

User Manual

Conversation Intelligence by EDMO



available on
AppExchange

EDMO
Supercharge University Admissions

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Installation Guide



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

EDMO **Conversation Intelligence | Empower Student Engagement with AI**
By Edmo

Turn your student leads into enrolled students

Salesforce App ★★★★★ 5 Average Rating (26 Reviews)

[Get It Now](#) [Try It Free](#)

Starting at \$25 USD/license/month
Discounts available for nonprofits
[Pricing Details](#)

Industries
Education Higher Education Enrollment

Business Need
Student Engagement Student Enrollment Enrollment

Requires
Sales Cloud Agentforce

[More Details](#)

Conversation Intelligence by EDMO, enables you to automate the complete enrollment journey of your potential students. With our advanced AI, you save both time and money while maximizing enrollment potential.

Watch Demo

Supercharge Admissions with AI-Powered Conversational Intelligence
Seamlessly integrate with Salesforce to analyze leads, prioritize high-potential prospects, personalize outreach, and optimize engagement strategies—empowering admissions advisors to drive enrollments with intelligent automation and AI-driven insights.

EDMO

Maximize revenue across your largest customers

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

Install EDMOConvoAIPackage
By iSchoolConnect

☐ Install for Admins Only ☒ **Install for All Users** ☐ Install for Specific Profiles...

You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

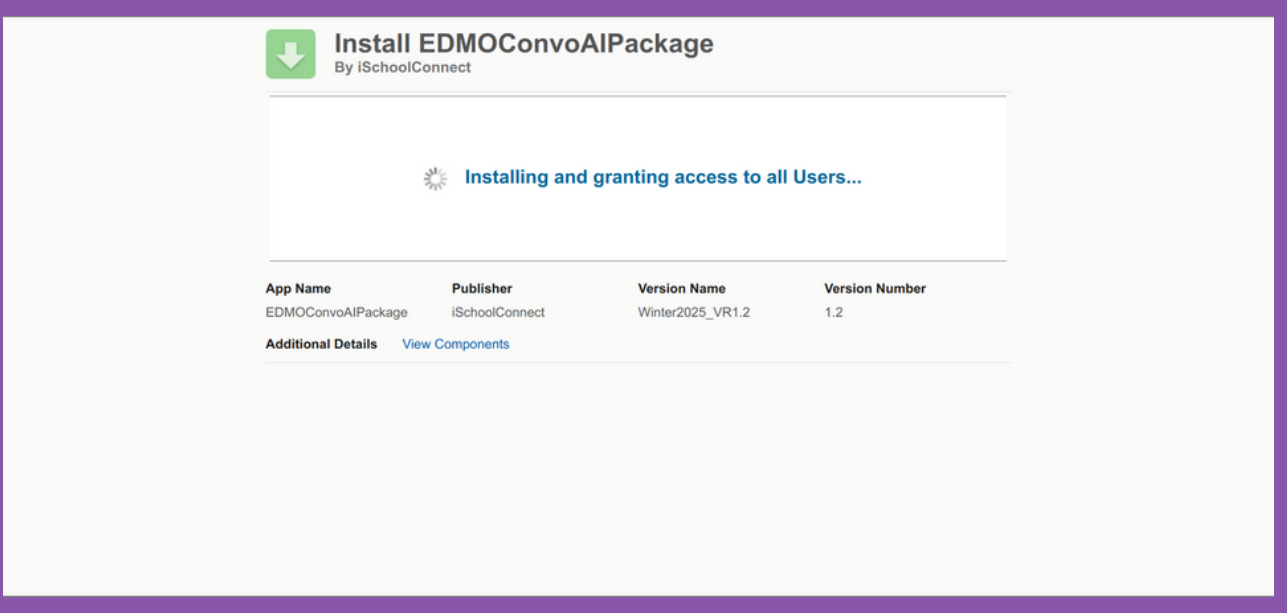
☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

[Install](#) [Cancel](#)

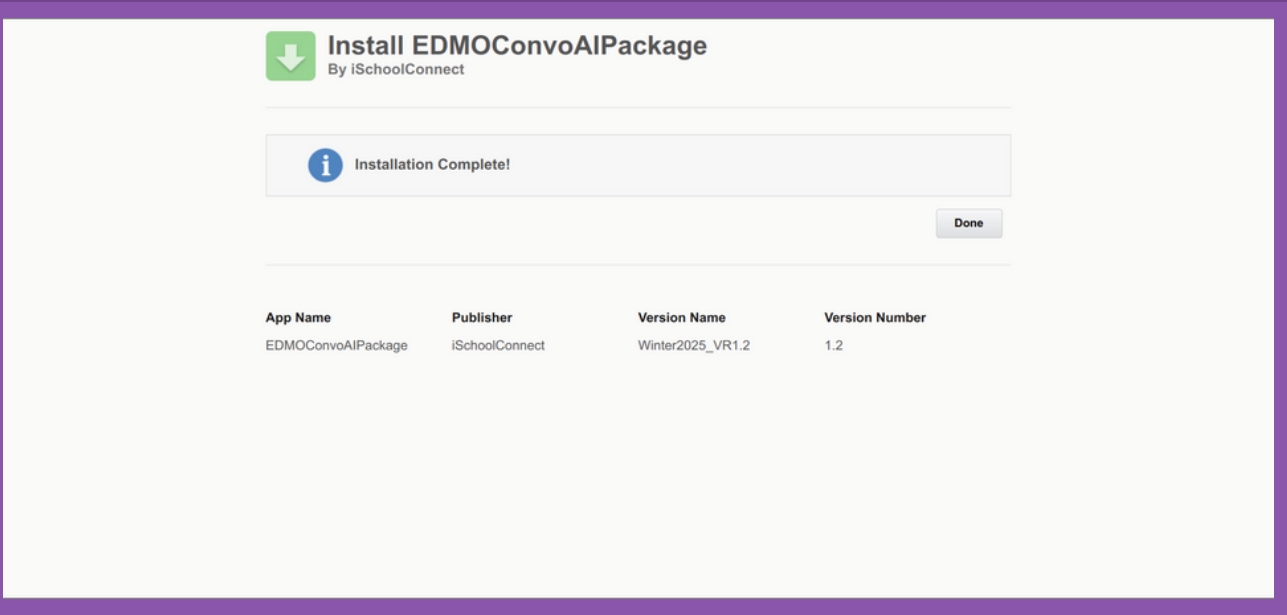
App Name	Publisher	Version Name	Version Number
EDMOConvoAIPackage	iSchoolConnect	Winter2025_VR1.2	1.2

