User Manual

Conversation Intelligence by EDMO

salesforce available on AppExchange

EDMO
Supercharge University Admissions

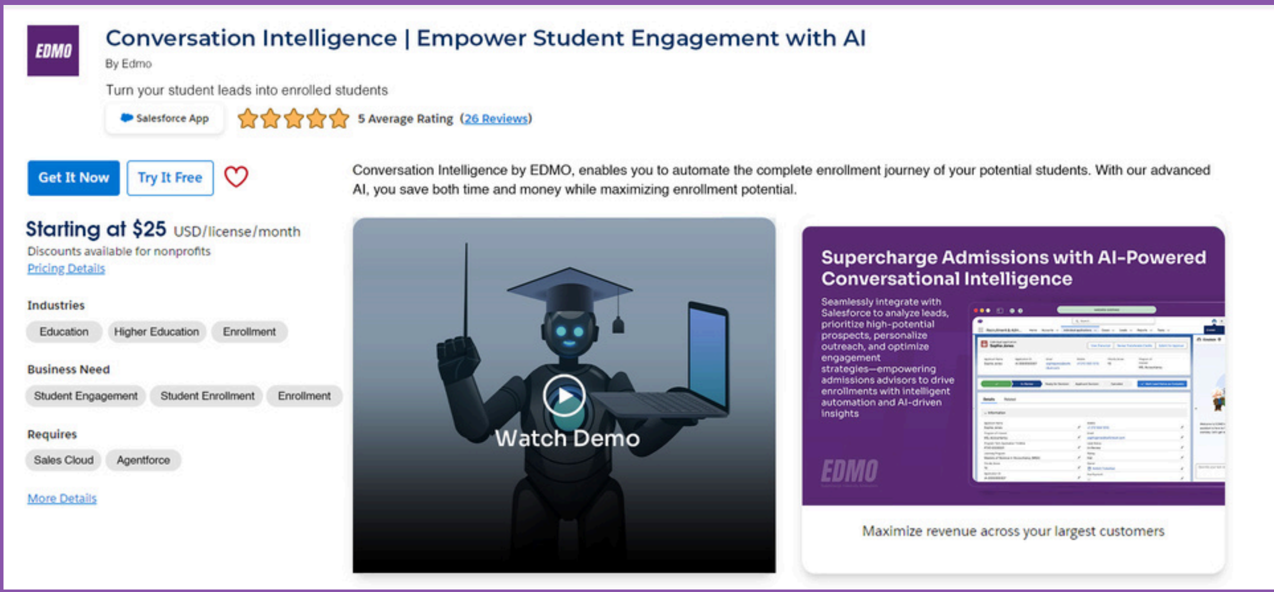
Content

Installation Guide

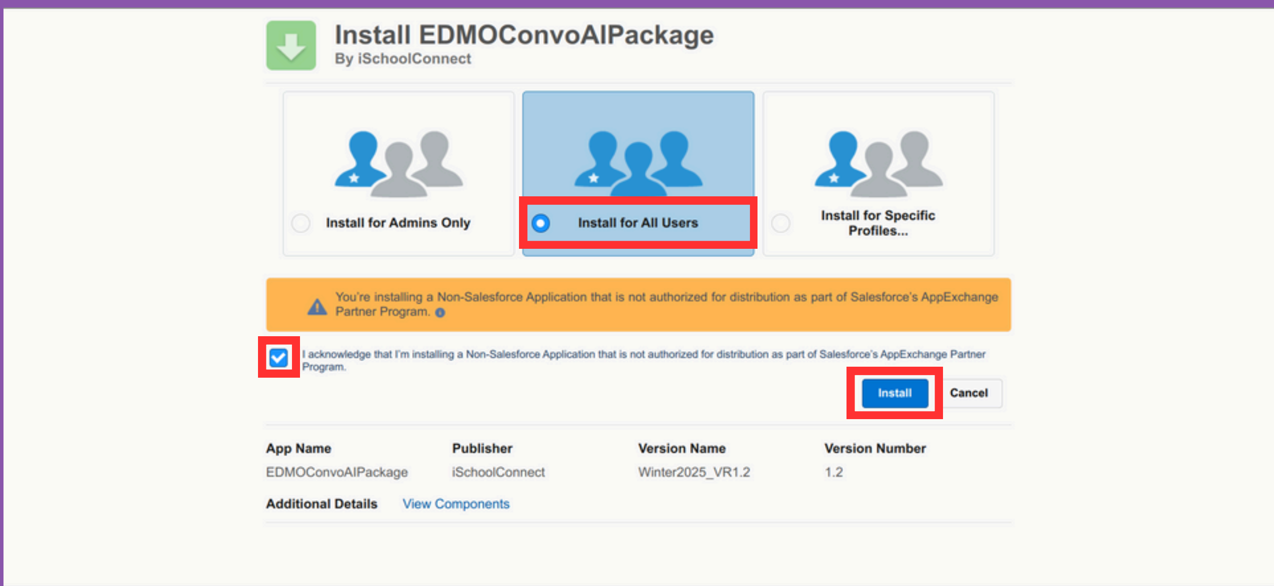
available on AppExchange

Supercharge University Admissions

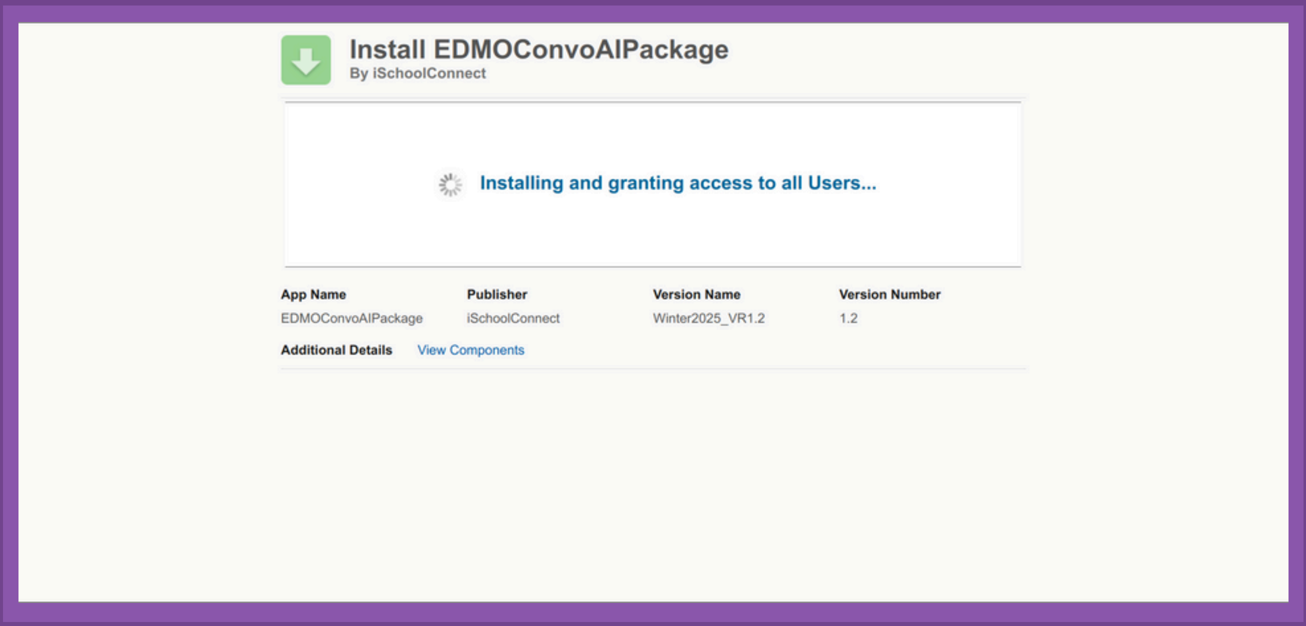
Here are the steps to follow to Setup Conversation Intelligence on your salesforce systems:



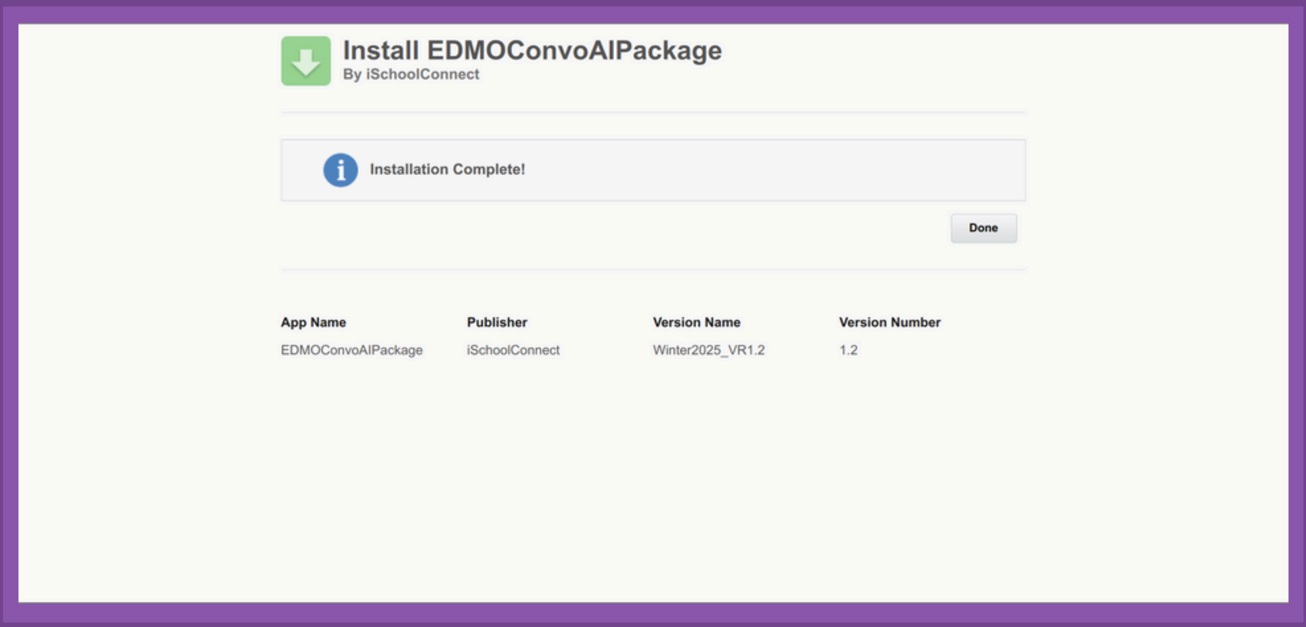
Step 1 - You'll see this screen right at the beginning, before you start downloading the application.



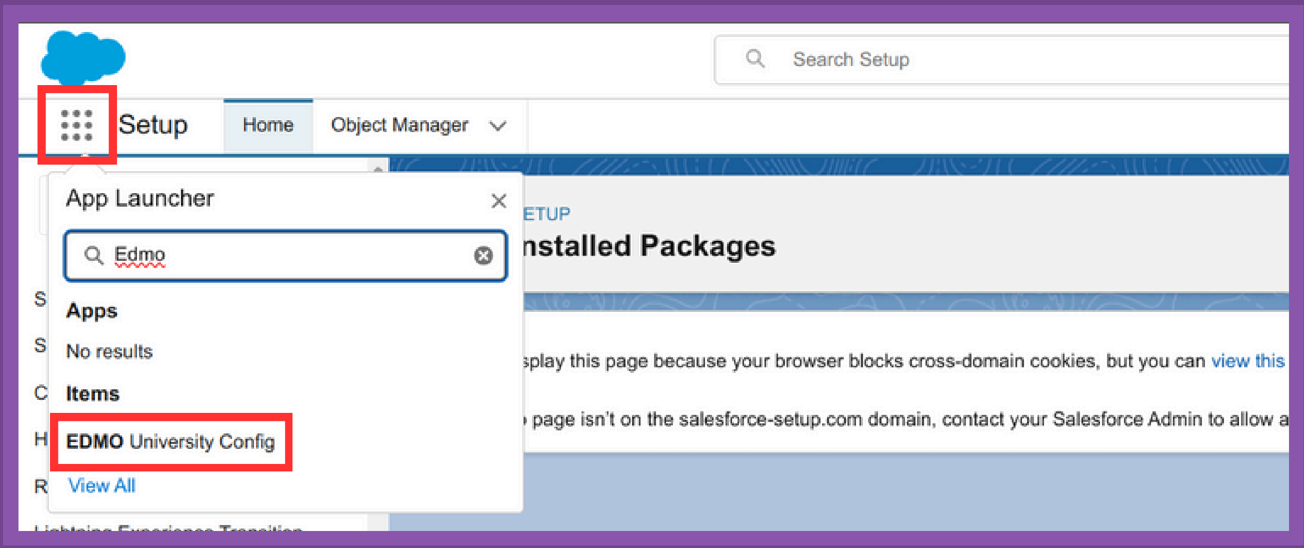
Step 2 - Once “Install” is clicked, the following screen will appear. Wait for the application to install. It will take a few minutes.



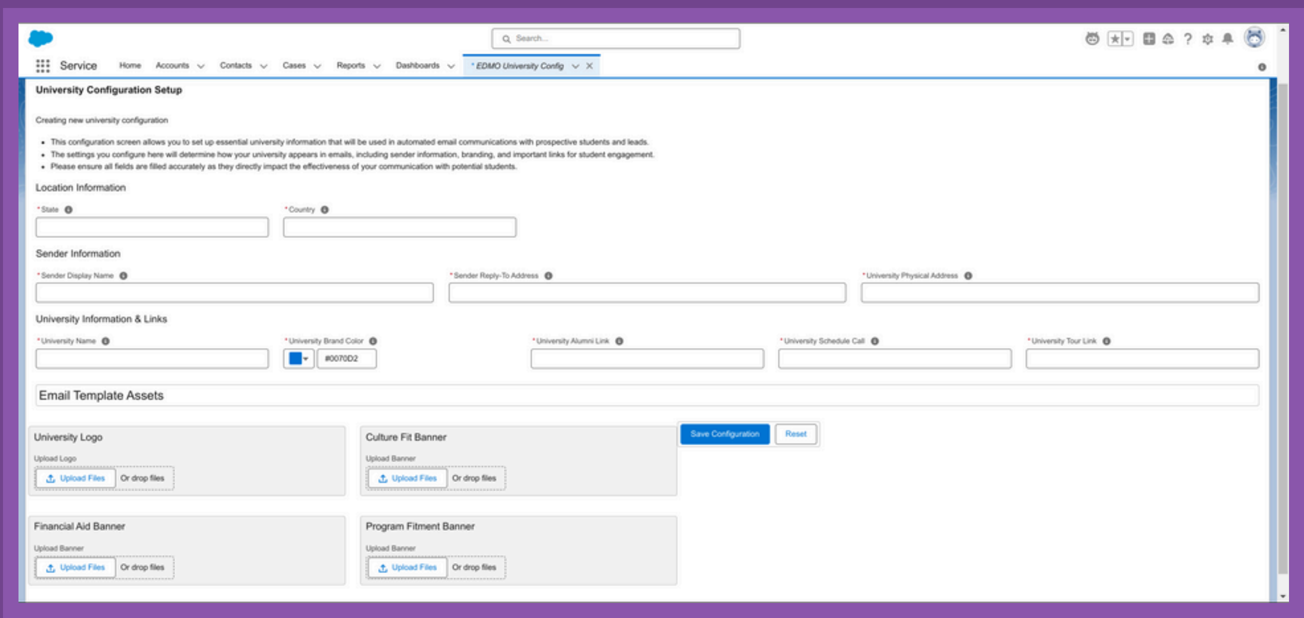
Step 3 - Once the installation is completed, the following screen will appear



