EDlumina
Education Software Solutions

Table of Contents

Login/User Log-In Page

- Users will be brought to their appropriate URL page given by the 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.

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
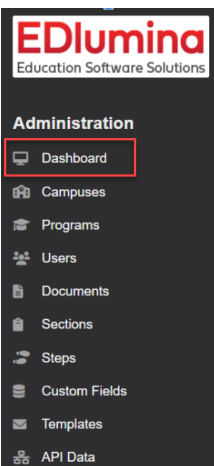
Dashboard

- A great visual representation of what is happening within EDlumina.
- All information on the dashboard can be filtered by Date, at the top right
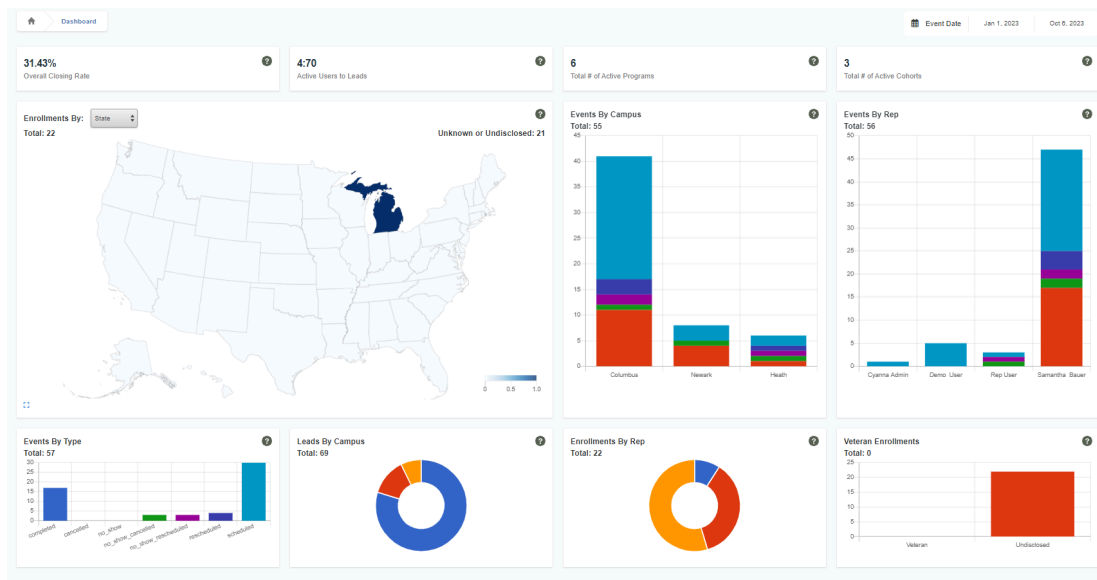
- <u>Overall Closing Rate</u> - This number refers to the overall Leads/Enroll closing rate for your school, between the selected date range. It is computed when the "Enroll" button is hit for a lead.
- <u>Active Users to Leads</u> - This ratio signifies the total number of active users your school has on EDlumina, as a comparison to the total number of leads, between the selected date range.
- <u>Total # of Active Programs</u> - This number refers to the total number of active programs your school has on EDlumina, between the selected date range.
- <u>Total # of Active Cohorts</u> - This number refers to the total number of active programs your school has on EDlumina, between the selected date range.
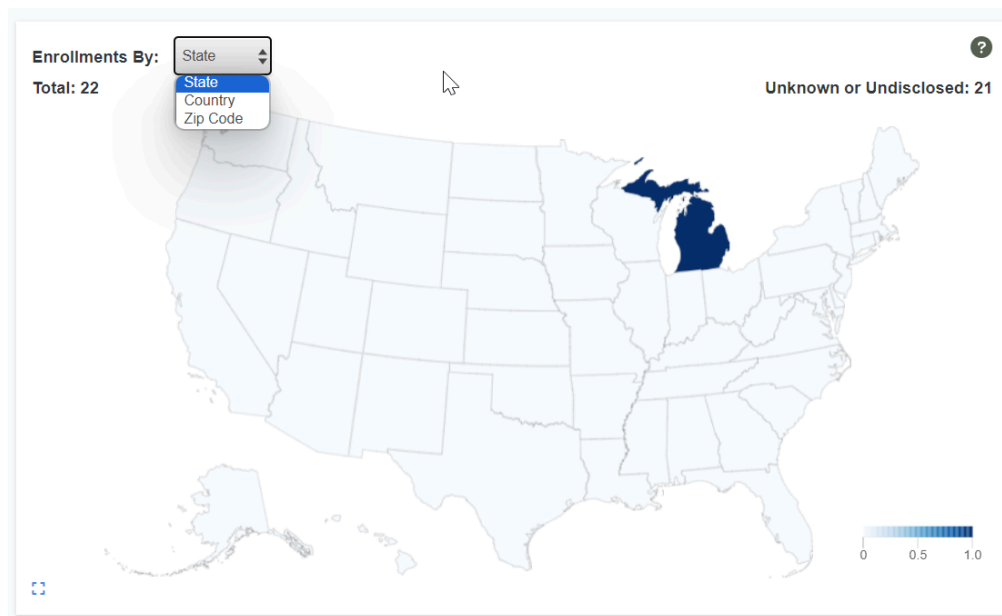
- **Enrollments By: State/Country/Zip Code**
  - This Heat Map is a visual representation of the enrollments your school has per State, Country or Zip Code, between the selected date range.
  - This data is pulled from the Lead Profile page from the "State" "Country" and "Zip Code" input bar. The number 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.
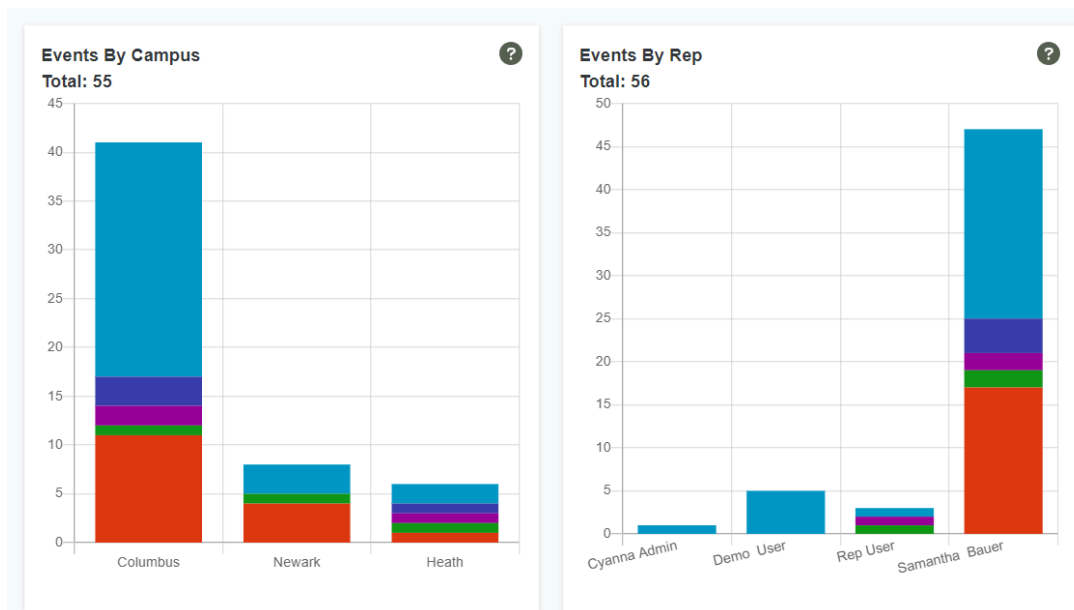
- **Events By Campus -**

