CRM Overview

What is Studynet CRM?

CRM stands for Customer Relationship Management. It is a strategy and set of technologies used by businesses to manage and analyze interactions with current and potential customers. The goal of CRM is to improve customer relationships, enhance customer satisfaction, and increase sales and revenue. CRM systems typically help organizations organize customer data, automate sales processes, track customer interactions, and support marketing and customer service efforts.

Studynet CRM is where all the data of employees of Studynet, leads and applications are stored. There are currently 11 branches of Studynet CRM:
Sydney CRM, Melbourne CRM, Brisbane CRM, Sylhet CRM, Dhaka CRM, Dhanmondi CRM, Chittagong CRM, Malaysia CRM, Nepal CRM, India CRM, Perth CRM.

Introduction to Studynet CRM

Studynet CRM is a comprehensive Customer Relationship Management system tailored specifically for Studynet. Its primary purpose is to streamline and automate various operational activities across multiple departments, ensuring efficient management of leads, students, courses, and administrative functions.

Key Features:

- **Lead Management:** Track and manage inquiries and potential students.
- **Course Application Processing:** Handle student applications seamlessly.
- **Contact Registration:** Maintain detailed contact records.
- **Internal Reporting:** Generate reports for performance analysis.
- **Administrative Tasks:** Manage different operational aspects like finance, marketing, communication, and more.
- **Multi-Branch Support:** The CRM is divided according to branches (e.g., Sydney, Melbourne, Perth, Brisbane, Dhaka, Chittagong, Sylhet, Dhanmondi, India, Nepal, Malaysia) to cater to localized needs.

- **Modules & Sections:** Includes dashboard, bookings, providers, marketing, leads, applications, students, migration, health cover, finance, reports, communication, contacts, agents, users, settings, products, site management, and API client details.

Technological Foundation:

- **Framework:** Built using **PHP CodeIgniter**, a lightweight and powerful PHP framework that ensures modularity, security, and scalability.
- **Multi-Branch Design:** Each branch has its dedicated interface, allowing localized data management and reporting.

CRM Module Structure

1. **Dashboard**
2. **Bookings**
   2.1. Bookings View
   2.2. Activity
   2.3. Event
3. **Providers**
   3.1. Provider View
   3.2. Add Provider
   3.3. Agent to Provider Setting
4. **Marketing**
   4.1. Marketing View
   4.2. Marketing & Promotion
   4.3. Campaign
   4.4. Email & SMS
   4.5. Target vs Achievement
   4.6. Events
   4.7. Partner Management
   4.8. Budgeting
   4.9. FB Setting
   4.10. Setting
5. **Leads**
   5.1. Leads View

Who uses the CRM?

Studynet CRM is utilized by various departments and individuals within Studynet to manage and analyze interactions with current and potential customers.

When a new staff member completes the Staff Registration, an account is created in their specific CRM branch. The IT team then updates the login credentials to the employee's work email and assigns them appropriate user roles.

The CRM supports multiple user groups, often aligned with departments, and a user can belong to multiple user groups within the same department. These departments and user groups include:

- **Admission:**
    - Admission
    - Application Team
    - COE Team
    - Common
    - Communication Team
    - GTE Team
- **Accounts:**
    - Accounts
- **IT:**
    - IT
- **Management:**
    - Administrator
    - Branch Manager
    - Management
    - Manager
- **Sales:**
    - Counsellor
    - Education Team

    - Leads Admin
    - PY Team
    - RPL Admin
    - Team Leader
- **Contact Center:**
    - Contact Center
- **Marketing:**
    - Marketing
- **Migration:**
    - Migration Agent
    - Migration Team
- **B2B:**
    - Account Executives
    - Assistant Account Executives
    - B2B
    - B2B Support
    - Business Development Manager
    - Operation Manager
- **HR:**
    - HR
- **Insurance:**
    - Health Cover Team

These roles and group memberships define the level of access and actions users can perform within the CRM, ensuring data security and efficient workflow operations.

Admission, IT, HR and Migration Team has access to all the Branches of CRM. The rest has access to their roles. For Instance, Sales has access to only their Branches. Contact Center has access to either onshore or offshore branches.

