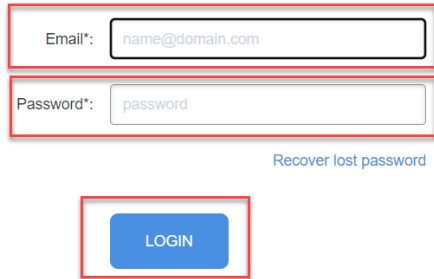


<b>Login/User Log-In Page</b>	<b>2</b>
Recover Lead Password	2
<b>Administration Section</b>	<b>2</b>
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Reports	25
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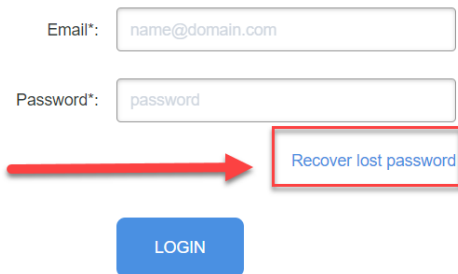
Email\*:

Password\*:

[Recover lost password](#)

## Login/User Log-In Page

- Users will be brought to their appropriate URL page given by System Administrators.  
Example: yourschoolsubdomain.edlumina.com/login
- Once the school specific URL has loaded, the user will be prompted to sign in with their credentials.
  - 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.



Email\*:

Password\*:

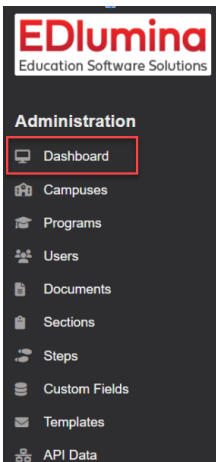
[Recover lost password](#)

## Recover Lead Password

Video: [Recover Lost Password](#)

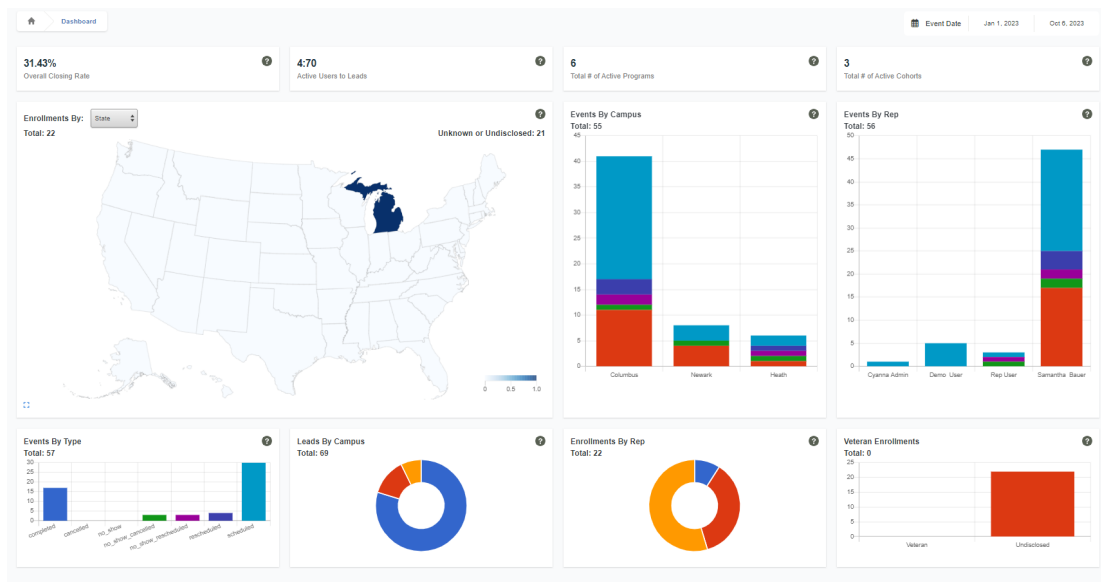
- Click the blue Recover lost password link.
- Enter the email address for your account.
- An email will be sent to you and you will be able to make a new password.
- Use this new password to log in with

## Administration Section



## Dashboard

- A great visual representation of what is happening within EDlumina.
- All information on the dashboard can be filtered by Date, at the top right



