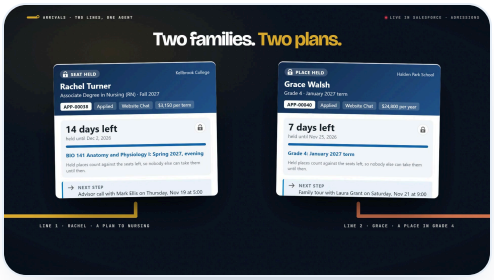
INDUSTRY AGENTS · AGENTFORCE SERVICE AGENT

# Student Enquiry and Enrolment Agent

## Every enquiry leaves with a plan.

The Student Enquiry and Enrolment Agent answers future students and parents in the chat on your school's own website, from your Salesforce records: programs, fees, intakes, entry rules and seats. It checks what the person has done against the entry rules and offers the next class that covers a gap. Consent comes first; then one yes holds the place, opens the application and books an advisor call or a tour. Colleges, K-12 schools and trade schools each keep their own words and rules.

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### WHAT IT DOES

**Answers from your records**
Programs, fees, intakes, schedules and seats left, read from Salesforce for the school the person is on.

**Turns a gap into a plan**
The next class that covers what is missing, with its dates and seats, then the program after it.

**A real time, picked on a calendar**
Advisor calls or tours from the host's calendar in Salesforce, chosen on a calendar inside the chat.

**Checks the entry rules**
What the person has completed, against the program's requirements: what is met and what is missing.

**Consent first**
Recorded before anything is booked; at a K-12 school it asks a parent for only the child's first name and birthday.

**One yes does it all**
The seat or place held for your set number of days, the application opened and the visit booked, then on the admissions desk with its plan.

### THE RULES IT FOLLOWS

- **From the records**
  Every program, fee, date and seat comes from Salesforce, never guessed.
- **Never promises admission**
  It can hold a place and open an application; the admissions team decides.
- **Consent first**
  Nothing is booked or opened until the person agrees to be contacted.
- **A child's details only from a parent**
  At a K-12 school, only the first name and birthday it needs.

### PROVEN IN A LIVE RUN

**Any school.** A college, a K-12 school or a trade school, each in its own words.

**From your records.** Every fee, date and seat comes from Salesforce, never guessed.

**Consent first.** Recorded before anything is booked; a child's details only from a parent.

WORKS WITH
Talks to customers

WHERE IT WORKS
Website chat

RUNS ON
Agentforce, Salesforce Sales Cloud, Messaging for Web, Salesforce Scheduler

BEST FOR
Admissions directors, enrollment managers, admissions advisors, registrars and front offices, heads of school, recruitment teams

INDUSTRIES
Community colleges, Private K-12 schools, Trade schools, Vocational schools, Nursing schools, Language schools

### WHAT YOU NEED

- ✓ **Sales Cloud**
  Your programs or grades, intakes, fees and seats in Salesforce.
- ✓ **Agentforce**
  Agentforce for your website, with Messaging for Web.
- ✓ **Scheduling**
  Advisor or tour hosts with their hours, for calls and visits.
- ✓ **Your rules**
  Entry requirements, documents and how long a place is held, per school.

Live. Recorded on a real Salesforce org and last validated Nov 19, 2026.

## Free scoping: a 60-minute review with an architect.

We map it to your org, your rules and your data, and give you a fixed plan before work starts.

salesforce PARTNER