Modules Brief

1. **Dashboard**

Overview:

The Dashboard is the central hub of the CRM. It provides a visual overview of key metrics, recent activities, and important notifications, enabling users to monitor and analyze operational performance briefly. Each user has different types of dashboard. The User alsp logs in and starts their day from the dashboard.

Key Components of the Dashboard:

- **Branch-wise Data:** The dashboard displays data segmented by branches such as Sydney, Melbourne, Brisbane, Dhaka, Malaysia, and others.
- **Visual Charts & Graphs:** Includes pie charts, bar graphs, and line charts representing various metrics like lead sources, application statuses, sales performance, and more.
- **Sales & Lead Metrics:** Shows the number of leads, applications, student enrollments, and sales figures.
- **Activity Feed:** Displays recent activities like new leads, applications, meetings, or updates.
- **Quick Actions:** Buttons for rapid navigation to key modules such as start new applications, view reports, or managing contacts.
- **Notification Panel:** Alerts users about pending tasks, upcoming meetings, or system updates.

Example Data Display:

- **Leads & Applications:** The dashboard displays total leads and applications per branch, helping to evaluate branch performance.
- **Sales Data:** Visual representation of sales figures across branches.
- **Branch-specific Insights:** For example, the Sydney branch might show the number of inquiries, applications received, and conversions.

User Interaction:

- **Filtering Options:** Users can filter data by date range, branch, campaign source, or status.
- **Drill-down Capabilities:** Clicking on charts or metrics takes users to detailed reports for further analysis.

2. **Bookings**

3. **Provider**

- What Does “Provider” Mean in StudyNet CRM?

In StudyNet CRM, a Provider refers to an educational institution or university in Australia that has an official partnership with StudyNet. These providers are the key entities offering courses and programs to international students through StudyNet’s platform and consultancy services.

Providers play a critical role in StudyNet’s mission of connecting students worldwide with Australian educational opportunities. Each provider comes with its own set of courses, admission criteria, commission structures, and partnership agreements, all managed within the CRM.

- **Purpose of the Provider Module**

The Provider Module acts as the central hub for managing partner universities. It ensures:

1. Organized and accessible information about all partnered institutions.
2. Seamless integration with marketing, lead management, applications, and finance workflows.
3. Clear assignment of agents and counselors to specific providers for accountability and efficient operations.

Provider Module Sub-Sections

2.1 Provider View

The **Provider View** in StudyNet CRM acts as the central interface for accessing and managing all partnered universities and educational institutions. It presents a structured list of providers along with critical details such as provider name, group, state, service type, product offerings, and commission structures. To enhance usability, it includes robust search and filter options, enabling users to find providers based on parameters like country, provider group, commission type, state, or product. This ensures quick access to relevant provider information and simplifies day-to-day operations.

- Key details:
    - Provider Group
    - Provider Name
    - State
    - Service

    - Product
    - Commission type

- Includes **search, filter, and quick-view options**. Available filter options are:
    - Country
    - Service
    - Provider Group
    - Commission Type
    - State
    - Product
    - Provider Name
    - Commission Availability

2.2. Add Provider

The **Add Provider** submodule is designed for creating and registering new providers within the CRM. It captures all necessary details of the institution, including the provider name, type (Independent, Education Group, Super Agent), level (TAFE, University, College, Education Group), provider code, and trading name. Additionally, it includes branding fields such as logo, cover image, and slogan, along with operational details like website address, ABN number, student type, price level (Low, Medium, High), and status (Active/Inactive). It also allows defining specific attributes like internship availability, backslab, and clawback, ensuring all provider data is accurately documented for seamless integration with other CRM workflows.

Captures:

- Provider Name (required)
- Provider Type (Independent, Education Group, Super Agent) (required)
- Provider Code (required)
- Provider Level (TAFE, University, College, Education group) (required)
- Logo
- Cover Image
- Slogan
- Trading Name
- Student Type

- Website address
- ABN Number
- Price Level (Low, Medium, High)
- Status (Active, Inactive)
- Internship (Yes, No)
- Backslab (Yes, No)
- Clawback (Yes, No)

2.3 Agent to Provider Setting

The **Agent to Provider Setting** module in the CRM is designed to **manage and control the mapping between agents (or super agents) and providers (partner universities)**. This ensures that agents are assigned to specific providers based on agreements, commissions, or operational requirements. Here's a detailed explanation:

Purpose of Agent to Provider Setting

- To **define which agents can work with which providers**.
- To **control access** so agents only manage students and applications for the providers they are linked with.
- To **apply commission structures or partnership terms** for each agent-provider relationship.
- To enable **reporting and accountability** by tracking performance per agent-provider combination.