**31.43%**

Overall Closing Rate

**4:70**

Active Users to Leads

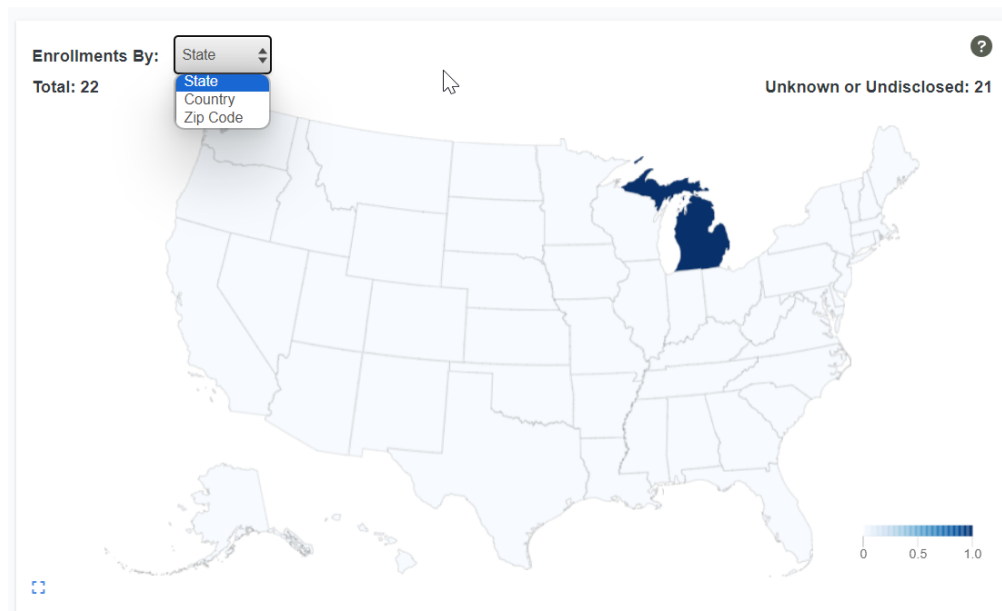
**6**

Total # of Active Programs

**3**

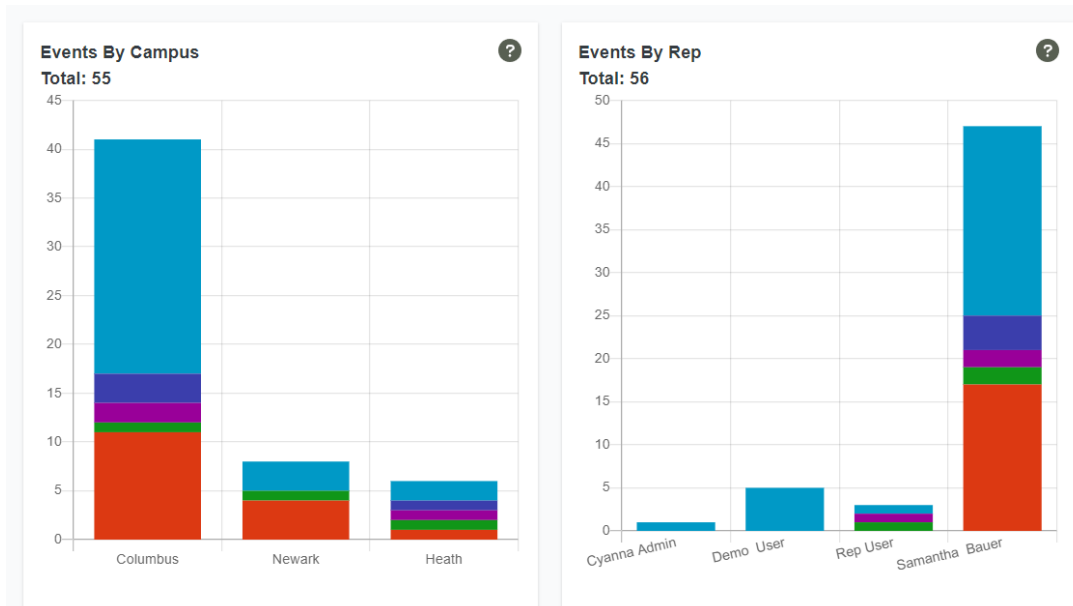
Total # of Active Cohorts

- **Overall Closing Rate** - This number refers to the overall Leads/Enroll closing rate for your school, between the selected date range. It is computed when the "Enroll" button is hit for a lead.
- **Active Users to Leads** - This ratio signifies the total number of active users your school has on EDlumina, as a comparison to the total number of leads, between the selected date range.
- **Total # of Active Programs** - This number refers to the total number of active programs your school has on EDlumina, between the selected date range.
- **Total # of Active Cohorts** - This number refers to the total number of active programs your school has on EDlumina, between the selected date range.



- **Enrollments By: State/Country/Zip Code**
  - This Heat Map is a visual representation of the enrollments your school has per State, Country or Zip Code, between the selected date range.

- This data is pulled from the Lead Profile page from the “State” “Country” and “Zip Code” input bar. The number only populates on the map after the Lead has been enrolled - showing a visual representation of the States where your school’s enrollments are coming from.
- EDlumina uses keyword recognition and predictive modeling to match the State inputs on the Lead In page to the Dashboard Map. In case the open text input is not within the margin of error for our matching engine, the enrollment will be in the “Unknown or Undisclosed” bucket without a corresponding State filler on the Map.

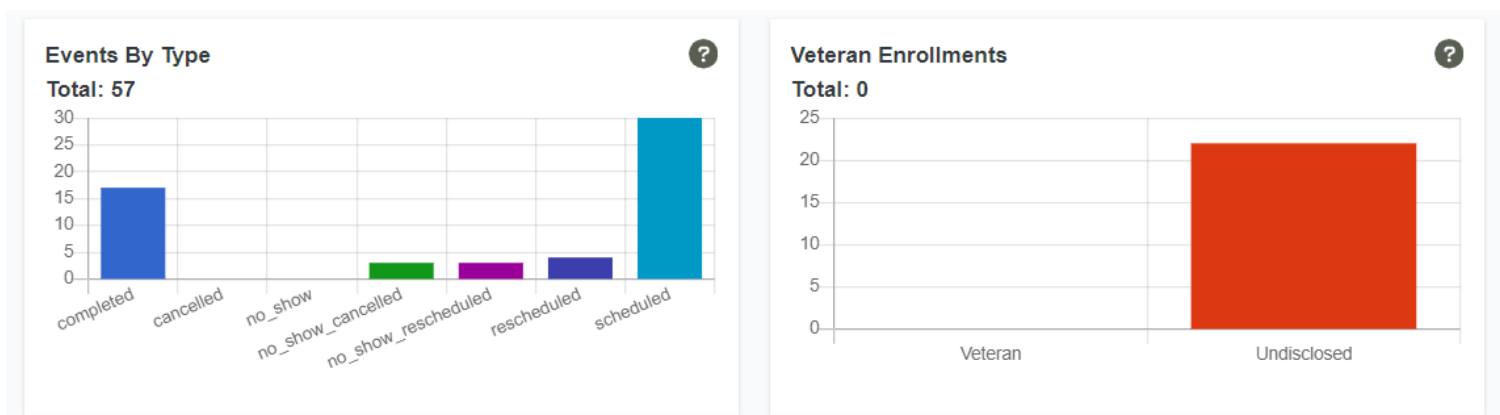


- **Events By Campus -**

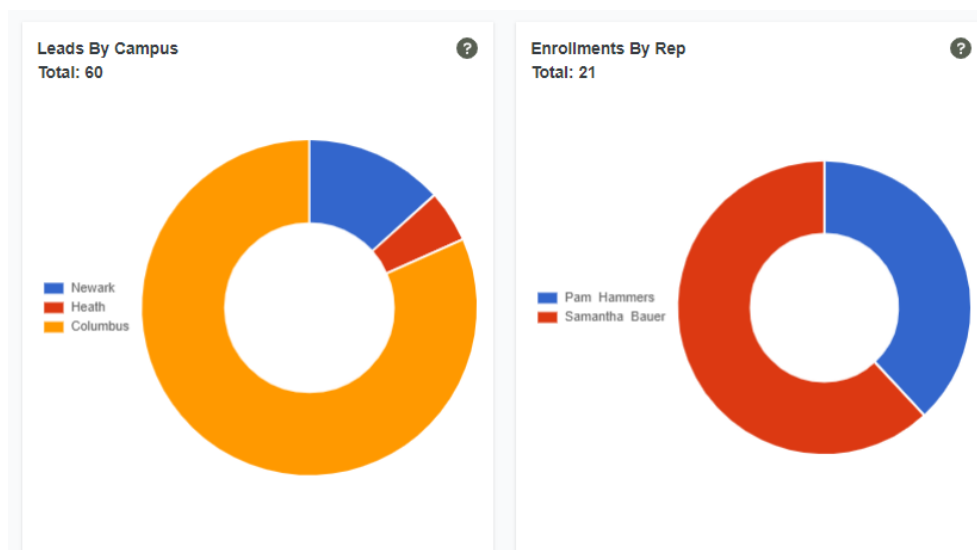
- This Staggered Bar Graph shows the total number of events by type, per campus, between the selected date range.
- Each of your school’s campuses is a different point/axis on the Staggered Bar Graph. Each “type” of event is a different color and a different layer on top of the axis of the Staggered Bar Graph.
- Depending on the number of events (within each type) a campus has, the spread of the layered coloring will be represented as long or short - longer spread for more events and a shorter spread for less events - per event type, per campus. The color scheme of the events type is represented via the legend of the graph.

