EDlumina Admissions Training Manual
v5.11.2021

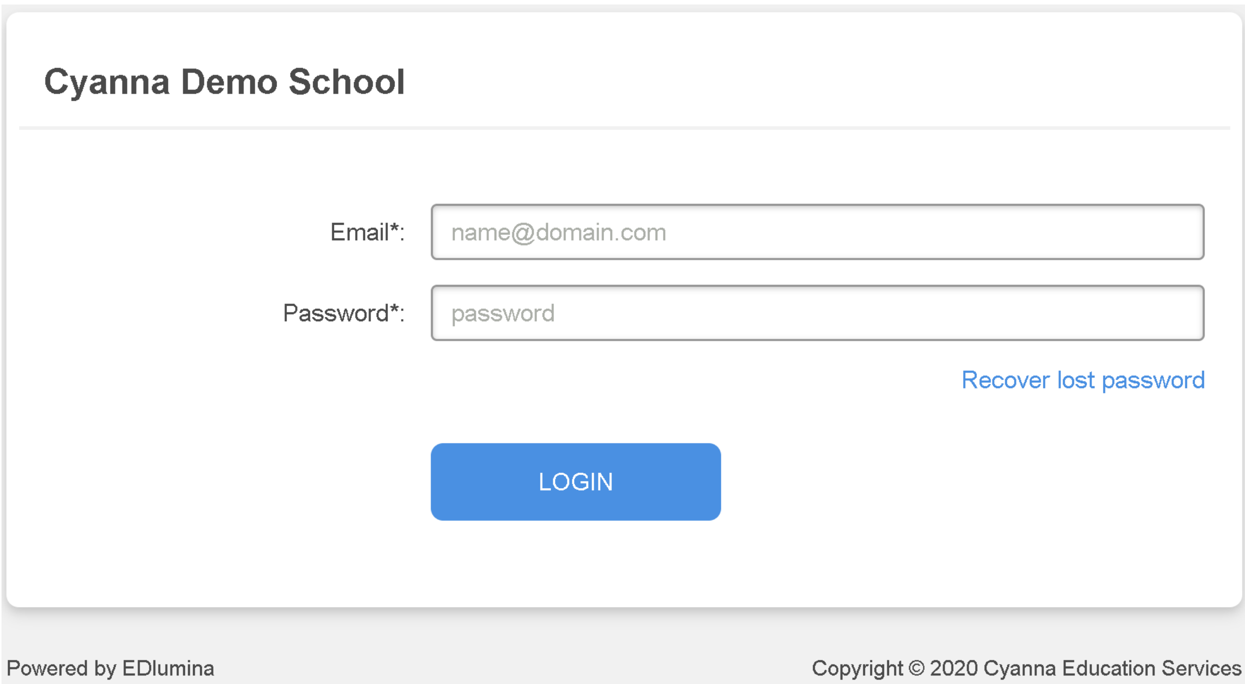
Table of Contents

User Log-In

Users will be brought to their appropriate URL page given by System Administrators.
Example: yourschoolsubdomain.edluminate.com/login

User Log-In page

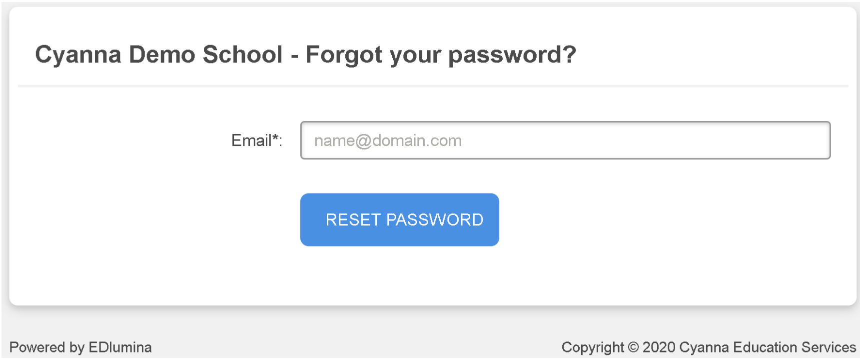
Once the school specific URL has loaded, the user will be prompted to sign in with their credentials (Email Address and Password). The school name & logo should be present on this page.



Enter your username and password into the corresponding boxes and click the blue **LOGIN** button.

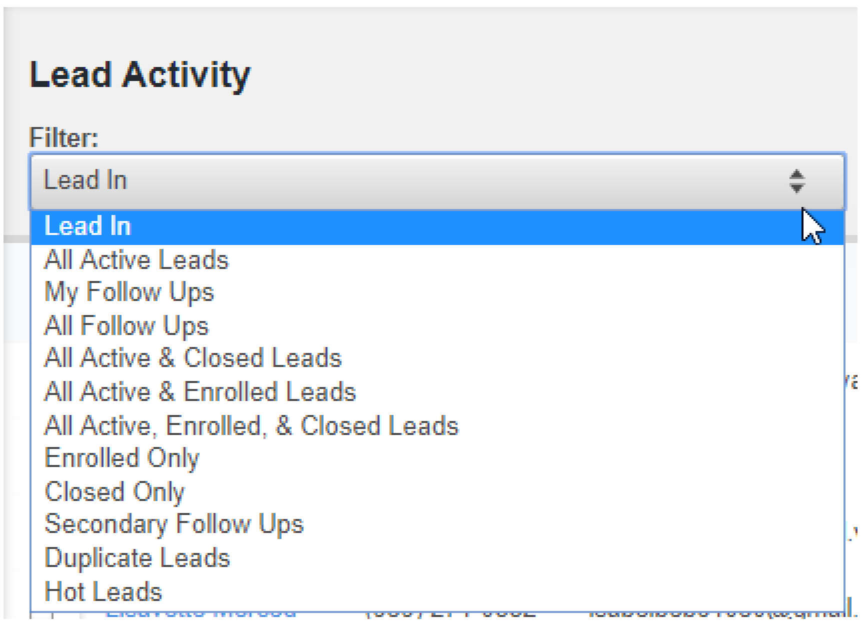
Recover Lost Password

If you cannot remember your password click the blue **Recover lost password** link. Next, enter the email address for your account. An email will be sent to you and you will be able to make a new password. Use this new password to log in with.

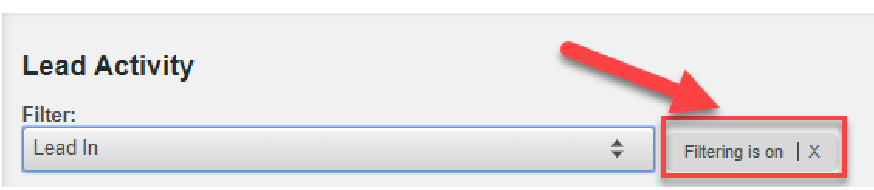


Lead Activity Page

Lead Activity Filters



- When Filtering is on, you will see this indicated to the right of the drop down menu:



Admin View - Lead Activity Page:

- **Lead In**

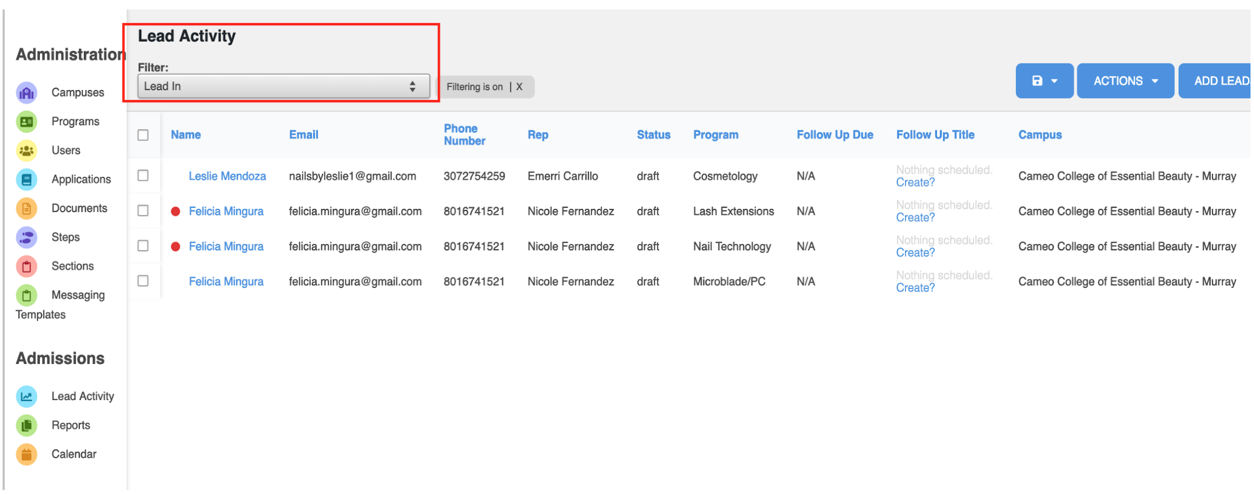
As an Admin the default filters on the lead activity page will route to any new “Leads In”. This means all leads that are in their first enrollment step will populate here until they transition to the next step.

Leads in the ‘Lead in’ filter will sort in reverse chronological order. So, the most recent leads in will populate at the top of this list. Under Follow Up Title, nothing will be scheduled, you will want to click on ‘Create?’ to add your follow ups. This will be by Event Type, Date/Time, Duration, Event Text (details) and who the follow up is assigned to.

- **All Active Leads**

Leads in an Active status, which are not marked as ‘Enrolled’ or ‘Closed’ and you wish to communicate regularly as the lead is nurtured through the enrollment process.

- **Follow ups** are used to keep track of leads in the order in which you need to contact them. See further information about follow ups below.

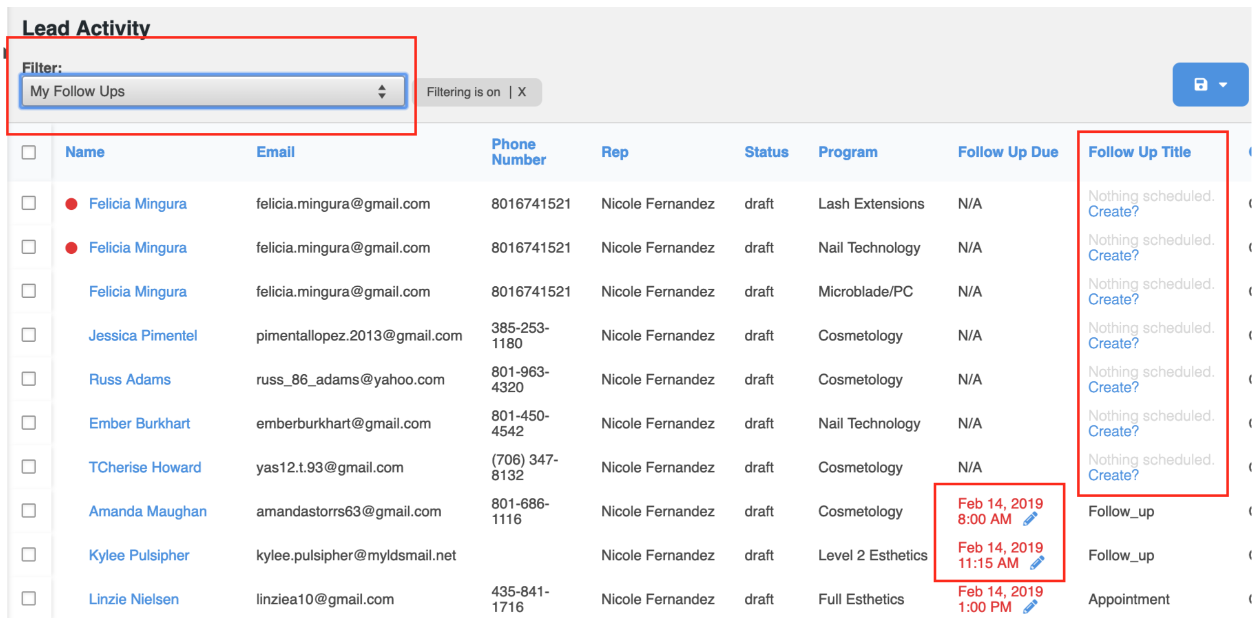


- **My Follow Ups**

My Follow Ups will show all the follow ups for which your user role is assigned. This is not dependent upon an Admin or Rep view. This filter should be used to follow up with leads assigned only to you.

Follow ups will show in the following order:

- No Follow Up Scheduled (Nothing Scheduled - Create)
- Follow Up Date Past Due (Shows date in red)
- Future Follow Ups (Up and coming - shows date in black)
-



Lead Activity

Filter: My Follow Ups | Filtering is on | X

	Name	Email	Phone Number	Rep	Status	Program	Follow Up Due	Follow Up Title
☐	Felicia Mingura	felicia.mingura@gmail.com	8016741521	Nicole Fernandez	draft	Lash Extensions	N/A	Nothing scheduled. Create?
☐	Felicia Mingura	felicia.mingura@gmail.com	8016741521	Nicole Fernandez	draft	Nail Technology	N/A	Nothing scheduled. Create?
☐	Felicia Mingura	felicia.mingura@gmail.com	8016741521	Nicole Fernandez	draft	Microblade/PC	N/A	Nothing scheduled. Create?
☐	Jessica Pimentel	pimentallopez.2013@gmail.com	385-253-1180	Nicole Fernandez	draft	Cosmetology	N/A	Nothing scheduled. Create?
☐	Russ Adams	russ_86_adams@yahoo.com	801-963-4320	Nicole Fernandez	draft	Cosmetology	N/A	Nothing scheduled. Create?
☐	Ember Burkhart	emberburkhart@gmail.com	801-450-4542	Nicole Fernandez	draft	Nail Technology	N/A	Nothing scheduled. Create?
☐	TCherise Howard	yas12.t.93@gmail.com	(706) 347-8132	Nicole Fernandez	draft	Cosmetology	N/A	Nothing scheduled. Create?
☐	Amanda Maughan	amandastorrs63@gmail.com	801-686-1116	Nicole Fernandez	draft	Cosmetology	Feb 14, 2019 8:00 AM	Follow_up
☐	Kylee Pulsipher	kylee.pulsipher@myldsmail.net		Nicole Fernandez	draft	Level 2 Esthetics	Feb 14, 2019 11:15 AM	Follow_up
☐	Linzie Nielsen	linziea10@gmail.com	435-841-1716	Nicole Fernandez	draft	Full Esthetics	Feb 14, 2019 1:00 PM	Appointment

- **<u>All Follow Ups</u>**

All Follow Ups will show all the follow ups across the system for an Admin. This is a great filter to view from an Admin perspective to ensure reps are hitting their follow ups and scheduling new ones.

Again, Follow ups will show in the following order:

- No Follow Up Scheduled (Nothing Scheduled - Create)
- Follow Up Date Past Due (Shows date in red)
- Future Follow Ups (Up and coming - shows date in black)

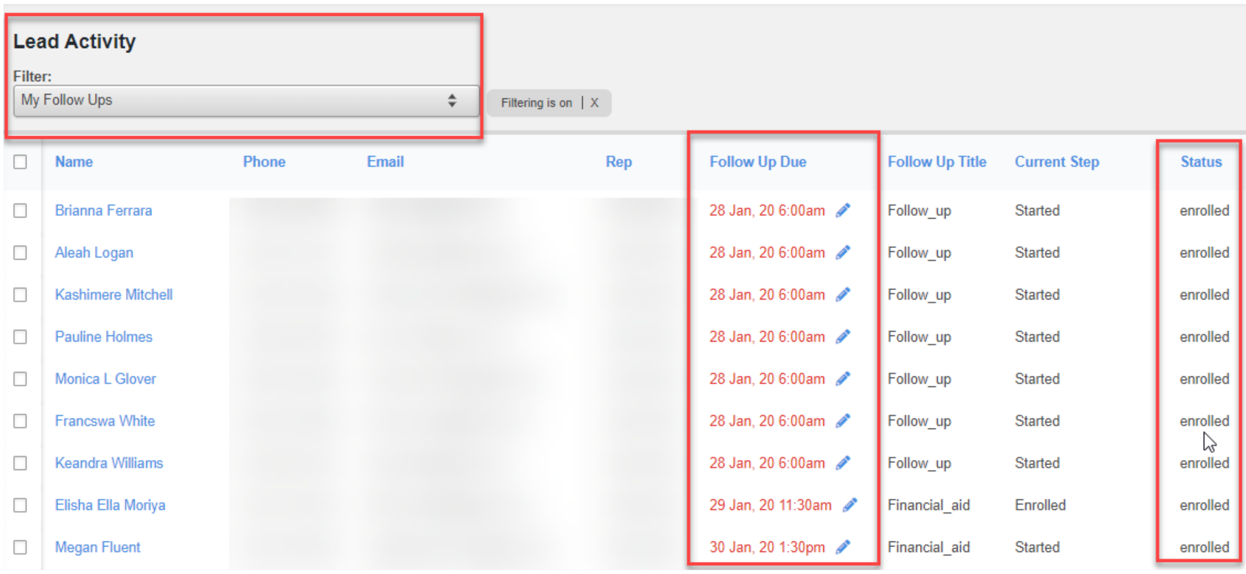
- **All Active & Closed Leads**
- **All Active & Enrolled Leads**
- **All Active, Enrolled & Closed Leads**
- **Enrolled Only**
- **Closed Only**
- **Secondary Follow Ups**

Secondary Follow Ups are used for reps/users that might share specific leads. If one is set as a Secondary follow up to a lead they can use this filter to keep track of the leads in which they share. This would not include their primary list of leads in the "My Follow Ups" filter.

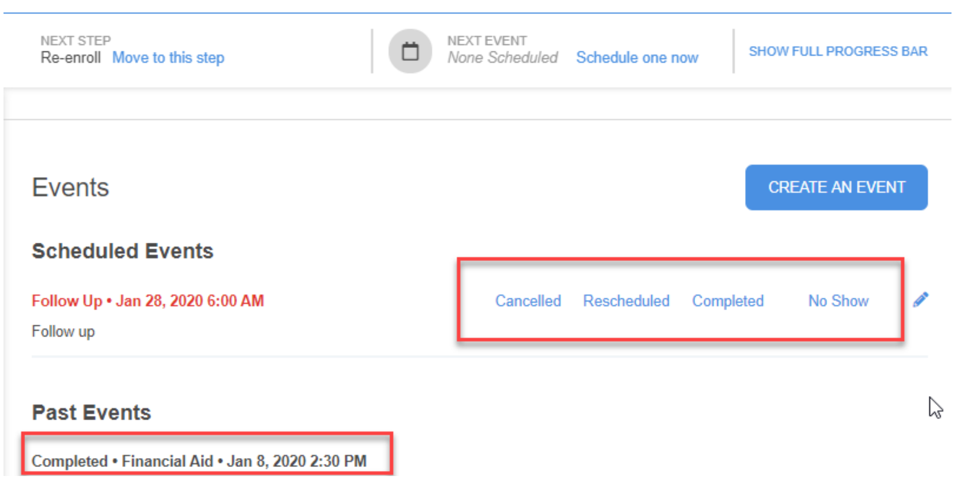
<u>Enrolled Events on Follow Up Lead Activity Page</u>

- If a lead has an **Enrolled status AND has a follow up scheduled** the lead will show on the My Follow Ups & All Follow Ups lead activity page. EDlumina allows you to nurture the leads even after enrolled!

- Please note, if the event outcome has not been "Completed", the past event for enrolled would also show. This would be a reminder for the Rep to clean up their data by making sure an outcome has been selected.

