How To Start An Application (Migration)

This guide simplifies the process for starting an application for migration , helping users navigate the online platform and complete their application efficiently. It’s essential for avoiding common risk and streamlining the visa application experience.

1. Navigate to CRM ApplyIMS

2. Click "Deals"

3. Select one Deal to add Application

4. Click "View Details"

5. Click "Applications"

6. All applications associated with the deal will be listed under Applications.

7. Click "Add Application"

8. Click Service

9. Select Service "Visa Application"

10. Click on Country (Countries will be listed according to the selected service).

11. Select Country(Australia)

12. Click Search Institution

13. Select institution "Australian Department of Home Affairs (Visa)"

14. Click the "Search Products" field.

15. Click the "Search Products" field.

16. Enter Product Name "Prospective Marriage Visa"

17. Click Search icon

18. Product "Prospective Marriage Visa (subclass 300)"will be displayed according to the search and filter criteria.

19. Click "Start Application"

20. Fields are filled automatically

21. Click Sub -Agent.

22. Select Sub-Agent "Putalisadak” Education Expert Visa Services"

23. Click "OK"

24. Once the application is successfully added, it will be listed in the application list as shown

How to create a new Deal

This guide simplifies the process of creating a new deal in the system by walking users through the steps of entering key details like the deal name, processing branch, contacts, services, and assignees. It's designed to help new users or those looking to improve their efficiency in managing deals, ultimately boosting productivity.

1. Navigate to https://expert.crm.applyims.com/dashboard

2. Click "Deals"

3. Click "Create a Deal"

4. Click and enter Deal Name

5. Click the "Processing Branch" field.

6. Type Processing Branch Name and select by clicking "Sydney"

7. Click the "Associated Contact" field.

8. Type the contact's name, and select by clicking.

9. Click "Select the appropriate service"

10. Select service "Education"

11. Click the box to select the country "USA". You can add multiple interests.

12. Click the box to select the country "Canada"

13. Click the box to select the interest "Undergraduate". You can add multiple interests.

14. Click the box to select the interest "Postgraduate"

15. Click Unassigned in the Assignee field.

16. Type Assignee Name and select by clicking

17. If the assignee you're searching for is in the list, click on it.

18. Click "Create a Deal"

19. - Once you create a new deal, it will automatically appear in the deals table

    - You can see all the details of the newly created deal, including the Deal Name, Associated Contact, Processing Branch, Interested Services, Assignee and Deal Status .

How to update a Deal

This guide outlines a simple process for updating a deal in the CRM system, including modifying details like the deal name and interested services. It helps users navigate the interface, make changes, and save updates, ensuring that the information remains accurate and current in the CRM.

1. Navigate to https://expert.crm.applyims.com/dashboard

2. Click "Deals"

3. Select the deal name that needs to be updated.

4. Click "View Details"

5. Click Edit button

6. Click "Deal Name" field.

7. Remove the existing deal name and enter a new deal name.

8. Processing branch and Associated contact cannot be edited; they will remain in disabled mode.

9. Click interested Services field

10. Click on the selected interests to uncheck them.

11. Click the box to select the interest "Diploma".

12. Click Assignee field

13. Select assignee by clicking

14. Click the selected assignee to unselect it.

15. All the assignees that are selected are presented in this way

16. Click "Save"

17. Any changes you made will be automatically reflected . Deal Name

18. Any changes you made will be automatically reflected . "Interested Service"

How to create a Deal from Contact

This guide offers a step-by-step process for creating a deal in Everest CRM, helping users navigate the platform and manage their contacts efficiently. It streamlines the workflow, ensuring accurate entry and tracking of deal details, and is useful for both new users and those seeking to enhance their organizational skills.