[Additional Details](#) [View Components](#)

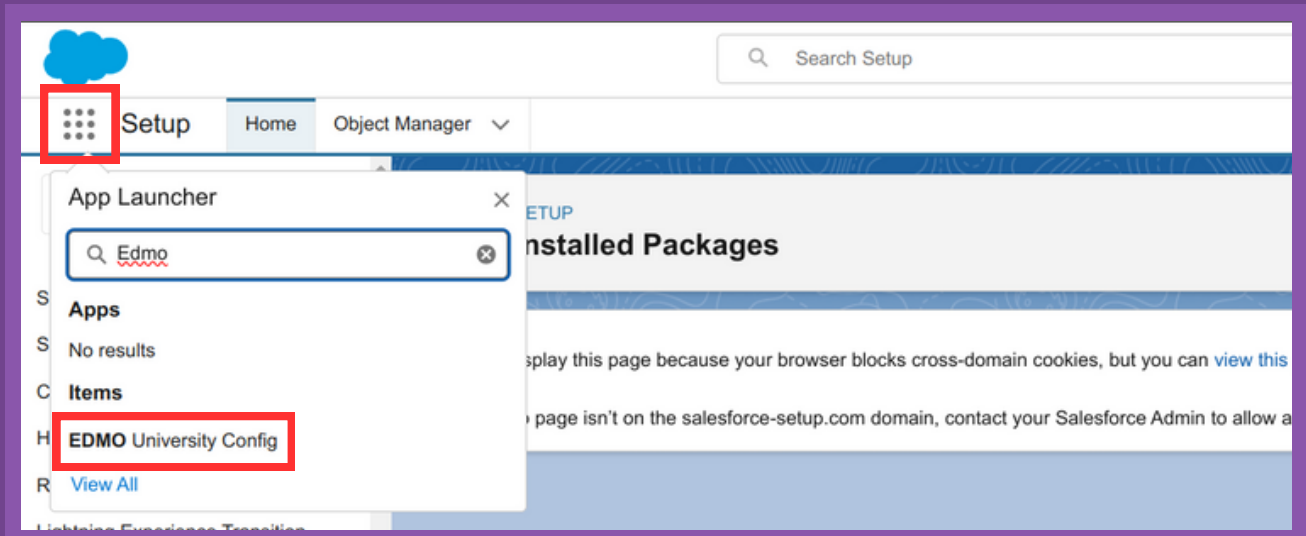
Step 2 – Once “Install” is clicked, the following screen will appear. Wait for the application to install. It will take a few minutes.



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



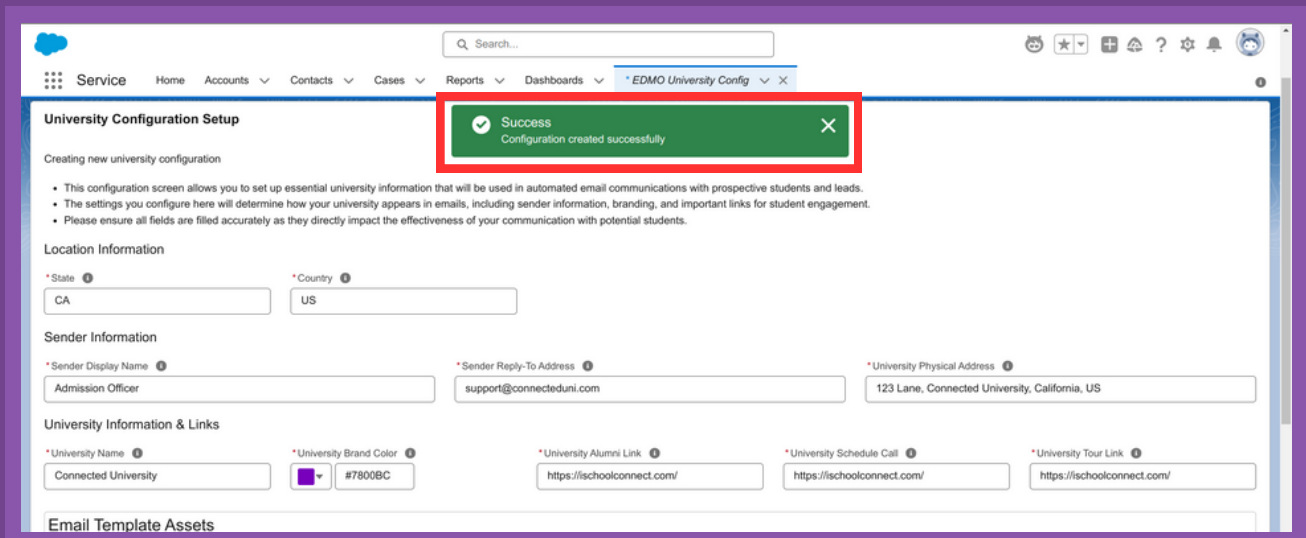
Step 4 – You’ll be redirected to your salesforce environment. Once you’re done, hover over the 9 dots on the left top corner. Search for “EDMO University Config”



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:

