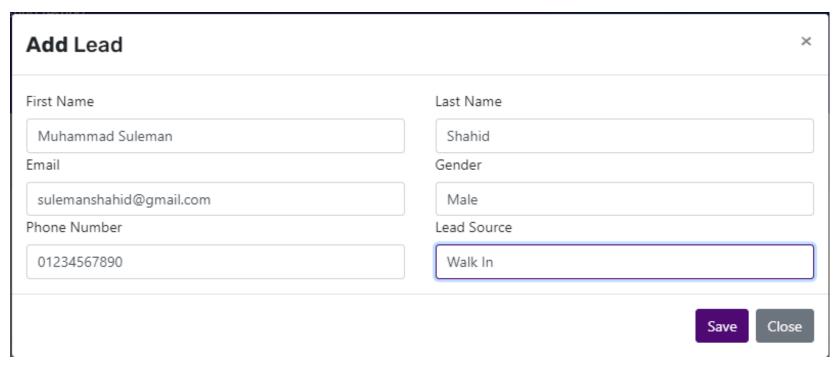
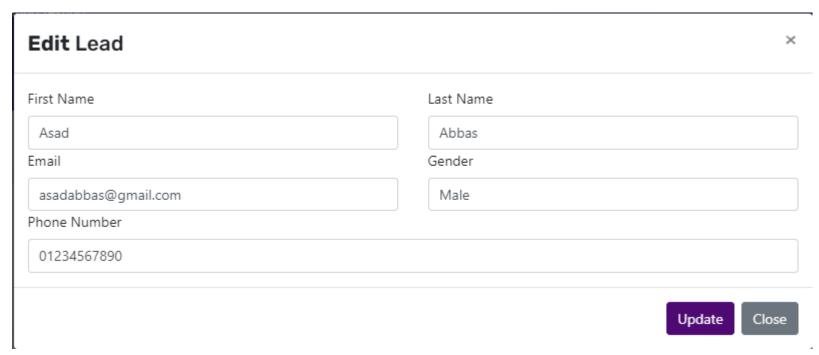
CRM Testing

My Leads Tab

- Two lead with same email or Phone # cannot be added
- When you add a lead, we don't have drop down options for lead source

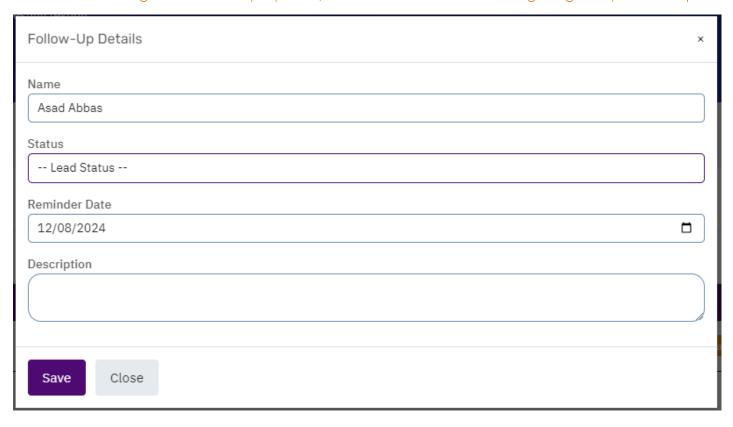


• When you edit the lead, you can edit all information except the lead source

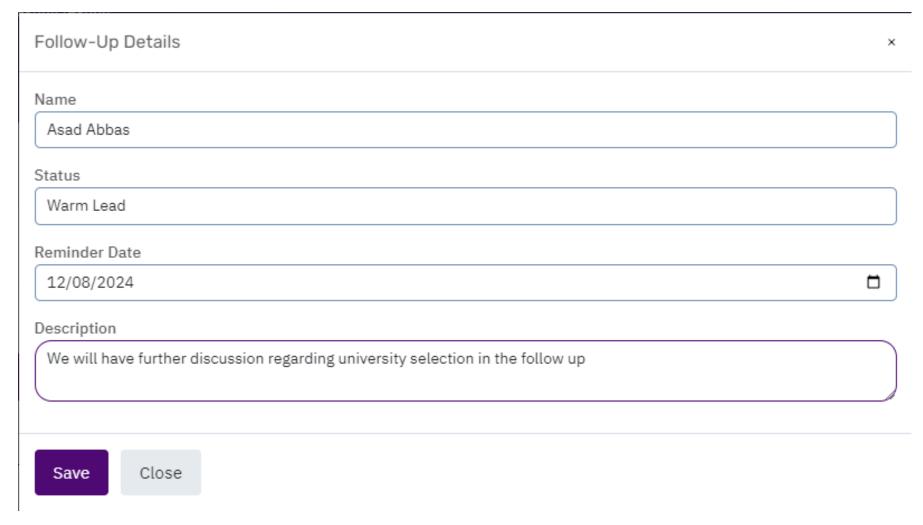


• University and its programs can only be added by the admin

• When we go for follow up update, does the status section is giving us option to update lead status as well?

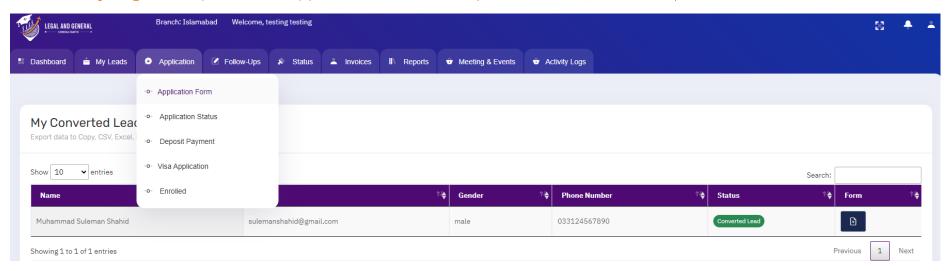


• Is this entry correct? I have given a date for next follow up and a description, that what will be the details of follow up and then the lead will be update to warm lead from pending lead. Or does this section is to update that the lead has converted from pending lead to warm lead and we will have next follow up on this date.