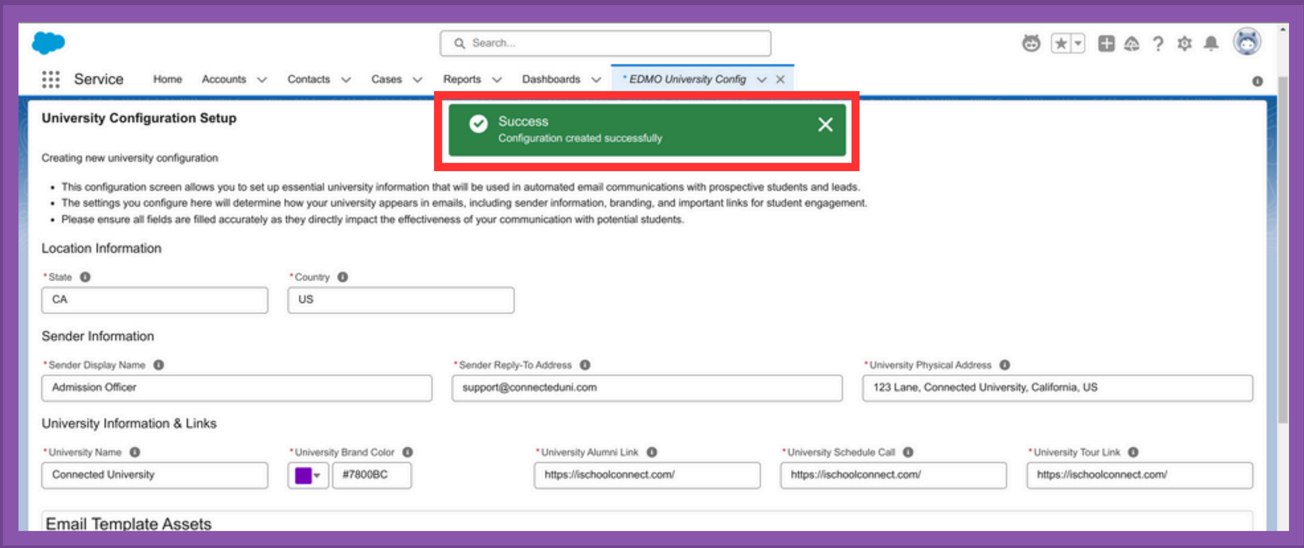
Step 4 - You'll be redirected to your salesforce environment. Once you're done, hover over the 9 dots on the left top corner. Search for "EDMO University Config"



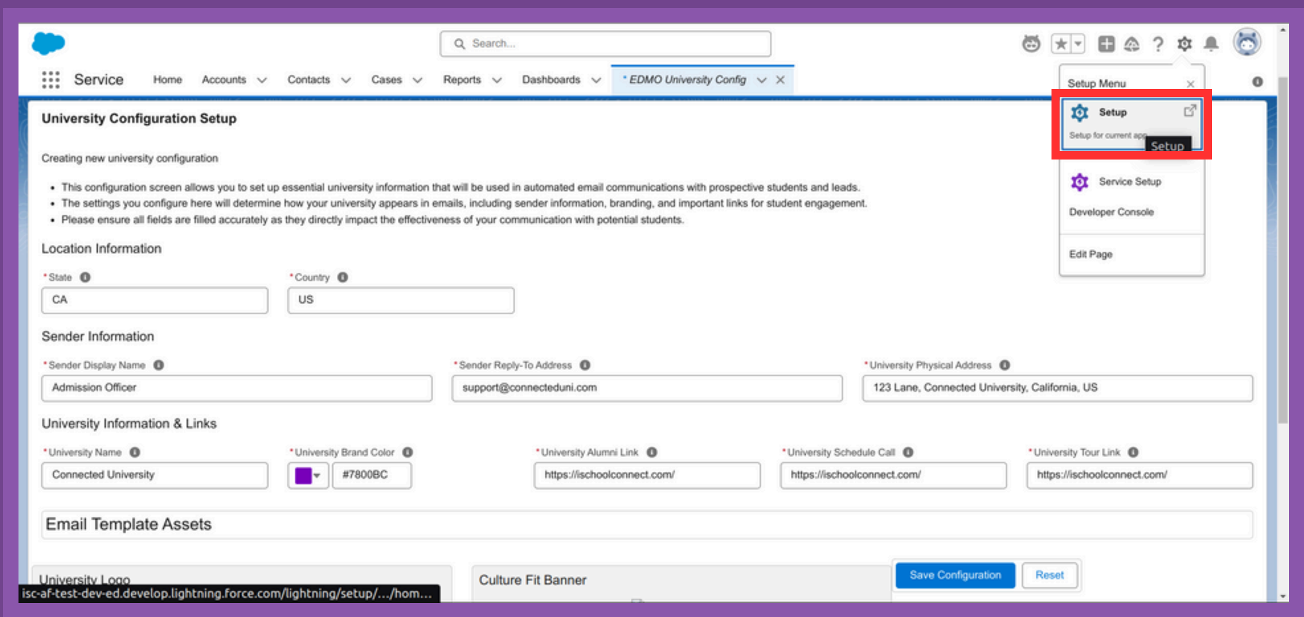
Step 5 - Click on "EDMO University Config". This will take you to the setup screen, wherein a few prerequisites need to be filled (University name, details etc, logo images...), which will look something like this:



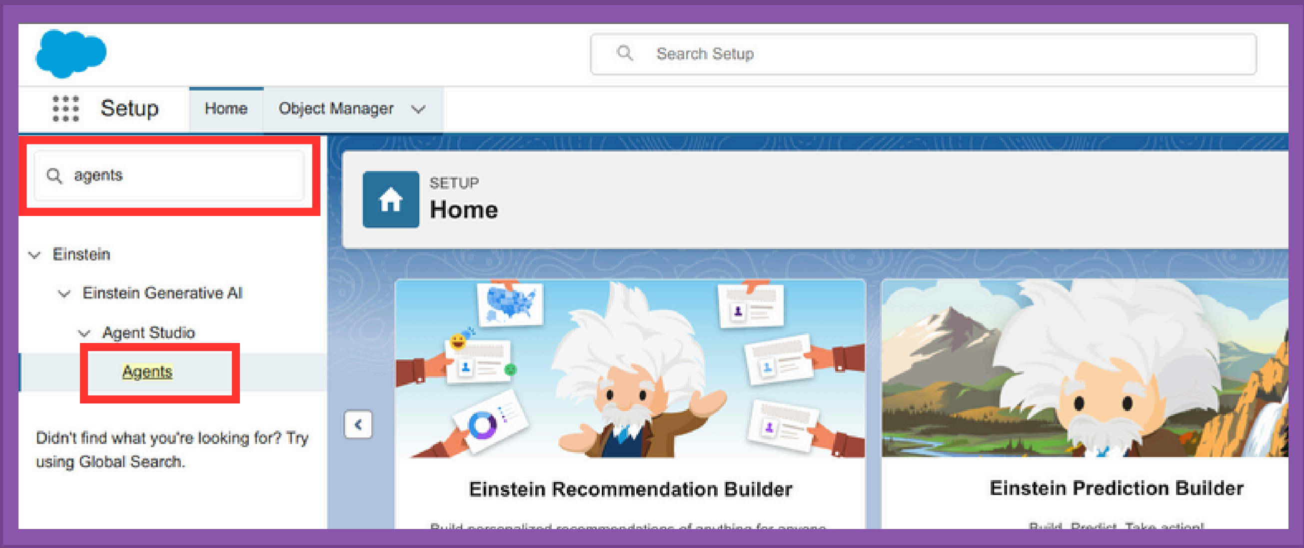
Step 6 - Fill in the required fields, if you hover over the “i” icon, you’ll know what needs to be filled in which input field. Once done, click on “Save Configuration”.