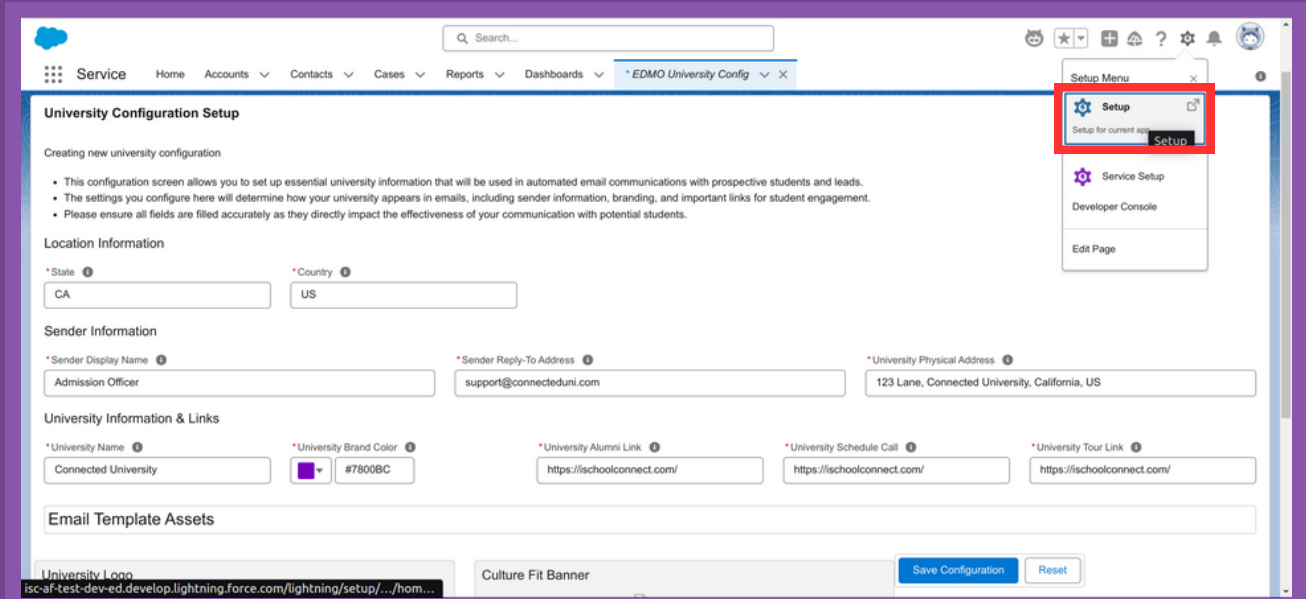
 A screenshot of the "EDMO University Configuration Setup" screen in Salesforce. The page title is "University Configuration Setup" with a subtitle "Creating new university configuration". Below this, there are instructions and a list of prerequisites. The form is divided into several sections: "Location Information" with fields for "State" and "Country"; "Sender Information" with fields for "Sender Display Name", "Sender Reply-To Address", and "University Physical Address"; "University Information & Links" with fields for "University Name", "University Brand Color" (set to "#0070C2"), "University Alumni Link", "University Schedule Call", and "University Tour Link"; and "Email Template Assets" which includes four upload areas: "University Logo", "Culture Fit Banner", "Financial Aid Banner", and "Program Fitment Banner". Each upload area has an "Upload Files" button and an "Or drop files" option. At the bottom right, there are "Save Configuration" and "Reset" buttons.

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”.



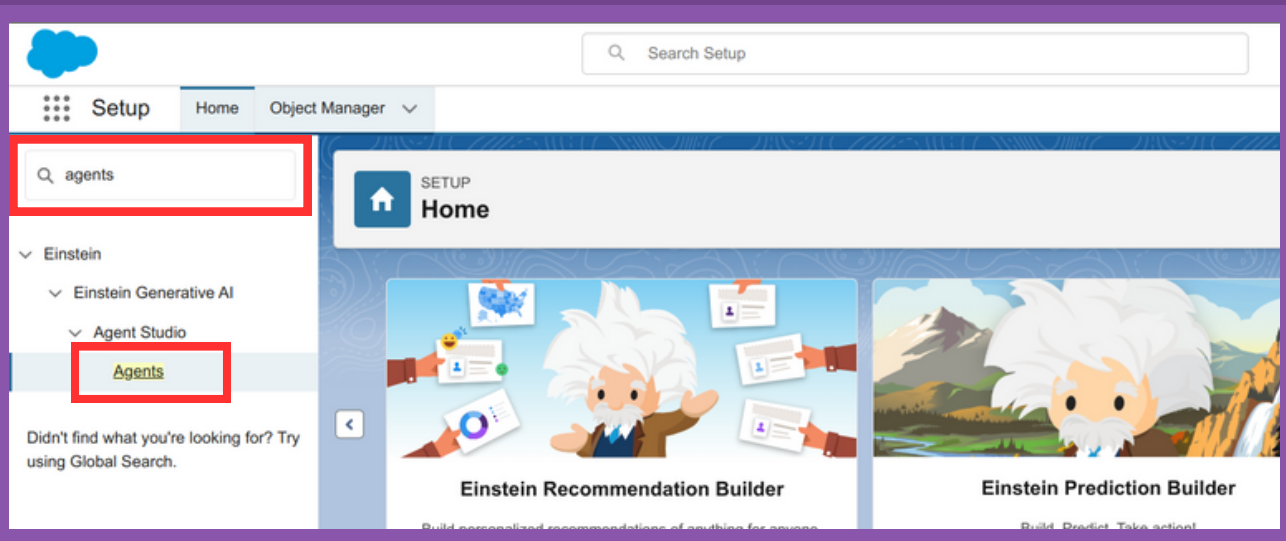
The screenshot shows the 'University Configuration Setup' page in a Salesforce-like interface. A green success message box at the top right states 'Success Configuration created successfully'. The form contains several sections: 'Location Information' with fields for State (CA) and Country (US); 'Sender Information' with fields for Sender Display Name (Admission Officer), Sender Reply-To Address (support@connecteduni.com), and University Physical Address (123 Lane, Connected University, California, US); 'University Information & Links' with fields for University Name (Connected University), University Brand Color (purple square), University Alumni Link, University Schedule Call, and University Tour Link; and 'Email Template Assets'.

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.