1. Navigate to https://expert.crm.applyims.com/dashboard

2. Click "Contacts"

3. Scroll through the list or search for the contact's name and select it by clicking on the contact's name.

4. If there are any deals present, they will be displayed in the list.

5. Click "Create a Deal"

6. Click and Enter in the "Deal Name" field.

7. Click the "Processing Branch" field.

8. Type the Processing Branch and select by clicking

9. The associated contact will be in a disabled state when accessed directly.

10. Click "Select the appropriate service"

11. Choose the service you want by clicking on it.

12. Click in the box to select the country "Australia"

13. Click in the box to select the Interests "Postgraduate"

14. Click "Unassigned" in the Assingee field

15. Type Assignee Name and select by clicking

16. Click "Create a Deal"

17. The new deal will show up in the list with its details, including Deal Name, Branch, Assignee, Deals Created and Interested Services.

How to assign Assignee in Deal

This guide simplifies assignee assignment in a deal within your CRM, enhancing workflow efficiency, clarity in responsibilities, and team collaboration.

1. Navigate to https://expert.crm.applyims.com/dashboard

2. Click "Deals"

3. Select Deal to assign Assignne

4. Click on the assignee from the selected deal.

5. Enter and Select Assignee

6. Selected Assignees will be listed

7. Selected Assignee will be displayed here, allowing you to review or modify

How to choose Interested Service for a Deal

This guide provides a streamlined process for selecting interested services in a deal, allowing users to efficiently customize options based on educational interests and locations within the CRM platform.

1. Navigate to https://expert.crm.applyims.com/dashboard

2. Click "Deals"

3. Click "Interested Service"

4. Click Service (Education)

5. Click box to select the country (USA).

6. Click box to select the Interests (Postgraduate).

7. Click "Submit"

8. Selected interested services will be displayed here, allowing you to review or modify.

How to Start an Application(Education) in Deal

This guide simplifies the process for starting an Application for Education, helping users navigate the online platform and complete their application efficiently. It’s essential for avoiding common risk and streamlining the visa application experience.

1. Navigate to https://expert.crm.applyims.com/dashboard

2. Click "Deals"

3. Select one Deal to add Application

4. Click "View Details"

5. Click "Applications"

6. All applications associated with the deal will be listed under Applications.

7. Click "Add Application"

8. Click Service

9. List of applications will be displayed here. Select Service "Education"

10. Click on Country (Countries will be listed according to the selected service).

11. Select Country(Australia)

12. Click Search Institution

13. Enter and select Institution (Crown Education Ptv Ltd)

14. Selected Institution will be displayed in the list

15. Click the "Search Products" field.

16. Enter Product Name "Community Service"

17. Product will be displayed according to the search and filter criteria.

18. Click "Start Application"

19. Fields are filled automatically

20. Click Sub -Agent.

21. Select Sub-Agnet "Putalisadak Education Expert Visa Services"

22. Sub-Agent Branch will be autofilled

23. Click "OK"

24. Once the application is successfully added, it will be listed in the application list as shown

How to Filter Deals by Assignee

This guide explains how to filter deals by specific team members in the system. It shows you how to find and manage deals related to individual assignees. It also explains how to clear the filter to see all deals again. This will help you work more efficiently and easily manage your deals.

1. Navigate to https://expert.crm.applyims.com/dashboard

2. Click "Deals"

3. Click "Assignee" filter

4. Display only the assignees associated with the branch and those present in the table.

5. Type Assignee Name "Juna Pun" and Select by clicking

6. Click box if you find assignee, or scroll through list to locate assignee "Alina Manandhar" you're searching for.

7. Deals are filtered and only those matching the selected assignee "Juna Pun" are listed

8. Deals are filtered and only those matching the selected assignee "Alina Manandhar" are listed

9. Display the number of assignees "2" that have been selected.

10. Click "Assignee" filter

11. Click "Clear"

12. When the filter is cleared, all deals present in the table will be displayed.

How to use Apply filters in deal

This guide offers step-by-step instructions for using advanced filtering options in deals section. It helps you narrow down searches by specific branches and date ranges, improving productivity and decision-making. It’s a key resource for optimizing your deal management process.

