizes and skill levels the ability to develop and deploy AI-powered applications swiftly.



### Move 31% faster

With Einstein 1 Platform, IT managers, admins, and developers can quickly create AI apps and automate processes.

[Salesforce Einstein 1 Platform for Application Development](#)

## Launch your AI app development journey

Today's Trailblazers are in a race to deliver the next best experience with AI – and you've already taken a crucial first step by exploring use cases in this guide. Now, continue your journey by learning how optimized data, trusted security, and low-code tools can accelerate AI app development and keep your organization on track for unstoppable productivity.

Discover how the Einstein 1 Platform helps teams connect, optimize, and secure their CRM data to enable fast AI app development.