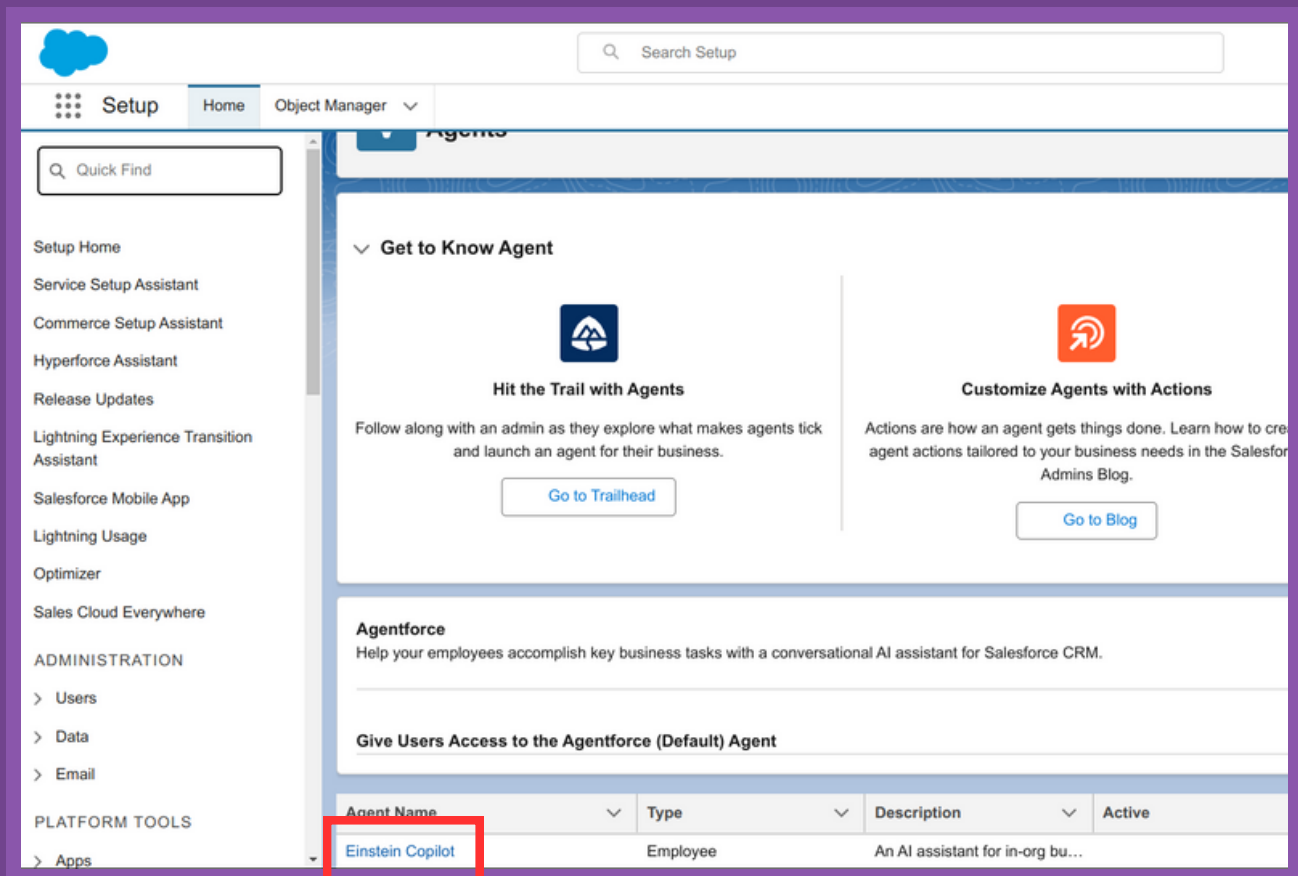


This screenshot shows the same 'University Configuration Setup' page, but with the 'Setup Menu' open in the top right corner. The menu is highlighted with a red box and contains options: 'Setup' (with a gear icon), 'Service Setup', 'Developer Console', and 'Edit Page'. The 'Setup' option is selected. The form fields and success message from the previous screenshot are still visible.

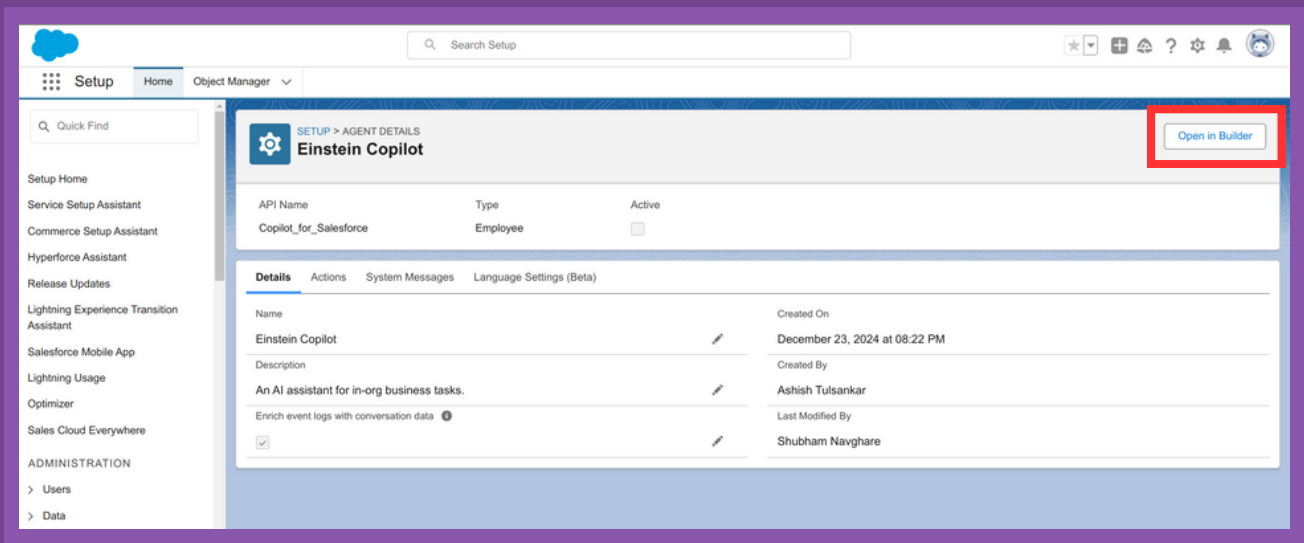
Step 8 – Search for “Agents” in the search box for setup and click on “Agents”.