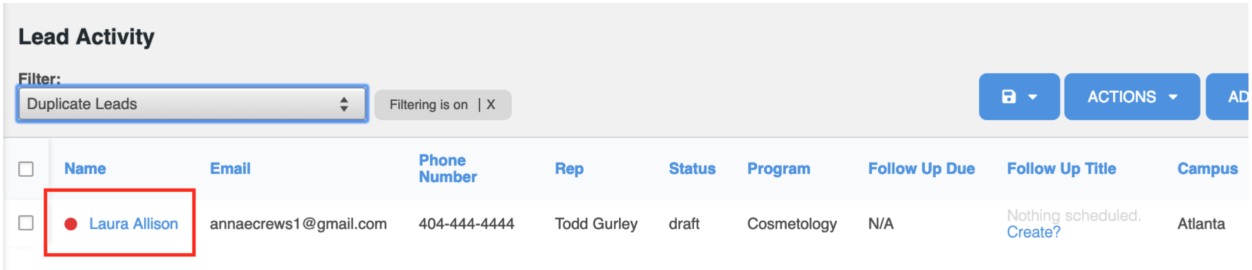


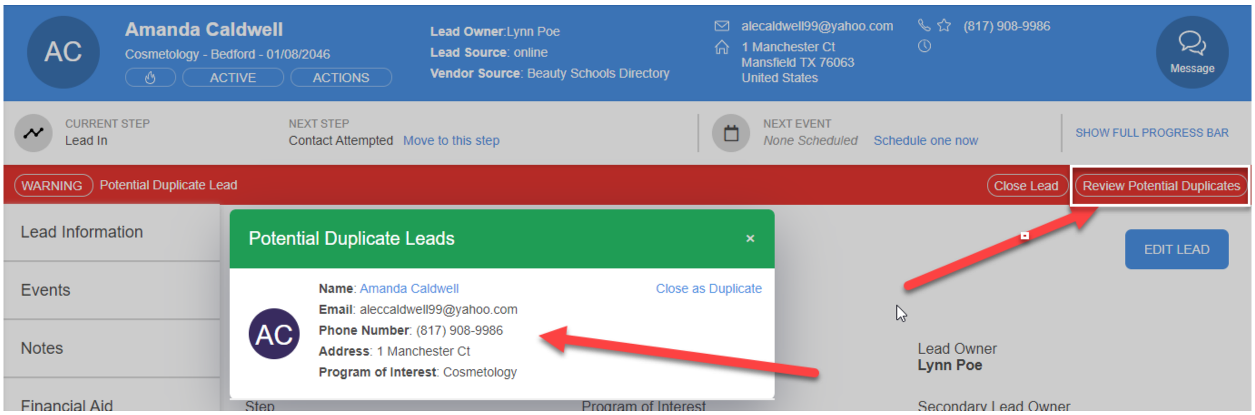
  - *Example is Brianne Ferrara above, she would not show with a past due event, if the Follow Up was completed appropriately.*

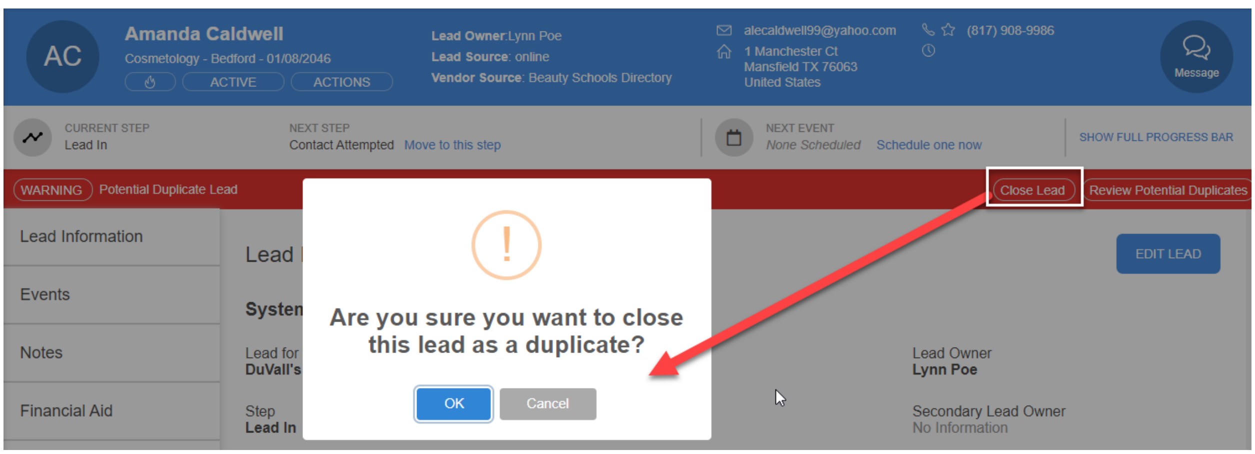


- <u>**Duplicate Leads**</u>

Duplicate leads will be marked by a red circle next to their name. Once you open the duplicate lead you'll be presented with an option to view the duplicates and decide which should be closed. Be sure to verify the original, or active lead and close the others.







- **Hot Leads**

Hot leads can be set in the user profile. From this filter you will be able to see all leads that have the "Hot Lead" designation. This can be used to keep track of leads that are close to enrolling or need extra attention.

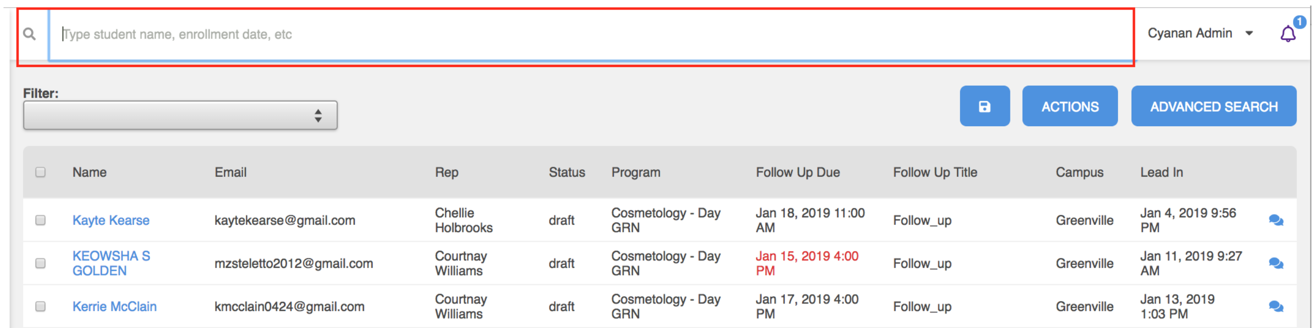
Rep View - Lead Activity Page:

All the above filters details apply to reps as well, except that, reps can only see leads for campuses in which they are assigned.

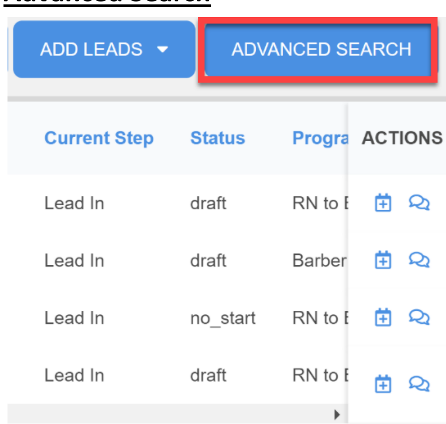
Search Bar

The search bar on your lead activity page is a great tool to find lead information quickly. You can quick search by things like:

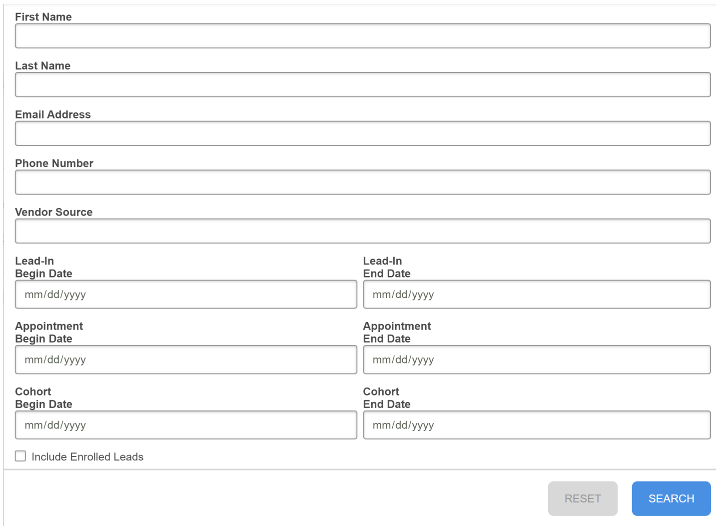
- Student Name
- Student Telephone Number or Partial Number
- Student Email
- Enrollment date



Advanced Search



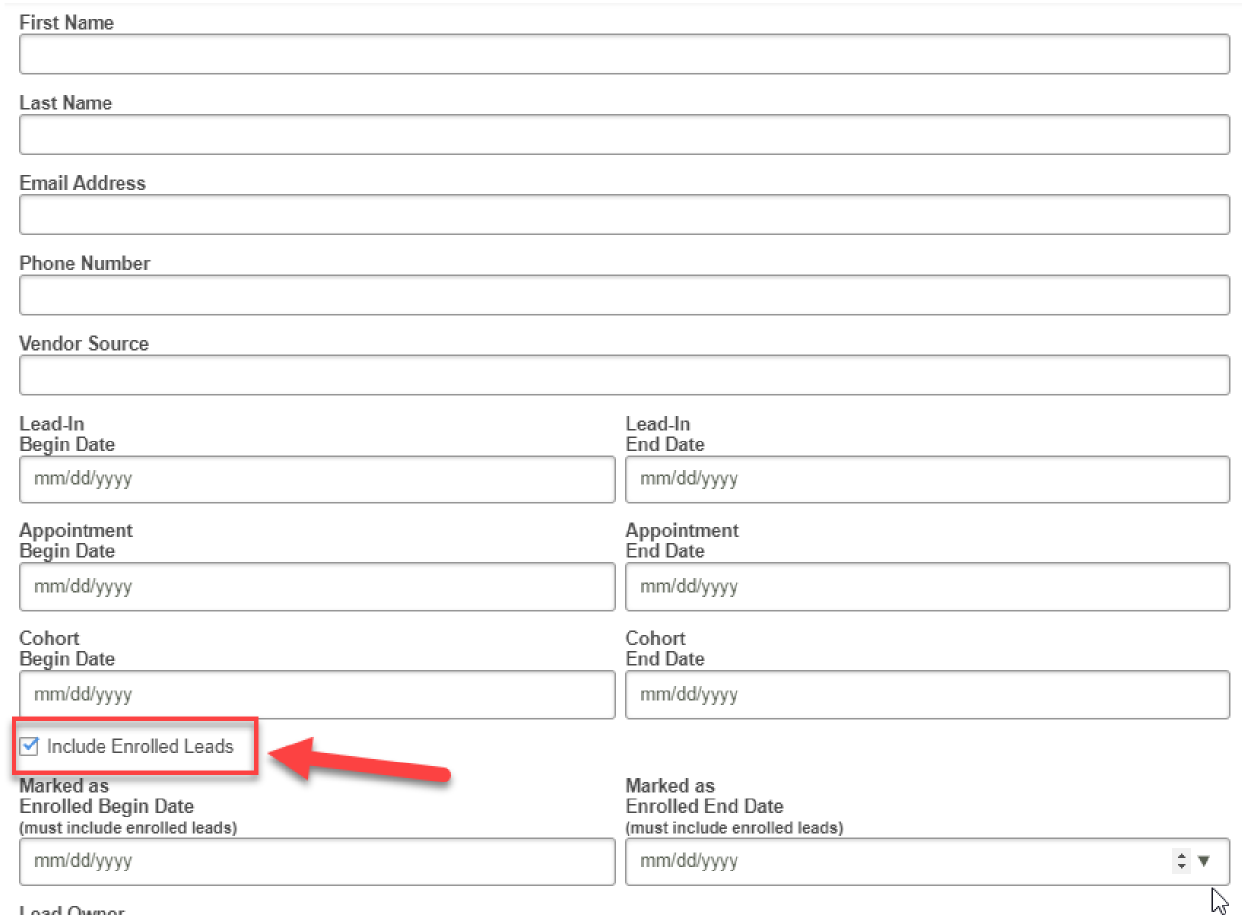
The **Advanced Search** button allows you to show only the results that fit a certain criteria. When the button is pressed, many different options should be listed that you can use in order to narrow down your search.



The search can be narrowed down by:

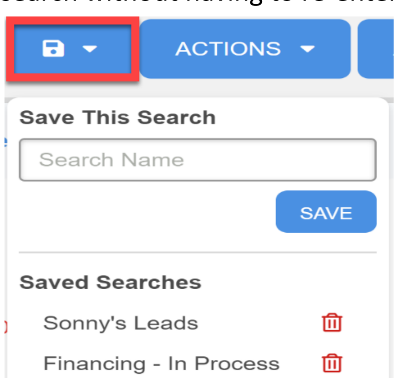
- First name
- Last name
- Email address
- Phone number
- Vendor source
- Lead in begin or end date
- Appointment begin or end date
- Cohort begin or end date

There is also an option in the bottom left corner if you want to **include enrolled leads**. Once you have entered your criteria, press **Search** to get the results to your search or **Reset** if you want to redo your search instead.



<u>Save this Search</u>

After making a search or advanced search, the results of a search can be saved. Press the **Save Search** button, which is to the <u>left</u> of the **Actions** button, and enter a name for the search that you are saving, then press the blue SAVE button. This will save the search so that you can easily access the results of the search without having to re-enter the search criteria.



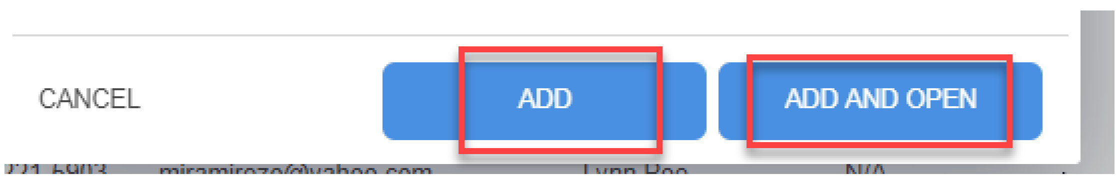
The **Saved Searches** button is in the **top left** of the picture above. When pressed, it creates the drop down that is shown above. You can save the current search results by entering a name and pressing

SAVE. The other saved searches can be accessed by pressing the search names that are listed. Saved Searches can also be deleted by pressing the red trash can icon.

Add a Lead Manually

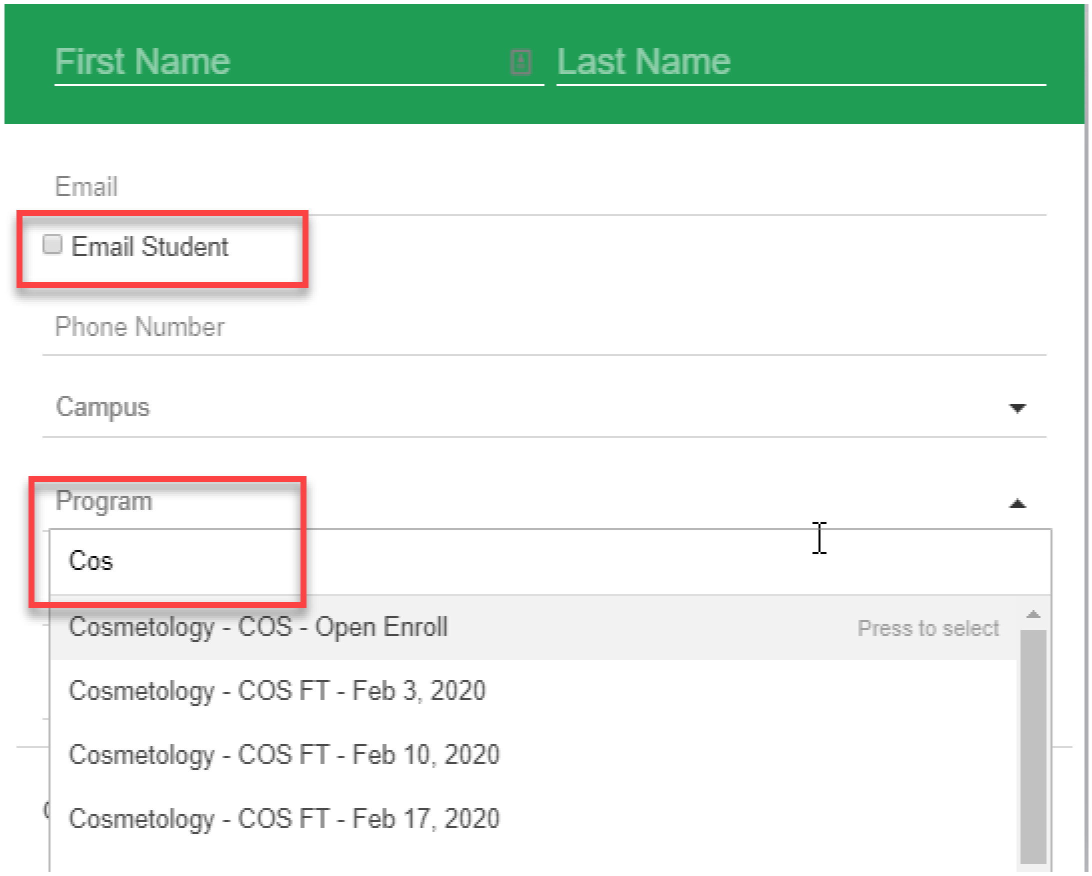
***Do NOT 'Check Email Student' if you are not using that part of the system.**

- Add Leads -> Add a Lead ->
    - Enter First & Last Name
    - Email and/Or Phone Number
    - *'Check Email Student' _ only if using that part of the system
    - Select Campus
    - Select Program
    - Select Rep
    - Select Lead Source option from drop down (sample...not all are listed here)
        - Online
        - Facebook
        - Google Adwords
        - LinkedIn
        - Referral
        - Personally Developed Lead
        - Government
        - Radio
    - Click ADD or ADD AND OPEN
        - ADD - Quickly adds lead to Lead In Dashboard
        - ADD AND OPEN - Opens the lead profile to allow you to continue to Edit to add additional information. Refer to the **Lead Profile Page** of this manual for further detail on the lead profile page.



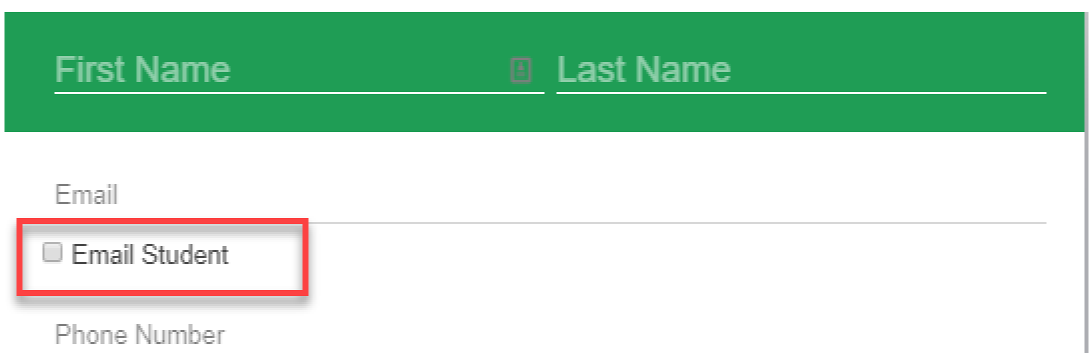
Manual Lead Addition - Type into the Program Field

You may offer many different programs. Adding leads in manually could leave you scrolling through a long list. By typing into the program field you can filter down to the program of interest without scrolling.



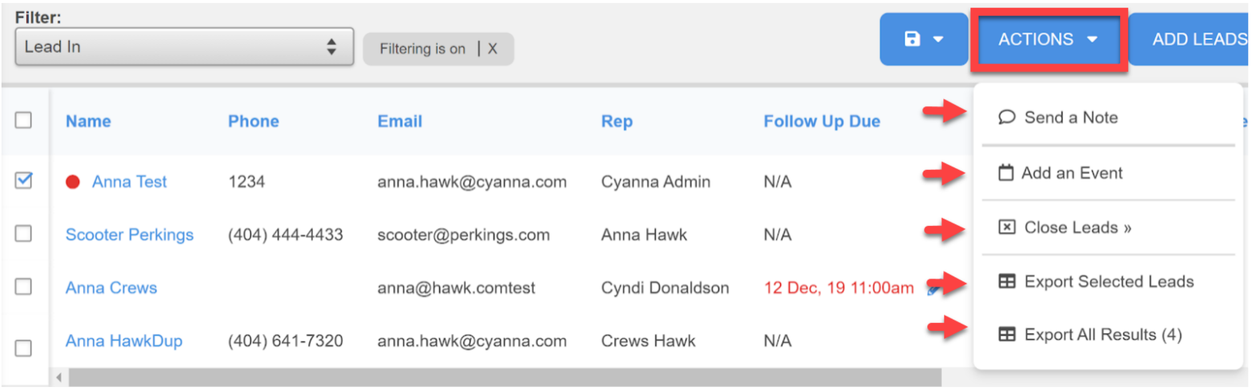
Manual Lead Addition - "Email Student" check

This will email the student login credentials to the system when checked. **Only check this if students should have access to the system.**



Actions Button

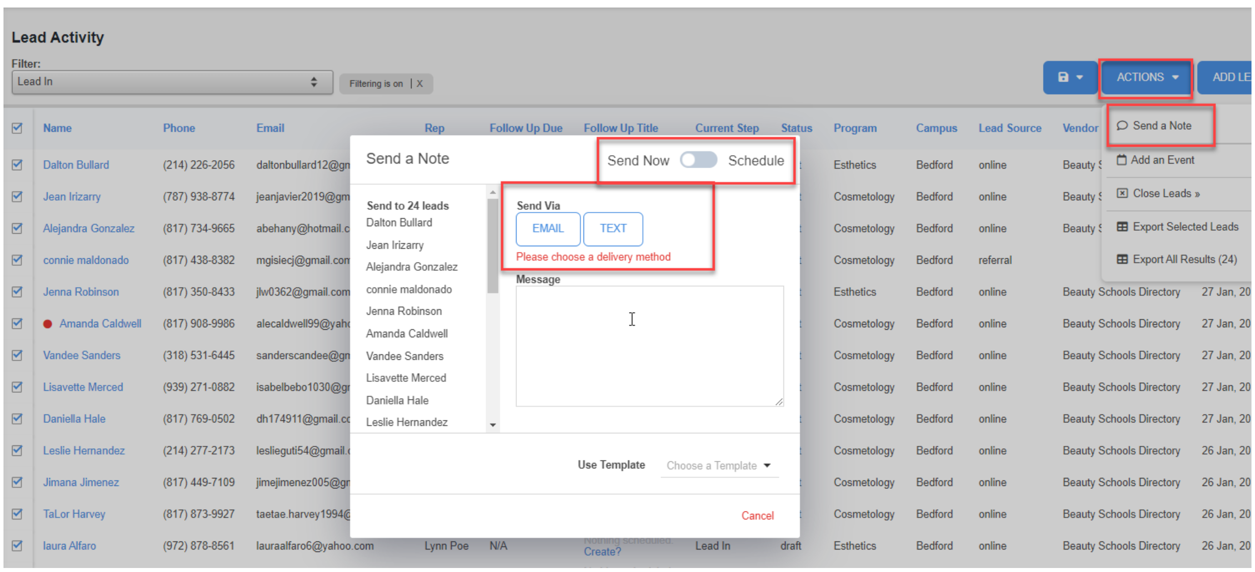
You can perform different actions to leads by selecting the **check boxes** to the left of the lead and then using the blue **Action** button.