- **Events By Rep -**

- This Staggered Bar Graph is a representation of the total number of events by type, per representative, between the selected date range.
- Individual representatives are shown as each of the different bars on the graph. For each representative, the height of the bar represents the total number of events they have on their EDlumina profile.
- Within each bar, the different colors for each representative shows the different types of events (as well as quantities) that they have recorded on their Edlumina profile. The color scheme of the events type is represented via the legend of the graph.



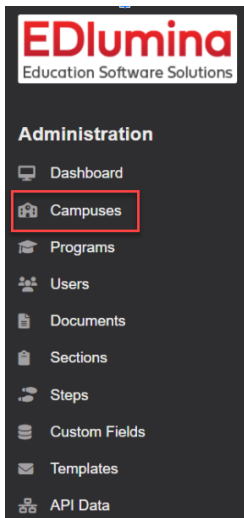
- **Events By Type -**
  - This Bar Graph is a representation of the total number of events, by type, for your school, regardless of any other parameters, between the selected date range.
  - Each different type of event is shown as a different bar on the graph. The height of each bar is representative of the total number of each type of event. The color scheme of the events type is represented via the legend of the graph.
- **Veteran Enrollment -**
  - This Bar graph is a representation of the V.A./Military Service status for your enrollments. This data is pulled in from the Lead Profile page for all of your enrollments, between the selected date range.
  - If there is no record in EDlumina, they will be on the "Undisclosed" bar of the graph.



- **Lead By Campus -**
  - This Donut/Pie Chart is a % representation of the total number of leads, as sourced by the school's various campuses, between the selected date range.
  - The mathematical % of the leads is distributed on the chart by the campuses. The size of each campus on the donut/pie is a representation of the total number of leads that are a part of each campus, as a % of the total number of leads for all the campuses combined. The greater a campus' contribution in leads, the greater the area it occupies on the donut/pie.
  - The color scheme of the campuses is represented by the legend of the donut/pie chart.

- Enrollments By Rep -

- This Donut/Pie Chart is a % representation of the total number of enrollments, as sourced by the various users, between the selected date range.
- The mathematical % of the enrollments is distributed on the chart by the users. The size of each campus on the donut/pie is a representation of the total number of enrollments that come from each user, as a percentage of the total number of enrollments for all the campuses combined. The greater a users' contribution in enrollments, the greater the area he/she occupies on the donut/pie.
- The color scheme of the users is represented by the legend of the donut/pie chart.



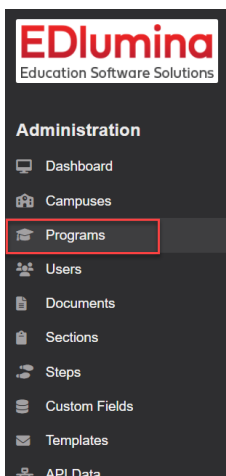
## Campuses

- You can create and organize your campuses if your organization has multiple locations where you intake students.
- *To create a new campus you will need to contact your EDlumina Contact to do this.*

## Lead Allocation

The image shows a 'Lead Allocation' interface. It has a title 'Lead Allocation' at the top. Below it, there are two rows of data. The first row is for 'Rep User' with '0 active leads'. To the right of this is a text input field containing '25' and a '% Remove' link. Below this row is a horizontal container with three blue buttons labeled 'Cosmetology', 'Barbering', and 'Skin Care'. The second row is for 'Samantha Bauer' with '24 active leads'. To the right of this is a text input field containing '75' and a '% Remove' link. Below this row is a horizontal container with three blue buttons labeled 'Paramedic', 'STNA', and 'Phlebotomy'.

- You can also select which specific programs should be assigned to each rep by selecting the “Show Associated Programs” option
- Lead allocation total always has to equal 100%
- If you change lead allocation at any time it will immediately start dividing leads based on the new percentages as soon as the changes have been made.



## Programs

Video: [Managing Programs](#)

Video: [Add Steps to Programs](#)

- Where all your program specifics are managed.
- You can view all the current programs available in table and sort them by headers:

[Home](#)
[Current Programs](#)
[ADD NEW PROGRAM](#)

NAME ↑ ↓	LEADS ↑ ↓	APPLICANTS ↑ ↓	ENROLLMENTS ↑ ↓	CAMPUS ↑ ↓	OPTIONS
Paramedic	1	0	1	Heath	<a href="#">Edit</a> <a href="#">Search</a> <a href="#">Delete</a>
STNA	2	0	1	Heath	<a href="#">Edit</a> <a href="#">Search</a> <a href="#">Delete</a>
Phlebotomy	2	0	0	Heath	<a href="#">Edit</a> <a href="#">Search</a> <a href="#">Delete</a>
Cosmetology	31	3	23	Columbus	<a href="#">Edit</a> <a href="#">Search</a> <a href="#">Delete</a>
Barbering	15	1	19	Columbus	<a href="#">Edit</a> <a href="#">Search</a> <a href="#">Delete</a>
Skin Care	15	1	18	Newark	<a href="#">Edit</a> <a href="#">Search</a> <a href="#">Delete</a>

[View archived programs](#)

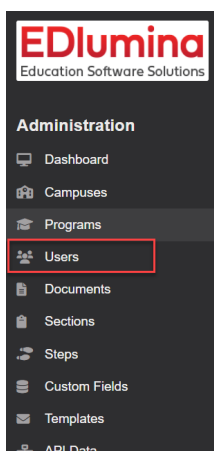
- You can add a new program by clicking on the ADD NEW PROGRAM blue button on the top-right corner.
  - It will take you to a form to create a new program
  - The following information is required:
    - Program name
    - Campus - if you have multiple campuses
    - Program Cohorts - set the dates for enrollment deadline and upon which students will begin attending.
    - Enrollment Steps and Requirements - Choose the steps you'd like to include for this program. These steps will guide your admissions representatives(s) through the enrollment process
    - Documents – Add Documents that are associated with this program.

[Home](#)
[Current Programs](#)
[Edit Program: Cosmetology](#)

[Overview information](#)
[Cohorts](#)
[Steps](#)
[Documents](#)

Program name\*:

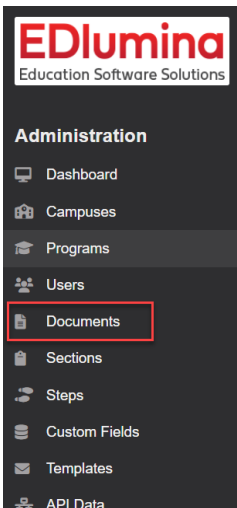
Campus\*:



## Users

Video: [Archive Users](#)

- You can manage all the users on the platform here
- User Roles:
  - Full Admin: Can see everything in the system (no restrictions)
  - Campus Admin: Can see everything at the campus level and has access to Campuses and Programs at the Administration level
  - Rep user: Can see all leads at their campus – during implementation, you can choose if you want reps to see all leads at this campus or their own leads.