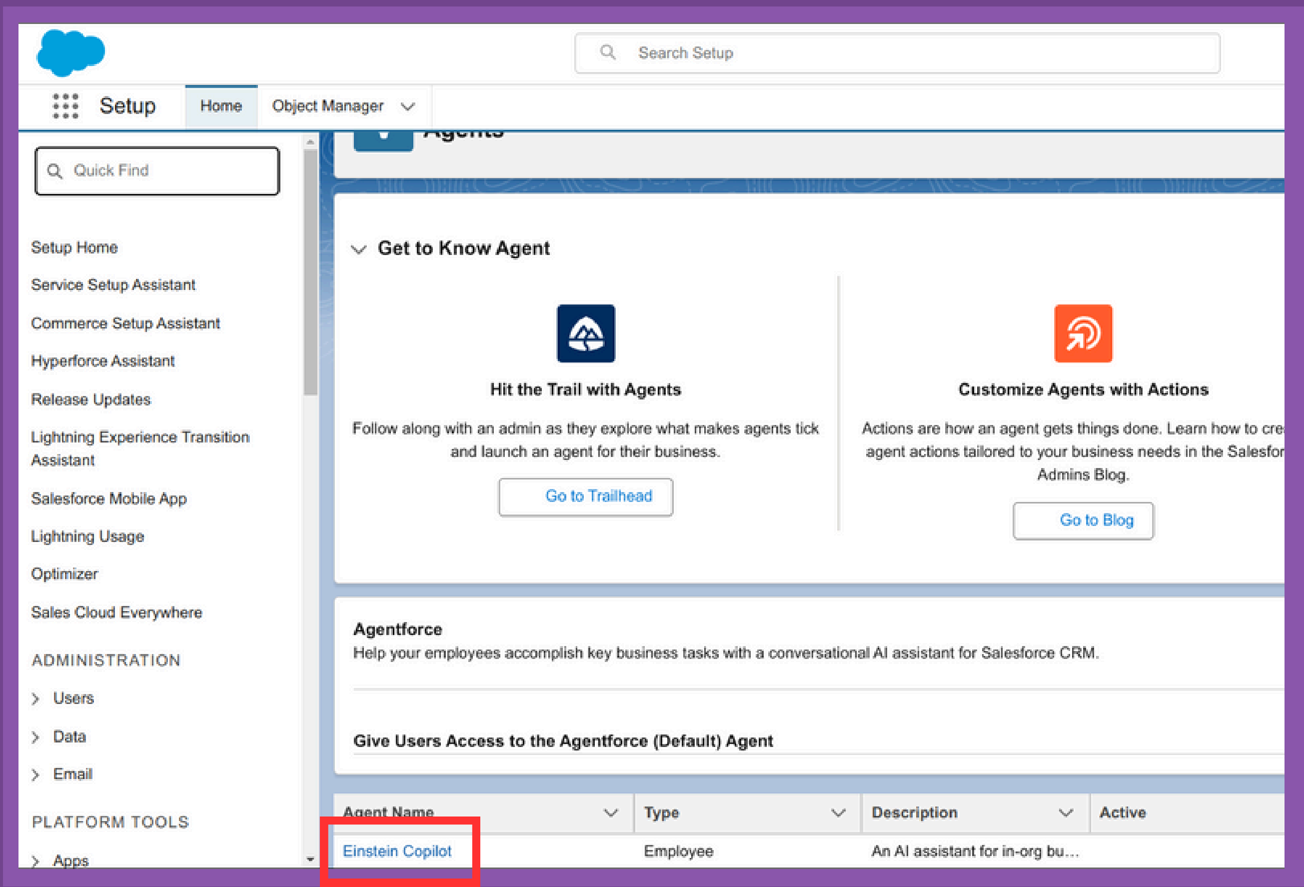
Step 7 - Once saved, you’ll see a Gear icon on the top right corner. Click on that, and select “Setup”. This will take you to the setup screen, where we will update the agent’s instructions & actions.



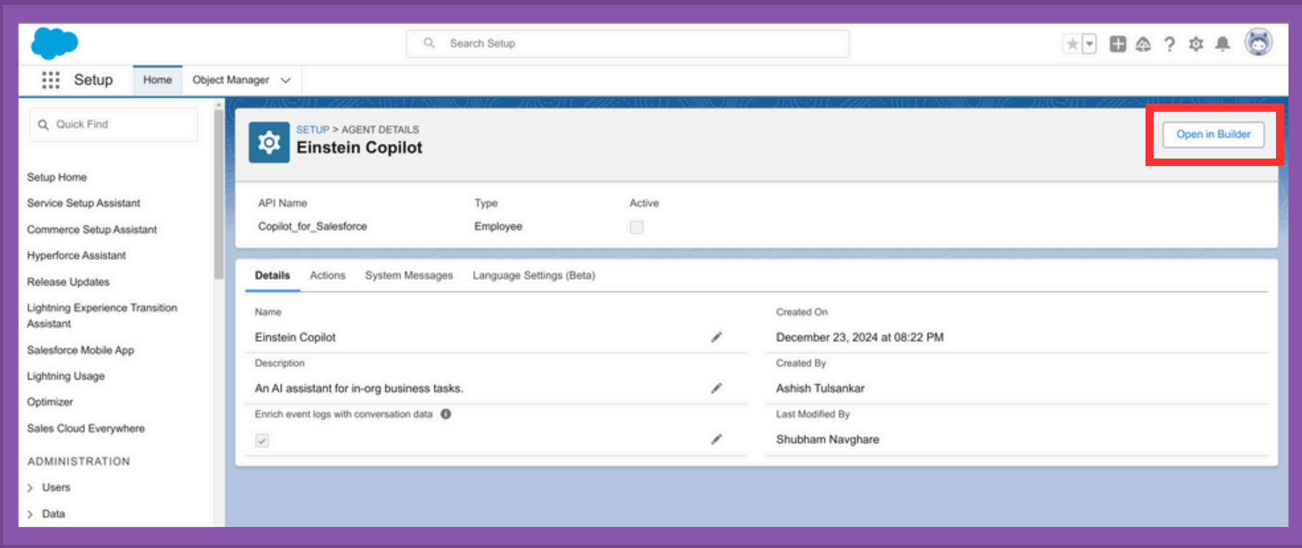
Step 8 - Search for “Agents” in the search box for setup and click on “Agents”.



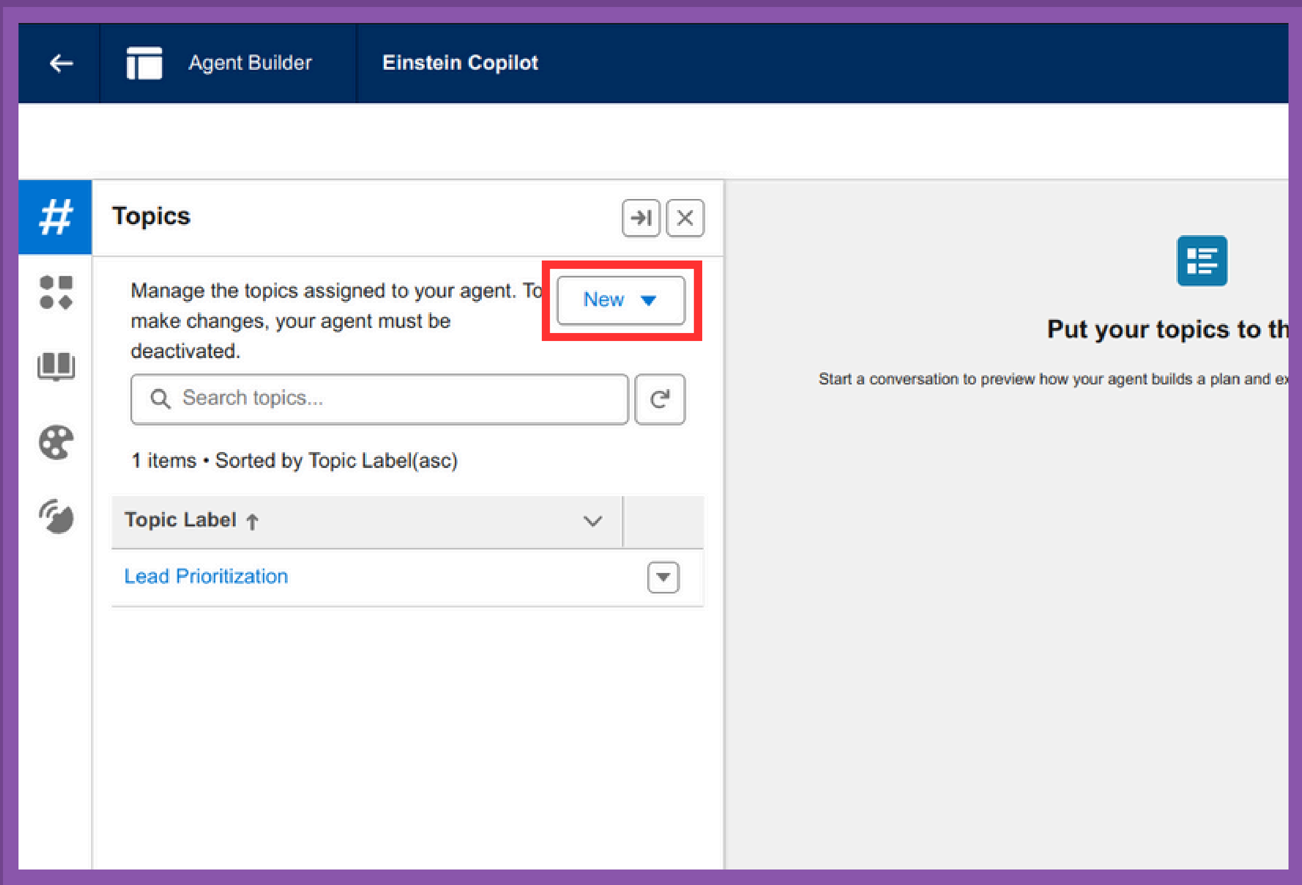
Step 9 - Once you click on “Agents”, you’ll be taken to the agents setup screen. Scroll to the bottom and you'll see “Einstein Copilot”.