Key Features in the Module

From the screenshot, the following components can be identified:

Add Button (+ Add)

- Allows the user to create a new **Agent-Provider mapping**.
- During addition:
  - Select **Provider (University)**.
  - Select **Super Agent** (main agency, if applicable).
  - Define **commission rates** or other details.

- Assign start and end dates for the mapping.

Agent to Provider Search Section

- Provides **search criteria** for finding existing mappings.
- Filters:
    - **Provider Name:** Search by the university name.
    - **Super Agent:** Search by the agency associated.
- **Search Button:** Displays the list of mapped agents for the selected provider or super agent.

Workflow Example

1. Admin navigates to **Agent to Provider Setting**.
2. Clicks **+ Add** to create a new mapping.
3. Selects:
    - Provider = “University of Sydney”
    - Super Agent = “ABC Global Consultants”
4. Saves mapping → Now agents under “ABC Global Consultants” can manage students for “University of Sydney”.

Benefits

- **Data security:** Prevents agents from accessing unauthorized providers.
- **Operational clarity:** Clear allocation of responsibility between agents and providers.
- **Financial accuracy:** Ensures correct commission structures are applied per relationship.

4. Marketing

What is the Marketing Module?

The **Marketing Module** in StudyNet CRM is designed to manage all **marketing activities, campaigns, promotions, communications, and performance tracking** for educational services. It helps the StudyNet team plan, execute, and monitor marketing efforts across multiple channels (Email, SMS, Events, Campaigns, etc.) to engage leads, students, and agents effectively.

Key Sections in the Marketing Module

From the navigation buttons shown, the module includes:

4.1 Marketing View

4.2 Marketing & Promotion

- Used to manage promotional activities like:
  - Discounts or offers for specific intakes.
  - University (provider) promotion campaigns.
  - Digital ads or offline promotional events.
- Can log all promotional activities for reporting and ROI analysis.

4.3 Campaign

- Allows users to create and manage **targeted campaigns** (e.g., Email campaigns, intake promotions, webinars).
- Tracks campaign progress, audience list, and results (open rates, responses).
- Supports segmentation (filter leads or students by country, interest, or status).

4.4 Email & SMS

- Bulk communication tool to:
  - Send promotional emails or SMS to leads, students, and agents.
  - Schedule automated email campaigns (reminders, offers).
  - Maintain templates for quick communication.
- Helps improve **response rate** and keeps communication centralized.

4.5 Target vs Achievement

- Tracks **marketing goals vs. actual performance**.
- Metrics include:
  - Leads generated vs. target.
  - Applications or students converted from campaigns.
- Useful for measuring the success of marketing activities and setting future KPIs.

4.6 Events

- Calendar-based event management (as seen in the right-side calendar view).
- Allows scheduling and tracking of:
  - Webinars, seminars, educational fairs.
  - Office events, university meetups.
- Each event can be linked to campaigns or promotions for leads and students.

4.7 Partner Management

- Manages marketing relationships with **education partners (providers or agencies)**.
- Tracks co-branded campaigns, promotional activities, or joint events.

4.8 Budgeting

- Handles budgeting for marketing campaigns or events.
- Records planned vs. actual expenses.
- Helps finance teams assess cost-effectiveness of marketing strategies.

4.9 FB Setting

- Used to manage Facebook ads or campaigns.
- Integration point to track lead generation through social media platforms.

4.10 Setting

- Allows configuration of **marketing preferences**:
  - Email templates, SMS gateways.
  - Campaign defaults (start date, target audience).
  - Event categories and tags.

Calendar View (Event Tracking)

On the right side of the image, the **calendar layout** shows:

- **Month, Week, and Day views** to manage events.

- Color-coded highlights for specific dates (e.g., events or deadlines).
- Simplifies scheduling and avoiding conflicts between marketing activities.