## Documents

Video: [Add & Edit Documents](#)

- You can view and manage created documents here
- You can create new documents by clicking the NEW DOCUMENT blue button on the top-right corner – This creates a new field where you can:
  - name the documents
  - choose the document type
  - include elements like header, footer, general info. Etc
  - add saved section
    - saved text section and checkbox section

*The saved sections need to be previously built on the Sections Tab.*

[Home](#) > [Documents](#) [NEW DOCUMENT](#) [Manage Signatures](#)

NAME ↑ ↓	TYPE ↑ ↓	BOXES CHECKED
<a href="#">Enrollment Fee</a>	Pre Enrollment	Take Payments
<a href="#">Immunization Records</a>	Post Enrollment	Allow Student Uploads, Require Admin Approval
<a href="#">Photo ID</a>	Pre Enrollment	Allow Student Uploads, Require Admin Approval
<a href="#">High School Completion</a>	Pre Enrollment	Allow Student Uploads
<a href="#">Enrollment Agreement</a>	Pre Enrollment	Include Educational Background, Include General Information, Include Location Information, Require Admin Approval, Take Payments

[VIEW ARCHIVED DOCUMENTS](#)

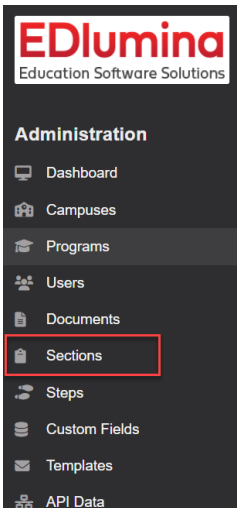
Document Name\*

Document Type

- ☐ Include General Information
- ☐ Include Location Information
- ☐ Include Educational Background
- ☐ Include Header
- ☐ Include Footer
- ☐ Allow Student Uploads
- ☐ Take Payments
- ☐ Require Admin Approval
- ☐ Include Signature On Approval

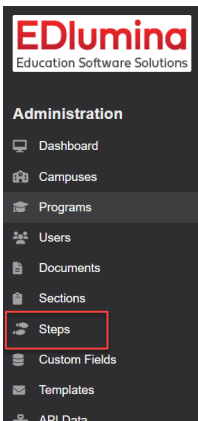
[+ ADD SAVED SECTION](#) [+ ADD TEXT SECTION](#) [+ ADD CHECKBOX SECTION](#)





## Sections

- You can use this tab to manage previously created and saved sections. These saved sections can be used to build documents as discussed above. The table shares the name of the section and the date it was created.
- You can create a new section by clicking on the NEW SECTION blue button on the top-right corner.
  - The button takes you to a form where you specify the details of your section. You need to provide a section name, question description and the type of question it is (text field, boolean, options and terms).
  - You can add questions of any type by clicking the link called “Add a new Question” on the bottom-left corner.
  - You click the blue button CREATE SECTION on the bottom-right to save the section.

The image shows the 'New Section' form interface. At the top, there is a breadcrumb navigation: Home > Sections > New Section. The form has a title 'New Section'. Below the title, there is a text input field for 'Section Name\*' with the placeholder text 'A brand new section'. Below this, there is a section titled 'Questions'. It contains a text input field for 'Question Description\*' with the placeholder text 'Question Description'. To the right of this field is a dropdown menu for 'Type' with 'Text Field' selected. Below the 'Question Description' field is a checkbox labeled 'Required?'. At the bottom left of the form is a link 'Add a new question'. At the bottom right is a blue button labeled 'CREATE SECTION'.

## Steps

Video: [Add Steps](#)

Video: [Setting up Automated Messaging](#)

- You can manage and add to your pipeline steps (per program) here.
- This is where you can set up automated messaging per step.
  - Click on each step will allow you to set up an email or SMS message to go out automatically (based on timeframe), when a lead is moved to this step.

## Steps

Add or edit steps here.

Step name\*:

CREATE NEW STEP



Steps

NEW STEP

NAME ↑ ↓	AUTOMATED MESSAGES ↑ ↓	CREATED AT ↑ ↓
Contacted	5	2022-02-11
Appointment	0	2022-02-11
Financing	0	2022-02-11
Enrolled	2	2022-02-11
Application	0	2022-02-11
Started	0	2023-01-24
New Lead	2	2022-02-11
Alumni	3	2023-01-28

[Home](#)
[Steps](#)
[Edit Step: Contacted](#)

Step name\*:

Contacted

---

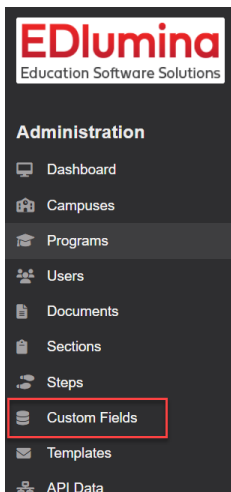
**Automated Messages**

Send	New Lead Email	▼	to the lead	1 ▼	Minutes ▼	after this step.	<a href="#">Remove</a>
Send	Contact 1	▼	to the lead	1 ▼	Hours ▼	after this step.	<a href="#">Remove</a>
Send	Contact 2	▼	to the lead	3 ▼	Days ▼	after this step.	<a href="#">Remove</a>
Send	EDlumina HTML	▼	to the lead	10 ▼	Days ▼	after this step.	<a href="#">Remove</a>

[+ Add Rule](#)

[Archive this step](#)

[UPDATE STEP](#)



## Custom Fields

Video: [Custom Fields](#)

- Can add Custom Fields for your leads to track any specific information you want. These can be either open text fields or dropdown options.
- These field will show and can be edited per lead in the Lead Profile Page
- API's can be connected to these fields
- Fields are searchable in Advanced Search

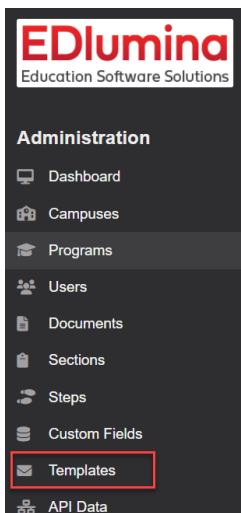
[Home](#) > [Custom Fields](#) > [New Custom Field](#)

Field Name\*

Field Type\*

[TEXT](#)[DROPDOWN](#)

[ARCHIVE THIS FIELD](#)[CREATE](#)



## **Templates (Messaging)**

Video: [HTML Layout Builder](#)

- You can view and manage messaging templates here.
  - All - email and SMS messages together
  - Email - view only email templates
  - SMS - view only SMS templates
  - Template Submissions - submissions from rep users (those who do not have admin access) will populate here as they request approval
- HTML Templates
  - This is a creative tool that allows users to build beautifully designed messaging templates from scratch
- All of these can be found by clicking on the “Manage Layouts” button on the “Templates” Section of your Administration menu.