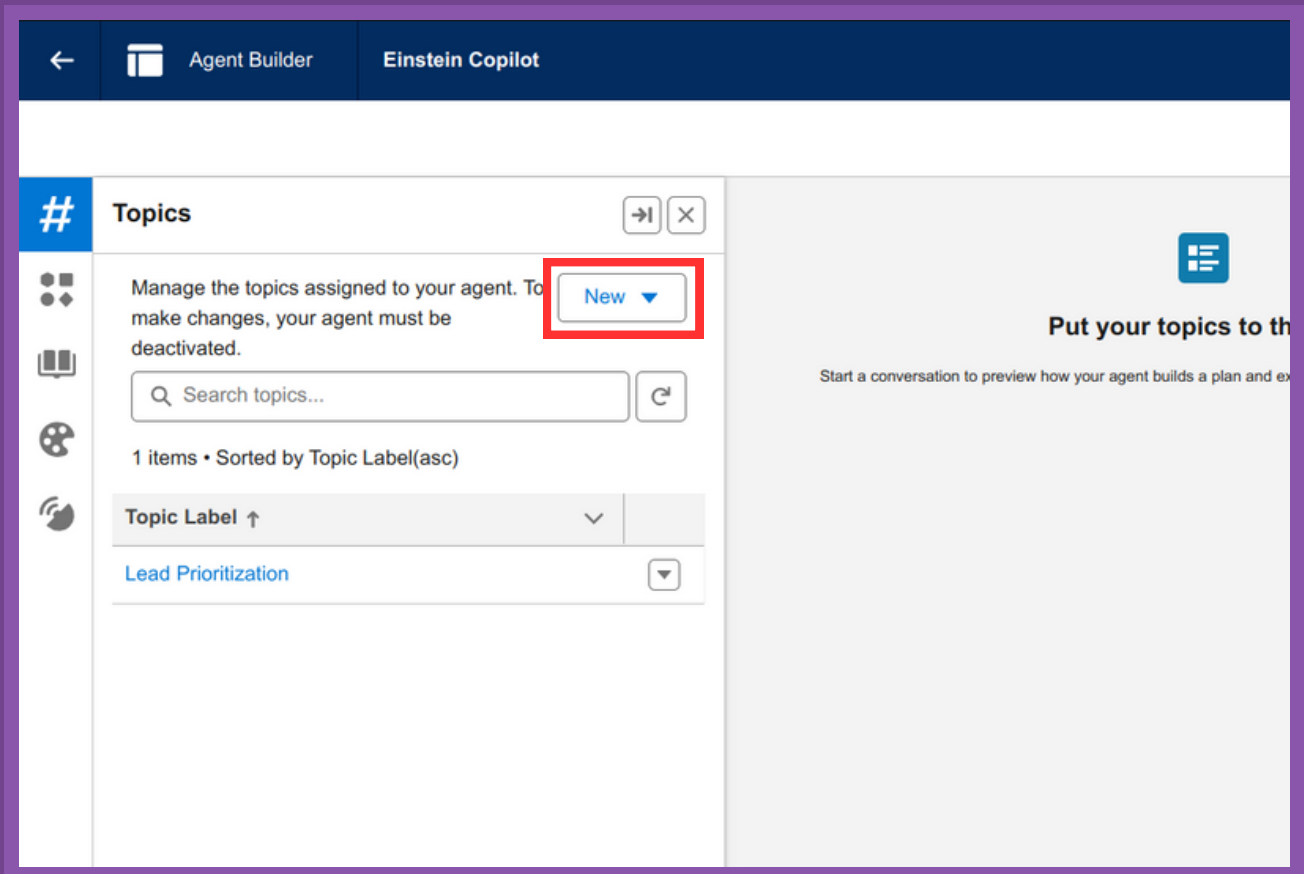
Step 9 – Once you click on “Agents”, you’ll be taken to the agents setup screen. Scroll to the bottom and you’ll see “Einstein Copilot”.



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"

The screenshot shows the 'Topic Details' configuration page for a topic named 'Lead Prioritization'. The page is divided into two tabs: 'Topic Configuration' (selected) and 'This Topic's Actions'. The 'Topic Configuration' tab contains several fields for customizing the topic. The 'Topic Label' field is set to 'Lead Prioritization'. The 'Topic API Name' field is set to 'Lead_Prioritization'. The 'Classification Description' field contains the text: 'This topic is triggered when enrollment officers seek assistance with re-engaging inactive students nearing the end of the enrollment conversion funnel. The'. The 'Scope' field contains the text: 'Your role is to categorize inactive students based on their duration of inactivity. This categorization helps enrollment officers prioritize which groups to target first'. The 'Instructions' field is currently empty. Red boxes and arrows highlight the 'Topic Label', 'Classification Description', 'Scope', and 'Instructions' fields. At the bottom of the page, there are 'Cancel' and 'Save' buttons.

Topic Details

Topic Configuration This Topic's Actions

You're customizing

Lead Prioritization

* Topic Label

Lead Prioritization

Topic API Name

Lead_Prioritization

* Classification Description ⓘ

This topic is triggered when enrollment officers seek assistance with re-engaging inactive students nearing the end of the enrollment conversion funnel. The

* Scope ⓘ

Your role is to categorize inactive students based on their duration of inactivity. This categorization helps enrollment officers prioritize which groups to target first