Search Activity

The search filters allow you to:

- **Search Activity By** (e.g., "Completed").
- **Completed?** filter to show tasks/activities that are done or pending.

This ensures marketing tasks (campaigns, events, promotions) are well-tracked.

5. Leads Module

The **Leads module** is designed to **manage prospective students (leads)** who are interested in studying in Australia through StudyNet's services. This is the starting point of the student journey in the CRM, capturing key details for counseling, follow-ups, and application processing.

Purpose of Leads View

- Centralized **database of all leads** for the consultancy.
- Provides powerful **search and filter options** to quickly locate specific leads.
- Supports **status tracking**, **follow-up management**, and **service categorization**.
- Acts as a **bridge between marketing campaigns, counseling, and application submission**.

5.1 Leads View

The **Leads View Module** is the core section for managing **potential students (leads)** who have shown interest in StudyNet services such as education, visa, health cover, or migration services. It allows counselors and marketing teams to **track, filter, and manage leads** throughout the **pre-admission process**, starting from **GTE (Genuine Temporary Entrant) checks** up to the point where they receive an offer letter (COL).

5.2 Add Leads

The **Add Lead** module in StudyNet CRM is designed to capture and register potential students or clients who show interest in StudyNet's services. Its primary purpose is to record all essential details of a new lead, such as their personal information, service type (e.g., education, migration, health cover), and inquiry source. By systematically storing this information, the module ensures that every new prospect is tracked from the very beginning of their journey. This helps counselors and agents follow up effectively, manage communication, and guide leads through the application process, ultimately improving lead conversion rates and overall workflow efficiency.

5.3 Inquires

What Is an Inquiry?

An **Inquiry** is the *first expression of interest* from a prospective student (or their guardian/agent) about any StudyNet service—education placement, migration, visa, health cover, etc.
Examples:

- A student submits a **web form** asking about bachelor programs in Sydney.
- Someone calls an office and leaves their phone number wanting to know about visa options.
- A visitor at an **education expo** registers interest in multiple universities.

All of these are Inquiries.

Relationship Between Inquiry and Lead

- **Every inquiry must belong to a Lead.**
- **First Inquiry:** When the system receives the *very first inquiry* from a new person, StudyNet CRM **creates a new Lead ID** and links the inquiry to it.

- **Subsequent Inquiries:** Every future inquiry from the same person is **attached to the existing Lead ID**, giving staff a full history of engagement.
- This prevents duplicate leads, keeps communication history unified, and improves conversion analysis.

Inquiry Search Panel (Filters)

Filter	Description	Usage Example
Date From / Date To	Inquiry date range.	Show all expo inquiries from last week.
Inquiry Status	Workflow state (e.g., Pending, Contacted, Closed — values configured).	Follow up on pending inquiries.
Lead Source	Where inquiry originated (Website, FB/Instagram, Event, Referral, etc.).	Evaluate campaign performance.
Course Name	Interest expressed (e.g., IT, Bachelor of Nursing).	Route to specialist counselor.
Looking For More Than A Visit?	Flag indicating deeper intent than just visiting.	Prioritize high-intent inquiries.

Key Screen Actions

+ Add Inquiries
Manually log a new inquiry received via phone, walk-in, chat, or email. If no Lead exists, the system creates one; otherwise you search/select an existing Lead ID.

Expo Info
Bulk entry or review of inquiries collected at **education expos / fairs**. Useful for batch processing and quick lead creation from event signups.

5.4 Global Lead Search

Perform a **cross-branch or global search** across all branches of crm.

Field	Description
Leads Id	Unique identifier for the lead in the CRM.
Service Type	Dropdown (Education, Visa, Health Cover, Migration, etc.).
First Name / Last Name	Student's name for quick lookup.
Owner	Assigned counselor or CRM user handling the lead.
Lead Source	Origin of the lead (Website, Agent, Social Media, Event, etc.).
Rating	Quality of lead (Hot, Warm, Cold).
Email / Mobile	Contact details for search.
Lead Status	Current status (New, In-progress, Converted, Cancelled).
Follow-up Status	Indicates if follow-ups are pending, done, or overdue.
Lead Created Date (From/To)	Date range when the lead was created in CRM.
Visa Date (From/To)	Expected or actual visa application date range.
Country	Country preference for study (Australia, UK, etc.).
Nationality	Student's nationality for segmentation.