Sending a Note

A note can be sent to all of the selected leads using the **Send a Note** option under actions.

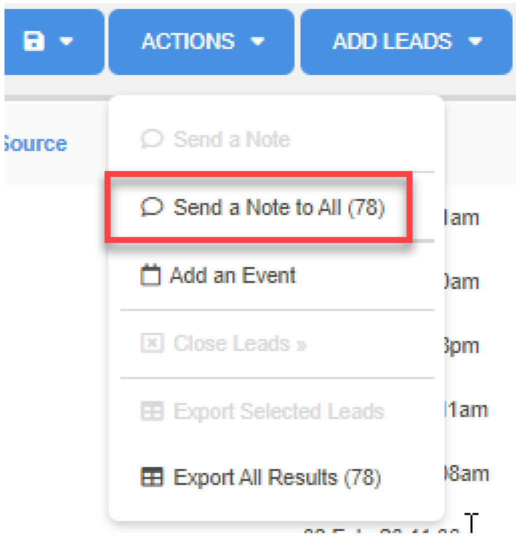
It can be sent as either an email or text, and sent immediately or scheduled for a later time. Enter the message in the text box and click **Send** to send the message to the selected lead(s).



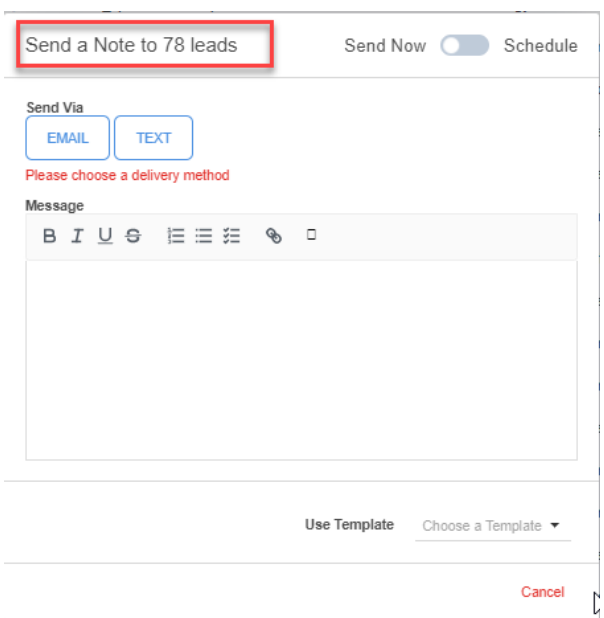
Send a Note to All (Mass)

Users will have the option, when searching for a group of leads to “Send a Note to All” of the leads in that search.

- First select the leads you’d like to send, go to “Actions” and select to “Send a Note to All”



- Once you've selected the to 'Send a Note to All' the dialog box will open where the message can be entered and sent via Email or Text.

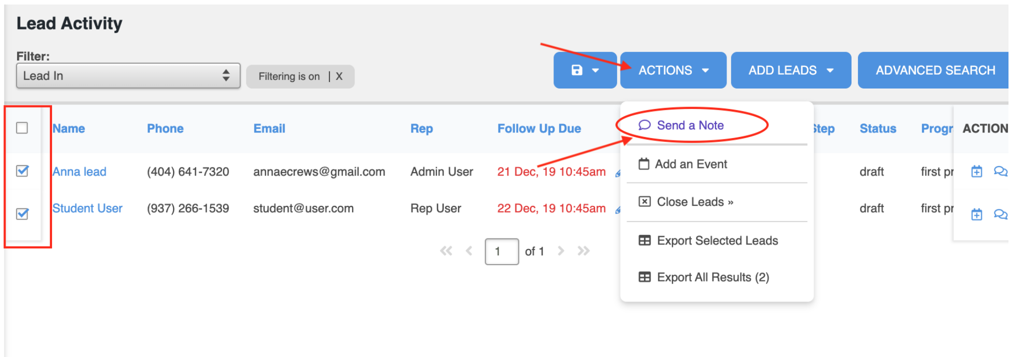


<u>Sending a Mass Note with a Template</u>

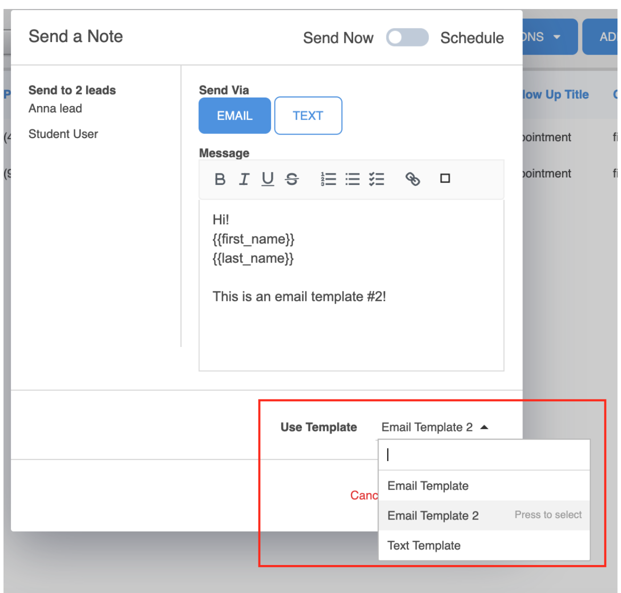
First, create the various templates that should be saved for later use. Refer to the *Message Templates* section of the training manual for details.

Once the templates have been created and saved. Review the following to begin using this new feature:

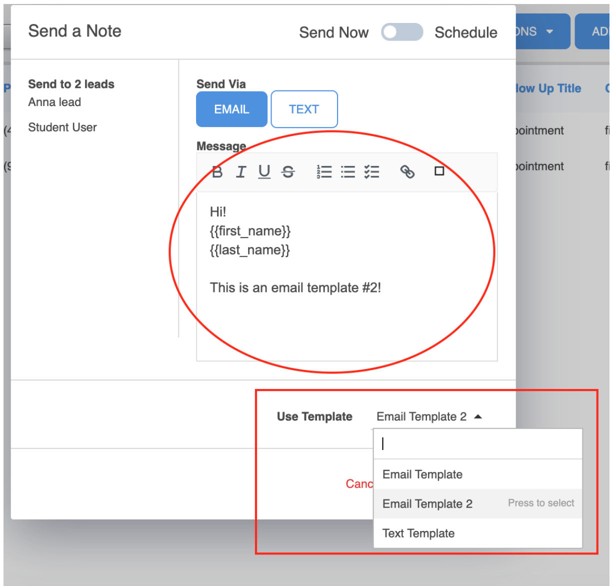
On the lead Activity Page, select the leads where a message should be sent, then go to “**Actions**” > “**Send a Note**”



Next, select the delivery method (Email or Text) and click on “**Use Template**”. Within this dropdown you will see the various templates for use.



After the template has been selected, the message will populate into the textbox. The message can be edited as needed.

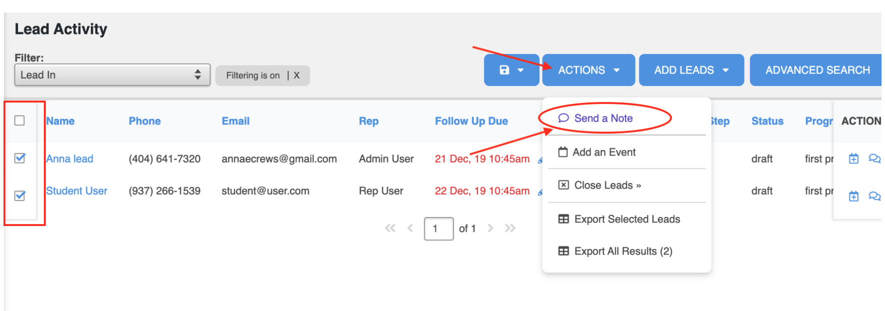


Once the message is ready to send, simply hit “**send**”.

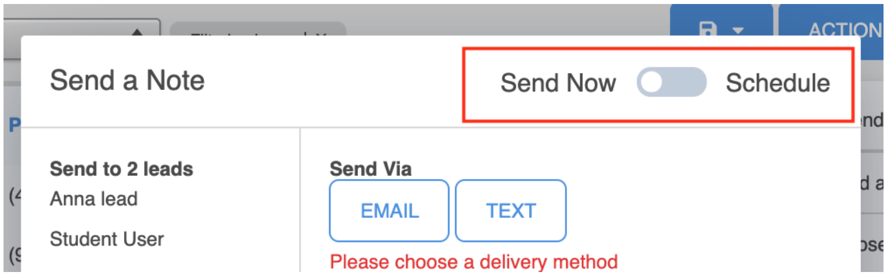
Scheduled Notes/Messaging

The ability to assign message templates to steps to automatically upon entering that step already exists, however we’ve added onto this feature with scheduled messaging. Now, in the “**Send a Note**” feature on your **Lead Activity** Page you can schedule a time to send certain messages to a group of prospective students. This feature can be used in conjunction with the new template selector, or for ad hoc messaging.

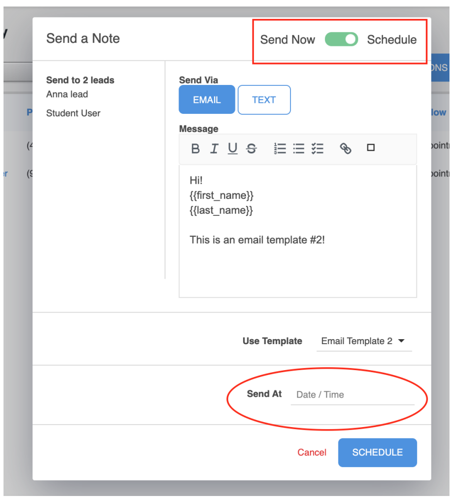
On the lead **Activity Page**, select the leads where a message should be sent, then go to “**Actions**” > “**Send a Note**”

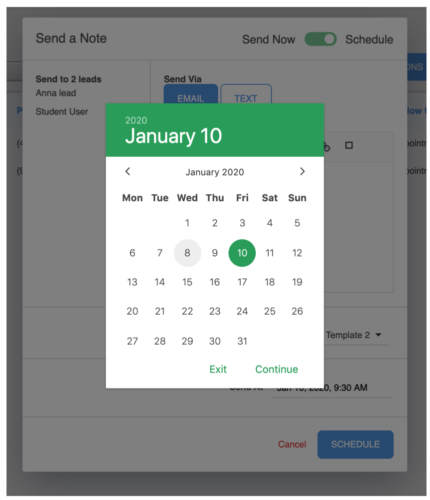


Next, turn on the switch from “**Send Now**” to “**Schedule**”

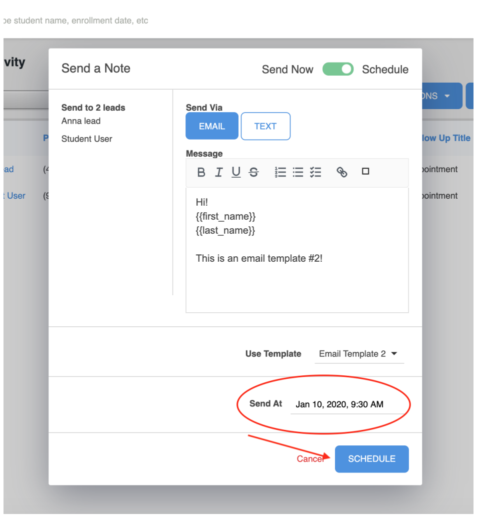


From here, users will be shown the option to “**Send At**”. By selecting this a date and time selector will populate.





Select the time and select “**Schedule**” to have the message be sent at the time selected.

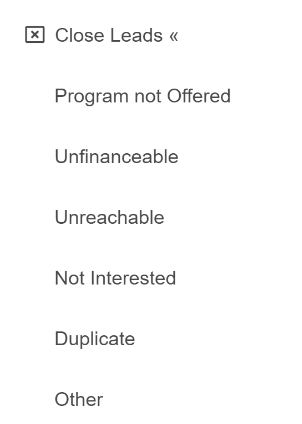


Add an Event

Events can be added for the selected leads using the **Add an Event** option. See **Schedule an Event for the Lead** section for more information about events.

Close Leads

If you want to close a lead for any reason, you can use the **Close Lead** option.



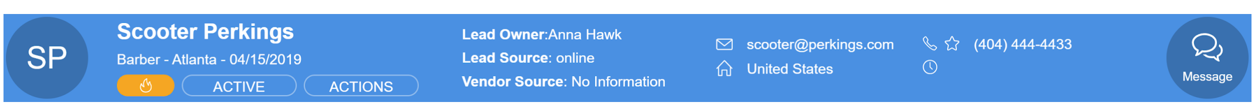
After selecting **Close Lead**, the above options for closing the lead will be listed. If the reason for closing the lead is not listed, select Other. After selecting the reason for closing the lead, the lead will now be closed and removed from the lead activity dashboard for follow ups.

Export Selected Leads/ Export All Results

Selecting to export either the selected leads or all of the results will download the leads to your computer in a .csv file that should be stored in your downloads folder. This file can be opened in Microsoft Excel or in a text editor, such as notepad.

Lead Profile Page

When on the Lead Activity Page, click on any of the leads to open up a new tab of their profile.



The top of the Lead Profile page should have some of the key information of the lead.

Fire Icon

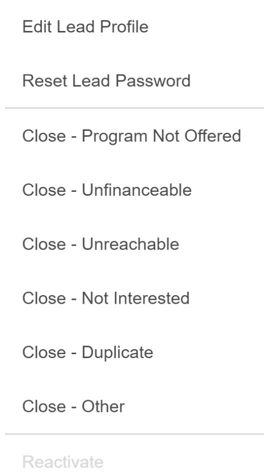
The fire icon on the left hand side of the screen indicates that a lead needs extra attention, as they could be close to enrolling or are very interested. Clicking on the icon will either change it to active or inactive. Orange means that the lead is “hot” and blue is normal.

Status Icon

This icon is to the right of the fire icon and shows whether or not the lead is currently active. If the lead is active, it will say **active**, if it is not, it will say **inactive**. A lead can be opened or closed in the **Actions** icon.

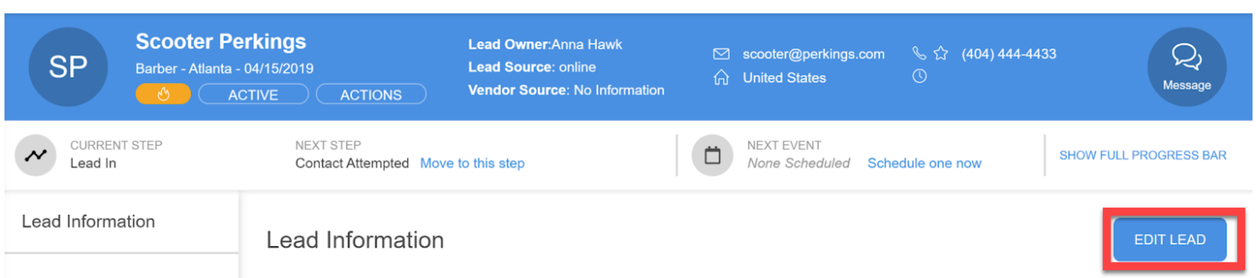
Actions Icon

Different actions can be performed for the lead in the **Actions** option.



Edit Lead Profile

The Lead's profile can either be edited with the **Edit Lead Profile** option under **Actions**, or by selecting the blue **Edit Lead Profile** button on the right hand side of the screen of the Lead Profile Page. The different sections of the lead profile page are listed in the **Lead Profile Main Function**s section of this document.



Reset Lead Password

By selecting the Reset Lead Password option under the **Actions** button, an email will be sent to the lead with a new password for their account.

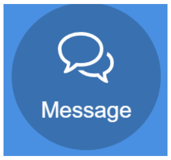
Closing a Lead

Leads can be closed under the **Actions** button by clicking on the reason that the lead is being closed.

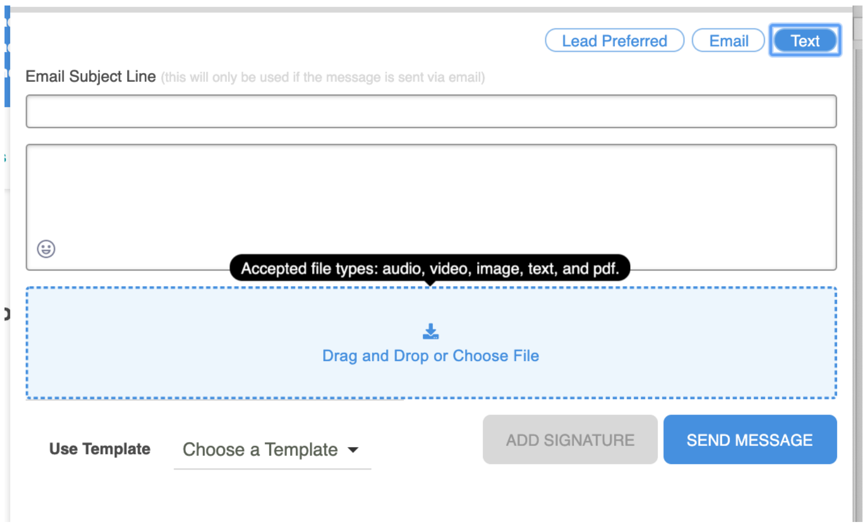
Reactivating a Lead

A previously closed lead can be reactivated by pressing the REACTIVATE option at the bottom of the **Actions** options.

Send/Receive a Message



Click the message button on the top right hand side of the lead's profile page. The messaging panel should then come up. The message can either be sent or you can review the conversation history.



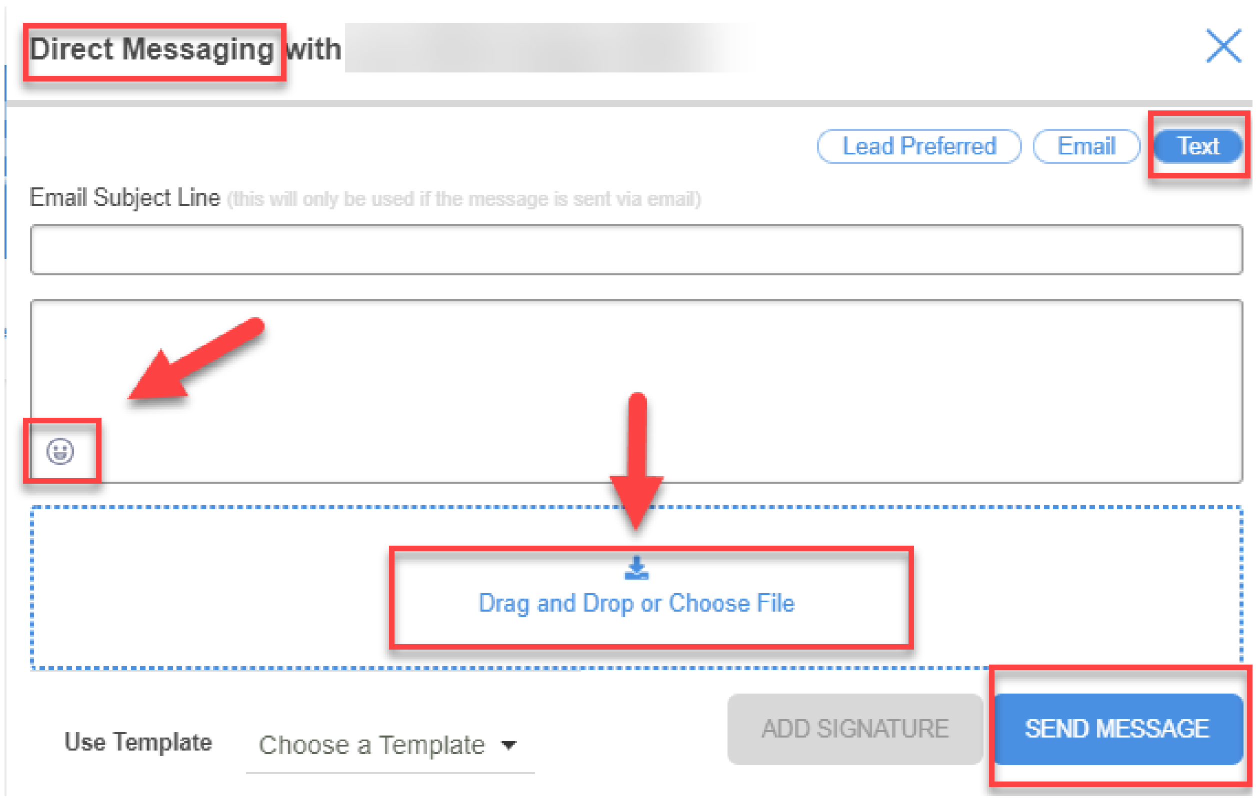
Text & Email with Attachments: MMS

- There is functionality to send and receive MMS messages within EDlumina via Text or Email .
    - **MMS** stands for '**multimedia messaging** service' aka attachments, and was built using the same technology as SMS (short message service) text messages.
    - While SMS was built to send short messages, **MMS** focuses on sending **multimedia messages** (attachments!).
- To send an Email or text message, whichever the lead prefers by selecting one of the options at the top of the message panel.
    - Navigate to a students profile (Message) or the 'Send a Note' feature and select "Text" or "Email". (Lead Activity/Actions -> Send a Note or Send a Note to All)
    - Once text is selected you can drag and drop or upload the supported file types into the message to be sent.
        - If you hover over the 'Drag and Drop or CHoose File, this will display the accepted file types
        - Accepted files types can be received as well as sent - audio, video, image, text and pdf.
            - Unfortunately, word docs, Excel and other file types are not accepted at this time.
            - Emoji's can also be sent/received!