Instructions ⓘ

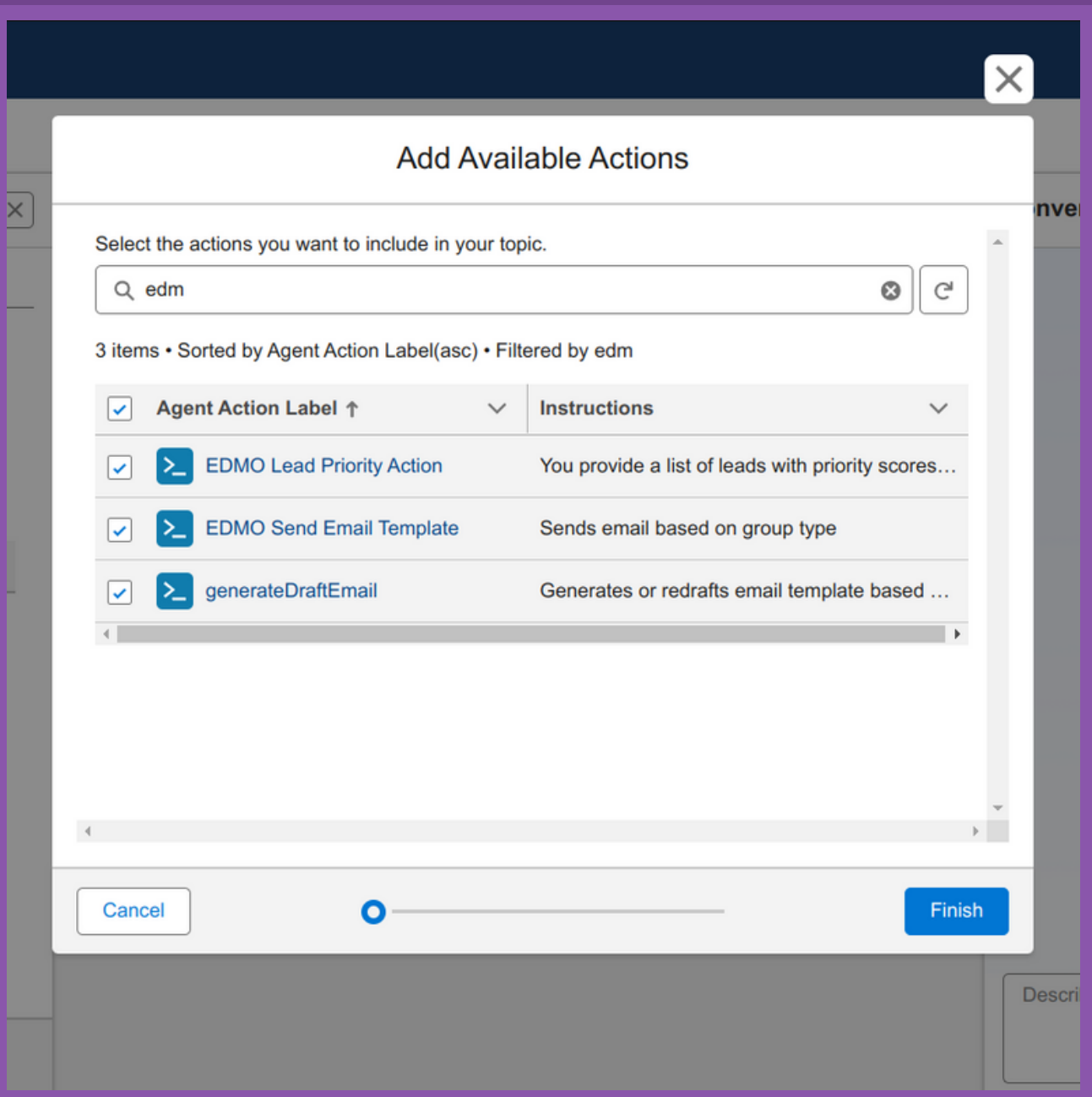
Cancel Save

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

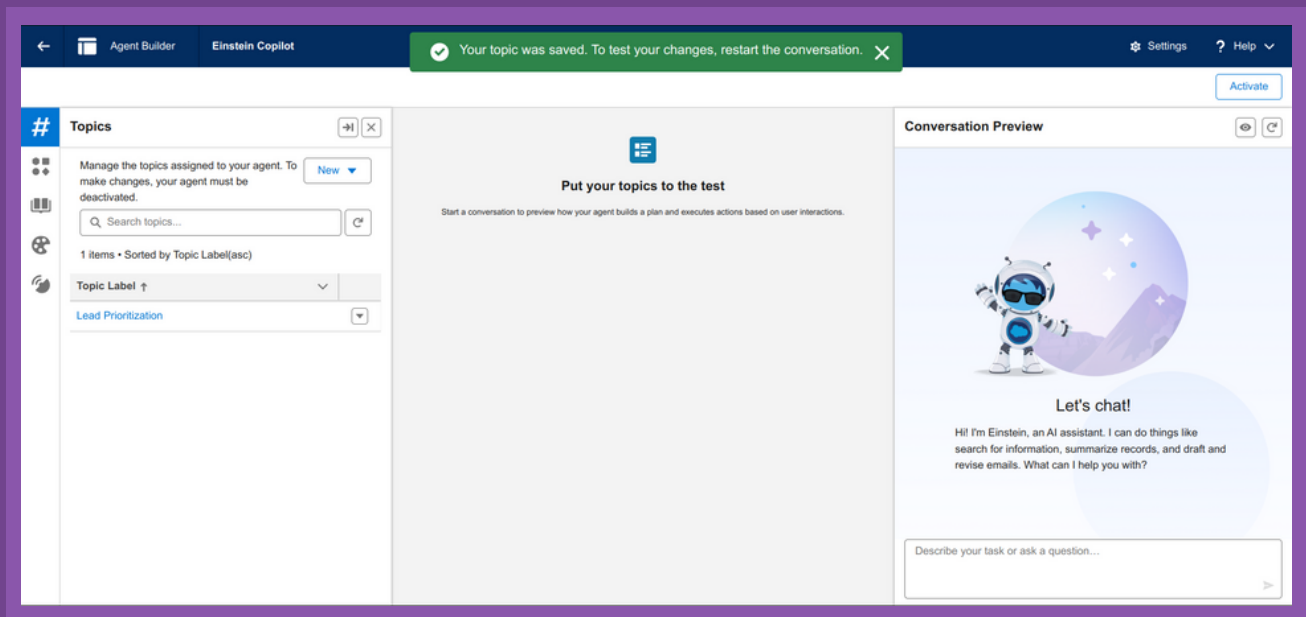
The screenshot shows the Einstein Copilot Agent Builder interface. At the top, there is a dark blue header with a back arrow, the 'Agent Builder' logo, and the text 'Einstein Copilot'. Below this is a white sidebar with a blue header containing a hash symbol and the text '← Topic Details'. The sidebar also contains four icons: a 2x2 grid, a book, a palette, and a Wi-Fi symbol. The main content area has two tabs: 'Topic Configuration' and 'This Topic's Actions', with the latter being selected. Below the tabs, there is a text block: 'Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated.' To the right of this text is a 'New' button with a downward arrow. Below the text is a search bar with the placeholder 'Search actions...'. A dropdown menu is open below the search bar, showing two options: 'Add from Asset Library' (highlighted with a red box) and '+ Add Action'. Below the dropdown, it says '0 items'. At the bottom, there is a table header with the text 'Agent Action Label ↑' and a downward arrow.