Workflow

1. Counselor searches for leads by applying filters (e.g., **Service Type = Education**, **Lead Status = New**).
2. Views results and selects a lead for follow-up or update.
3. From the lead details screen, user can:
   - Update personal details.
   - Change lead status.
   - Schedule or log follow-up activities.
   - Convert lead into an **Application**.

6 Application

An **Application** represents a formal submission (or in-progress submission) by a student to a **Provider (partner university)** or related service (e.g., visa, migration assistance, health cover add-on). Applications are created **after a Lead is qualified** and ready to move forward with a specific course, intake, or pathway.

Key Actions

6.1 Application View

This is the **main workspace** for managing and reviewing applications.

Typical capabilities:

- **Search & Filter Applications** (see Section 3 below).
- View summary records in a table: Student Name, Service Type, Provider, Status, Assigned Counselor, Last Update.
- Open an **Application Detail page** to see:
  - Course / Program details
  - Intake & session start dates
  - Provider reference numbers
  - Submitted documents (transcripts, English scores, passport, etc.)
  - Communication history (emails sent to provider, notes from counselor)
  - Status timeline (Submitted → Offer Issued → Offer Accepted → COE Issued, etc.)
- Trigger task actions:
  - Upload or replace application documents
  - Update status (e.g., “Docs Pending,” “Submitted to Provider,” “Offer Received”)
  - Assign / reassign owner or department
  - Link to **Finance items** (application fee, tuition deposit, commission tracking)

Application Search Filters (Field Reference)

When using **Application View** (and often also available in the **Check Application Update** screen), you can narrow results using these filters:

Field	What You Enter	Why It’s Useful
Service Type	Education, Visa, Migration, Health Cover, etc.	Focus on a specific pipeline (e.g., only university course applications).
CRM ID	Internal application ID or student CRM reference.	Fast lookup when you have the record number.
First Name	Student’s given name.	Partial or full match for quick search.

Last Name	Student's family name.	Essential for duplicates and record confirmation.
From Date	Start date for creation/submission date range.	Track intake batches or recent submissions.
To Date	End date for date range.	Combine with From Date for reporting periods.
Department	Primary department handling the case (e.g., Admissions, Migration Services).	Route work to internal business units.
A. Department (Application Department / Assigned Department)	Sub-team or regional office responsible for the application.	Useful for multi-country teams or franchise offices.
Application Status	High-level milestone (Pending, Completed, Withdrawn, Rejected).	Pipeline tracking and reporting.
Process Status	Operational step or next action (GTE -> Application -> Communication and Update -> COE).	Day-to-day workflow control; shows what needs attention next.

Example Workflow: Lead to Application to Update

Step 1: Counselor qualifies a lead → converts to **Application**.
Step 2: In **Application View**, selects provider, course, intake; uploads documents.
Step 3: Submits application to provider (status: *Submitted*).
Step 4: Provider issues *Conditional Offer* → Counselor updates via **Check Application Update**.
Step 5: Student supplies missing docs → status moved to *Offer Accepted*.
Step 6: Confirmation of Enrolment (COE) issued → triggers Finance and Visa workflows.

Application Status

Status	Meaning
Pending	Application is active and in progress (e.g., submitted, awaiting updates).
Completed	Successfully processed and closed (e.g., COE issued or service delivered).
Withdrawn	Application withdrawn by the student or agency before completion.
Rejected	Application declined by the provider or not successful.

7. Students Module

- What Is a “Student” in StudyNet CRM?

In StudyNet CRM, a **Student** is a **qualified Lead who has progressed far enough in the application pipeline to receive a Conditional Offer Letter (COL)** from a partner institution and is being actively managed through to **Confirmation of Enrolment (COE)**. Once a lead reaches COL, it is elevated into the **Students Module**, where higher-touch processing, compliance, communication, and final enrolment tracking occur.

Key Stages in the Student Journey

The Students Module tracks four structured stages. Think of them as **milestones + workflow checkpoints**:

2.1 GTE (Genuine Temporary Entrant Review)

- Verify academic, financial, and English documents.
- Ensure student meets Australian visa intent and provider-level compliance.
- Flag missing or risky documentation early.