1. Navigate to https://everest.crm.heubertapp.com/dashboard

2. Click "Deals"

3. Click "Apply Filters"

4. Click Branch

5. List of branches available in the deals is displayed.

6. Select one Branch "Kathmandu"

7. Select the "Sydney" branch, as multiple branches can be chosen.

8. Click the "Start date" field.

9. Click Month

10. Select month from list (August)

11. Click day (29)

12. Click the "End date" field.

13. Select month and day (September and 3)

14. Selected filters are displayed like this:

15. Click "Apply" button

16. Only the deals with the selected branch "Kathmandu" are displayed.

17. Only the deals with the selected branch "Sydney" are displayed.

18. Deals within the selected date range are displayed.

19. Deals within the selected date range are displayed.

How to filter Deals by Service

This guide offers a step-by-step process for efficiently managing and filtering migration and education applications within a system. It helps users focus on specific services, countries, and interests, making their approach more organized and targeted. Using this guide will streamline your workflow and improve decision-making in the migration and education sectors.

1. Navigate to CRM ApplyIMS

2. Click "Deals"

3. Click service filter

4. The service filter is displayed

5. Select Service by clicking "Migration"

6. Based on the selected service, the country displayed

7. Select another Service "Education"

8. Select Country by clicking " Australia"

9. Select Another Country by clicking "Education"

10. Click Interests

11. The list of Interests displays based in the selected country

12. Select Interests by clicking "Doctrate"

13. Select Interests by clicking "Visa Application"

14. Select interests by clicking "Skills Assessment"

15. Click "Apply"

16. The deals are filtered, and only those matching the selected interested services "Education, Australia, Diploma, Postgraduate" are listed.

17. The deals are filtered, and only those matching the selected interested services "Migration, Australia, Visa Application" are listed.

18. Click "Service" filter

19. Click "Clear"

20. When the filter is cleared, all deals present in the table will be displayed.

How to change the status of deal to 'Complete'?

This guide is crucial for users looking to independently finalize deals in the system, ensuring a smooth process. It offers step-by-step instructions for navigating the platform, managing applications, and confirming deal completion. By following the guide, users can avoid common mistakes and ensure all criteria are met before marking a deal as complete, empowering them to manage deals effectively.

1. Navigate to https://expert.crm.applyims.com/dashboard

2. Click "Deals"

3. Click "In Progress"

4. - Select Deal

   - Click "View Details

5. Ensure that at least one application is completed before completing the deal

6. Click on Status.

7. - List of Status will be displayed

   - Select completed Status

8. If there are any remaining in-progress applications, they will be listed here.

9. Select Reasons.

10. Enter Remarks

11. Click "Mark Deal as Completed"

12. A success message will be displayed

13. The status will be updated from 'In Progress' to 'Completed

14. The in-progress applications will now be discontinued.

How to change the deal status to 'Lost'?

This guide offers a clear process for changing a deal's status to 'Lost' in a system. It provides step-by-step instructions to help users avoid confusion, ensure compliance, and maintain accurate records. Following these steps supports effective deal management and reporting.

1. Navigate to https://expert.crm.applyims.com/dashboard

2. Click "Deals"

3. Click "In Progress"

4. - Select one deal

   - Click "View Details"

5. Click Status

6. - A list of statuses is displayed.

   - Only 'Lost' and 'In Progress' are shown, as none of the applications in the deal are completed.

7. Click "Lost" Status

8. Only in-progress applications are listed.

9. Scroll to check for other in-progress applications.

10. Click Reason.

11. Select one reason from the list.

12. Enter remarks

13. Click "Mark Deal as Lost"

14. A success message is displayed.

15. The status has been changed from 'In Progress' to 'Lost'.

16. All in-progress applications will now be updated to 'Discontinued Applications'.