The ADD SIGNATURE button will add the signature of the campus that the lead is interested in. To edit the signature, look at the **Campus** section of the manual.

Select SEND MESSAGE to send the message to the lead.

The message history with the lead should be below the messaging panel when the **Message** option is selected.

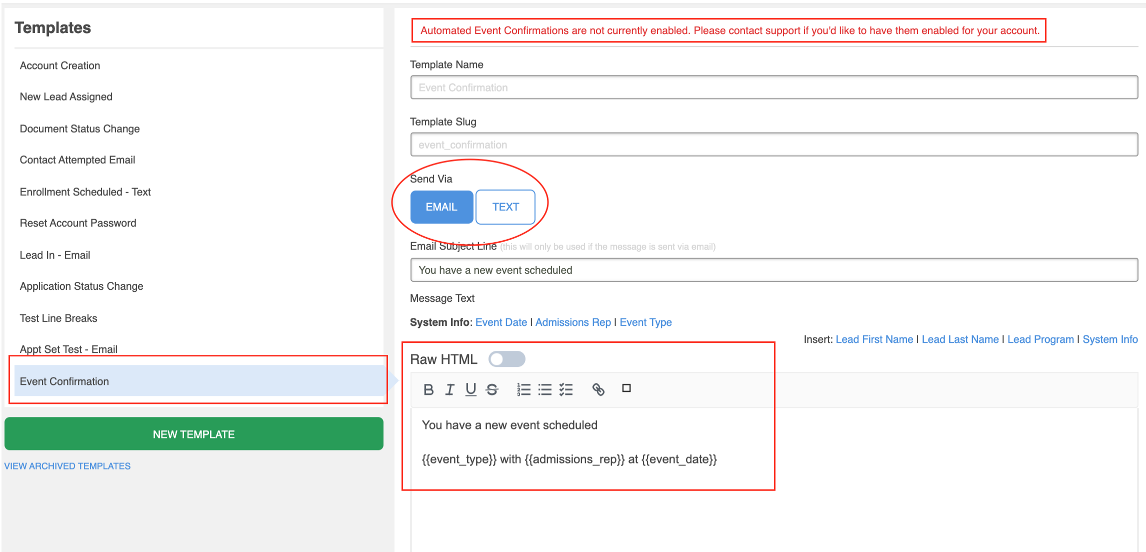


__**Automated Event Confirmation Reminders**__

*Note, to begin using this feature **you must make a request from your Cyanna contact to turn this on**. Once on, the confirmation messages will go out as you create the appropriate event types detailed below.

When scheduling an event type of "**Appointment**", "**Interview**", or "**Financial Aid**" an automated message can now be sent to the student prospect confirming the event.
This confirmation is defaulted to the following in the **Message Templates** section, but can be updated with HTML/Text as needed per client.

A copy of the confirmation sent will show within the Direct Message on the individual's lead profile page.

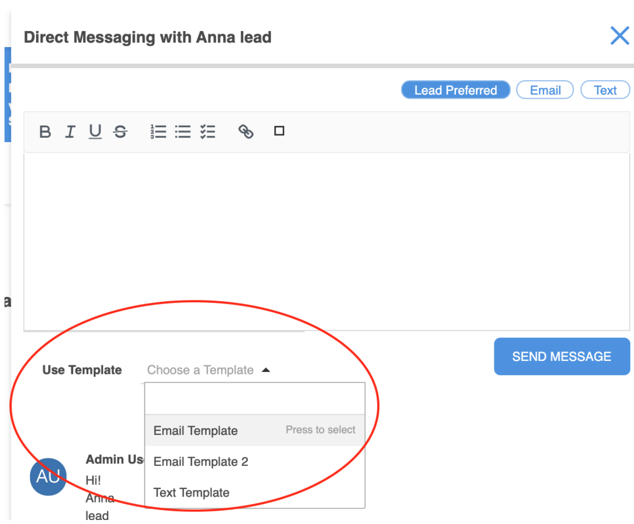


Sending a Message with a Template

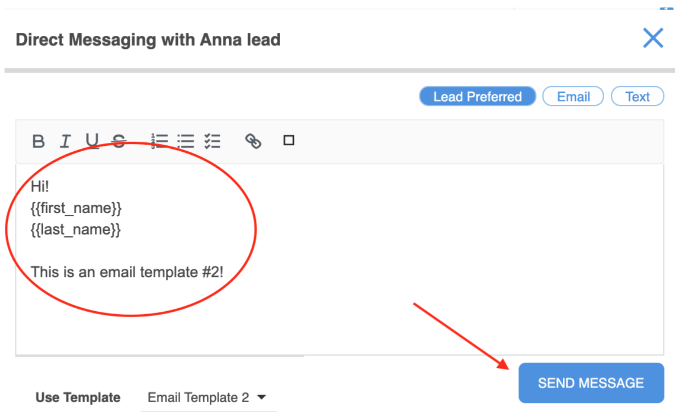
First, create the various templates that should be saved for later use. Refer to the *Message Templates* section of the training manual for details.

Once the templates have been created and saved. Review the following to begin using this new feature:

Select the lead in which you'd like to send a message. Go to the "**Message**" icon. Once there, you should see a new option to "**Use Template**". Select the template dropdown to populate the necessary message.



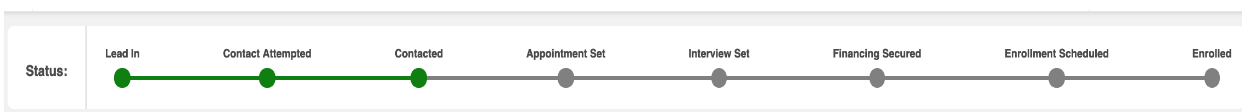
Once the message has populated, users can adjust the language as needed then send.



Current Step and Lead Progress Bar

Make sure reps know that clicking each step in a lead profile is important for reporting purposes. We want to capture each time and day that a step is selected so the reporting is accurate. You may need to select "**Show Full Progress Bar**" on the right hand side of the screen for the bar to appear.

The Current Step is the step that the lead is currently at in the process.



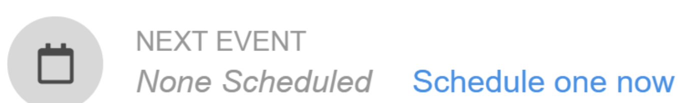
Showing the full Progress Bar allows the movement of the lead to the next steps in the process. Steps cannot be skipped in this process. You can also move backwards in the process with the Lead Progress Bar.

Move to the Next Step of the Status Bar

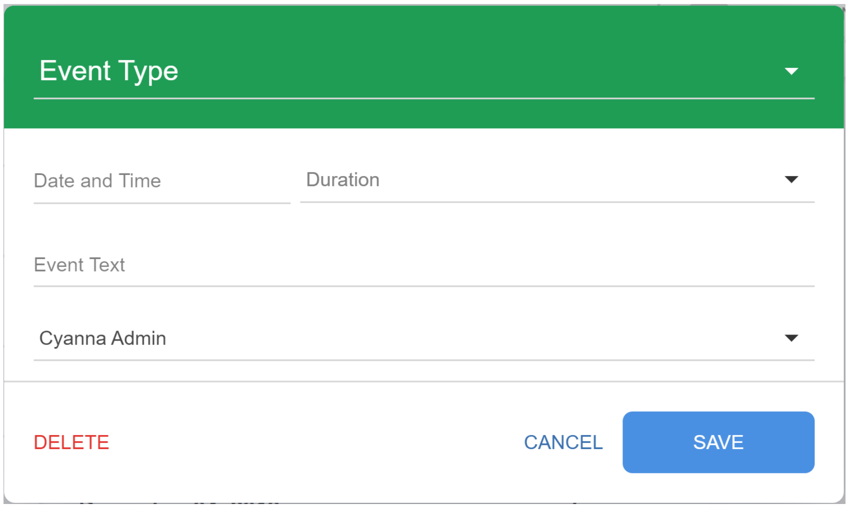
The lead can be moved to the next step easily with the NEXT STEP button. This will move the lead to the next step in the lead's interest/application.

Schedule an Event for the Lead

On the lead profile page, select **Schedule One Now** under the **Next Event** tab.



The type of event can be selected under **Event Type**. This can be a Followup, Appointment, Interview, Financial Aid, or General event.



The data and time of the event can be set in the **Date and Time** box. The length of the event can be set up in the **Duration** box after the date and time are already selected. Any additional information for the event can be put in the **Event Text** box. Select **SAVE** to put the event into the calendar.

Lead Profile Page Main Functions

There are 7 main sections of the Lead's Profile Page:

- Lead Information
- Events
- Notes
- Financial Aid
- Documents
- Recent Activity
- Enrollment

These can all be edited by selecting the blue **Edit Lead** button on the right hand side of the screen that was discussed in the *Edit Lead Profile* section.

Lead Information

This includes all the demographic and personal information for the lead, including System Tracking Information, Contact Information, and General Information.

System Track Information

System Track Information

Lead for **Cyanna Demo School**	Campus **Atlanta**	Lead Owner **Anna Hawk**
Step **Lead In**	Program of Interest **Barber**	Secondary Lead Owner No Information
Lead in **December 04, 2019**	Lead Source **online**	Vendor Source No Information
Cohort **Bar Q2 Cohort (April 15th, 2019)**	Cohort / Start Time No Information	Academic Outcome No Information

System Tracking Information includes:

- Who the Lead is for
- What Step the Lead is in the Process
- The Date that the Lead Came in
- The Lead's Cohort
- Campus
- Program of Interest
- Lead Source
- Cohort Start Time
- Primary/Secondary Lead Owner
- Vendor Source - this is an open text field used to further detail how the lead was generated. This information can be entered manually by editing the lead or populate from the school website or various contact forms.
- Academic Outcome

The only 3 sections of information that cannot be changed in the editing process are Who the Lead is for, What Step the Lead is in the Process, and the Date that the Lead Came in.

Contact Information

Contact Information

Prefered Contact Method **Mobile Phone** Email **scooter@perkings.com** Okay to email	Phone **Primary:** (404) 444-4433 **Mobile:** No Information **Home:** No Information Okay to call or text	Address No Information

Contact information includes:

- A preferred Contact Method

- Email
- Phone Number
- Address

Users can also select “Yes” or “No” for “Okay to Text” and “Okay to Email” in this section.

General Information

General Information includes:

- Name
- Race/Ethnicity
- Date of Birth
- Gender
- Marital Status
- Whether the Lead is a US Citizen
- Whether the Lead is VA/Military
- High School Attended
- Highest Degree Earned
- High School Graduation Year

General Comments

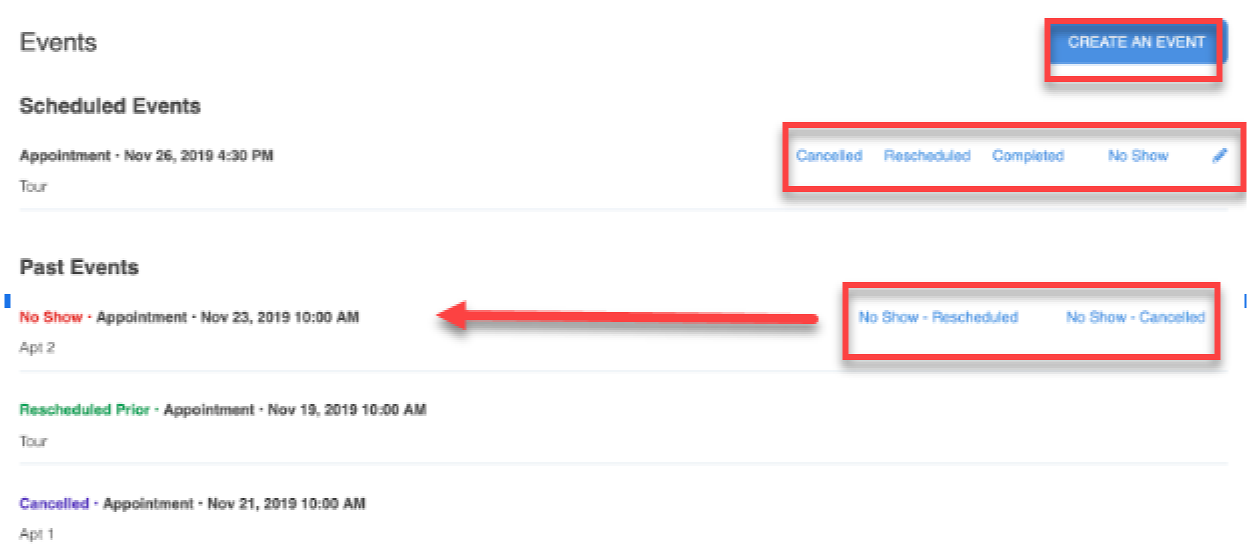
Extra comments about the lead can be added here. This information will also populate in the lead export of leads from the lead activity page.

Events

This section will list all the events that are related to the selected lead. An event can be created with the “**Create an Event**” button on the right hand side of the screen. This is explained in the *Schedule an Event for the Lead* section of this document.

- Event outcomes were added to the lead profile in addition to the existing outcomes, Completed and No Show:
    - Cancelled
    - Rescheduled

- If an event is marked as No Show two additional options are presented for the event, “No Show - Reschedule” and “No Show - Cancelled”
    - If “No Show - Reschedule” is selected the event will be moved to Reschedule - After.
    - If “No Show - Cancelled” is selected the event will be moved to Cancelled - After.
- Each of these statuses will have a direct relationship on the [Events/No Show Report](#) detailed below.
    - Pending is the number of events scheduled during the timeframe with no closure/outcome.
    - Completed are events that took place as scheduled and were closed.
    - Appointments/Interviews shows the number of Appointment and Interview type events that were scheduled.
    - ‘Reschedule Prior’ is the number of events that were marked as a “Reschedule” prior to the event taking place.
    - ‘Cancelled Prior’ is the number of events that were marked as “Cancelled” prior to the event taking place.
    - No Shows are events marked as ‘No Show’
    - ‘Reschedule After’ are marked as a Reschedule after the event was past and marked as a “No Show”.
    - ‘Cancelled After’ are marked as Cancelled after the event was past and marked as a “No Show”.
    - Based on all of these numbers the ‘No Show’ Percentage can be derived on the Events/No SHow Report.



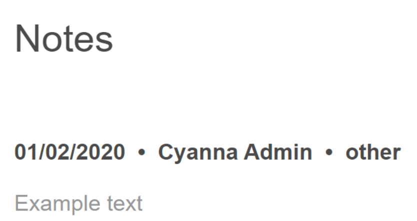
Scheduled Events

These are the upcoming events for the lead. These events can be cancelled, rescheduled, completed, or marked as a no show with the corresponding buttons to the left of the event. The event can be edited with the pencil icon to the right of the other buttons.

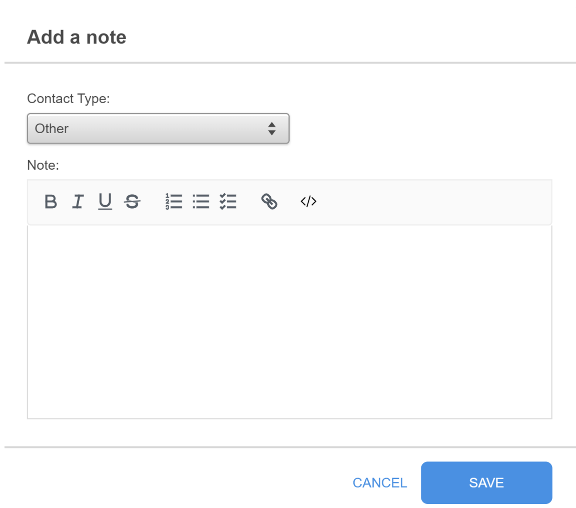
Past Events

These events have already occurred and act as a history of the lead.

Notes



Any extra notes about the lead can be written here to act as a reference. They will be listed under the date, who took the notes, and the contact method with the lead. Notes can be added by pressing the blue **ADD A NOTE** button on the right hand side of the screen.



Choose the contact type that was made with the lead when obtaining this information. Type the notes about the conversation/lead in the text box. Click the blue SAVE button to save the note.

Financial Aid

This keeps track of all of the financing that the lead has paid or is planning to pay. *Note, this section of the application is purely for note keeping and does not accept payment as part of various payment plans.

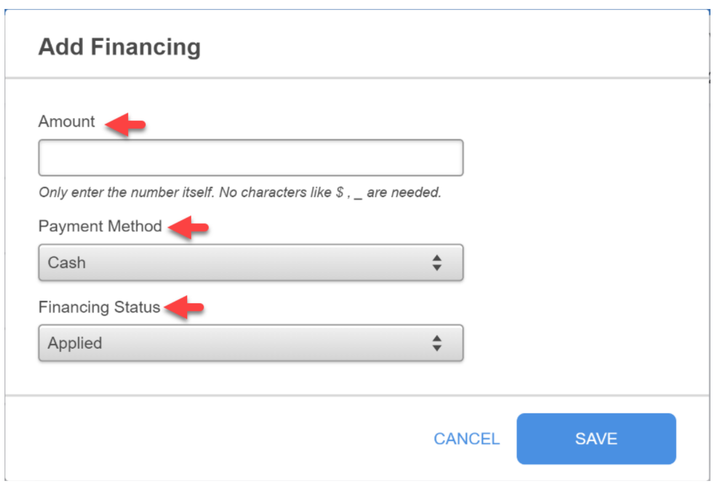
Prospective Financing is used to keep track of the financing that is being processed or that is being applied for.

Confirmed Financing is used to keep track of the money that the lead has already paid.

Cancelled Financing is used to keep track of the financing that gets cancelled or rejected.

Add Financing

Click on the blue **ADD FINANCING** button in the top right corner of the Financial Aid section of the page.



Add the amount that is being financed as a number without extra characters such as $, or _. Click the **Payment Method** option and select one of the payment methods. Then choose the **Financing Status** option and choose from the following options:

- Applied
- In Process
- Approved
- Cancelled

Click SAVE when you are done.

Edit Financing

Click the blue pencil to the right of the added finance to edit. Change any of the options shown above in the *Add Financing* section. Press **SAVE** when done.

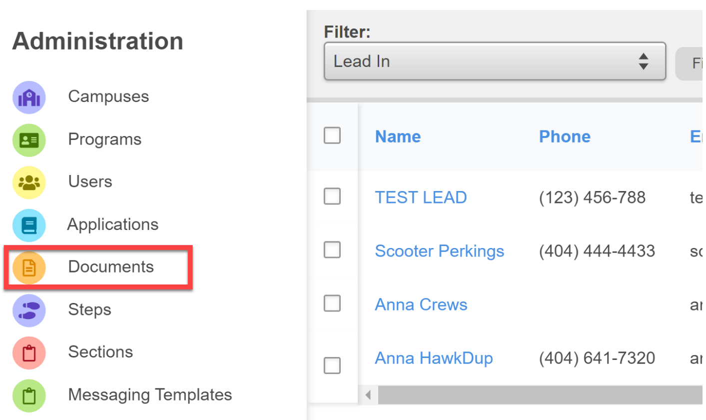
Student Documents

The documents for application are all kept in the **Documents** section. These documents could include things like:

- Application
- Enrollment Agreement
- Copy of Photo ID
- Transcript Copies

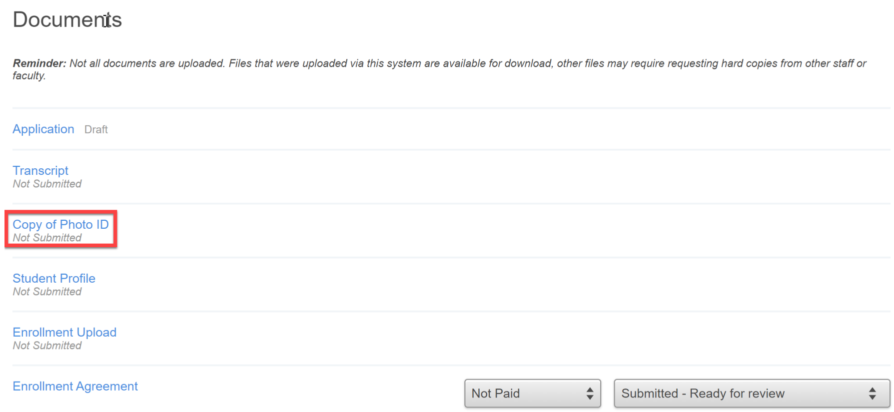
Documents for students are created in the **Documents** with **Sections** created first which is under the **Administration*** section of the main page.

