1. Overview

This document outlines how to manage leads using the Studynet CRM.

2. Creating a New Lead

1. Navigate to `Leads > Add Leads`.
   Link: [branch_name].studynetcrm.com.au/leads/add
2. Select Service Type:
   - Education
   - PY (Professional Year)
   - Visa Services
   - Health Cover
   - RPL (Recognition of Prior Learning)
3. Fill out the fields:
   a. Inquiring for
   b. Study Level
   c. Inquiry Note [Required]
   d. Course Name (Multiple upto 3) [Required]
   e. Lead Source (e.g., Website, Agent, Walk-in) [Required]
   f. First Name [Required]
   g. Last Name [Required]
   h. Email [Required]
   i. Contact No [Required]
   j. Date of Birth
   k. Country of Birth
   l. Application Type (e.g. Onshore, Offshore)
   m. Counsellors [Required]
4. Click Save to register for the lead.

3. Assigning a Counselor [Owner]

1. Open the lead profile.
2. Click on Edit Owner
3. Choose from the dropdown list of available counselors.

4. Assigning a Call Centre Executive [Handler]

1. Open the lead profile.
2. Click on Edit Owner
3. Choose from the dropdown list of available handlers.

4. Lead Rating Definitions

Status	Meaning
New	Just created, not yet contacted
Follow-up	Contacted, awaiting action
Hot	Highly interested student
Cold	Not interested currently
Not Reachable	Contact attempts failed

5. Lead Sources

Source	Description
Acuity Appointment	Appointment made in Acuity service
Call	Called the company number
Company FB/Insta	Referred from Facebook/Instagram campaign
Email Marketing	Referred from Email Marketing
FB Messenger	Referred from Facebook Messenger
Office Phone/Mobile	Called in Office Phone/Mobile
Online Application	Filled up online application form
Personal Reference	Referred by an internal employee
Referral Agent	Referred by a referral agent
Referred by Hossain	Referred By the CEO
Referred by Manir	
Sub Agent	Referred by Studynet subagent
Virtual Office	Join virtual office meeting
Walk-in	Visited office physically
Website	Referred from website
WhatsApp	Referred by whatsapp campaign
Expo Walkin	Joined expo event

6. Tagging Interests

- Use tags to label course interest, location, or scholarship requirements.
- Tags help segment leads for follow-up campaigns.

6. Lead Status Definition

Status	Meaning
Pending	Just created, not yet contacted
Enquiry	Started communication
Application	Applied for a course
Converted	Got the COE
Cancelled	Cancelled the application

6. Assign Leads

1. Navigate to `Leads > Global Leads Search`
2. Search for the lead(s) that you want to assign/transfer using the search filters.
3. Select the leads by clicking on the checkbox next to each lead.
4. To assign the Select Owner/Handler option, Select the department and a list of people recognizing the department will load. Select the person you want to assign the lead to and Click on the **Assign** button

7. Transfer Leads

1. Navigate to `Leads > Global Leads Search`
2. Search for the lead(s) that you want to assign/transfer using the search filters.
3. Select the leads by clicking on the checkbox next to each lead.
4. Select the office Branch you want to transfer the lead to and enter a reason for the transfer. Finally, Click on **the Transfer** button.

8. Leads Search

1. Navigate to `Leads > Leads View`
2. <u>Leads Search:</u>
   Leads ID: You can search for a specific lead, by just entering the lead ID and clicking the ***Search*** button.
   Owner**:** You can also select an owner to show all the leads handled by them.
   Service Type**:** Select the type of service's leads you are looking for
   Name (First Name and Last Name)**:** You can also enter the First and Last name to search for the leads. (Note: Character Sensitive)
   Lead Source: You can also select a lead source to filter out all leads based on the source.
   Rating: Filter out the leads based on their Rating (Hot/Warm/Cold/etc.)

***Email and Mobile**:* Enter the email and/or mobile number of the leads you want to search.
Lead Status: You can also filter out leads based on the status of the leads.

9. Leads Profile

1. Upon clicking the “Search” button in Lead Search, all the leads related to the filters will appear under the search dashboard.
2. Navigate to `Action > Profile`
3. You can update lead information here and upload documents

10. Edit Leads

1. Upon clicking the “Search” button in Lead Search, all the leads related to the filters will appear under the search dashboard.
2. Navigate to `Action > Edit`
3. You’ll be taken to a new page, where all the information about the lead is displayed to be edited.
4. After editing/updating any field, click on the Update button to save the new information about the lead.
5. Inquiry date cannot be edited

11. Change Lead Status from Pending to Inquiry

1. Upon clicking the “Search” button globally, all the leads related to the filters will appear under the search dashboard.
2. Navigate to `Action > Profile`
3. Select a reason for Inquiry and click on Update. The lead status will change to pending

12. Global Lead Search

1. Navigate to `Leads > Global Leads Search`
2. You’ll be taken to the global leads search dialog box
3. To search for lead(s), try using the multiple filters to your preference and click on ***the Search*** button.

13. Lead Profile