Messaging Templates

MANAGE LAYOUTSNEW TEMPLATE

AllEmailSMSTemplate Submissions

NAME ↑ ↓	SEND VIA ↑ ↓	SUBJECT LINE ↑ ↓	SYSTEM TEMPLATE ↑ ↓
Account Creation	email	Welcome to EDlumina!!	Yes
Reset Account Password	email	Your password has been reset in EDlumina	Yes
New Lead Assigned	email	New Student Assignment	Yes
Document Status Change	email	Your document has changed status in EDlumina	Yes
Application Status Change	email	Your application status changed in EDlumina	Yes
New Document Submission	email	A new document has been submitted in EDlumina	Yes
Event Confirmation	email	You have a new event scheduled	Yes

Message Layouts

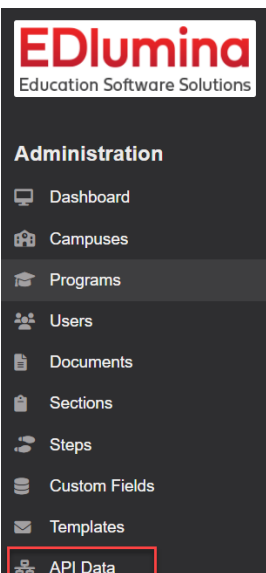
NEW LAYOUT

Message layouts can be hand designed here for use with one or many messaging templates.

My LayoutsEDlumina Layouts

NAME ↑ ↓
EDlumina - Learn More
EDlumina - Acceptance
EDlumina - Program Interest
EDlumina - Event
EDlumina - Information Request

VIEW ARCHIVED LAYOUTS



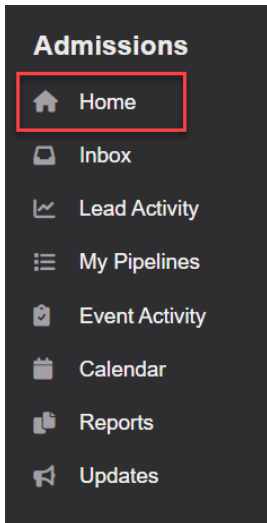
## API Data

• Your web developer will need this information to get your website or any marketing campaigns connected to EDlumina.

- [API Docs/Introduction](#)

<a href="#">API Docs</a> API Access Key:	
<b>Programs</b>	
PROGRAM NAME ↑ ↓	PROGRAM ID
Paramedic	5
STNA	6
Phlebotomy	7
Cosmetology	1
Barbering	3
Skin Care	2
<b>Campuses</b>	
CAMPUS NAME ↑ ↓	CAMPUS ID
Newark	2
Heath	3
Columbus	1

# Admission Section



## Home

Video: [Admissions Home Screen](#)

- Overview of what is happening with each individual user
- Data can be viewed on a weekly or monthly basis

Monday, October 30th, 2023  
**Good evening**  
• Full Admin

My Week My Month

### Overview

My Leads In <b>4</b>	Enrollments <b>2</b>	Messages Sent <b>10</b>	Events Completed <b>7</b>
-------------------------	-------------------------	----------------------------	------------------------------

### Recent Activity

**Molly Marks**  
Program: Cosmetology  
Step: New Lead  
[Send Note](#)  
[View Profile](#)

**Molly Briggs**  
Program: Cosmetology  
Step: New Lead  
[Send Note](#)  
[View Profile](#)

### Upcoming Events

LEAD NAME	EVENT TYPE	EVENT DATE	EVENT TIME
Joan Osgood	Appointment	October 29th, 2023	10:30pm
Aaron Smith	Appointment	October 30th, 2023	07:30am
Adam Bardelang	Financial Aid	October 31st, 2023	08:00pm
Jenny Mock	Financial Aid	November 2nd, 2023	10:30am

### Approval Pending

DOCUMENT NAME	LEAD NAME	PROGRAM NAME
Photo ID	Sammy Mock	STNA

- Overview
  - My Leads-in - number of leads assigned to user
  - Enrollments - number of leads enrolled
  - Messages sent - number of messages sent by the user
  - Events Completed - number of events that were scheduled have been completed by the user

Overview

My Leads In  
**4**

Enrollments  
**2**

Messages Sent  
**10**

Events Completed  
**7**

- Recent Activity - new leads assigned for leads a user has been communicating with regularly

Recent Activity



**Molly Marks**

Program: **Cosmetology**  
Step: **New Lead**

[Send Note](#)  
[View Profile](#)



**Molly Briggs**

Program: **Cosmetology**  
Step: **New Lead**

[Send Note](#)  
[View Profile](#)

- Upcoming Events - Events that are upcoming over the next 3 days for the user
- Approval Pending - Documents that need to be approved by the user