2.2 Application (Formal Submission Stage)

- Submit required forms and supporting docs to the university (provider).
- Track acknowledgement, conditional requirements, and turnaround time.

2.3 Communication & Update

- Ongoing back-and-forth with the student (and sometimes agents) for:
  - Missing docs
  - Updated transcripts / English scores
  - Offer conditions (financials, GTE clarifications)
- Logs all emails, calls, SMS, and file uploads.

2.4 COE (Confirmation of Enrolment)

- Final confirmation issued by the provider once conditions are met (fees paid, documents cleared).
- Critical output used for **student visa lodgment**.
- Triggers “completion” state for the student record and integration into **Finance** and **Visa modules** (if applicable).

When Does a Lead Become a Student?

A **Lead converts into a Student once a Conditional Offer Letter (COL) has been received** and the case is actively being managed toward meeting conditions and obtaining a COE. This transition is important because:

- Record ownership may shift to a specialized **Admissions / Student Processing team**.
- Additional compliance tasks (GTE, document checks) become mandatory.
- Student-level reporting (conversion rates, COE success) begins.

Students Module – Search & Filter Panel

Users can locate and manage student records using the following filters:

Filter	Purpose	Typical Usage Example
Student ID	Unique system identifier for the student record.	Direct lookup from email ticket or report.
First Name / Last Name	Name-based filtering.	Handling walk-ins or phone queries.
From Date / To Date	Date range (record created, stage start, or configurable).	Show all students moved to Student stage in the last month.
Institution Name	Provider university the student applied to.	Review students linked to a specific partner for upcoming intake.
Sales Person	Assigned counselor/advisor responsible for the student.	Performance tracking by staff.
Process Status *(workflow-level)*	Operational progress: **Not Started, In Progress, Completed, Cancelled, Rejected**.	Day-to-day task management—what needs action.
Student Status *(record-level outcome)*	High-level student lifecycle: **In Process, Rejected, Cancelled, Completed**.	Reporting & dashboards—pipeline health.

14 Contacts

The **Contact Module** in StudyNet CRM functions as the internal employee directory and onboarding record system for all StudyNet branches. When a new staff member joins, they complete an employee registration form; upon submission, the system automatically creates a unique employee ID within the branch CRM they are joining and stores the submitted details (such as name, email, phone, and branch association). This creates a structured, searchable record that links the employee to operational workflows across the platform—so they can be assigned leads, students, applications, or administrative responsibilities.

14.1 Contacts View

Contact View allows authorized users to look up employees across a branch (or multi-branch, depending on permissions) and quickly see key identifying information like name, email address, and contact numbers. Search tools help HR, managers, or system admins locate staff by name or other attributes, verify active accounts, and confirm contractability for workflow assignments or internal communication.

14.2 Add Contacts

The **Add Contact** sub-module supports two common scenarios: onboarding a newly hired employee whose registration data wasn't captured through the standard form (manual entry), or creating temporary/contract staff accounts. Here, an administrator enters the employee's core information directly into the CRM. During this process, the admin sets an initial password—this becomes the employee's CRM login credential. (Best practice: require the employee to change this password at first login to maintain account security.) Once saved, the new contact record is immediately available in Contact View and can be linked to roles, permissions, and ownership of records in other modules.

16 Users

The **Users Module** in StudyNet CRM is responsible for managing system user accounts and their roles or permissions within the platform. When a new contact (employee) is created in the **Contact Module**, that record is automatically visible in the **Users View**, ensuring that every registered staff member has a corresponding user account in the CRM.

The key purpose of this module is to **control user access, roles, and group memberships**. Each user belongs to a specific group or department (e.g., Admissions, Marketing, Finance), which defines the level of access and actions they can perform within the CRM. For instance, an employee initially registered under the Admissions group may only have access to leads and student-related operations. However, if their responsibilities expand to handle processes up to the **COE (Confirmation of Enrolment) stage**, their group membership or permissions can be updated directly in the Users Module.

The **Users View** provides a list of all active CRM users, including details such as username, email, assigned group, and account status. Administrators can modify group assignments, enable or disable accounts, and manage access levels for employees as their roles change. This ensures that employees always have the right level of access to perform their tasks effectively while maintaining strict control over data security and workflow operations.