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- 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.
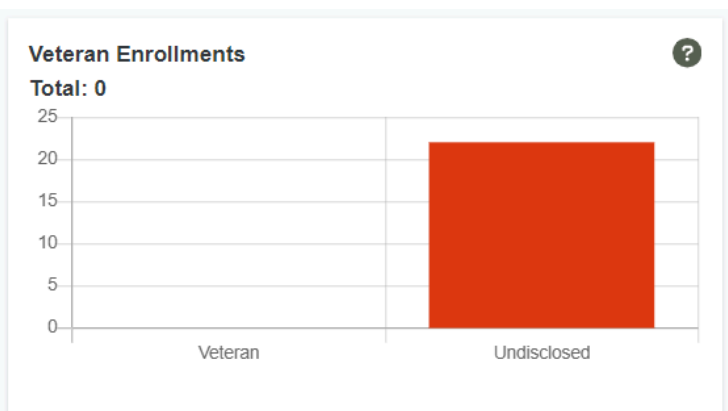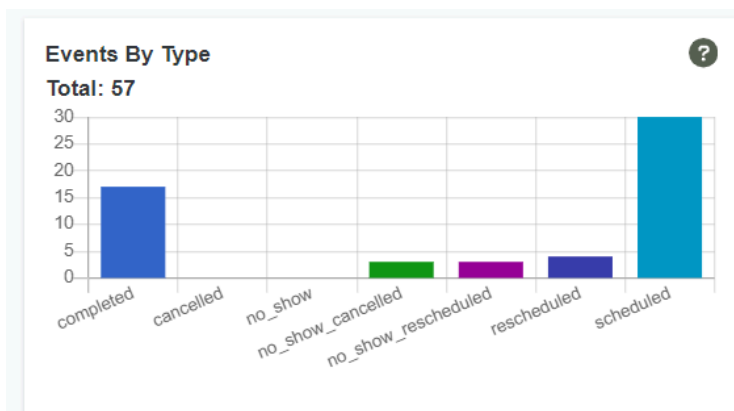
- **Events By Type -**
  - This Bar Graph is a representation of the total number of events, by type, for your school, regardless of any other parameters, between the selected date range.
  - Each different type of event is shown as a different bar on the graph. The height of each bar is representative 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.