*These documents will need to be added to each corresponding Program(s) for uploads to be successful and appear in the lead profile.

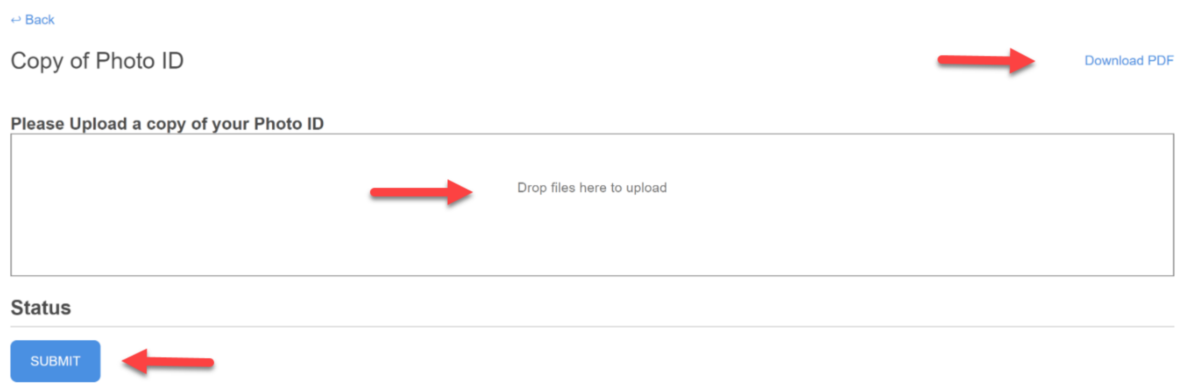


Submitting Documents/Files

Documents can be submitted for a student by clicking on any of the documents that are available for that student.



Files can then be submitted for the student as documentation by dragging files to the box or by clicking on the box to look through files in your computer files.

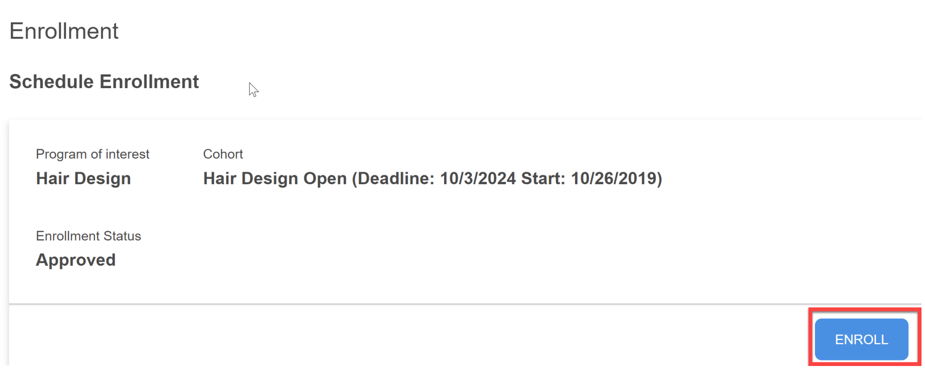


Click the blue **SUBMIT** button to submit the file as a document.

Submitted documents can be downloaded as a PDF by clicking **Download PDF** in the top right corner of the panel shown in the screenshot.

Enrollment

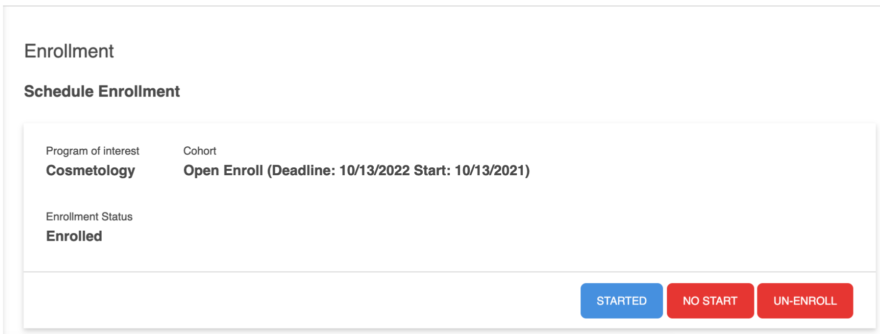
This can be used to show that the student has been enrolled. **Important:** Make sure that all of the information for the student (Program of interest, cohort, etc.) is correct before enrolling the student.



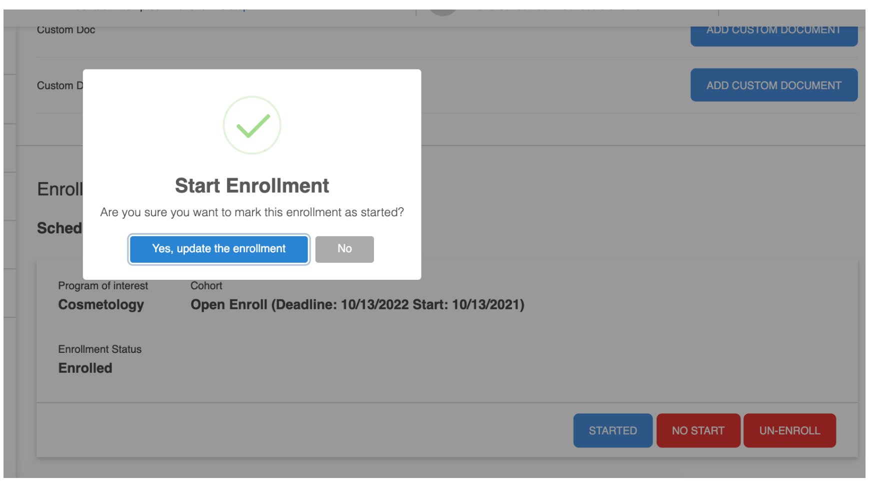
If a student is already enrolled, they can be **Unenrolled** or marked as Started/**No Start** if they did not show up or are not starting that semester.

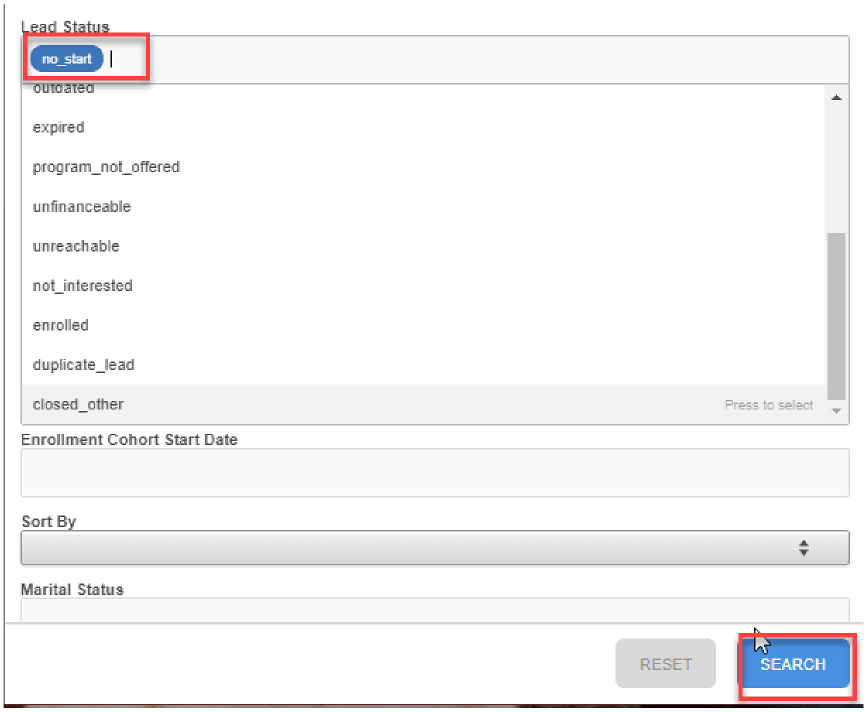
- Unenroll can be used for students that were prematurely moved to Enroll
- No Start can be used for students that are, indeed, No Starts*
- Started can be used to Start the enrollment*

*After a student is enrolled there is now an option to Start and No Start students. This designation will be directly linked to the new lead reporting detailed below.



- Selecting Started and/or No Start on the user profile will allow EDlumina users to search for Started and/or No Starts under "Lead Status" in the Advanced Search on the Lead Activity page and will be directly linked to the new lead reporting detailed below in Overview ("Campus Dashboard").





System Messaging

System Default Automated Message Templates Notes

There are Three types of automated messages:

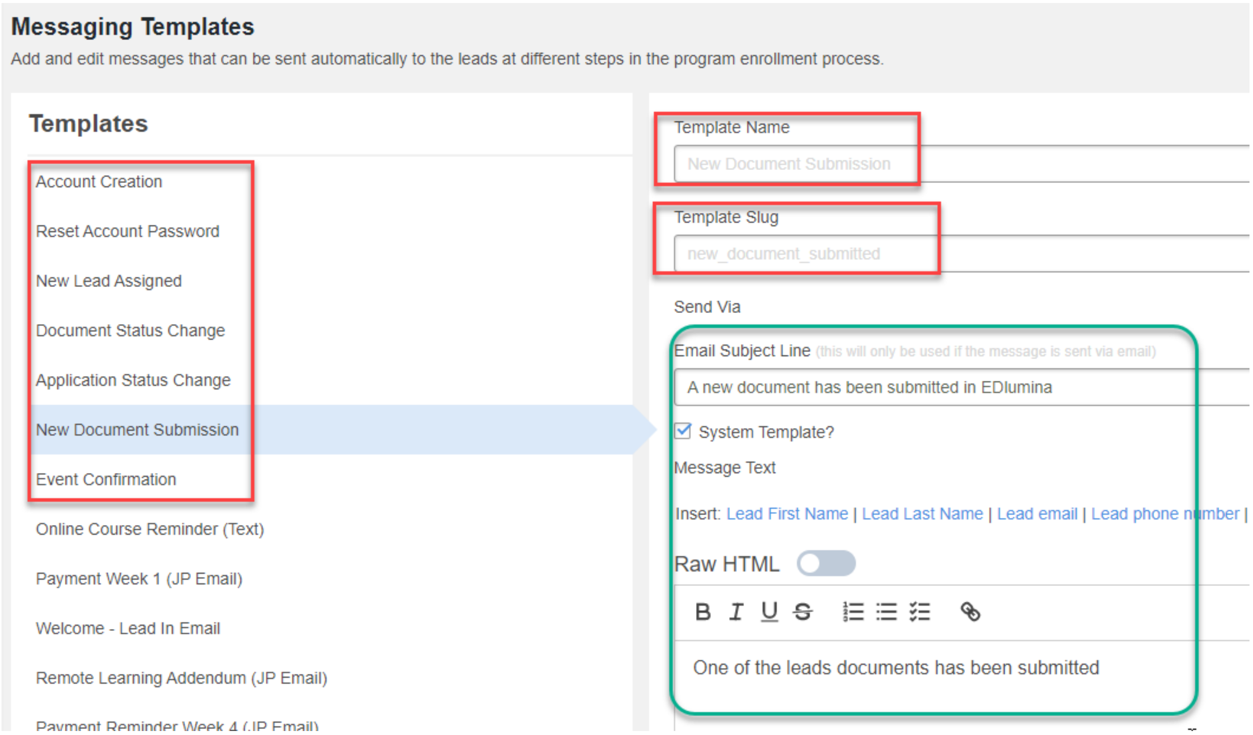
1. System generated templates that cannot be removed, but can be modified.
    a. If the Template title and slug is greyed out do not modify!
    b. The email subject and body of the message can be updated
2. Self created templates that can be created ad hoc and modified or removed at any time.
3. Event Confirmation Reminders

System Generated Templates

The system generated messages are shown in the screenshot below. These will be sent to students via email and detail various things like account creation, document status changes, and application status changes for students. The new lead assigned template will be sent to Admissions Reps email addresses as new leads are assigned to them in EDlumina.

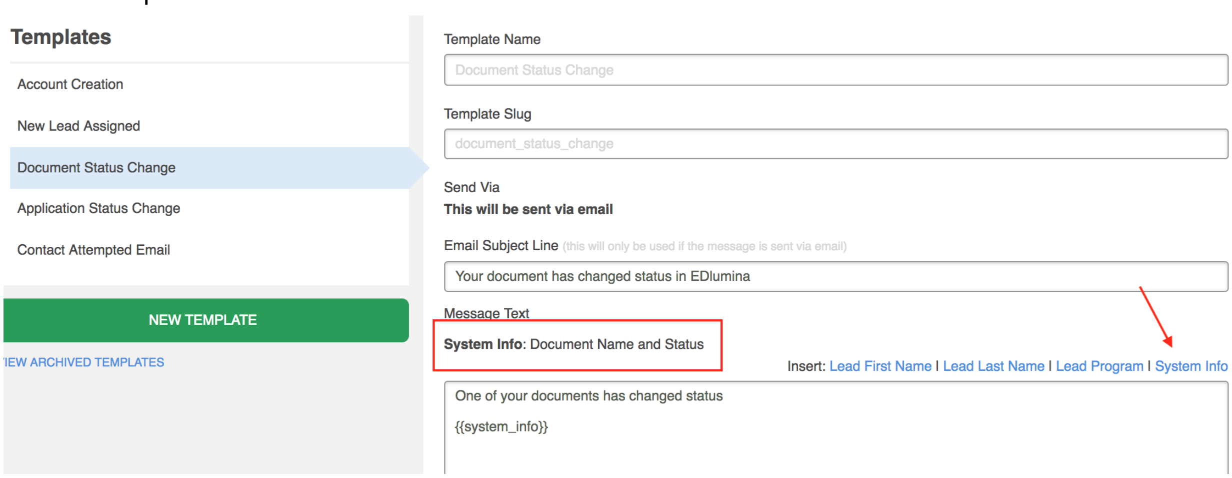
*In Red are the system default messages, please do not change the Template name and slug (they are greyed out).

In green is what can be modified.



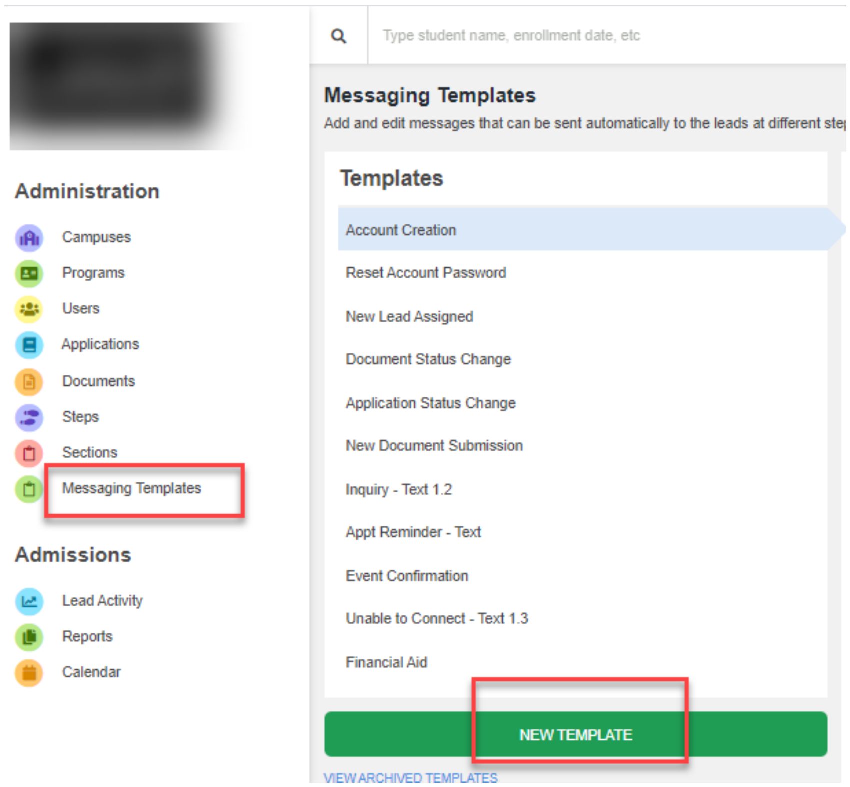
Note that for each of the system default messages users can add information like student name and program. There is also a note about what the “System Info” tag will capture for each template. Do not remove these unless you have reviewed the following and decided these are unnecessary:

- Use “System Info” to include EDlumina URL, Username, and Password for the **Account Creation** template.
- Use “System Info” to include Document Name and Status for the **Document Status Change** template.
- Use “System Info” to include current application status for the **Application Status Change** template.



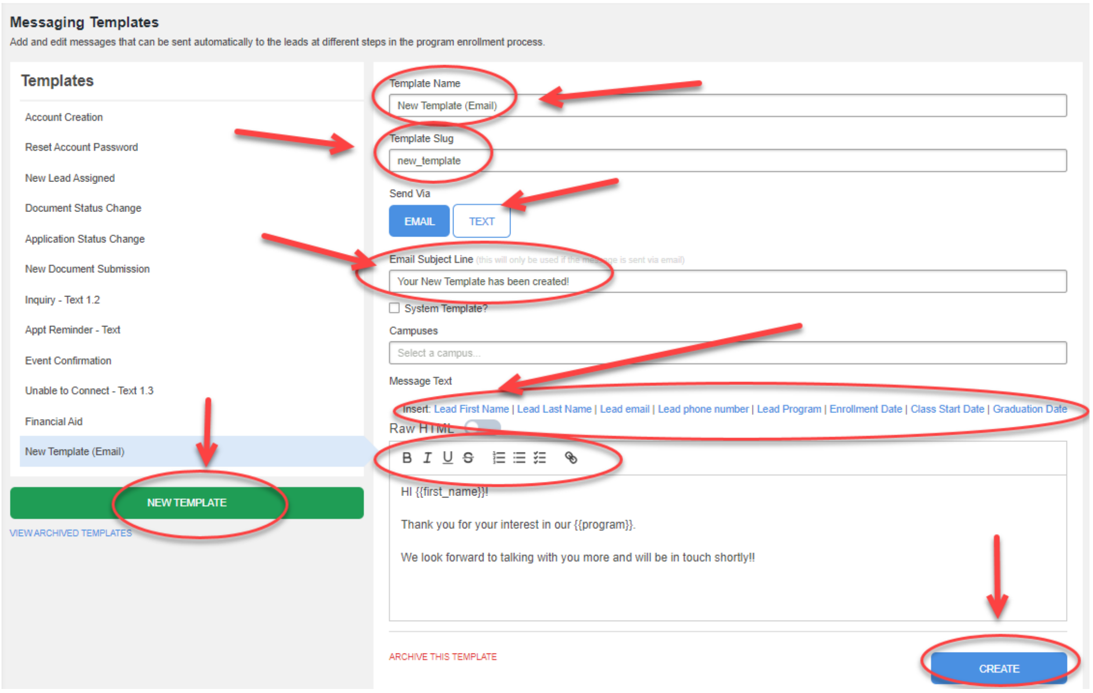
Message Templates - Client Created

Messages Templates can be added by Admins by visiting the “Message Templates” section on the left hand panel. From there you will select “New Template” -

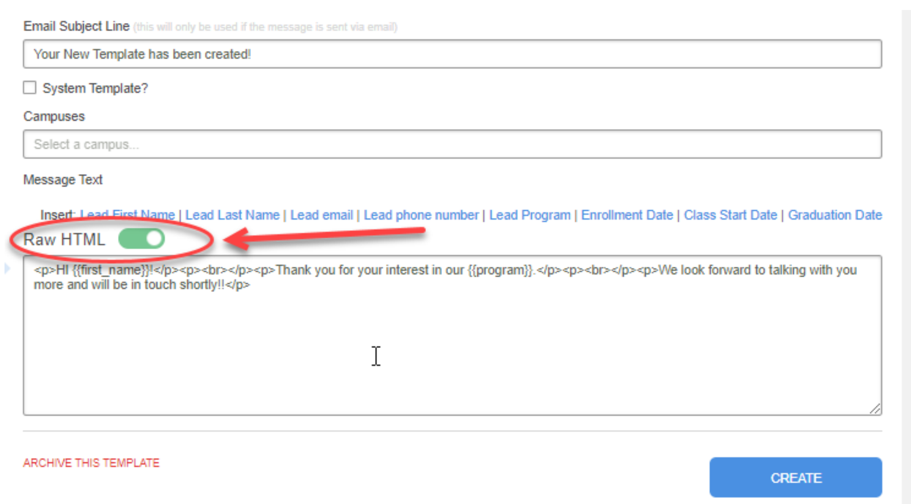


Once you’ve started the new template you’ll want to enter the following:

Template Name: Enter something as a quick reference to what the template is for. It’s likely a good idea to also enter if this is an email, or text type or message (see screen shot).
Template Slug: This should use the same or abbreviated Template Name in **lowercase with underscores**, **no spaces**. It is okay if these do not match the template name exactly.
Send Via: This is where you’ll select how you want the message to be sent. Either by “Email”, or “Text”. (This is where we referenced adding the send type in Template Name)
Email Subject Line: This will appear in the subject of an email sent to end users. Leave blank if Text.
Message Text: Here you will enter your message! Note, there are system information ‘tags’ you can insert like First and Last name and program to make the messages more customizable.



You may also have your marketing team enter Raw HTML to create links, images, maps and more by toggling the slider.