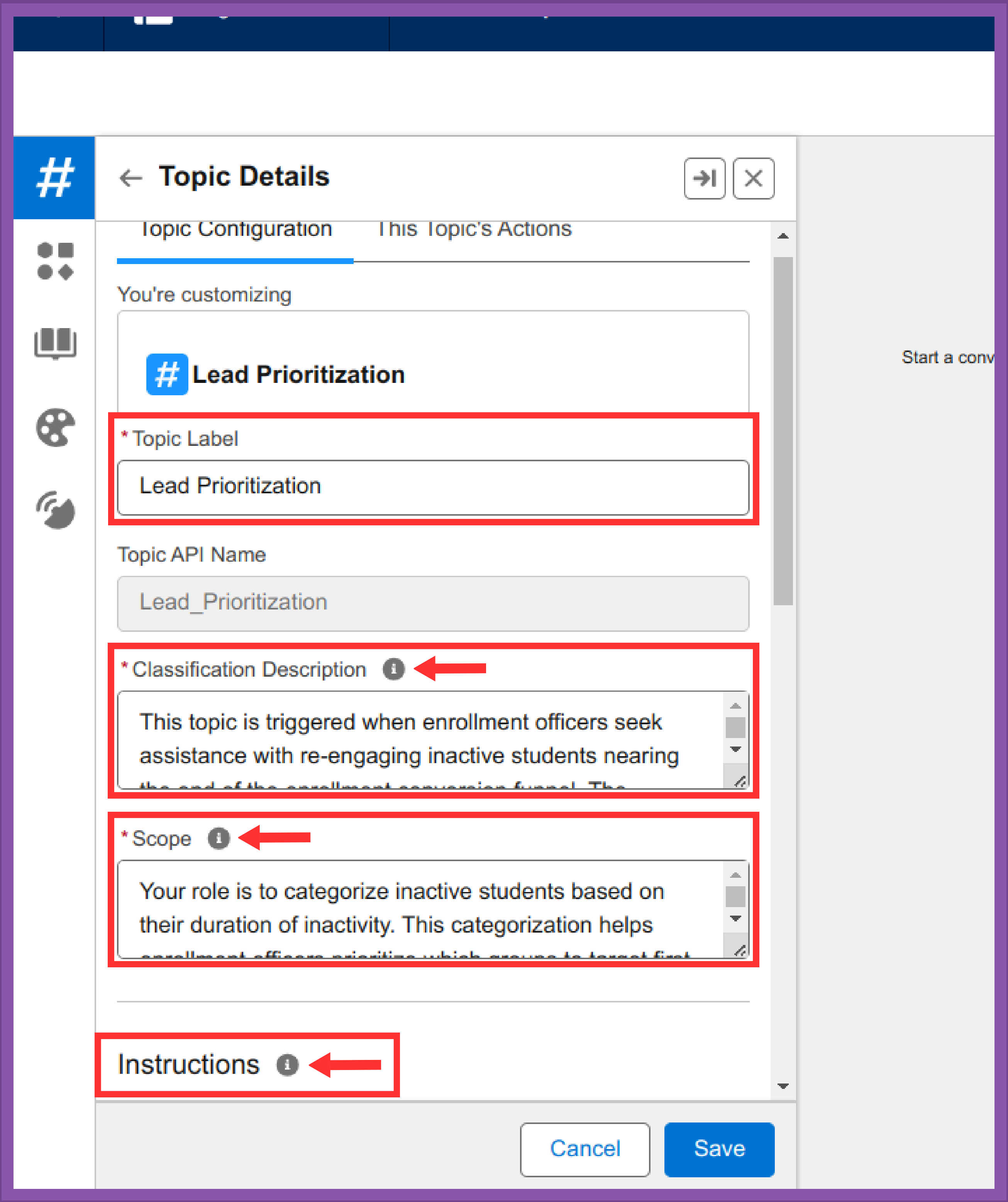
Step 10 - Once you click on this, you'll see this screen. Click on "Open builder"



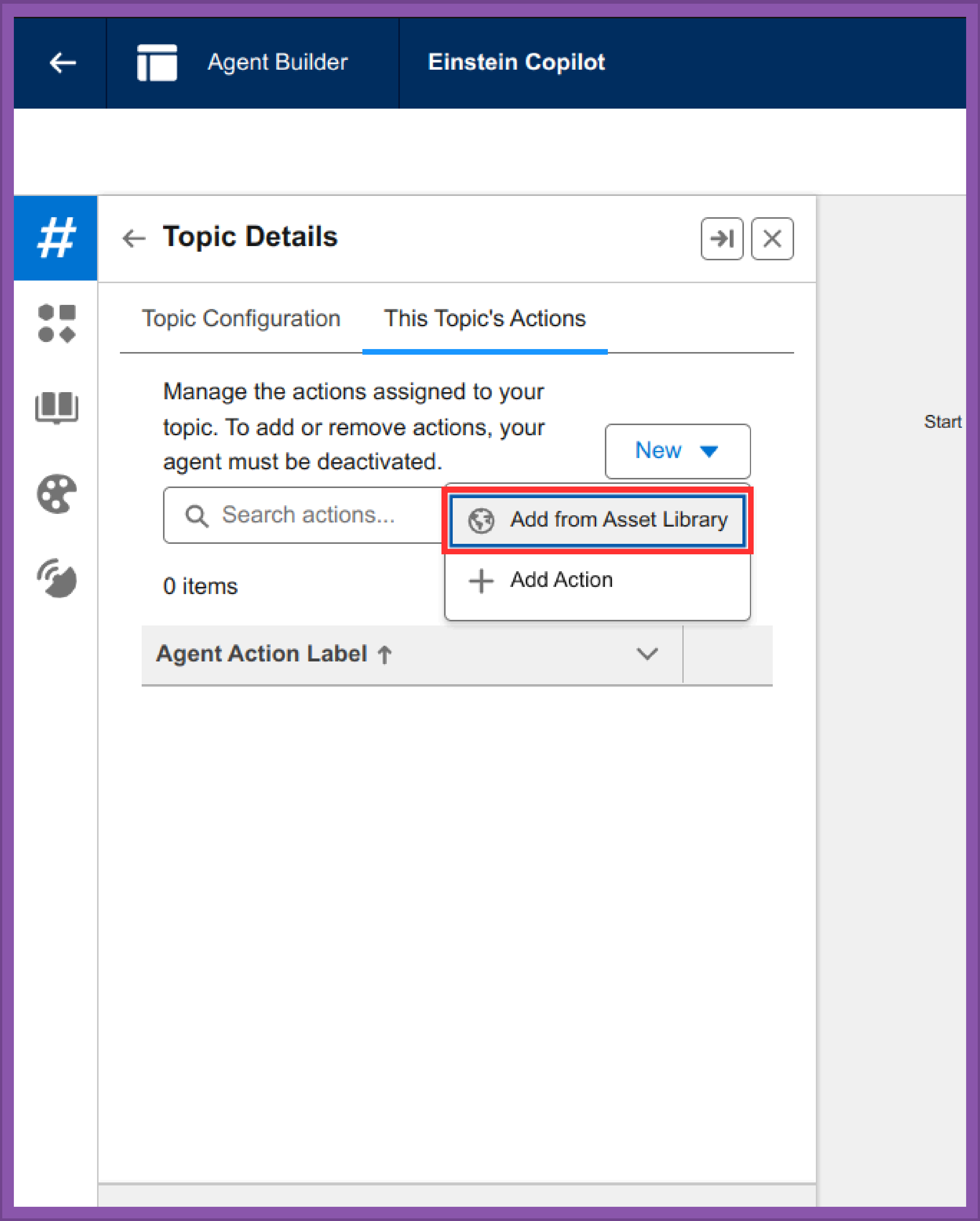
Step 11 - You'll be taken to the agent builder playground where we need to set up the agent, Click on "New" under Topic.