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

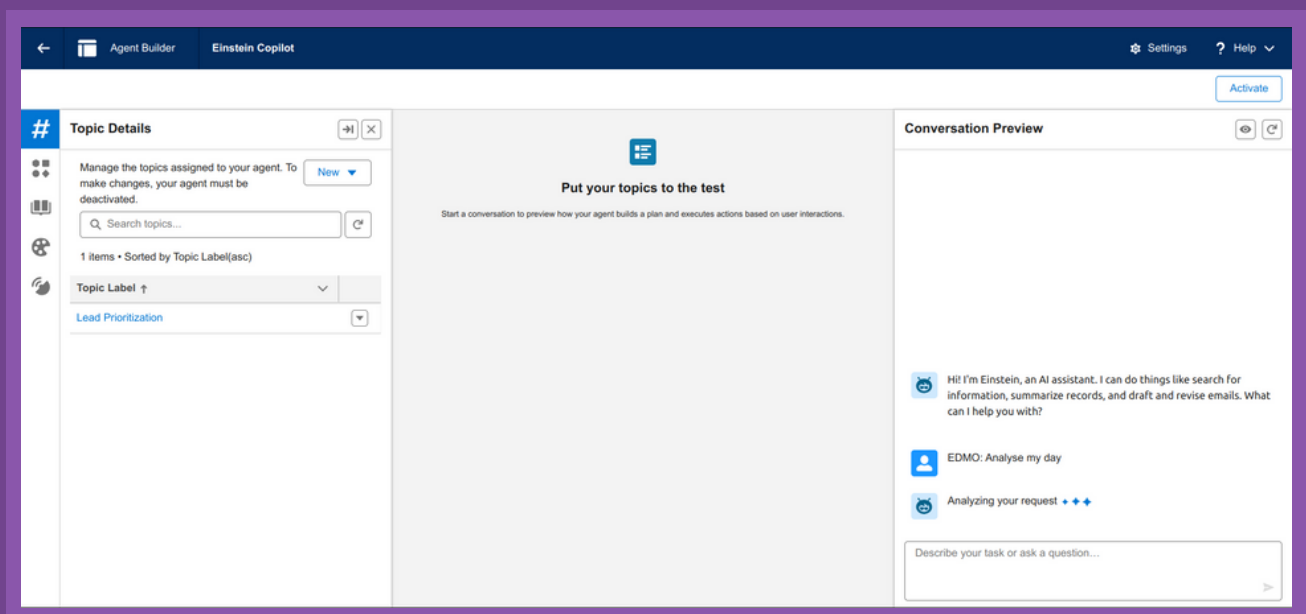
Once selected, Click on “Finish”. This would save those actions to the agent.



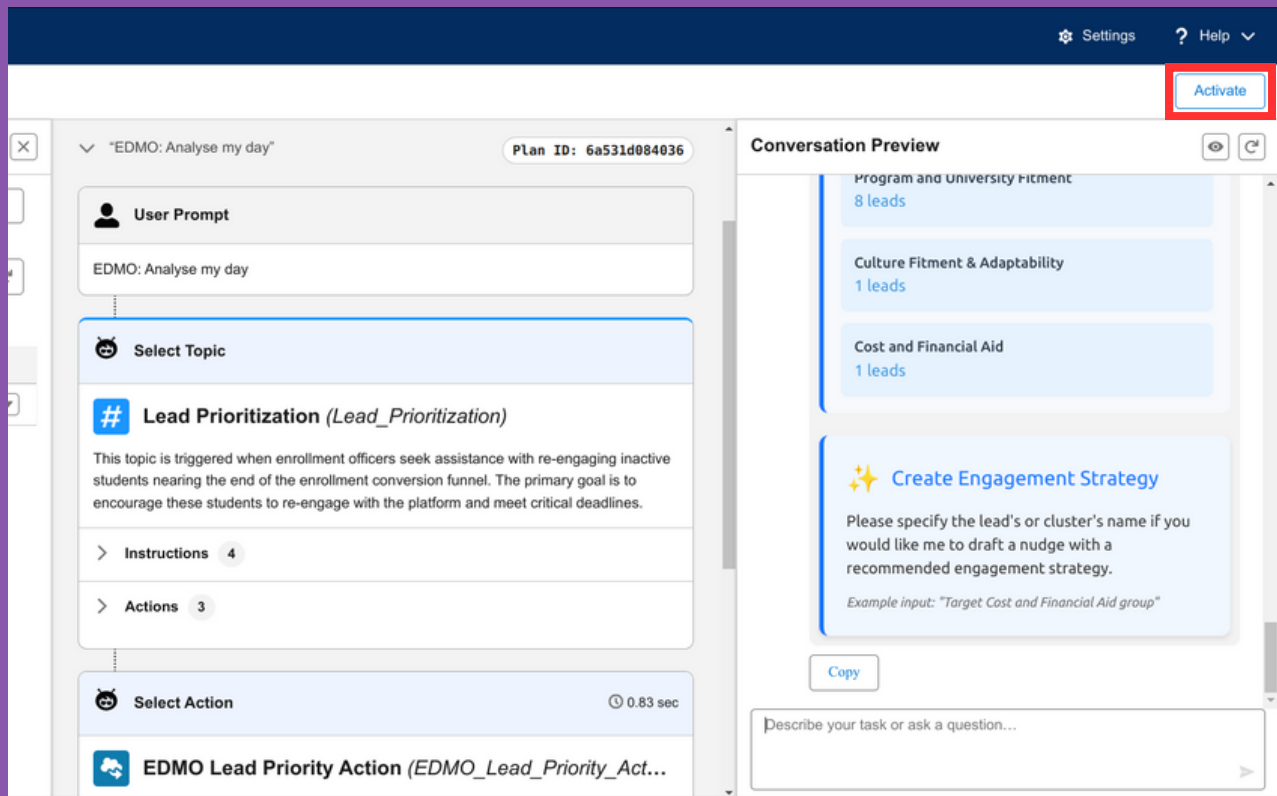
Step 15 – Save the instructions & actions to the agent



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



available on
AppExchange

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.

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.
-

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'`.

