

AI One Stop (Advisor)

Assets checklist



We recommend uploading the following assets to help your AI One Stop best understand your school. You can upload .pdf, .txt, and .csv files to train your AI One Stop.

- ☐ **Course Catalog & Degree Pathways**
Information about all majors, programs, and courses available, including prerequisites and academic policies.
- ☐ **FAQs and How-To's**
Quick answers and step-by-step guides on academic, financial aid, campus resources, and student life essentials.
- ☐ **Calendars and Key Deadlines**
Important dates for registration, add/drop periods, exams, and academic advising sessions.
- ☐ **Tutoring & Learning Support**
Details about academic support centers, tutoring services, and study groups.
- ☐ **Clubs & Organizations**
A list of student clubs, cultural organizations, and leadership opportunities.
- ☐ **Athletics & Recreation**
Information on varsity sports, club teams, intramural sports, and fitness facilities.
- ☐ **Campus Events & Traditions**
Key student events, social gatherings, and campus traditions that enhance student engagement.
- ☐ **Buildings & Campus Resources**
Descriptions of academic buildings, libraries, computer labs, and study spaces.
- ☐ **Housing & Residential Life**
Details about dormitory options, amenities, residence hall policies, and roommate matching services.
- ☐ **Dining & Meal Plans**
Information on campus dining options, meal plans, and dietary accommodations.

☐ **Mental Health & Wellness Services**

Details on counseling services, wellness programs, and crisis support.

☐ **Career & Professional Development**

Internship and job placement resources, career counseling, and resume-building workshops.

☐ **Financial Aid & Scholarships**

Information on financial aid options, scholarships, grants, and work-study opportunities.

☐ **Alumni Network & Career Connections**

Notable alumni achievements and opportunities for students to connect with mentors.

☐ **Special Programs & Student Success Initiatives**

Details about unique programs designed to support specific student populations, such as first-generation students, transfer students, and international students.

AI One Stop Training guide



Basic setup

Complete the following to be ready to launch to students.

1. **Choose a name and photo**

Give your AI One Stop a friendly and approachable identity. Your school's name will always appear with your agent's name, so no need to add "from X College" in the name.

2. **Add your website URL**

Index key areas of your website.

[Assets](#) →

3. **Complete a training interview**

Answer questions on a phone call with your AI One Stop to capture the essence of your school.

[Staff interviews](#) →

4. **Edit personality**

Define the personality of your AI One Stop to match your school's tone and voice.

[Personality](#) →

5. **Train your AI One Stop using your best emails**

Forward emails to your AI One Stop using your unique email address to help it learn.

[Email Trainer →](#)

6. **Test your AI One Stop**

Chat with your AI One Stop as if you're a student to ensure it provides responses you like.

[Test AI One Stop →](#)

Before you launch

Our Trust & Safety checks will evaluate your AI One Stop across the most common scenarios to ensure it provides accurate and helpful responses. You will receive a report card to give you the green light to launch your AI One Stop to students.

Expand knowledge

Add even more resources and information to continue training and get the most out of your AI One Stop:

1. Upload assets
2. Complete additional staff interviews
3. Forward emails
4. Add any custom instructions

Upload Assets

This section is where you can add detailed, factual, and objective information about your institution.

This data helps in presenting a clear and detailed picture of what your institution has to offer.

Get started with our recommended assets: [Assets Checklist](#)

Staff interviews

Train the unique aspects of your school and fill in any missing information. We recommend completing an interview for each of the preset topics. Complete them yourself or have another member of your staff take the call.

Tips for the call

- **Feel free to interrupt.** If the interviewer misses a key point, feel free to interject.
- **You can ask new questions.** Your AI interviewer can generate them instantly.
- **There's no time limit.** Take your time to ensure thorough and complete responses.
- **Don't worry about being perfect.** The call will be summarized and you can make edits.

Email Trainer

Send your existing marketing emails to your unique vault email address, allowing your AI One Stop to analyze them and craft content that mirrors your brand's voice. For a simplified training process, we recommend listing your AI One Stop's email as a contact in your inquiry forms and marketing flows.

For added security, the AI One Stop will only process emails from a list of senders you've specifically approved (under "Allowed senders").

Custom instructions

Custom instructions allow you to tailor the behavior of your AI One Stop to align with your institution's specific policies, preferences, and resources. It's alright to leave this section blank or have only a few instructions set.

Be clear and specific in your instructions to avoid misunderstandings. Use separate sentences whenever possible. For best results, write as though you're giving instructions to a 10th-grader.

Test your AI One Stop

Manual testing

Chat with your AI One Stop to ensure it provides accurate and helpful responses to students.

Select **Randomize student** to see how your AI One Stop personalizes responses for different profiles.

[Test AI One Stop →](#)

What if my AI One Stop gets something wrong?

If info needs to be corrected or updated, upload an asset or complete a staff interview to correct the information. Once indexed, your AI One Stop will have the accurate info.

Automated checks

To ensure the safety and accuracy of your AI One Stop, we run automated benchmark checks. These tests will evaluate your AI One Stop's performance across various scenarios, verifying its ability to provide appropriate responses.

After our system completes benchmarking your AI One Stop, you will receive a report card highlighting your AI One Stop's strengths and identifying any areas for improvement.