Step 12 - Name the topic as “Lead Prioritisation” and update the Description, Scope & Instructions as mentioned in the “instructions document”. Once updated, click on "This Topic’s Action”

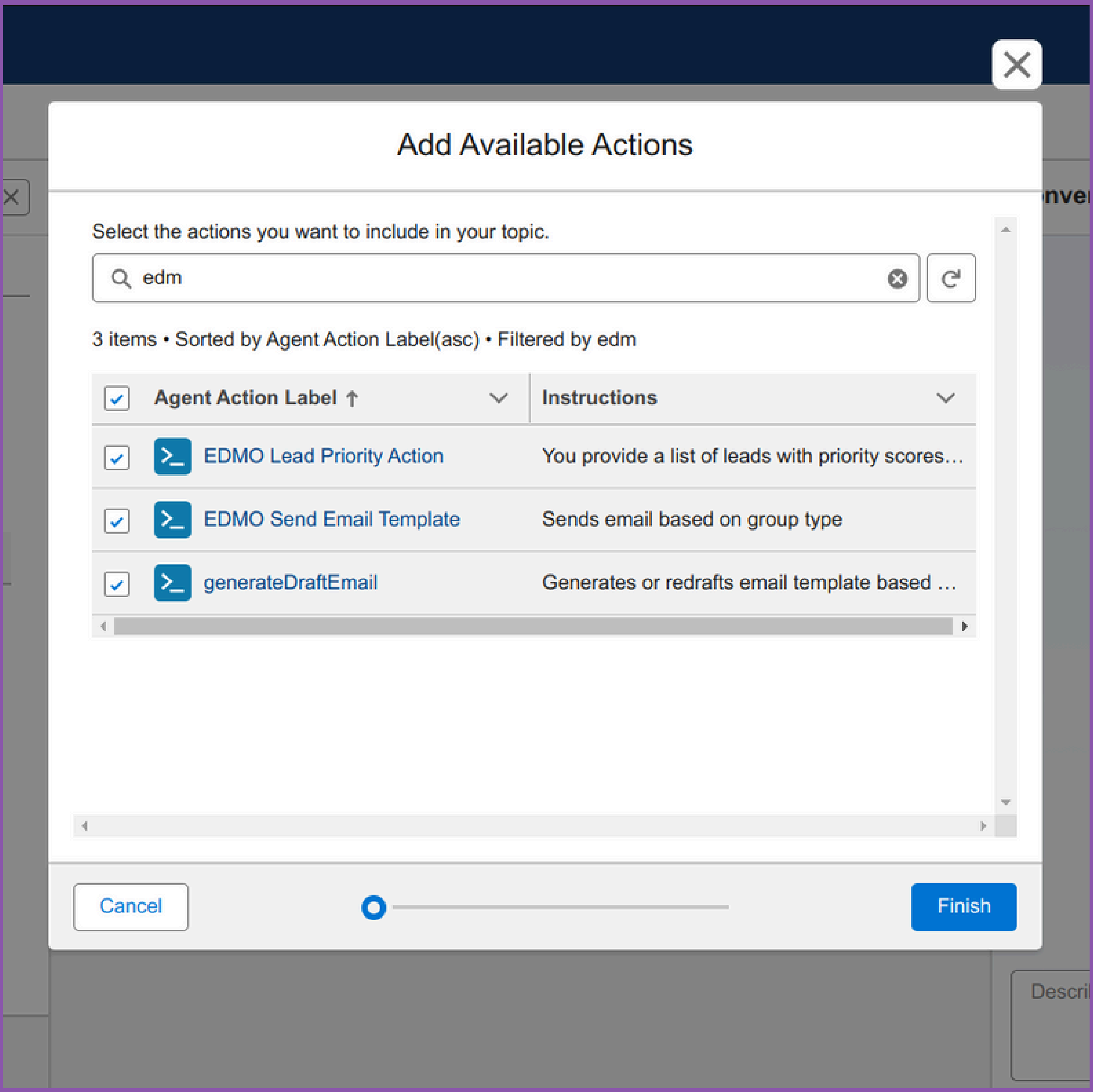


Step 13 - Click on “New” and then click on “Add for Asset Library”.

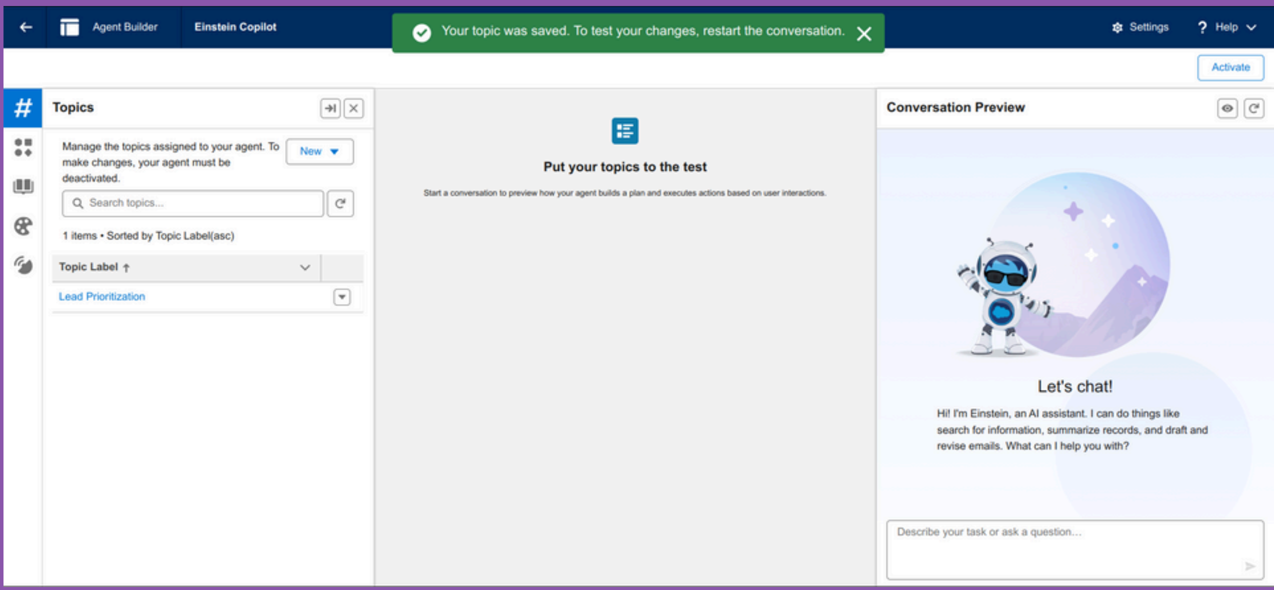


Step 14 - You'll be redirected to this screen, select these 3 actions, "EDMO Lead Priority Action", "EDMO Send Email Template" & "generateDraftEmail".

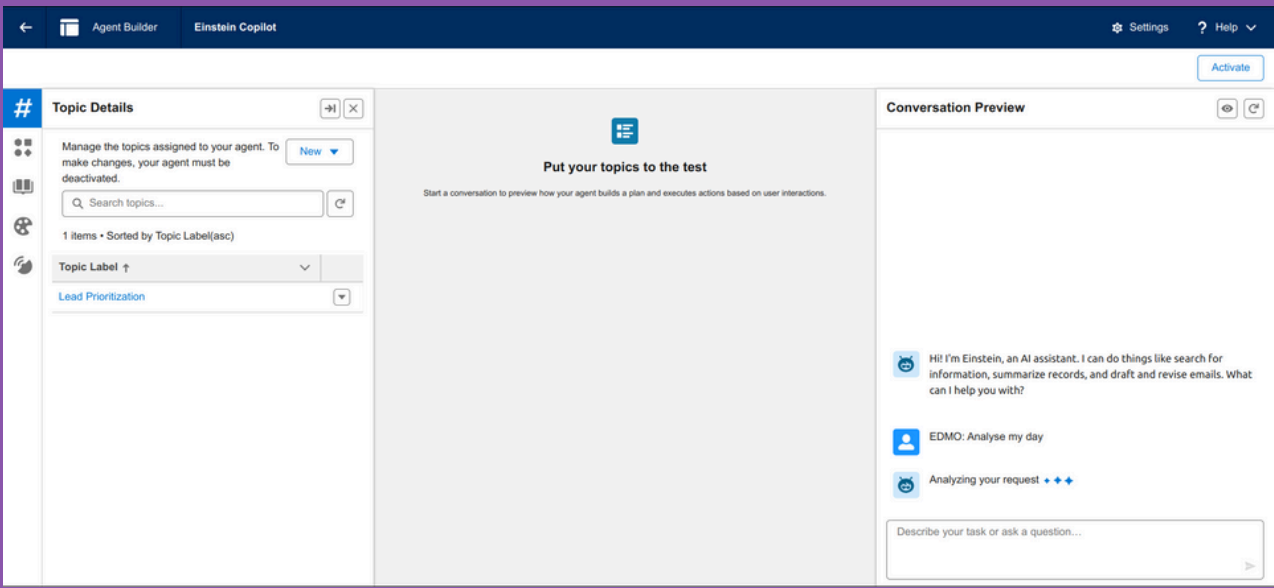
Once selected, Click on "Finish". This would save those actions to the agent.