4. Revising Email Drafts

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

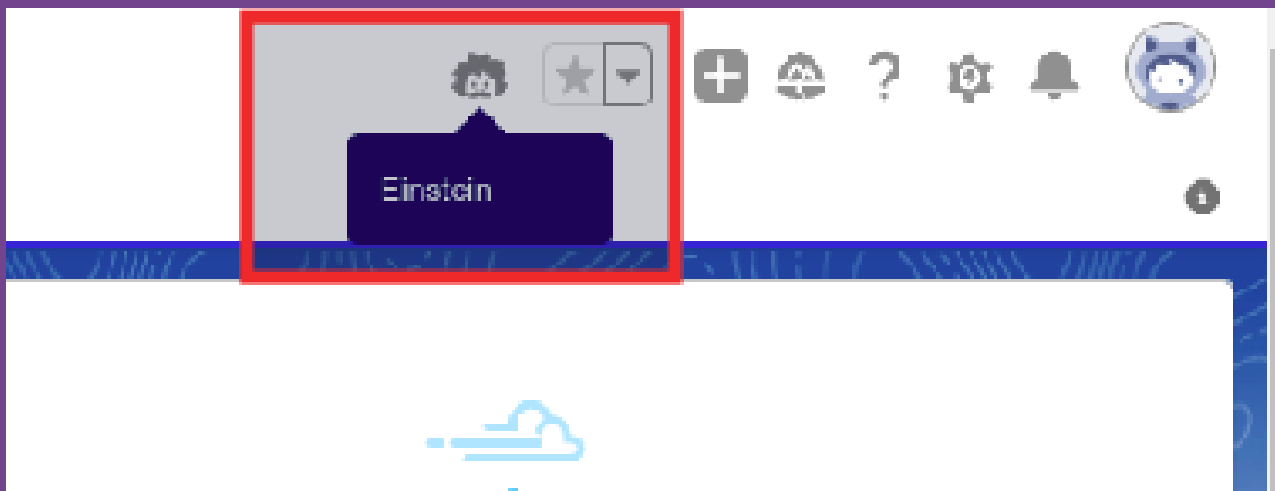
```
{  
  "isRedraft": true,  
  "previousTemplate": templateData,  
  "groupType": "{groupType}",  
  "customPrompt": "{customPrompt}"  
}
```

Add Agent Actions to the Topic

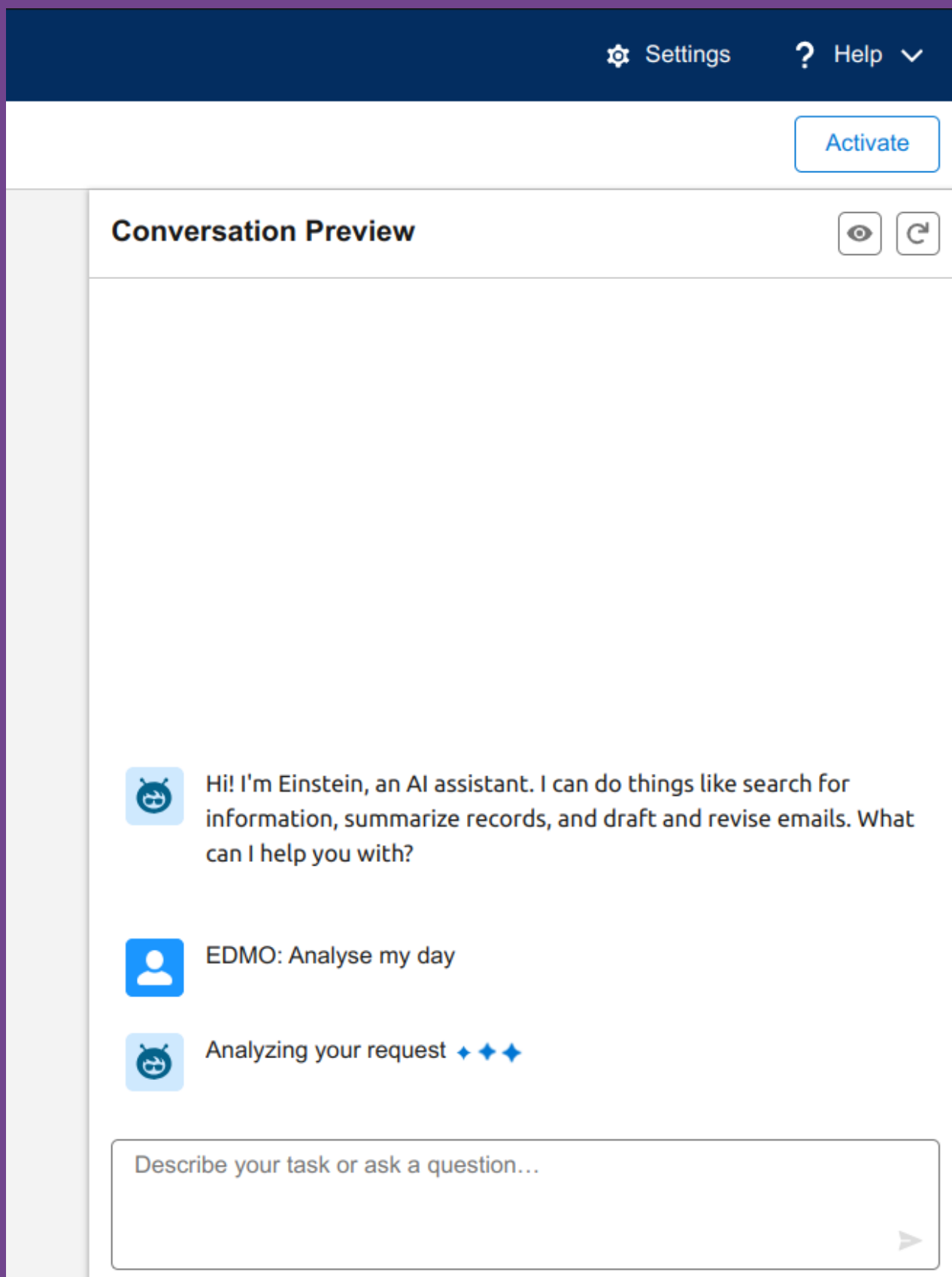
1. Inside Agent Builder, click on Lead Prioritization Topic that we created
2. Make sure the Agent is deactivated
3. Go to “This Topic’s Actions”
4. Click on “New” and select “Add from Asset Library”
 - a. Select the 3 actions:
 - i. EDMO Lead Priority Action
 - ii. generateDraftEmail
 - iii. EDMO Send 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

Agentforce ⓘ

Hi! I'm Einstein, an AI assistant. I can do things like search for information, summarize records, and draft and revise emails. What can I help you with?

EDMO: Analyze my day

Here is the analysis of your day. How else can I assist you?

Patricia Feager
High

Email	patricia_feager@is.com		
Location	NC	Events Responded	0
Inactivity Days	N/A	Phone	N/A
Email Opt In	Yes	Call Opt In	Yes

Inactivity Cause Program and University Fitment

Shelly Brownell
High

Email	shellyb@westerntelecom.com		
Location	CA	Events Responded	0
Inactivity Days	N/A	Phone	N/A
Email Opt In	Yes	Call Opt In	Yes

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