Upcoming Events

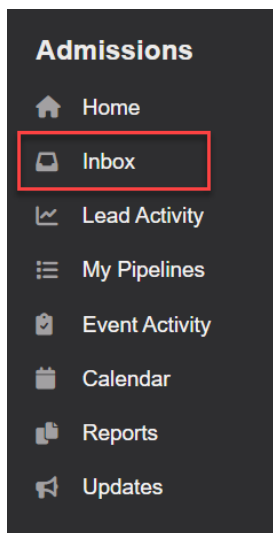
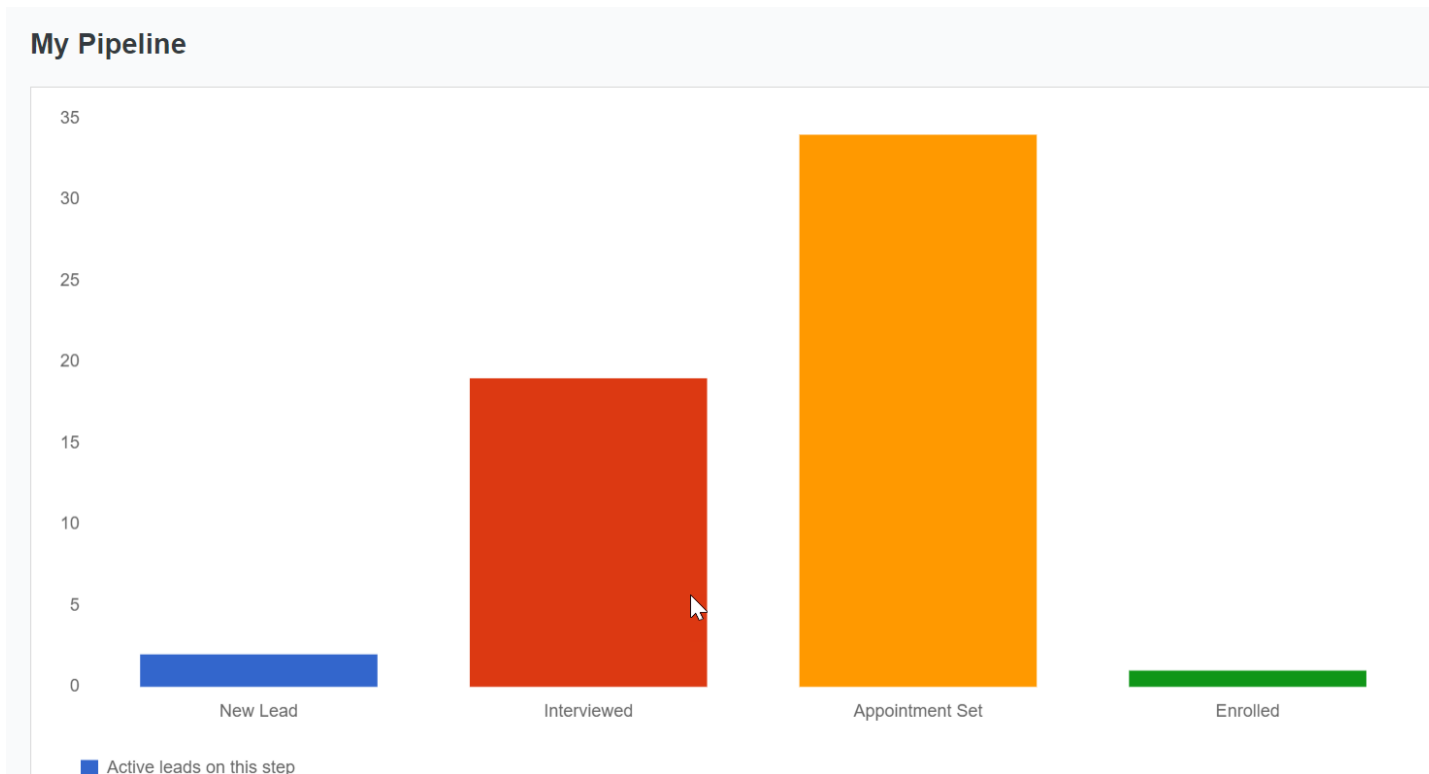
LEAD NAME	EVENT TYPE	EVENT DATE	EVENT TIME
Joan Osgood	Appointment	October 29th, 2023	10:30pm
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Approval Pending

DOCUMENT NAME	LEAD NAME	PROGRAM NAME
Photo ID	Sammy Mock	STNA



- My Pipeline - how many leads a user has in each pipeline step



## Inbox

Video: [Inbox Notifications](#)

- This allows users to filter notifications by category, set alerts, star, archive and take other mass actions for their upcoming notifications.
  - Click on the bell icon on the top right, or on the “Inbox” link on the left navigation to use this feature.
  - Filters for this are:
    - All: All messages coming into EDlumina
    - Direct Messages: All Email or SMS messages
    - Event Alerts: If you opt-in (on calendar) to receive alerts prior to a scheduled event happening
    - Student Alerts: When a user receives a new lead in the system or a lead completes a document
    - Discovery Messages: (For users using Discovery Learning Platform)

Inbox ▾

All   Direct Messages   Event Alerts   Student Alerts   Discovery Messages

<input checked="" type="checkbox"/>	STAR	NAME	SUBJECT	RECEIPT TIME	RECEIPT DATE	ACTIONS
-------------------------------------	------	------	---------	--------------	--------------	---------


- **+New:** Allows you to search a lead and send a message right from the inbox

Inbox ▾


All   Direct Messages   Event Alerts   Student Alerts   Discovery Messages

**Search for Lead/Student to Direct Message**

Jen



**Jen Marks**  
 jmarks@demo.com  
 (444) 333-7861  
 Columbus



**Jenny Mock**  
 jenn@lead.com  
 Columbus

- **Actions:** You can take mass action by clicking on the blue ACTION button on the top-right corner. This will allow you to:
  - Mark all as read
  - Mark all as unread
  - Mark all as archived
- **Filters:** Allows you to search anything in the inbox by key word or dates



**Filters**

☐ Notification Date   
 ☐ Start Date   
 ☐ End Date

**Search Notifications**

Search

- **Notifications:** By clicking/checking the boxes, this will send specific alerts to your email. Uncheck the box you do not wish to receive email notifications for. This will still notify you in the inbox.












### Notification Settings

Select which notifications you would like to receive

- ☒ Direct Messages
- ☒ Lead Status Changes
- ☒ New Lead Notifications
- ☒ Documents Submitted
- ☒ Events
- ☒ Discovery Messages

## Admissions

-  Home
-  Inbox
-  **Lead Activity**
-  My Pipelines
-  Event Activity
-  Calendar
-  Reports
-  Updates

## Lead Activity

Video: [Actions](#)

Video: [Advanced Search](#)

Video: [Headers and Filters](#)

- You can view, manage, edit, add and monitor lead activities on this tab.
- You can filter the lead activity information by:
  - All active leads: Active Leads in the system (not enrolled or closed)
  - My follow ups: specific for the user logged in and they follow up they create
    - All follow ups: all follow ups in the system, not user specific
    - All active and closed leads: all leads that are not enrolled
    - All active and enrolled leads: all lead that are not closed
    - All active, enrolled and closed leads: ALL leads in the system
    - Enrolled only: leads that are enrolled
    - Closed only: Lead that are closed

- Secondary follow ups: If you are a secondary lead owner, those follow ups will populate here
- Duplicate leads: Leads that came in as a duplicate
- Hot leads: Leads that were marked as a Hot Lead. You can do this by click the fire icon on the Lead Profile Page

- Actions:

- Send a Note: Select a few to send a message (text or sms) to
- Send a Note to All: Mass message everyone in the Lead Activity que
- Add an Event: If you need to add an event to a lead
- Close Lead: you can close a lead for a number of reasons:
  - Program Not Offered
  - Unfinanceable
  - Unreachable
  - Not Interested
  - Duplicate
  - Do Not Contact - this will stop all sms messaging to the lead
  - Other - this will open a text box to type in why the lead was closed
- Reassign All Lead: Reassign all leads in the Lead Activity que (admin feature)