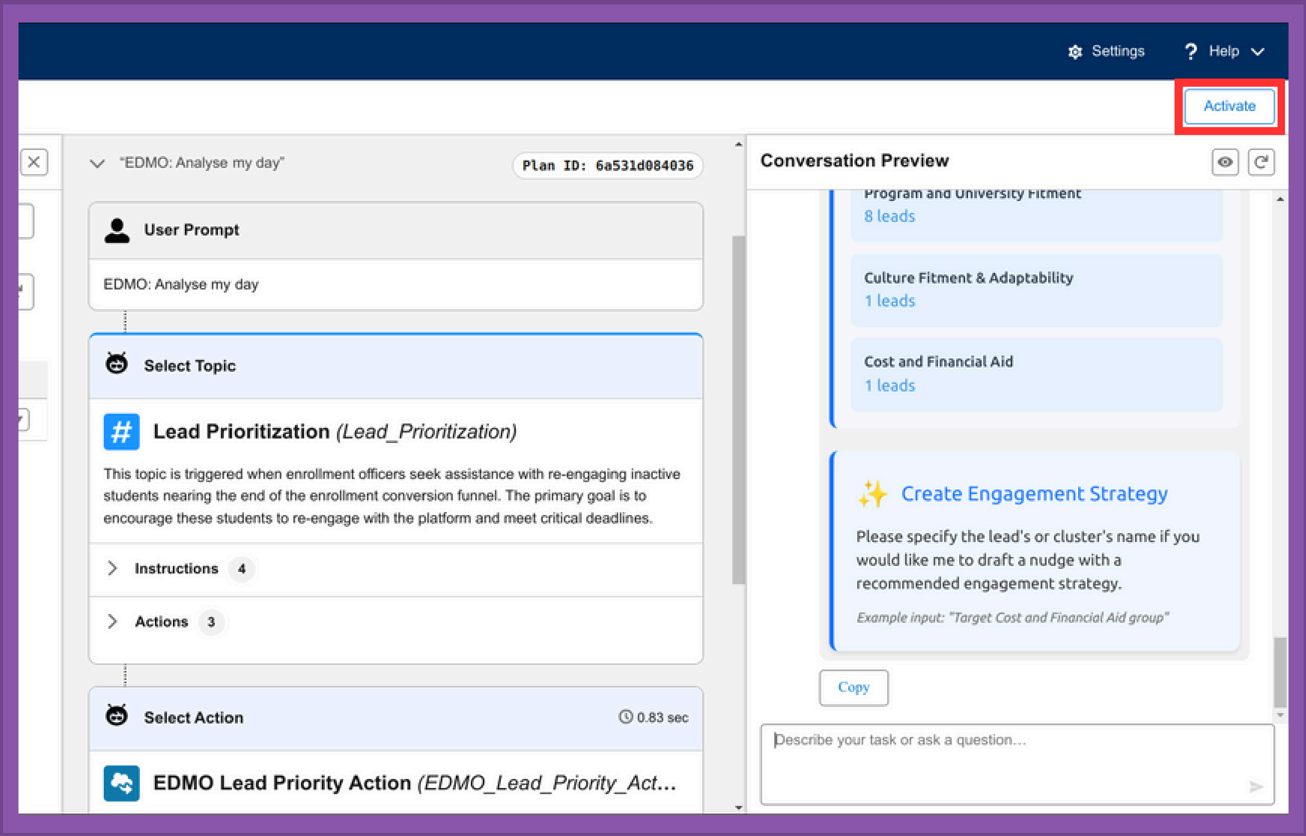
Step 15 - Save the instructions & actions to the agent



Step 16 - Test the agent using the “Conversation Preview” box.



Step 17 - You should be able to see the results now. Once the results are generated, click on Activate, to activate the Agent.



How to Use

Conversation Intelligence

1. Agent Configuration Guide

This document provides detailed instructions for configuring the Agent in Salesforce after installing the package. Follow the steps below to ensure proper functionality.

1. Enable Agents for your Org if you haven’t already
   a. Go to Einstein Setup
   b. Click on Turn on Agentforce (formely known as Einstein)
2. Search for Agents in the Quick Find
3. Toggle Einstein Copilot for Salesforce to enable it
4. Click on the Agent: Einstein Copilot
5. Click on Open in Builder to open Agent Builder
6. Inside Agent Builder, create a new topic called Lead Prioritization, and fill up the details with the following:

Agent Builder Settings

Classification Description

This configuration is triggered when enrollment officers need assistance re-engaging inactive students nearing the end of the enrollment conversion funnel. The primary objective is encouraging these students to re-engage with the platform and meet critical deadlines.

Scope

The Agent is designed to categorize inactive students based on their duration of inactivity. This categorization enables enrollment officers to prioritize which groups to target first and take the necessary actions.

Agent Instructions

1. Analyzing Priorities

When the user says, "EDMO: Analyze my day", the Agent must execute the function **EDMO_Lead_Priority_Action().**

The output should be stored in a variable named leadDistribution, which will contain each group and their respective email addresses.

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2. Sending Re-engagement Emails

When the user says, "Send re-engagement emails to {groupType} group", the Agent should:

- Execute the action EDMO_Send_Email_Template().
- Use the variable leadMetadata to filter email addresses based on {groupType}.
- Confirm with the user whether the email template has been updated. If updated, use the revised version for sending emails.
- Ensure the salutation in the email uses only the first name of the lead.
- Verify that the recipient list includes only emails belonging to the specified {groupType} group.

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3. Generating Email Drafts

When the user says, "Target {groupType}", the Agent must execute the function generateDraftEmail() without "customPrompt" field.

The generated draft content should be stored in a variable named templateData, specifically in 'generatedContent.htmlBody'.

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4. Revising Email Drafts

If the user requests changes to the draft, the Agent should re-run the function generateDraftEmail() with the following inputs:

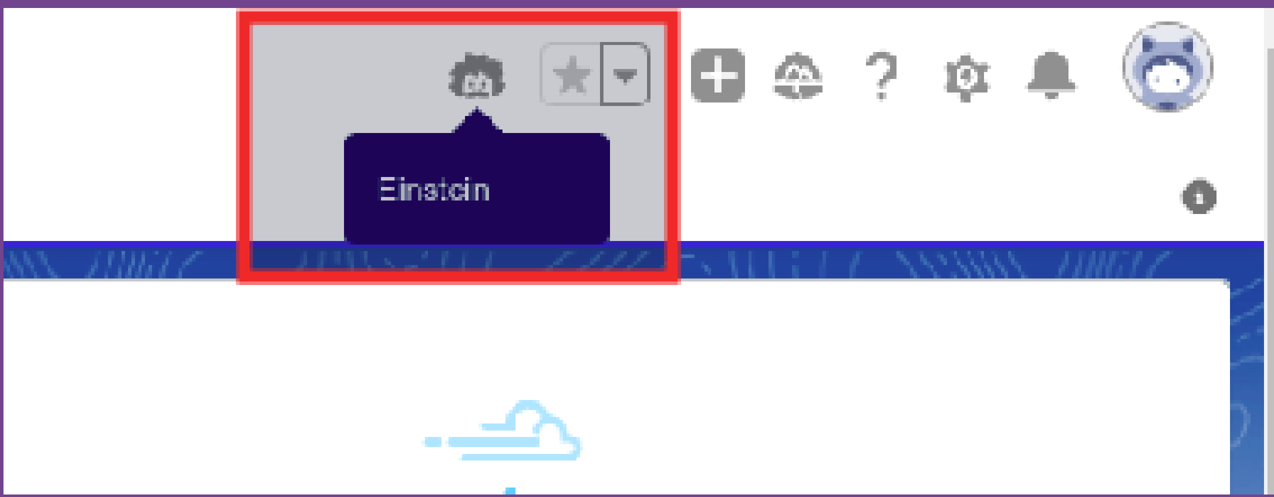
```
{
  "isRedraft": true,
  "previousTemplate": templateData,
  "groupType": "{groupType}",
  "customPrompt": "{customPrompt}"
}
```