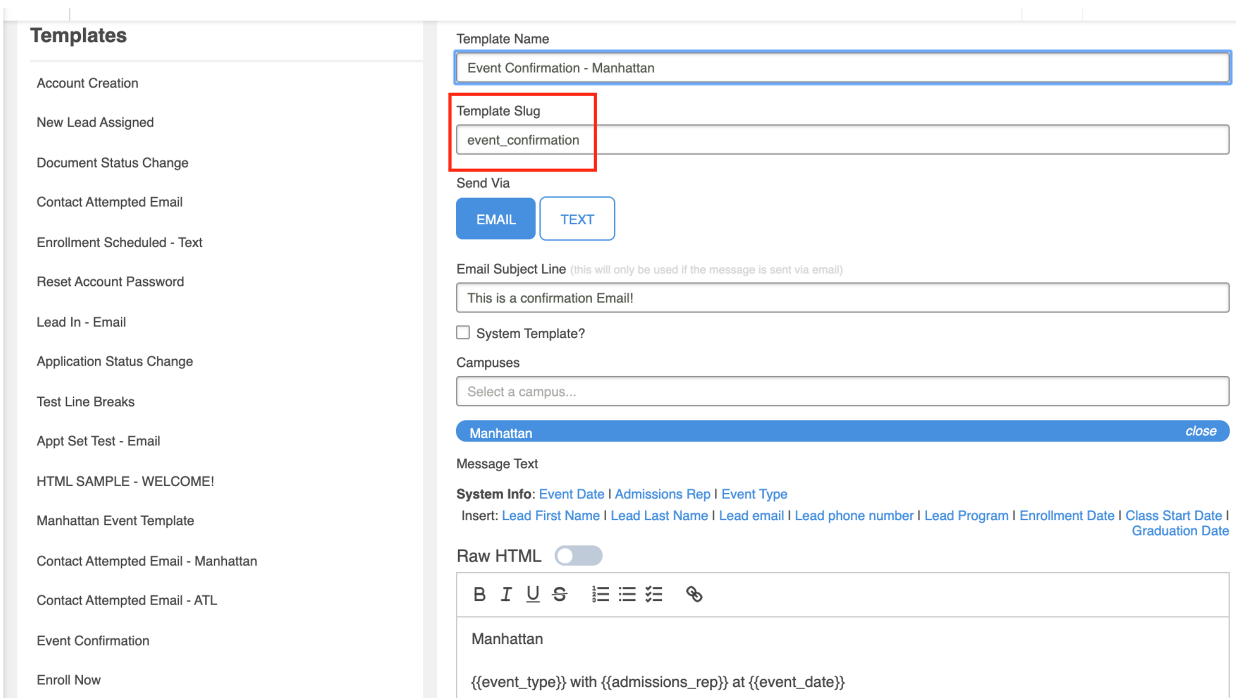


Event Confirmation Reminders - **Automated Event Confirmations are not enabled by default. Please contact support if you'd like to have them enabled for your account.*

Multiple Event Confirmations Messages

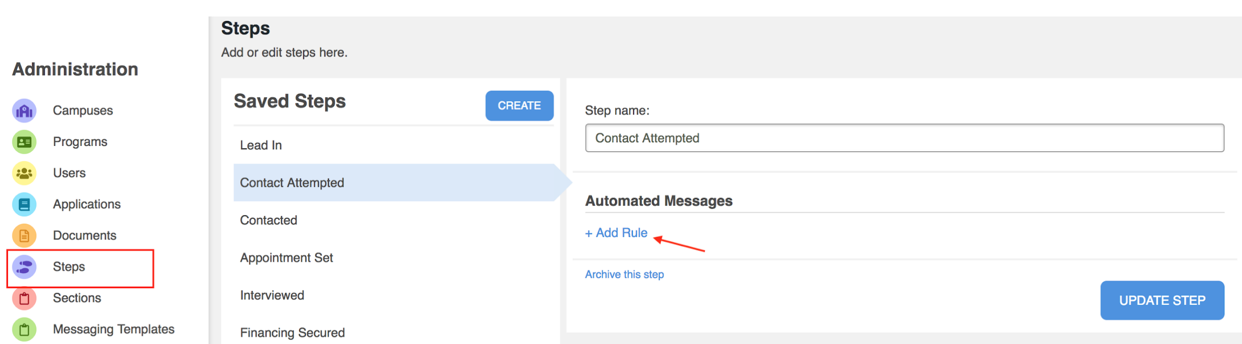
- Event Confirmation type messages, if you've enabled them, can be set as multiple message types.
    - (If you are unsure if this has been enabled on your site contact your EDlumina representative)
- Users can now set up event confirmations per campus or as an email and text message.

- To set these up:
    - Create a new template
    - Into the "template slug" field enter: "event_confirmation"
    - After the template slug has been entered the "System Info" will populate for selection.
        - From there, users can enter the event date/time, admissions rep, and event type.
    - This will allow prospects to be notified of their event via email, text, and/or have specific event details based on their location where multiple campuses are open.



<u>Create Automated Messages and Automated Follow Ups</u>

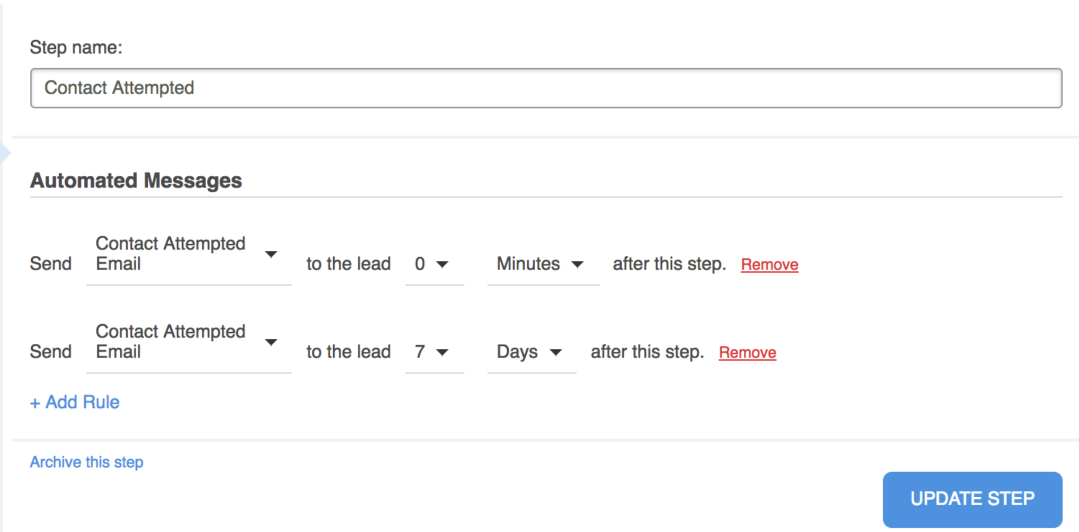
After you have created the template you'll want to assign it to a "Step" - Navigate to "Steps" in the left Panel, select the step the message should be associated with, and click "Add Rule"



By adding rules to steps you are setting up the timing for which messages will be sent to leads.

First, you'll select the template you created in the dropdown next to "Send", then select the time after a lead has selected a step for this message to be sent (see screenshot below).

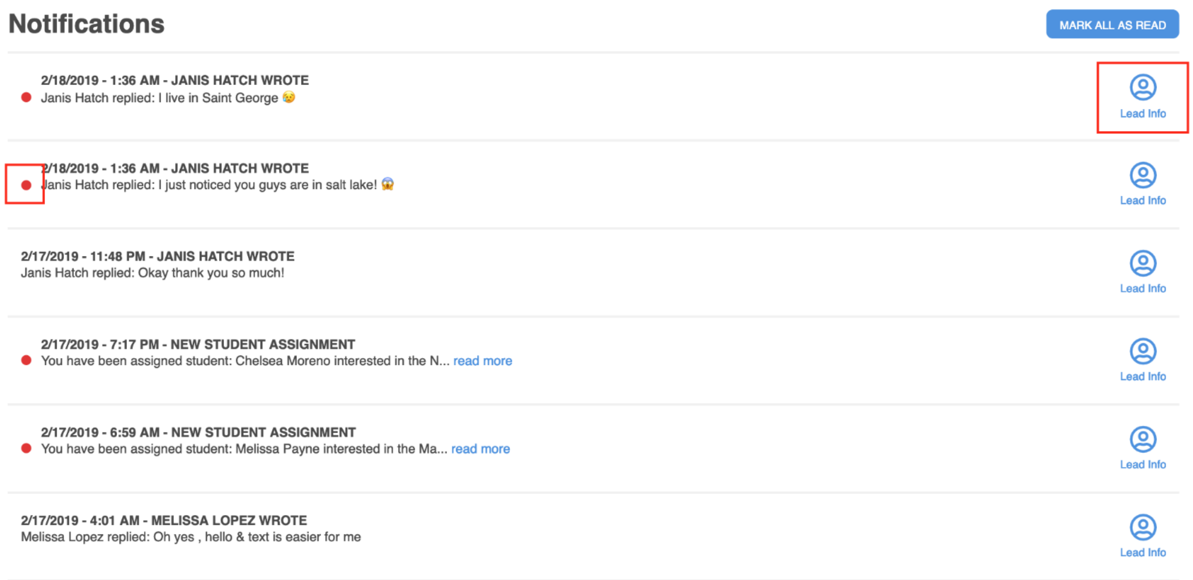
- A few notes: Templates that are set to send 0 minutes out will be sent as soon as the lead hits list status.
- For automated follow ups you can select for messages to go out at later dates, every week, 2 weeks, or month for example. This is a great tool for leads that requested information but have not yet made contact with their Admissions Reps.
- If there is a delayed timing for a template note that the message will not go to the lead if they are no longer in that status. This avoids erroneous messages being sent.



Notifications

Notifications, found in the upper right hand corner of a reps profile are used to track all notifications from a prospect to the rep or admin who manages the lead.

- Users will see a red circle next to unread notifications for easier identification of unread messages
- Users can also click directly to a lead profile from the notifications page.
- The MARK ALL AS READ button will make all of the unread notifications be marked as read.



Once you've clicked the "Lead Info" hyperlink the system should direct you to the appropriate pages. For example:

- If the notifications reference something from Direct Feedback, they will be brought to that Direct Feedback section.
- If the notifications reference something from the Application, they will be brought to the Application page.
- The same is true for other notifications and links to various pages in the lead profile.

Mass Text or Email via 'Send a Note' Feature

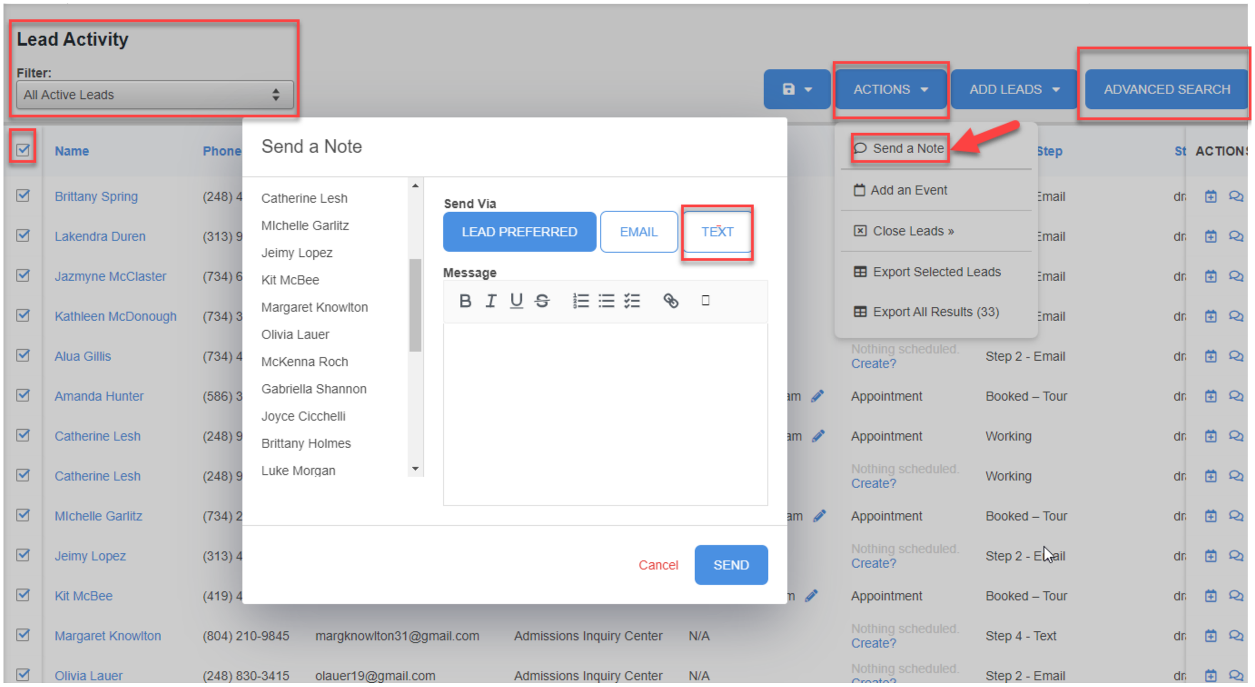
You may use your Lead Activity Filters or Advanced Search to pull your list. Once your results display, select the leads (top checkbox on the far left is for all the leads on the page) and then go to Actions->Send a Note->Send Via Text (or Email).

- IF there is not a phone number listed (or email address) for the lead, it will appear in red so that you know who will not receive the message.
- Any system messages will then appear in the Lead profile under Direct Messages for future reference.
- Please note: 30 leads appear in the application window, however you may select as many leads (pages) as you have results to send all at the same time.

Tip: If you are not already using the Signature feature of EDlumina - Add a "Call this number" message to 'Send a Note' Mass texts or emails sent from system

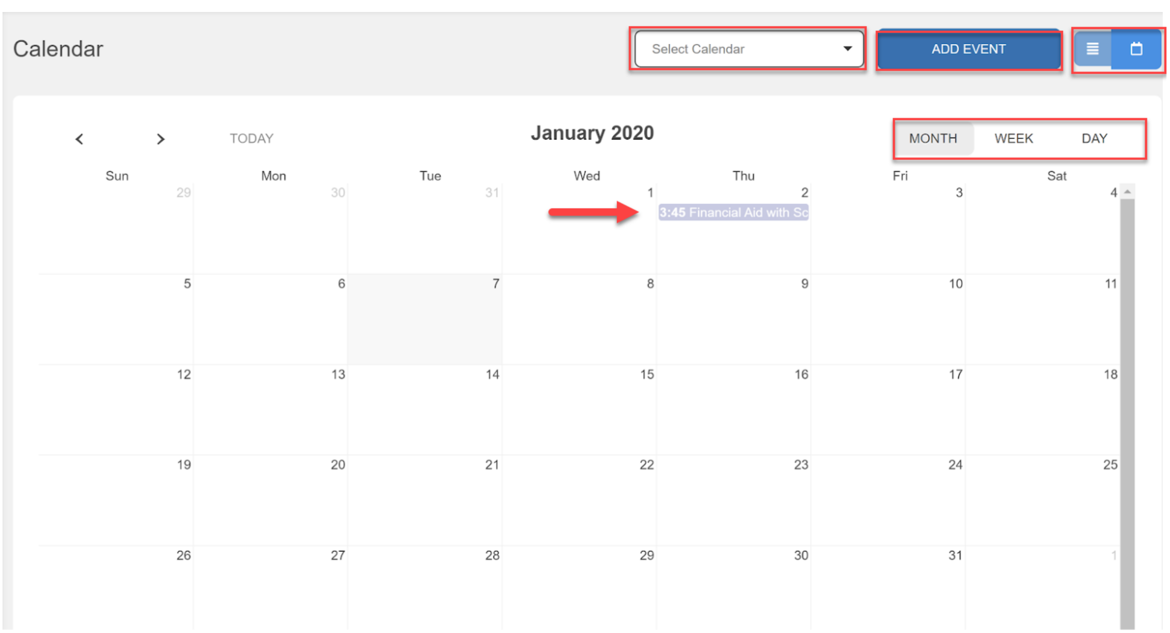
- Because the text number we set up for you is local you will likely want to add a message behind a text giving the number where you can be reached.

- We have signatures by campus - there is an ‘Add Signature’ button in Direct Message for individual communication to the lead through EDlumina.



Calendar

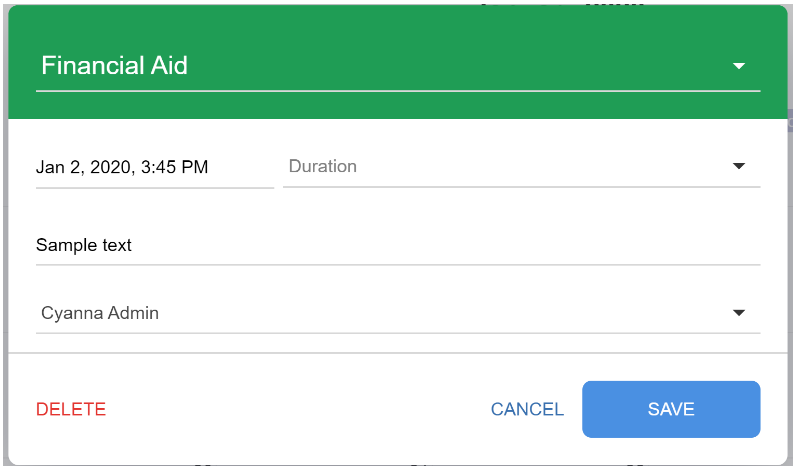
The Calendar helps keep track of all of the events for the different leads. The Calendar can be narrowed down to only include the leads for a certain representative or for the leads of a certain campus by using the **Select Calendar** drop down table at the top of the Calendar page.



The Calendar can show the events for the **Month**, **Week**, or **Day** by selecting the corresponding options in the top right corner of the screen. You can change the month, week, or day you are looking at by clicking the left and right arrows in the top left corner of the screen.

Viewing or Changing the Details of an Event and Deleting Events

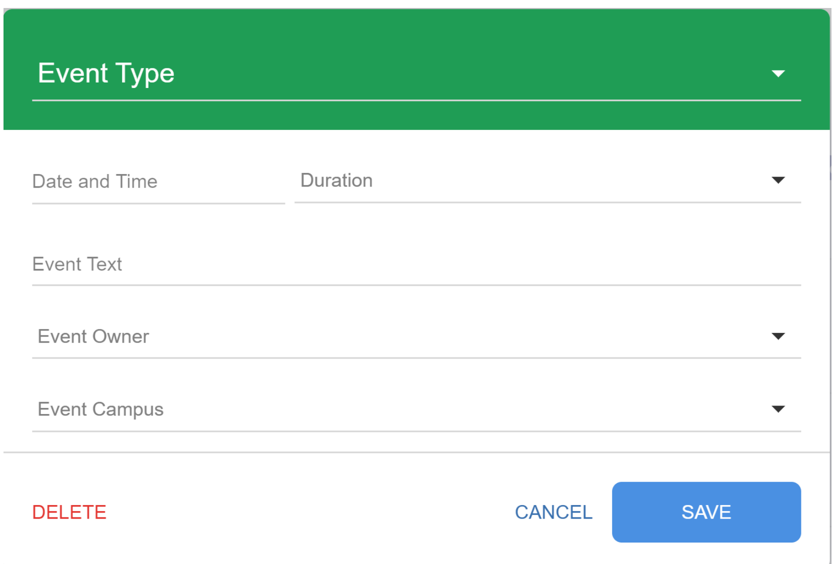
Click on the events on the calendar to view the details of the event or to edit the event.



Change any of the details in the event that are needed then click **SAVE**. If you are wanting to delete the event, select the red **DELETE** button in the bottom left corner of the pane.

Add an Event to the Calendar

Click the blue ADD EVENT button in the top right corner of the screen.



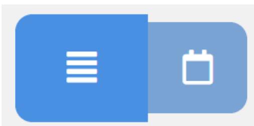
Enter the specified information for the event and click **SAVE** once completed. The information that can be entered is:

- Event Type
- Date and Time

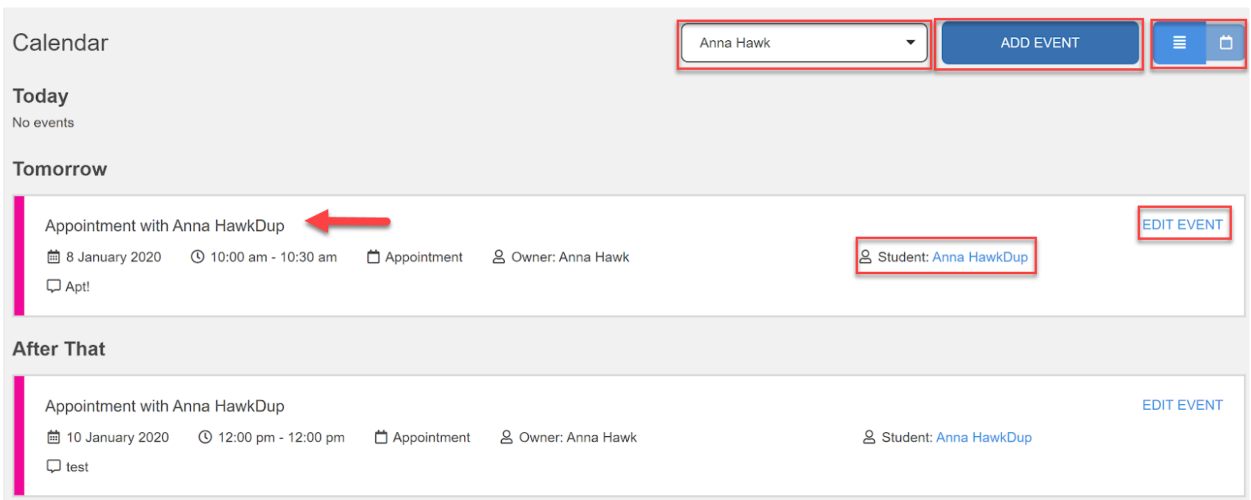
- Duration
- Event Text/Details
- Event Owner (Representative)
- Event Campus

Upcoming Events

Click on the **Upcoming Events** button in the top right corner of the Calendar page. It is the button with four lines beside the normal calendar option.



