**Project 30: Pioneerlinks - Education Consultant Management System**

**About the Client**

Pioneerlinks Education & Visa Consultants in Melbourne are dedicated to assist and guide international students with selecting courses in various education sectors which are aligned with their career goals.

We also assist for the **family visa Australia** to those families who wanted to migrate to Australia. At Pioneerlinks Career Consultancy the education advice is complimented with professional migration advice to design a comprehensive career strategy. Pioneerlinks Migration team of dedicated professionals equipped with sound knowledge of Australian Education Industry, National Code and Australian immigration law providing informed advice to our clients maintaining highest satisfaction level.

At Pioneerlinks Migration, We have a highly experienced and registered migration consultants who provide their services to the clients throughout the world want to apply for Australian visa. We as a registered migration agent in Melbourne provide services and assist our clients through the complex process of visa application.

We will probably manage and give a consistent domain in the middle of customer and lawyer all through the movement process. We offer an open, available law office, willing to speak to your hobbies morally, ardently and speedily.

Our expert specialists are accessible to help with:

* Student visa applications,
* Business visa application, Visitor Visa
* Family stream applications including life partner/accomplice and guardian movement.
* Employer Nomination Visa, General Skilled Migration.
* Regional state sponsorships.
* MRT/AAT Appeals for refusal and Cancel Visa Services

**Project Brief & Business Problem Specifications:**

Client is facing the following problems and issues in the existing system:

Answering Questions

Hard to simplify Bookkeeping

Payment Problem Management

Organizing the Document Lifecycle

Information Management Operations

Hiring and Maintaining Quality Staff

Overall Responsiveness to Clients

Don’t Know What Will Go Wrong

Lost documents

**System Modules Requirements**

**Admin/Management Module**

1. **Dashboard:** In this section, admin should be able to see all detail.

**Lead Forms:**

Track where the Lead is coming from

Identify the source Lead is coming from, this could be from website, social media or seminars.

Integrate Lead Forms through embedding and QR codes

Show Lead Forms in online admin dashboard by system generated code. Use QR code to reach more leads.

**Customer Relationship Management (CRM)**

**From Lead to Prospect, from Prospect to Client**

The system should be dedicated to ensuring admin have all the client’s information in one place, where he/she can easily follow the client’s activities.

**Days in Queue Track**

The longer the leads wait, the higher the risk of losing them. The system should have implemented a days in queue tracker, so admin can prioritize leads that have been waiting in the queue longer.

**Track Visa Expiry**

Input Visa Expiry – the system should notify the admin before the client visa expires. Admin can follow up with client and advise another service to the client.

**Partner & Product Relationship Management (PRM)**

**Partners & Products all in one place**

PRM in an Education & Migration Agency is prime. The system should be able to easily manage and view all the partners in one place and view important information, such as contact information, office branches, offered courses & products and many more.

**Task Management**

**Keeps track of individual and team tasks**

The system should help counsellors avoid losing work and important information while managing their tasks to ensure counsellors stay on schedule and meet deadlines.

**Prioritize work**

Tracking tasks should allow everyone to understand which are more important or require more time, so admin team members can plan their time and meet deadlines.

**SMS Messaging**

**Send updates to clients within Agentics:**

Use SMS messaging to notify clients about their appliciations or upcoming appointments.

**Application Checklist**

**Know which documents are required for different stages of an application**

The application process is often tedious and requires multiple documents from clients. System should have a document checklist, where admin can easily view all the documents needed during the different stages of an application.

**Make documents mandatory before proceeding**

Make certain documents mandatory in workflow to ensure the education counsellor does not miss a single document before progressing the application.

**Application Management**

**Keep clients updated**

Automatically send clients email notifications once an application stage changes to keep them updated in the application process.

**Organising made effortless**

Add related documents in the applications. The system should update and never miss a step with an application stage-wise viewing of activities taken so far with the client activity log.

**Client Portal**

**Keep clients updated on their application is crucial to maintaining good relationships**

The system should offer a dedicated client portal for customers. Once the portal is enabled, the client will receive a link to login into their portal, where customer can login and view their details, status of their applications and upload documents.

**Clients can upload documents from their own device**

Clients should be able to upload documents from their device through the client portal, making it easy to access in the system document system. Integrated with syetm document checklist, clients receive email reminders notifying them when to upload documents when needed.

**Reporting**

**Locate the problem, make plans to overcome the problem**

Reports should be available for multiple key features of the system, so admin can make informed business decisions based on the progress of the agency.

**Contact Reports**

Quick & efficient way of acquiring accurate information of leads, prospects and clients with their sources for proper monitoring and further analysis.

