Studynet CRM: Frequently Asked Questions

Q1: How do I reset a lead's status?

- Go to the lead profile > click on **Edit** > choose new status from dropdown.

Q2: Can I reassign a lead to another counselor?

- Yes. In the lead view, click **Change Counselor** and select the new one.

Q3: What happens if a lead is duplicated?

- The CRM auto-flags duplicate emails. You can merge them under **Lead Tools > Merge Leads**.

Q4: Where do I track application updates?

- In the **Application Tab** under the lead profile. Status and notes will be listed.

Q5: Can we add custom statuses or tags?

- Yes. Ask the admin team to update the **Settings > CRM Config > Status & Tags**.

Q6: What is the purpose of the Application Update Tracker?

- The Application Update Tracker shows all updates for every student application you've handled.

Q7: How can I search for my applications in the Application Update Tracker?

- Open the Application Update Tracker.
- Use the search filters (e.g., date, status, or lead) to narrow down your applications.
- Click the "Search" button to display your application results.

Note: Only your applications should appear.

Q8: What do the color codes in the Application Update Tracker mean?
These color codes indicate the application stages:

- **GTE:** Stage 1
- **Application:** Stage 2
- **Communication:** Stage 3
- **COE:** Stage 4
  Click on a color to view all applications in that stage.

Q9: How can I check the status of my application?

- In the Application Update Tracker, locate your application in the search results.
- Check the stage number (1-4) next to the application:
  a. 1 = GTE
  b. 2 = Application
  c. 3 = Communication
  d. 4 = COE
- For more details, click the "Track Application" button.

Q10: Can I view other people's applications in the Application Tracker?
No, only your own applications can be viewed in the Application Tracker

Q11: How can I view the status of an application in each stage?
Against each application, there is a button that will lead you to the track application page. At the top of this page, you will see the application status in each stage

Q12: Why isn’t the application status updating after approval?
There may be a delay.

- Wait a few minutes and refresh the page.
- If it doesn’t update, contact the IT team.

Q13h: How do I view communication logs for a specific stage?

1. Open the Track Application View.
2. Go to the "Communication Panel."
3. Click the stage button (e.g., GTE, Application) to view logs for that stage.

Q14: How do I check if a provider or course is connected to Studylink?
In the Application view, check the "Provider StudyLink Connectivity" and "Course StudyLink Connectivity" columns for the connection status.

Q15: What should I do if a provider or course is not connected to Studylink?
Use the Provider Merge or Course Merging processes to verify and connect them. Visit:

- Provider Merge: https://sydney.studynetcrm.com.au/setting/provider_verification/view
- Course Merging: https://sydney.studynetcrm.com.au/setting/course_verification/view

Q16: How do I register an applicant in Studylink from the CRM?

1. Go to the Application Process View.
2. In the "Studylink Information" section, click "Register Studylink Applicant."
3. Ensure the applicant profile is created first.

Q17: Why is creating an applicant profile necessary before applying?
It ensures all required information is linked and available for Studylink to process the application.

Q18: How do I update application details in Studylink from the CRM?
In the Application Process View, under "Studylink Connect," click "Update Applicant Info to Studylink" to sync the latest details.

Q19: What are the file upload requirements for Studylink?
Files must be ≤10MB and in these formats: .doc, .docx, .gif, .jpeg, .jpg, .pdf, .png, .ppt, .pptx, .tif, .tiff, .txt, .xls, .xlsx.

Q20: How do I view email logs related to an application?
Scroll to the Email Log section, click "Refresh" for the latest emails, and manage them directly in the CRM.

Q21: What happens if I delete a file in Studynet CRM or Studylink?
Deleting a file in one system syncs the deletion to the other, keeping both platforms updated.

Q22: How do I ensure provider names match between CRM and Studylink?
During Provider Merge, verify the CRM provider name matches Studylink's. Update if needed.

Q23: What if the wrong course is connected to Studylink?
Redo the Course Merging process to select and combine the correct course from Studylink.

Q24: How can I confirm synchronization between CRM and Studylink?
Check the Studylink portal after CRM actions and use the "Refresh" button in Status and Email Logs for updates.

Q25: Why select the most recent course version during merging?
Studylink may list multiple versions (e.g., by campus). The latest version ensures accuracy and prevents errors.

Q26: Can I manage multiple applications for one student?
Yes, each application is tracked separately with its own details and status in the CRM.

Q27: What does the Studylink Information section display?
It shows Applicant Profile Status, Application Connection Status, Attached Files, Studylink Application Status, Last Update, and Application ID, with an option to update the ID manually.