Add Agent Actions to the Topic

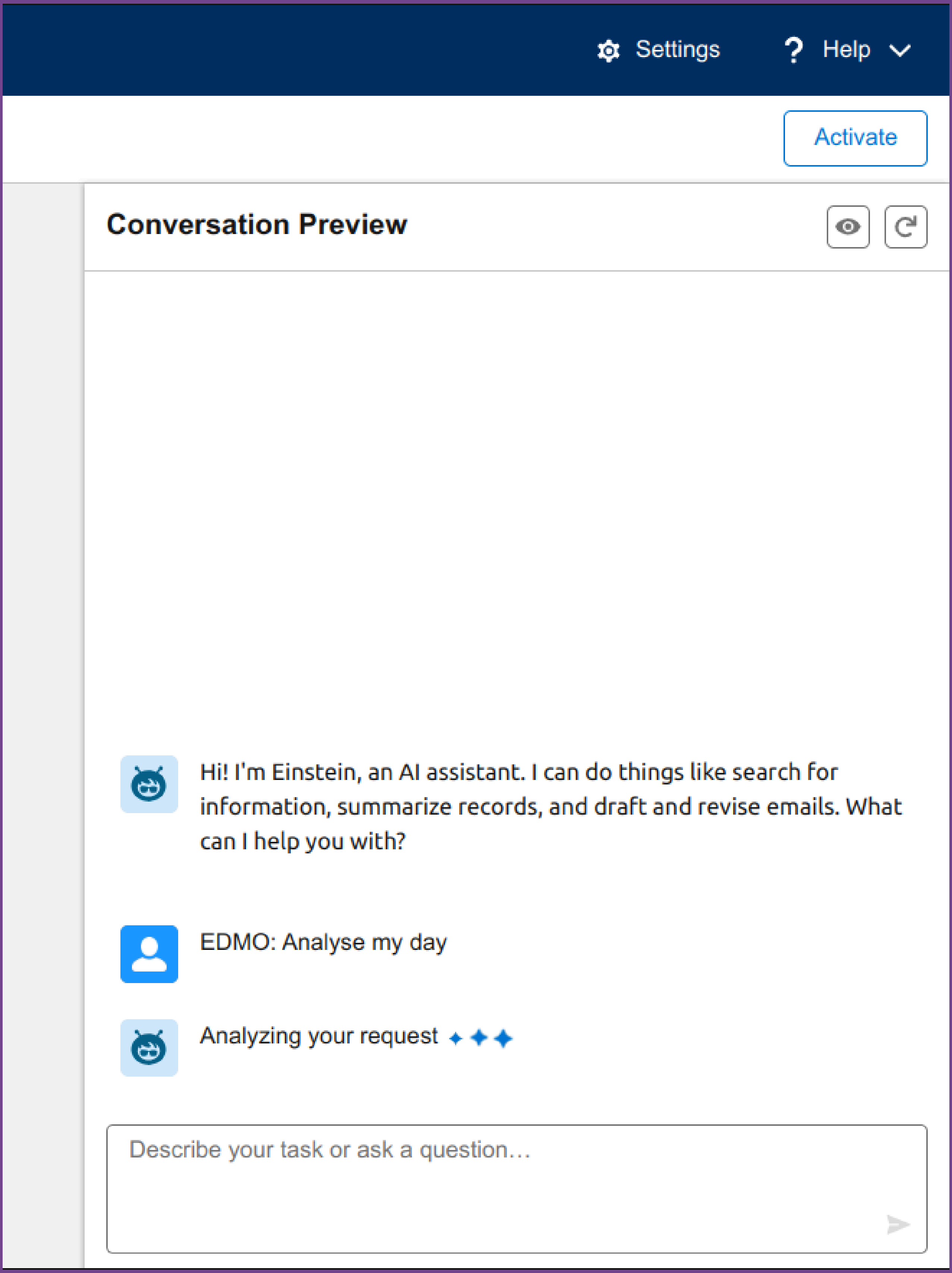
1. Inside Agent Builder, click on Lead Prioritization Topic that we created
2. Make sure the Agent is deactivated
3. Go to “This Topic’s Actions”
4. Click on “New” and select “Add from Asset Library”
    a. Select the 3 actions:
        i. EDMO Lead Priority Action
        ii. generateDraftEmail
        iii. EDMO Send Email Template
    b. Click on Finish
5. You should be able to see the action in the list

Using EDMO Conversational AI

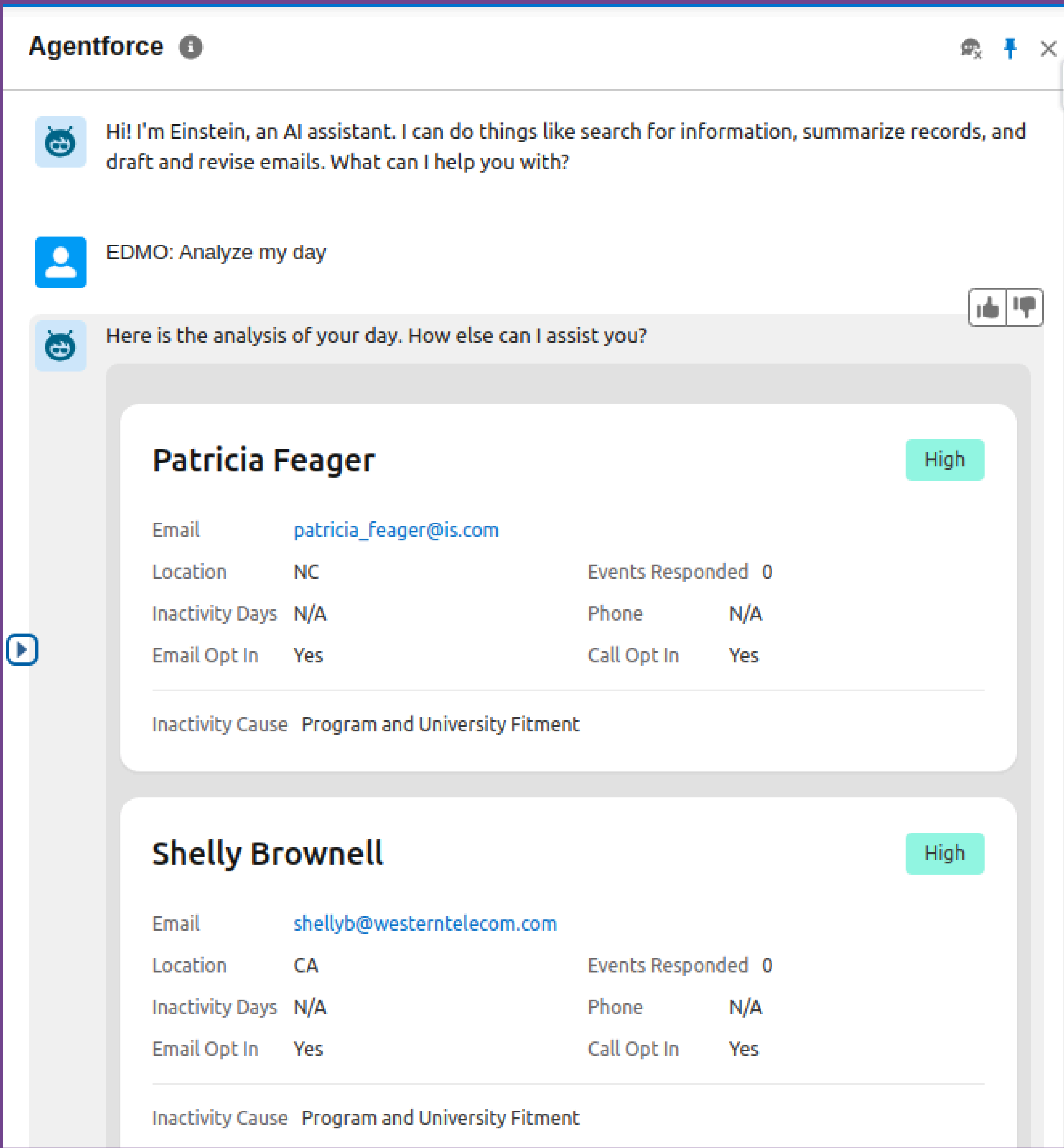
1. Navigate to any apps (Sales, Marketing CRM classic, etc)
2. Click on Einstein icon to open Agentforce copilot



3. Start with the prompt "EDMO analyze my day"



4. Check the response



CONTACT INFO

+1 (781) 775-1363

info@goedmo.com

www.goedmo.com

33 Boston Post Road, W Suite 600,
Marlborough MA, USA - 01752

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Salesforce