- Reassign Selected Leads: click the boxes of people you want to select to reassign (admin feature)
- Open In New Tab(s): This will open the Lead Profile Page to all selected leads
  - *Note: you will need to turn off your pop-up blocker for this*
- Mark Initial Contact Made: This is a manual action. This will date and time stamp when you have actually started communication back and forth with the lead. This is what counts as a “Contact” on the Lead Trends report.
- Export Leads (Results) - you can export anything in the lead activity page into an excel or .csv file

The screenshot shows a web interface for managing leads. At the top, there is a 'Filter:' dropdown set to 'Lead In'. To the right are buttons for 'ACTIONS', 'ADD LEAD', and 'ADVANCED SEARCH'. Below these is a table with columns: NAME, PHONE, EMAIL, REP, FOLLOW UP DUE, FOLLOW UP TITLE, PROGRAM, and CAMPUS. The table contains four rows of lead data. A dropdown menu is open over the table, showing actions like 'Send a Note', 'Send a Note to All (4)', 'Add an Event', 'Close Leads', 'Reassign All Leads (4)', 'Reassign Selected Leads', 'Open In New Tab(s)', 'Mark Initial Contact Made', 'Export Selected Leads', and 'Export All Results (4)'. At the bottom right, it says 'Total leads: 4'.

	NAME ↑ ↓	PHONE ↑ ↓	EMAIL ↑ ↓	REP ↑ ↓	FOLLOW UP DUE ↑ ↓	FOLLOW UP TITLE	PROGRAM ↑ ↓	CAMPUS ↑ ↓
<input checked="" type="checkbox"/>	Molly Marks		mollymarks@demo.com	Samantha Bauer	N/A	Nothing scheduled <a href="#">Create?</a>	Cosmetology	Columbus
<input type="checkbox"/>	Molly Briggs		mbriggs@demo.com	Samantha Bauer	N/A	Nothing scheduled <a href="#">Create?</a>	Cosmetology	Columbus
<input type="checkbox"/>	Sammy Mock		smock@email.com	Samantha Bauer	N/A	Nothing scheduled <a href="#">Create?</a>	STNA	Heath
<input type="checkbox"/>	Dan Spear	(556) 123-1234	speardaniel@demo.com	Pam Hammers	N/A	Nothing scheduled <a href="#">Create?</a>	Skin Care	Newark

- **Add Lead**

- Manually add a lead by clicking and completing the fields

The screenshot shows a modal form for adding a new lead. The form has fields for 'First Name\*', 'Last Name\*', 'Email', 'Phone Number', 'Campus\*', 'Program\*', 'Admission Rep', and 'Online'. There are checkboxes for 'Email Student' and 'Draft'. At the bottom are buttons for 'CANCEL', 'ADD', and 'ADD AND OPEN'. The background shows a blurred view of the lead table.

- **Advanced Search:** This allows you to search anything within EDlumina.

- You can save these searches, by clicking the floppy disk icon next to actions. These searches will save in “real-time” and you can always refer back to these as needed

× Advanced Search

First Name

Last Name

Email Address

Phone Number

Vendor Source

Lead-In  
Begin Date

Lead-In  
End Date


 

Appointment

Appointment

RESET

SEARCH



ACTIONS

ADD LEAD

ADVANCED SEARCH

FOLLOW UP D


Save This Search

SAVE

N/A

Saved Searches

Jan 2023 Start



STATUS

PROGRAM

draft

Cosmetolog

draft

Cosmetolog

Advance?

## Admissions

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## My Pipelines

- The pipeline allows a user to view where a certain lead is in the admissions process (Lead to Enroll Steps).
- Sort your pipeline by programs and search for a lead by their name.
- You can further sort the information by choosing
  - Status: active, enrolled, closed
  - Individual or all Representatives
  - User
  - Hot leads, name, date of birth, lead status, lead in, campus, program or primary owner
  - order : ascending or descending
- Filter by specifying the time period you are looking within.

My Pipelines - Cosmetology

Lead in: Jan 1, 2023 - Oct 31, 2023

Search by name: [ ] Active: Samantha Bauer Samantha Bauer Sort By: Lead Status Ascending

New Lead (2)	Contacted (3)	Appointment (3)	Application (4)	Financing (4)	Enrolled (1)	St
<div>Molly Marks Campus: Columbus Lead in: 10/25/2023 Working 5d 5d</div>	<div>Michael Kupp Campus: Columbus Lead in: 09/07/2023 Working 34d 28d</div>	<div>Jenny Stokes Campus: Columbus Lead in: 07/14/2023 Working 82d 102d</div>	<div>Jenny Mock Campus: Columbus Lead in: 05/11/2023 Hot Lead Working 122d 172d</div>	<div>Susan Burns Campus: Columbus Lead in: 08/09/2023 Working 34d 76d</div>	<div>Bill Marks Campus: Columbus Lead in: 03/07/2023 Enrolled 82d 77d</div>	
<div>Molly Briggs Campus: Columbus Lead in: 10/25/2023 Working 5d 5d</div>	<div>Brandon Williams Campus: Columbus Lead in: 07/14/2023 Working 82d 76d</div>	<div>Mindy Michaels Campus: Columbus Lead in: 03/15/2023 Hot Lead Working 172d 174d</div>	<div>Billy Odaysia Campus: Columbus Lead in: 06/13/2023 Enrolled 20d 122d</div>	<div>Jordy Parks Campus: Columbus Lead in: 08/09/2023 Working 34d 34d</div>		
	<div>Aaron Smith Campus: Columbus Lead in: 10/10/2023 Enrolled 0d 20d</div>	<div>Molly Phieffer Campus: Columbus Lead in: 05/11/2023 Working 172d 172d</div>	<div>Jenny Brinkley Campus: Columbus Lead in: 06/30/2023 Enrolled 0d 174d</div>	<div>Jen Marks Campus: Columbus Lead in: 06/13/2023 Working 108d 133d</div>		
			<div>Danny Stewart Campus: Columbus Lead in: 04/06/2023 Hot Lead Working 108d 175d</div>	<div>Joey Burrs Campus: Columbus Lead in: 09/26/2023 Working 34d</div>		

## Admissions

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## Event Activity

- You can view and manage the events with leads here
- Advanced Search: This allows you to search any events within EDlumina.
  - You can save these searches, by clicking the floppy disk icon next to actions.