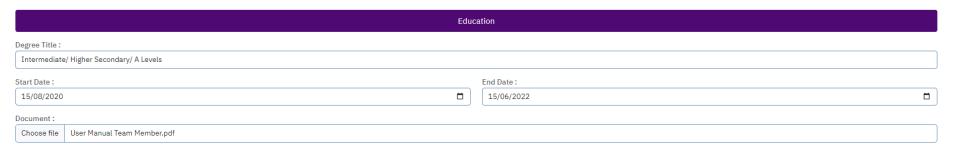


Application Tab

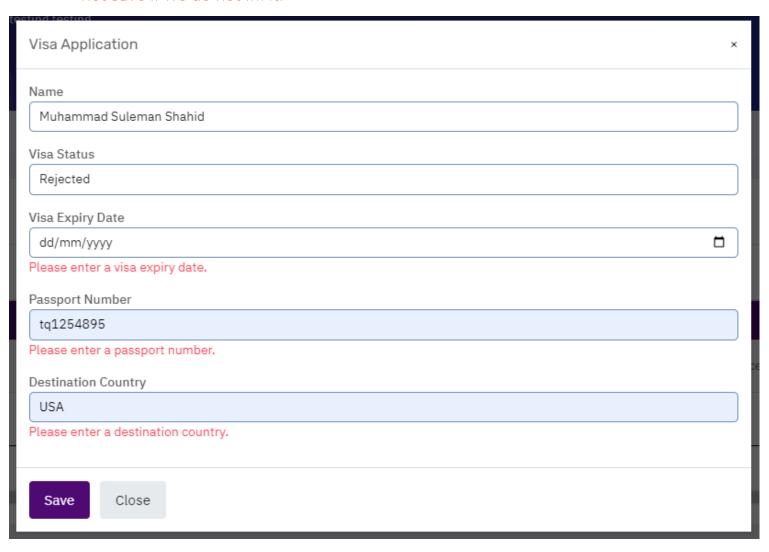
• In Application form section, you can view My Converted Leads Summary – All the converted leads are direct here. Here you get the option to fill application form for the particular lead, which is updated to converted lead



- Application Form
 - o No drop down options for Language selection
 - o We can upload PDF, jpeg files in documents section and fee voucher section
- We can add only one level of education



• In Visa Application status update, what could be the visa expiry date when the visa has been rejected. It does not save if we do not fill it.



• Even if a student application status is pending, which is updated by the Admin (that whether the application is accepted or rejected)

Application Status Summary

Email

sulemanshahid@gmail.com

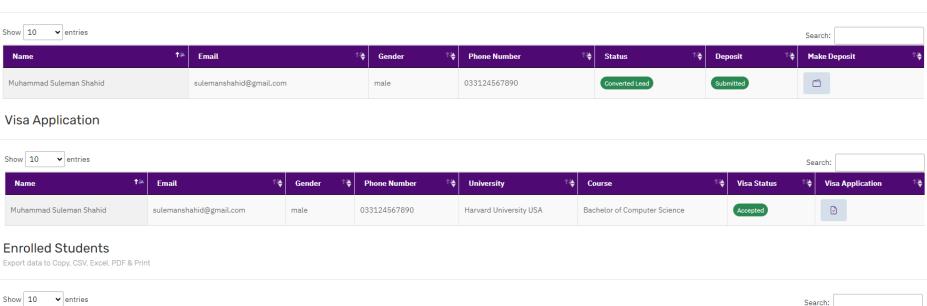
Gender



• If the team member update deposit payment status as submitted and visa application update as Accepted. The student is directed to Enrolled Student. Even if the admin does not update its status as accepted or rejected.

Deposit Payment

Muhammad Suleman Shahid



Cnic

34125-9741394-8

University

Harvard University USA

Program

Bachelor of Computer Science

Phone Number

033124567890

• After filling the form, when clicked on save it gave this error. Try opening url in other browser. Team is working on it

% https://legalandgen.technologyinn.net/Identity/Account/Login



This page isn't working

If the problem continues, contact the site owner.

HTTP ERROR 400

• Lead Application form once filled cannot be viewed, edited or deleted

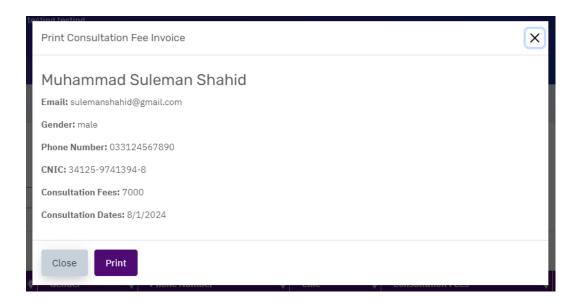
My Converted Leads Summary

Export data to Copy, CSV, Excel, PDF & Print



Invoices Tab

• In print consultation fee voucher. Close or X option is not working. We have to click on print and then cancel it to close the dialogue box. Here print command is working



Report Tab

• Print option is not working. When we click on print for university programs or enrolled students, it opens a new tab with log in option.