The Upcoming Events page shows the events that are coming up next in the calendar and the details of the events.



The events are ordered to show the ones that are coming up next first and then those that come after next. The events can be edited or deleted by clicking the **EDIT EVEN**T button. The edit option is explained above in the *Viewing or Changing the Details of an Event and Deleting Events* section.

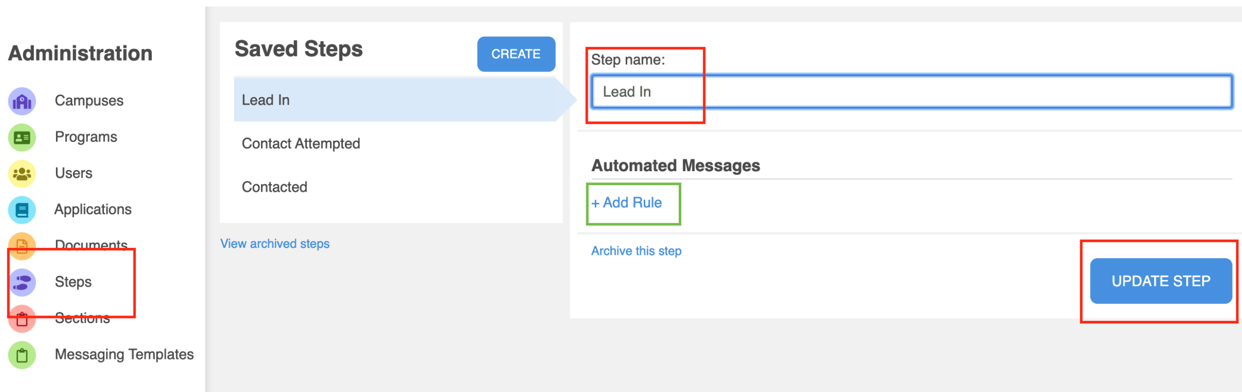
You can click on the student who is having the event to go to their lead page to look at their information before having the event for that student.

How to Add and Modify Steps in Programs

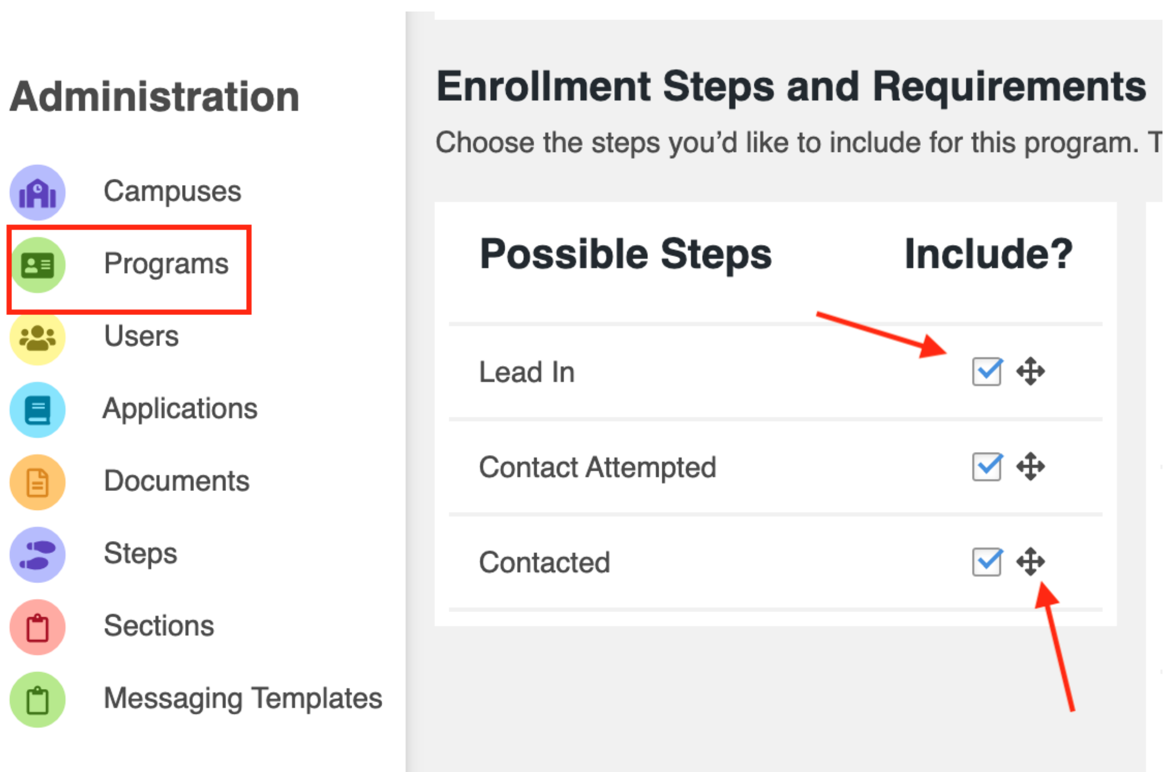
To add a step, as an Admin, navigate to "Steps"

From there, you can simply add or create steps and "Update Step". If there are message templates you will be able to add them here as well.

Once all the steps have been added, you'll navigate to programs to adjust their order.



The steps will be listed below the program cohorts and can be checked on and off per program in addition to dragging up and down using the arrows to adjust order.

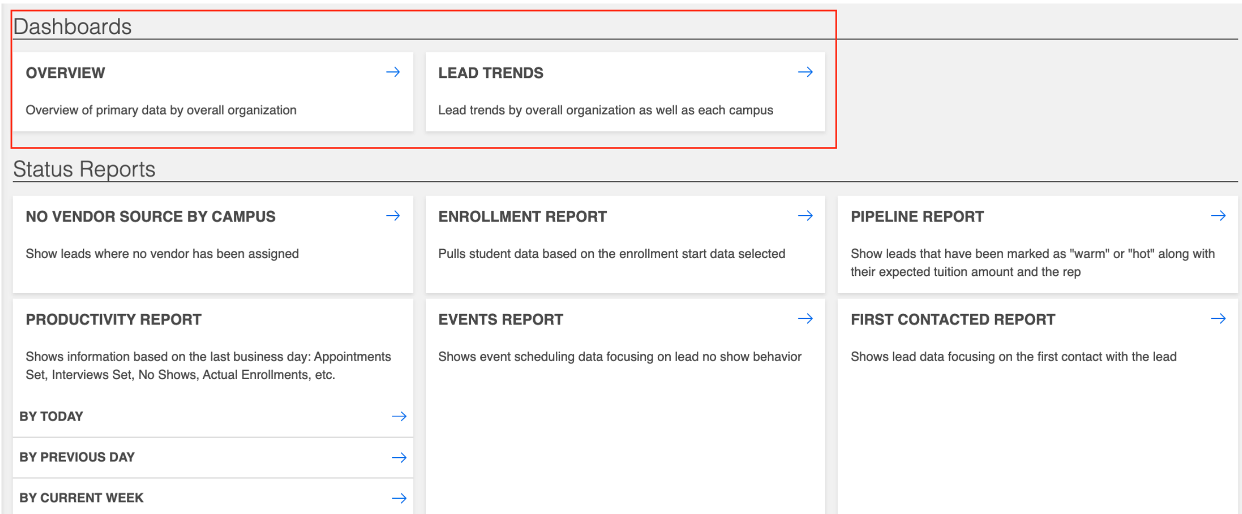


Once all of the steps are ordered correctly select "save" on the bottom right corner of the page.

Reports

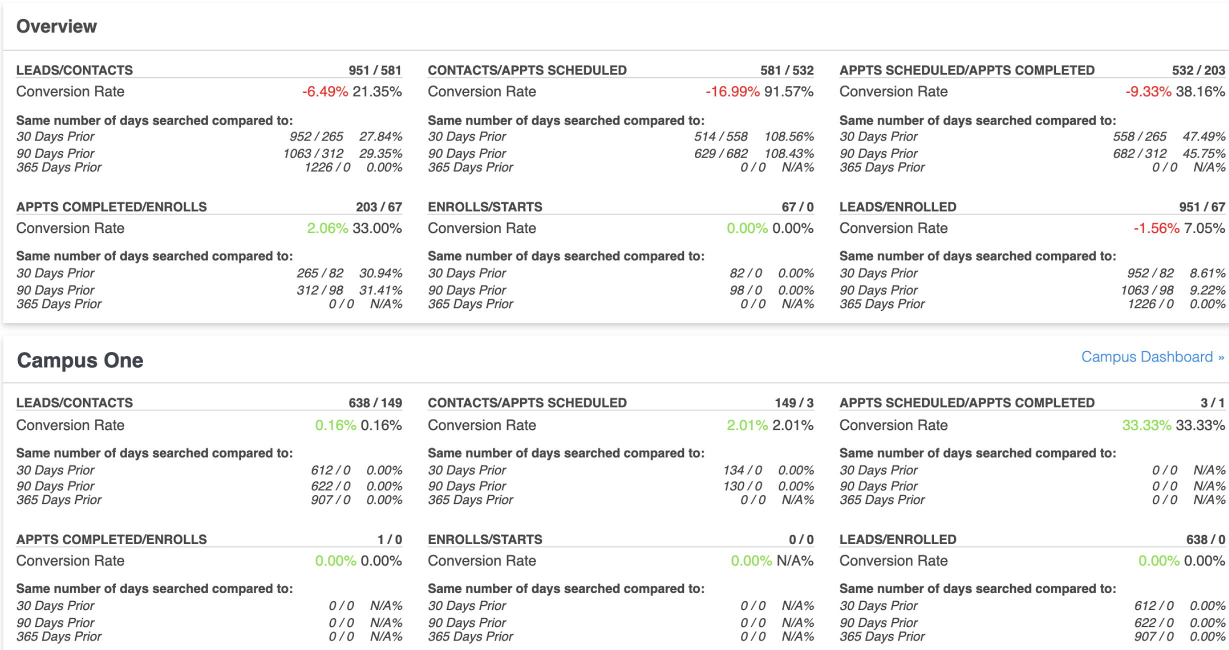
Important: All of the reports can be downloaded to a .csv file (excel file) by clicking on the respective **download** button on the report page of the data you want to download.

Dashboard Reporting



Overview

- Overview details show for the institution as a whole in “Overview” as well as show campus specific information.
- Leads/Contacts = Unique leads in (unique leads report) by those that have been contacted (completing the "First Contacted" in the lead profile)
- Contacts/Appts Scheduled = Those that have been contacted (completing the "First Contacted") by Leads that have had an *appointment* type of event scheduled
- Appts Scheduled/Appts Completed = Leads that have had an appointment scheduled / by those that have completed an Appointment (Numbers here are pulled from the Events Report)
- Appts Completed / Enrolled = those that have a completed appointment (Numbers to be pulled from Events Report) by those that were *marked as Enrolled.* (Not moved to an enrolled step)
- Enrolled / Start = Marked as enrolled / Those marked as a "Started" (New Feature above)
- Finally, the “Same number of Days Searched Compared to:” will give numbers to compare the existing date range with 30, 90, or 365 prior for the same number of days searched.
- By selecting “Campus Dashboard” users can drill down by program for the same statistics



Overview

LEADS/CONTACTS	951 / 581		
Conversion Rate		-6.49%	21.35%
Same number of days searched compared to:			
30 Days Prior	952 / 265		27.84%
90 Days Prior	1063 / 312		29.35%
365 Days Prior	1226 / 0		0.00%
CONTACTS/APPTS SCHEDULED	581 / 532		
Conversion Rate		-16.99%	91.57%
Same number of days searched compared to:			
30 Days Prior	514 / 558		108.56%
90 Days Prior	629 / 682		108.43%
365 Days Prior	0 / 0		N/A%
APPTS SCHEDULED/APPTS COMPLETED	532 / 203		
Conversion Rate		-9.33%	38.16%
Same number of days searched compared to:			
30 Days Prior	558 / 265		47.49%
90 Days Prior	682 / 312		45.75%
365 Days Prior	0 / 0		N/A%
APPTS COMPLETED/ENROLLS	203 / 67		
Conversion Rate		2.06%	33.00%
Same number of days searched compared to:			
30 Days Prior	265 / 82		30.94%
90 Days Prior	312 / 98		31.41%
365 Days Prior	0 / 0		N/A%
ENROLLS/STARTS	67 / 0		
Conversion Rate		0.00%	0.00%
Same number of days searched compared to:			
30 Days Prior	82 / 0		0.00%
90 Days Prior	98 / 0		0.00%
365 Days Prior	0 / 0		N/A%
LEADS/ENROLLED	951 / 67		
Conversion Rate		-1.56%	7.05%
Same number of days searched compared to:			
30 Days Prior	952 / 82		8.61%
90 Days Prior	1063 / 98		9.22%
365 Days Prior	1226 / 0		0.00%

Campus One — Campus Dashboard »

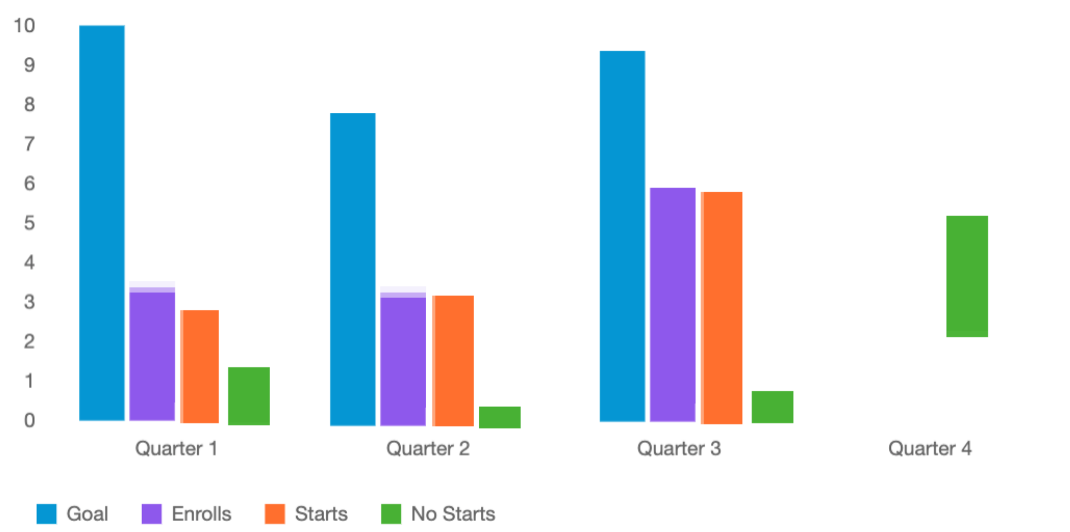
LEADS/CONTACTS	638 / 149		
Conversion Rate		0.16%	0.16%
Same number of days searched compared to:			
30 Days Prior	612 / 0		0.00%
90 Days Prior	622 / 0		0.00%
365 Days Prior	907 / 0		0.00%
CONTACTS/APPTS SCHEDULED	149 / 3		
Conversion Rate		2.01%	2.01%
Same number of days searched compared to:			
30 Days Prior	134 / 0		0.00%
90 Days Prior	130 / 0		0.00%
365 Days Prior	0 / 0		N/A%
APPTS SCHEDULED/APPTS COMPLETED	3 / 1		
Conversion Rate		33.33%	33.33%
Same number of days searched compared to:			
30 Days Prior	0 / 0		N/A%
90 Days Prior	0 / 0		N/A%
365 Days Prior	0 / 0		N/A%
APPTS COMPLETED/ENROLLS	1 / 0		
Conversion Rate		0.00%	0.00%
Same number of days searched compared to:			
30 Days Prior	0 / 0		N/A%
90 Days Prior	0 / 0		N/A%
365 Days Prior	0 / 0		N/A%
ENROLLS/STARTS	0 / 0		
Conversion Rate		0.00%	N/A%
Same number of days searched compared to:			
30 Days Prior	0 / 0		N/A%
90 Days Prior	0 / 0		N/A%
365 Days Prior	0 / 0		N/A%
LEADS/ENROLLED	638 / 0		
Conversion Rate		0.00%	0.00%
Same number of days searched compared to:			
30 Days Prior	612 / 0		0.00%
90 Days Prior	622 / 0		0.00%
365 Days Prior	907 / 0		0.00%

Lead Trends

- Lead Trends will show you Goals, Enrolled leads, Starts, and No Starts by year for each quarter.
- “Campus trends” will allow you to filter down by campus programs
- How to populate the numbers:
  - Goal = Goal total for that campus for the date range selected. Goal is found in Programs > Cohorts.
    - This will pull the sum for cohorts start date on the date range selected
  - Enrolled = Total number marked as enrolled (and still enrolled) for that date range
  - Starts = the new "Started" field in the lead profile
  - No Starts = those marked as "No Start" status for the date range selected.
- One can also sort by chart or table view:

Campus One

Table View | Campus Trends »



Campus Two

Chart View | Campus Trends »

	Goal	Enrolled	Start	No Start
Quarter 1	70	0	0	0
Quarter 2	48	22	0	0
Quarter 3	106	57	0	0
Quarter 4	48	48	0	0

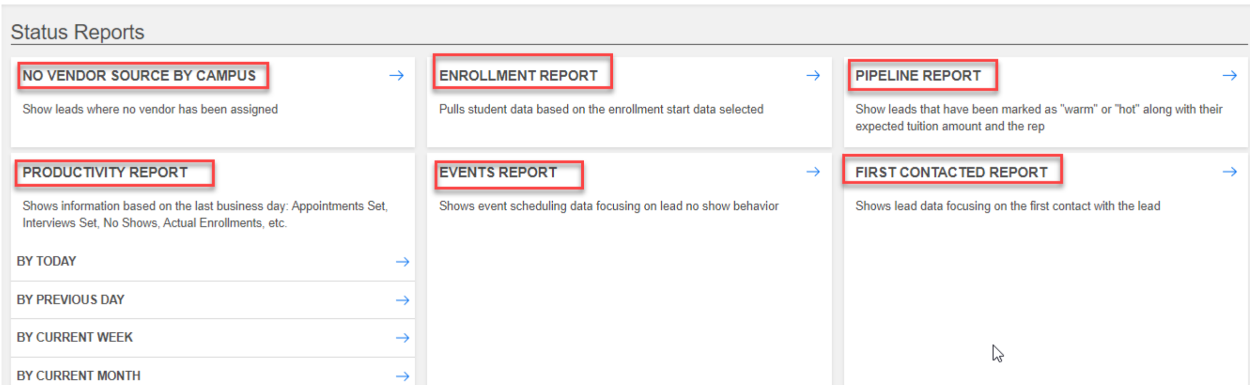
Programs > Program > Cohorts *(To enter a goal for the start date)*

Title*:	Open Enrollment Start Date*:	Open Enrollment End Date*:	Class Start Date*:	Graduation Date*:	Goal*:	Limit*:
EL EST PM - 2/3/20	Jan 1, 2019	Feb 3, 2020	Feb 3, 2020	mm/dd/yyyy	6	50
EL EST PM - 4/27/20	Jan 1, 2019	Apr 27, 2020	Apr 27, 2020	mm/dd/yyyy	6	50
EL EST PM - 10/12/20	Jan 1, 2019	Oct 12, 2020	Oct 12, 2020	mm/dd/yyyy	8	50
EL EST AM - 7/28/20	Jan 1, 2019	Jul 28, 2020	Jul 28, 2020	mm/dd/yyyy	8	50
EL EST PM - 7/20/20	Jan 1, 2019	Jul 20, 2020	Jul 20, 2020	mm/dd/yyyy	8	50

Status Reports

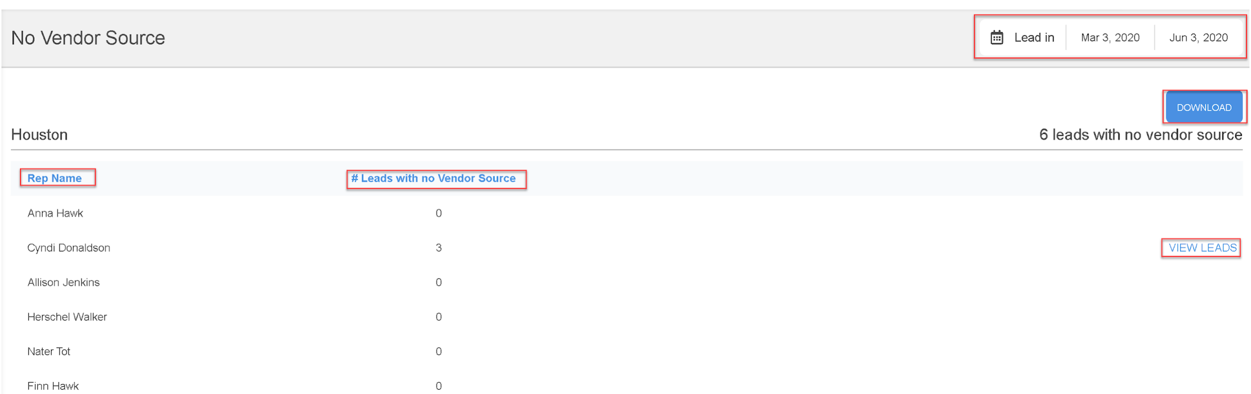
There are 5 different types of status reports for the students:

- No Vendor Source by Campus
- Enrollment Report
- Pipeline Report
- Productivity Report
- Events Report
- First Contacted Report



No Vendor Source by Campus

Show the leads that no vendor has been assigned to through a filtered date range (90 days is default) by Campus and Rep name, with totals by Campus. You may also click to view the leads directly. Click on the blue download button to download a .csv file (excel file) of the data.