These searches will save in “real-time” and you can always refer back to these as needed

- Actions:
  - Add an event: add and assign to an event owner
  - Export selected/all events: this can be exported into an excel or .csv file

### Event Activity

Filter:

This Week

Filtering is on | X



ACTIONS

ADVANCED SEARCH

<input type="checkbox"/>	NAME ↑ ↓	LEAD IN DATE ↑ ↓	FIRST CONTACT DATE ↑ ↓	EVENT TYPE ↑ ↓	EVENT DATE ↑ ↓	EVENT STATUS ↑ ↓	REP ↑ ↓	+
<input type="checkbox"/>	Aaron Smith	10/10/2023		Appointment	10/30/2023	Completed	Samantha Bauer	
<input type="checkbox"/>	Adam Bardelang	07/14/2023		Financial Aid	10/31/2023	Scheduled	Samantha Bauer	
<input type="checkbox"/>	Jenny Mock	05/11/2023	06/20/2023	Financial Aid	11/02/2023	Scheduled	Samantha Bauer	
<input type="checkbox"/>	Jenny Mock	05/11/2023	06/20/2023	Appointment	11/02/2023	Completed	Samantha Bauer	
<input type="checkbox"/>	Kara Wallace	02/11/2022	06/30/2023	Appointment	11/02/2023	Scheduled	Samantha Bauer	
<input type="checkbox"/>	Jenny Brinkley	06/30/2023	08/08/2023	Financial Aid	11/02/2023	Completed	Samantha Bauer	

## Admissions

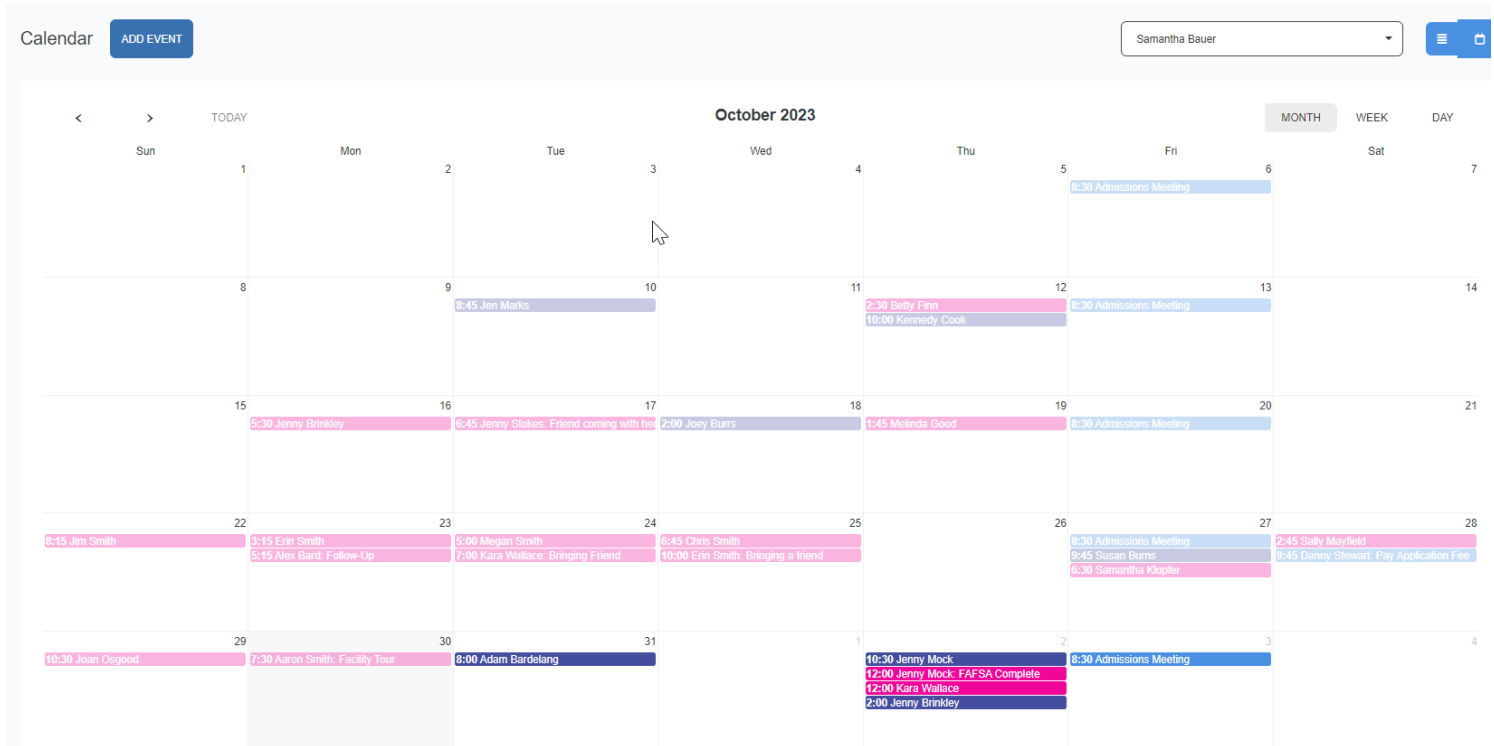
- Home
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## Calendar

Video: [Calendar](#)

- Any event scheduled in EDlumina will populate here.
- Calendar can be viewed by user or by campus.
- This can be viewed from a month, week, day or list view
- To add an event from the calendar, click “Add an Event”
- Opt-In Options
  - Event Alerts: Will remind you when an event is happening in (10, 30 or 60 minutes)
  - Daily Digest: This will send you an email every morning to let you know what you have on your calendar for the day.

- Include Follow Ups on Calendar” This will put your follow ups on your calendar if you want to see those.
- The legend used in the calendar is:
  - Appointment: Pink
  - Interview: Green
  - General: Blue
  - Financial Aid: Purple
  - Follow Ups: Teal



**Legend:**  
 Appointment: Pink  
 Interview: Green  
 General: Blue  
 Financial Aid: Purple

- ☒ Enable Morning Daily Digest
- ☒ Alert Me Before Event
- ☒ Include Follow Up Events

**Reminder Frequency**

10 Min Before

**Admissions**

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**Reports**

- See Reporting Manual



## Admissions

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## Updates

Video: [Knowledge Base](#)

- Any updates in EDlumina, a notification will pop up here to let you know what the update was/is
- Knowledge Base will include a short video of how to use EDlumina features added.

### EDlumina News and Updates

Catch up on all the news and updates from your team at EDlumina!

Updates

Knowledge Base

Search for a knowledge base video



#### How to set up Automated Reports

• Admissions Published: 08/01/2023

Watch this video to learn more about how admins can set up automated reports in EDlumina. These can be emailed out of EDlumina at periodic intervals - be it daily, weekly, monthly, quarterly or yearly. Users can custom enter recipients of these reports with comma separated emails. Users can also customize the email body and receipt times of these automated reports from their EDlumina accounts.



#### Introducing your Enrollment Pipeline

• Admissions Published: 05/19/2023

Watch this video to learn more about what EDlumina's pipeline is and how to customize it. Schools can create their custom steps, which can then be bucketed into different program-based pipelines. As users work their leads to navigate them through this pipeline, automated messaging can also be tied in to best scale your outreach. EDlumina's *My Pipelines* page takes this to greater heights by bringing your individual pipelines into a Kanban esque. view for better navigation & control.