**Application Reports**

Get detailed information of In Progress, Discontinued and Completed application to make future decisions.

**Invoice Reports**

Easily prepare reports of paid/unpaid invoices with all the valuable information like total fee, income sharing amount, client name, product name etc.

**Agent Management**

**Agent Management**

Many of the Education & Migration Agency business starts with symbiotic relationships with other Agents. These relationships are crucial to the business for client expansion, guidance and networking. The system should be able to connect with both Sub-Agents and Super-Agents.

**Invoicing**

**Commission Invoicing**

Easily creatable net claim and gross claim invoice with reminder notifications. Connects partners and clients together so admin never lose commission.

**General Invoicing**

Create an invoice for any other general service given to client or partner.

**Managing Client Discounts**

The system should keep proper information of discount given to the client so that finance is on check.

**Role Management**

**Control level of access**

Control levels of access to company’s client database to prevent the sharing of confidential information. .

**Key Performance Indicators (KPIs)**

Set targets and a measuring parameter within a specified time period. Increase agency team’s efficiency by establishing a KPI target for counsellors to judge their performance.

**Payment Schedule**

**Schedule all payment instalments related to the particular application.**

Track and communicate to agency client about their upcoming payments and deadlines.

**Tracking semester payments are very crucial to claim commission.**

When dealing with Education Services, the revenue is generated from the commission that are paid by partners when students make the fee payment each semester. Hence, payment scheduling allows the easy tracking of payment instalments over a period of the time to ensure never miss a dollar.

**Document Management**

**Stay organised with Document Management**

Admin should be able to stay organised by uploading documents in the system secured agent management system. Manage client documents easily and efficiently.

**Keep team members in the loop**

Adding related documents in the application so that others working on the application can easily access it without any hassle.

Admin can also update his profile, change the password and recover the password.

**User Module**

1. **Home Page:** User can view the home page of the real estate management system
2. **About:** User can view about us page.
3. **Services:**  (As discussed with the client)
4. **Contact us:** User can view contact us page.
5. **My Account:** In this, there is three sections:  **(A) User Profile**

In this section, the user do the following activity

1. **Edit Profile:** User can edit his/her own profile.
2. **Change Password:** Owner can change his/her own password.
3. **Add Documents:** User can add his/her own documents
4. **My Application:** User can see his/her own listed applications.
5. **Received Messages:** User can view receive enquiries against his/her own listed applications and also answer the enquiries.
6. **Logout:** Owner can logout from own account.
7. **Assessment:** For a free initial Skill assessment of visa options, user should be able to complete the questionnaire.
8. User might be eligible for a number of visa subclasses or streams – in this case client would recommend providing the user with a comprehensive Visa and Immigration Assessment as well as a Job Appraisal in written form.
9. **Get a Quote Form**
10. **As further discussed with the client**

**(B)Change Password:** User can change his/her own password.

**(C)Logout:** User can logout from own account.

**UI Design**

User Interface for this system is concerned with the dialogue between a user and the computer. It is concerned with everything from starting the system or logging into the system to the eventually presentation of desired inputs and outputs. The overall flow of screens and messages is called a dialogue.

**UI Design Requirements**

1. The system user should always be aware of what to do next.
2. The screen should be formatted so that various types of information, instructions and messages always appear in the same general display area.
3. Message, instructions or information should be displayed long enough to allow the system user to read them.
4. Use display attributes sparingly.
5. Default values for fields and answers to be entered by the user should be specified.
6. A user should not be allowed to proceed without correcting an error.
7. The system user should never get an operating system message or fatal error.

The aim of proposed system is to develop a system of improved facilities. The proposed system can overcome all the limitations of the existing system. The system provides proper security and reduces the manual work.

* + Security of data.
  + Ensure data accuracy's
  + Proper control of the higher officials.
  + Minimize manual data entry.
  + Minimum time needed for the various processing.
* Greater efficiency.
* Better service.
  + User friendliness and interactive.
  + Minimum time required.

Functional requirements are product features or functions that developers must implement to enable users to accomplish their tasks. So, it’s important to make them clear for the stakeholders. Generally, functional requirements describe system behavior under specific conditions. The developers of this system must enhance the performance and efficiency of the system by adding 15 to 20 more functional requirements. Students need to do their own research to find how they can improve the system and which FRs need to added. The group must need a prior approval from the stakeholders/project supervisor before finalizing these Functional Requirements. These enhanced FRs must be reflected separately in Final SRS Report after the approval.

**Hardware Requirement: Should be recommended by the developers.**

**Software Requirement: Should be recommended by the developers.**