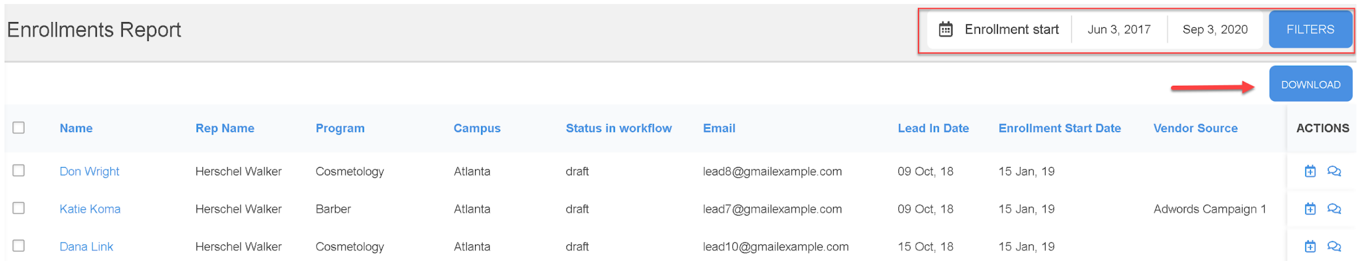


The leads that do not have a vendor source are organized by Campus. They are also organized by which representative they have. The leads can be further organized by selecting the beginning and ending **Lead In** date shown in the top right hand corner of the screenshot.

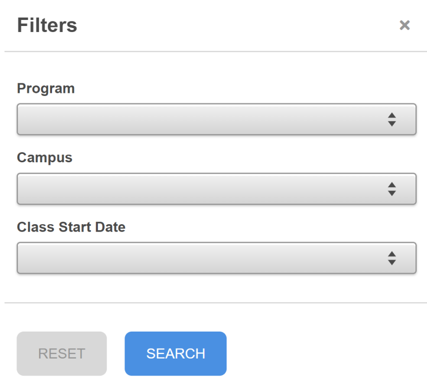
Click **View Leads**, shown on the right hand side of the screenshot in order to show all the leads with no vendor source for a representative.

Enrollment Report

This option will pull student data based on the criteria for the enrollment start dates that were selected. Once you are on the **Enrollments Report** page, choose both a start date and end date for the enrollment. The page should then display all the students that will be enrolling within that time period.



The results of the Enrollment Report can be further narrowed down by selecting the **FILTERS** button in the top right hand corner of the screen.



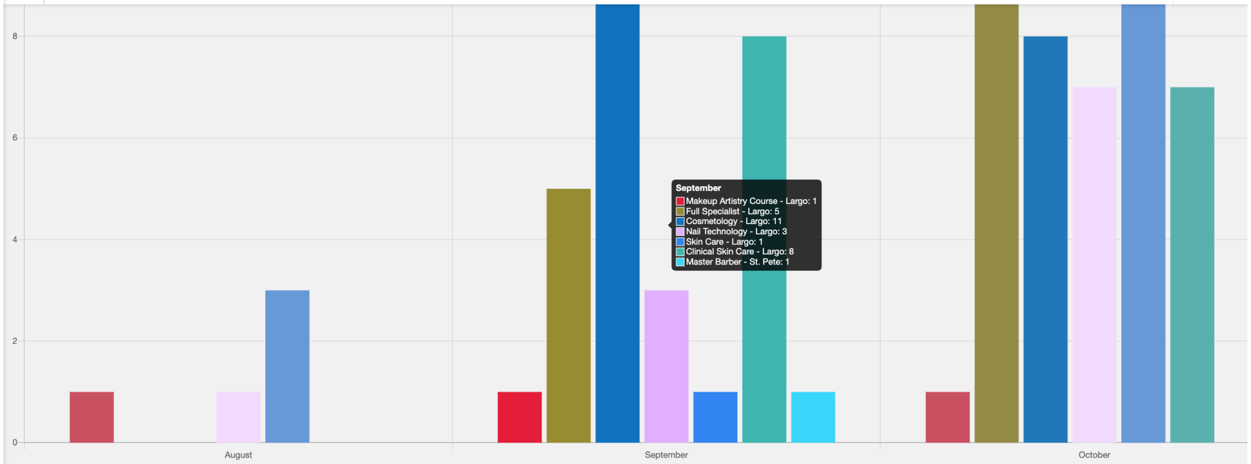
The leads can be sorted by:

- Program
- Campus
- Class Start Date

Press the **search** button to get the results of the narrowed down search.

Pipeline Report

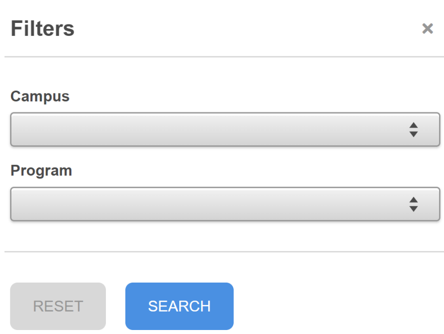
Shows the leads that have been marked as “hot,” their expected tuition amount, and their representative.



	Name	Rep	Program	Campus	Last Interview Date	Cohort Start Date
☐	Elysia Latherow	Largo Rep. 1	Skin Care - Largo	Largo	30 Aug, 2019	14 Apr, 2040
☐	sophia salvati	Largo Rep. 1	Skin Care - Largo	Largo		14 Apr, 2040
☐	Chloe Bogden	Largo Rep. 1	Skin Care - Largo	Largo		14 Apr, 2040
☐	Simone Prince	Largo Rep. 1	Makeup Artistry Course - Largo	Largo		8 Apr, 2040
☐	Shania Brathwaite	Largo Rep. 1	Nail Technology - Largo	Largo		14 Apr, 2040

These can be sorted by their lead-in date. Once on the **Pipeline Report** page, select the **Start Date** and **End Date** in the top right hand corner of the screen. The results displayed will be within the start and end dates.

The results of the Enrollment Report can be further narrowed down by selecting the **FILTERS** button in the top right hand corner of the screen.



The leads can be sorted by **Campus** and **Program**. Press the **search** button to get the results of the narrowed down search.

Productivity Report

This shows the information based on the last business day. This can be sorted by today, the previous day, the current week, or the current month. The information shown for these include:

- Appointments
- Interviews
- No Shows
- Actual Enrollments

- Unworked Leads
- Notes

The “Unworked” Leads number we’re planning to modify, so disregard for now.

You can change the sorting of the dates by selecting the drop down in the top right corner. This is shown below.

Productivity Report

Current Month | Jun 1, 2020 | Jun 30, 2020

DOWNLOAD

Houston

	Appointments Set	Planned Interviews	No Shows	Actual Enrollments	Notes Added	Leads in
Houston	0	0	0	0	0	0

VIEW REPRESENTATIVE DETAILS

The activity is organized by the campuses of the school. By selecting **View Representative Details**, it will show the information per representative.

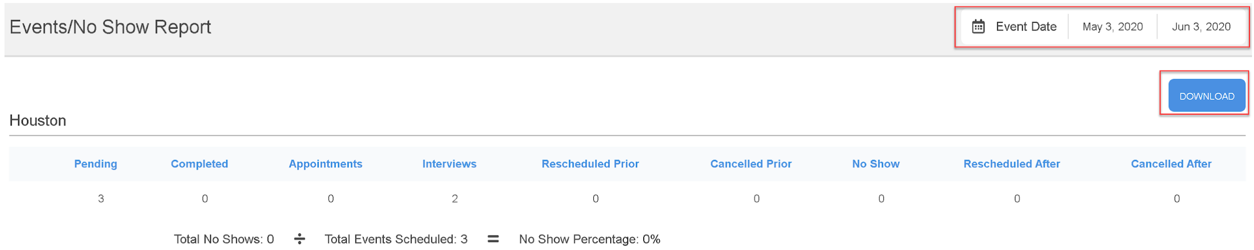
HIDE REPRESENTATIVE DETAILS

Sonny Michel	0	0	0	0	0	0
Allison Jenkins	0	0	0	0	0	0
Todd Gurley	0	0	0	0	0	0
Anna Hawk	0	0	0	0	0	0

Events/No Show Report

This report pulls information regarding scheduled (pending), completed and no show Appointment and Interview type events. This shows event scheduling data focusing on lead “no show” behavior. This includes:

- Pending
- Completed
- Appointments
- Interviews
- Rescheduled Prior
- Cancelled Prior
- No Show
- Rescheduled After
- Cancelled After



The data is sorted by campus and can be narrowed down by selecting the start and end event dates in the top right corner of the screen. The date can also be downloaded to a .csv file (excel file) by selecting the download button.

The report will have the **Total No Shows**, **Total Events Scheduled**, and the **No Show Percentage** for each campus.

- Pending is the number of events scheduled during the timeframe with no closure/outcome.
- Completed are events that took place as scheduled and were closed.
- Appointments/Interviews shows the number of Appointment and Interview type events that were scheduled.
- ‘Reschedule Prior’ is the number of events that were marked as a “Reschedule” prior to the event taking place.
- ‘Cancelled Prior’ is the number of events that were marked as “Cancelled” prior to the event taking place.
- No Shows are events marked as ‘No Show’
- ‘Reschedule After’ are marked as a Reschedule after the event was past and marked as a “No Show”.
- ‘Cancelled After’ are marked as Cancelled after the event was past and marked as a “No Show”.
- Based on all of these numbers the ‘No Show’ Percentage can be derived.

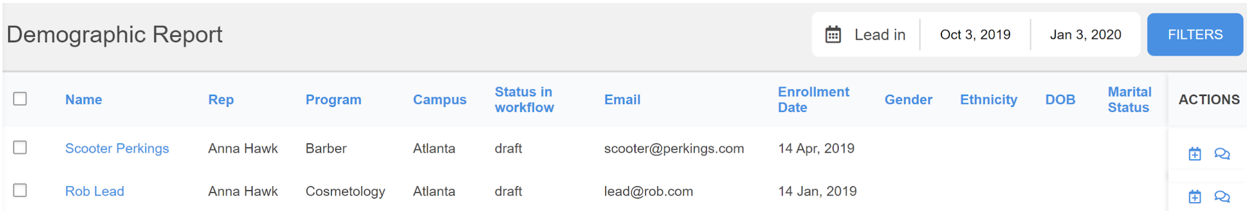
Lead Demographics Reports

Demographics Report

The Demographics Report offers the demographics data that is relevant for each lead. This can be run by the program or the campus. As well as the lead’s main information, it includes:

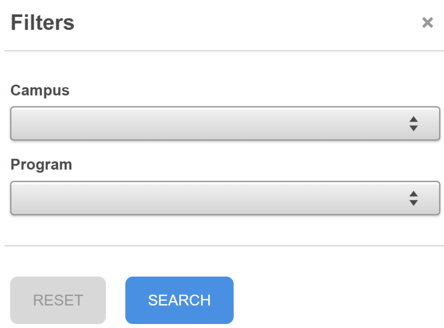
- Gender
- Ethnicity
- Date of Birth
- Marital Status

This excludes closed and enrolled - we’ll update to pull the list of “Enrolled” students that came in during the timeframe as well.



Once on the **Demographics Report** page, the leads can be sorted by their **Lead In** date by selecting the start date and end date in the top right corner of the screen. The results displayed will have a Lead In date within the given period.

The results of the Demographics Report can be further narrowed down by selecting the **FILTERS** button in the top right hand corner of the screen.

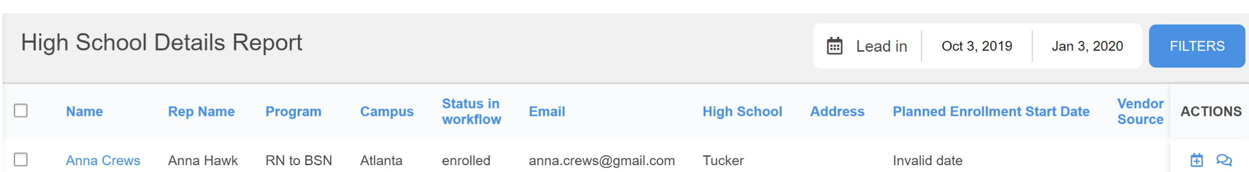


The leads can be sorted by **Campus** and **Program**. Press the **search** button to get the results of the narrowed down search.

High School Details Report

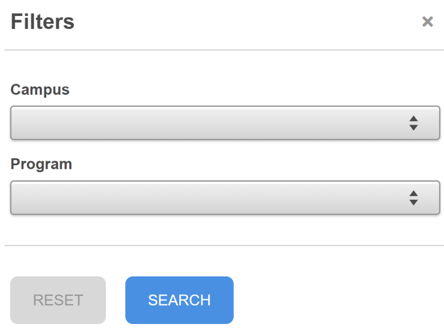
Pulls the intended start date for a lead as well as the high school that they attended. This can be run by Program or Campus. This will include their general information as well as:

- High School
- Address
- Planned Enrollment Start Date
- Vendor Source



Once on the **High School Details Report** page, the leads can be sorted by their **Lead In** date by selecting the start date and end date in the top right corner of the screen. The results displayed will have a Lead In date within the given period.

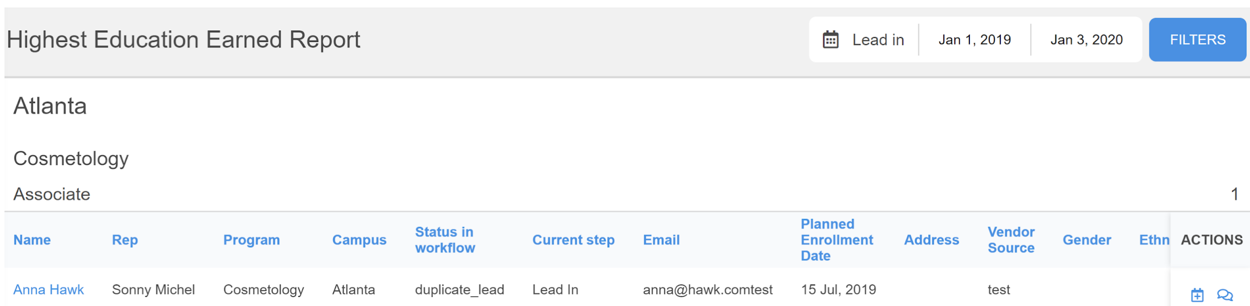
The results of the High School Details Report can be further narrowed down by selecting the **FILTERS** button in the top right hand corner of the screen.



The leads can be sorted by **Campus** and **Program**. Press the **search** button to get the results of the narrowed down search.

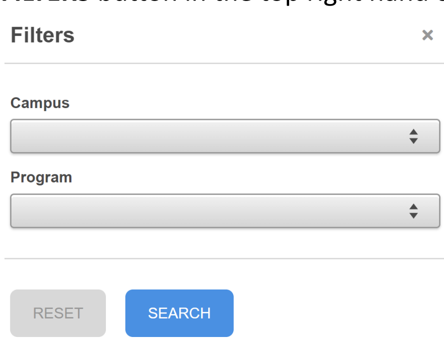
Highest Education Report

This offers the demographics data as well as the highest degree earned by the lead. This can be run by the campus or program. This will list the same data as the **Demographics Report** that is listed above, but now the leads are organized by the highest degree that they earned.



Once on the **Highest Education Earned Report** page, the leads can be sorted by their **Lead In** date by selecting the start date and end date in the top right corner of the screen. The results displayed will have a Lead In date within the given period.

The results of the Highest Education Earned Report can be further narrowed down by selecting the **FILTERS** button in the top right hand corner of the screen.



The leads can be sorted by **Campus** and **Program**. Press the **search** button to get the results of the narrowed down search.

Efficacy and Actions Report

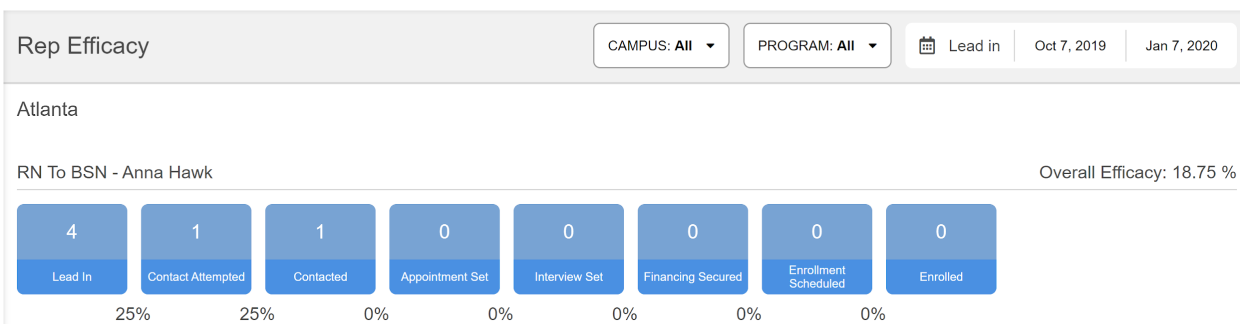
Efficacy Report

The Efficacy Report pulls numbers and percentages for each step in a program workflow based on the set-up leads that came in during the pre-selected data range.

The intent of this report is to track the efficacy of the various sources. This report will only pull the step actions for **leads** that came in during the date range selected. This is different from the Actions Report that will show all the **actions** taken on the workflow during the date range associated with all the leads regardless of when the lead came into the system. In short, one is based on the actions for the lead in date for leads (Efficacy) and the other is based on the actions taken during the date range (Actions).

The Efficacy Report can organize the data in 5 different ways:

- By Vendor Source
- By Program
- By Representative
- By Lead Source
- By Campus



Once on one of the **Efficacy Report** pages, the data can be sorted by their **Lead In** date by selecting the start date and end date in the top right corner of the screen. The results displayed will have a Lead In date within the given period.

The results of the Efficacy Report can be further narrowed down by selecting the **CAMPUS** or **PROGRAM** button in the top right hand corner of the screen.

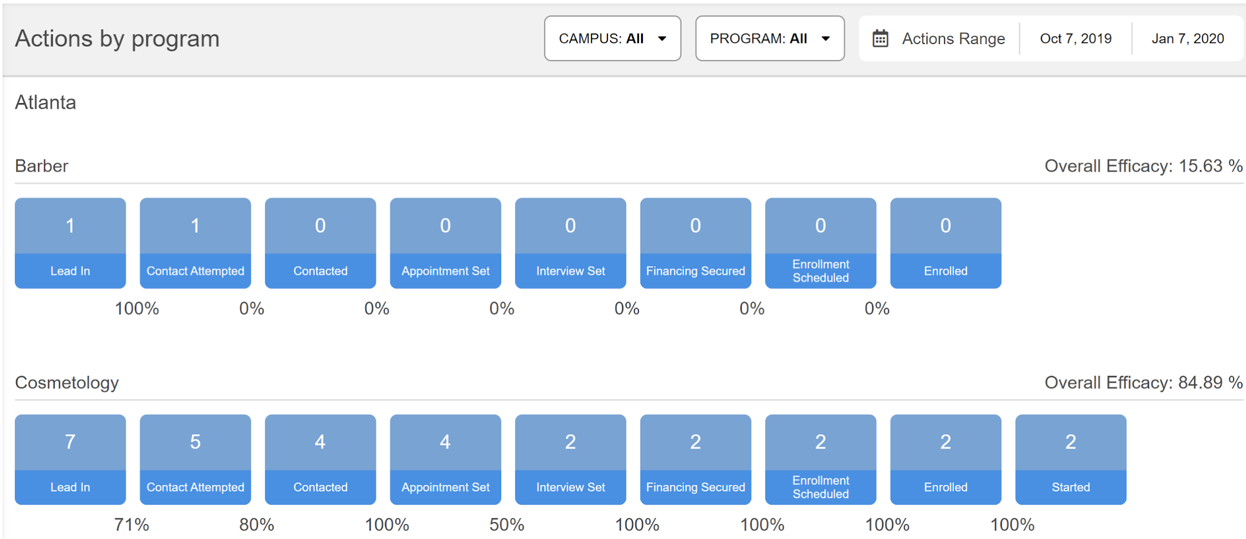
Actions Report

Shows all the **actions** taken on the workflow during the date range associated with all the leads regardless of when the lead came into the system.

The Actions Report can organize the data in 4 different ways:

- By Vendor Source
- By Program
- By Representative

- By Lead Source



Once on one of the **Actions Report** pages, the data can be sorted by their **Actions Range** date by selecting the start date and end date in the top right corner of the screen. The results displayed will be within the given period.

The results of the Actions Report can be further narrowed down by selecting the **CAMPUS** or **PROGRAM** button in the top right hand corner of the screen.