Leads By Campus
Total: 60

Legend:
- Newark
- Heath
- Columbus

Enrollments By Rep
Total: 21

Legend:
- Pam Hammers
- Samantha Bauer
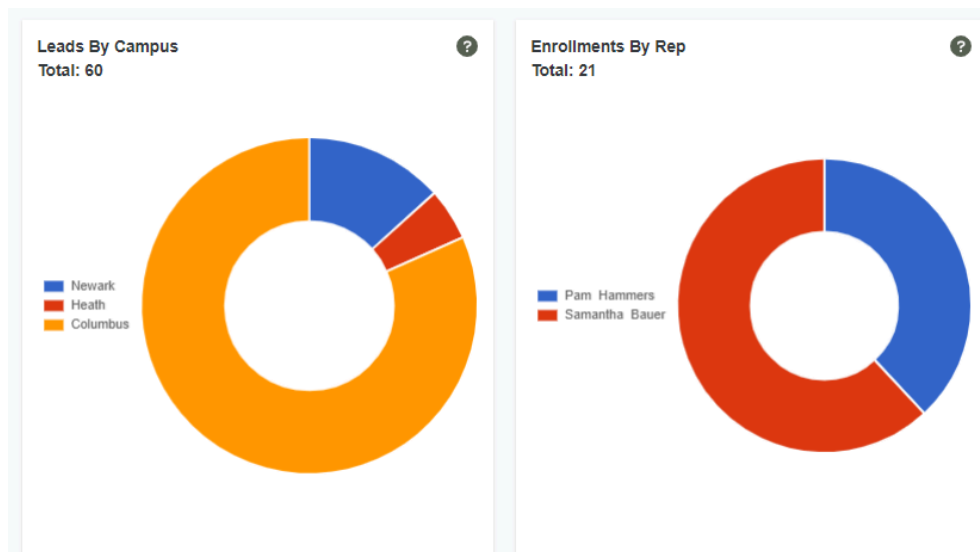
- <u>Lead By Campus -</u>
  - This Donut/Pie Chart is a % representation of the total number of leads, as sourced by the school's various campuses, between the selected date range.
 - The mathematical % of the leads is distributed on the chart by the campuses. The size of each campus on the donut/pie 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.

- <u>Enrollments By Rep -</u>
  - 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.
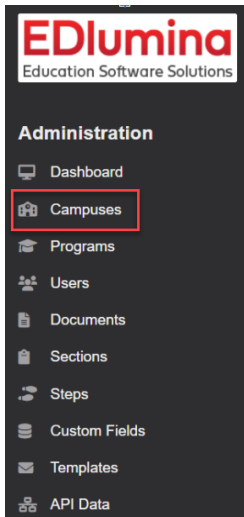
Campuses

- 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**

- You can also select which specific programs should be assigned to each rep be 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.
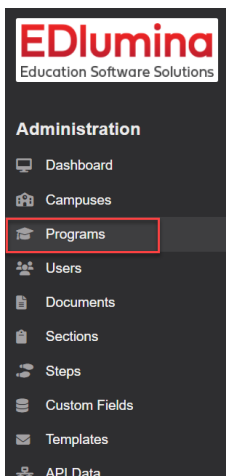
Programs

- 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:

NAME ↑↓	LEADS ↑↓	APPLICANTS ↑↓	ENROLLMENTS ↑↓	CAMPUS ↑↓	OPTIONS
Paramedic	1	0	1	Heath	✎ 🔍 ⊘
STNA	2	0	1	Heath	✎ 🔍 ⊘
Phlebotomy	2	0	0	Heath	✎ 🔍 ⊘
Cosmetology	31	3	23	Columbus	✎ 🔍 ⊘
Barbering	15	1	19	Columbus	✎ 🔍 ⊘
Skin Care	15	1	18	Newark	✎ 🔍 ⊘

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.

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Users

![EDlumina Administration sidebar menu showing Dashboard, Campuses, Programs, Users, Documents, Sections, Steps, Custom Fields, Templates, API Data]
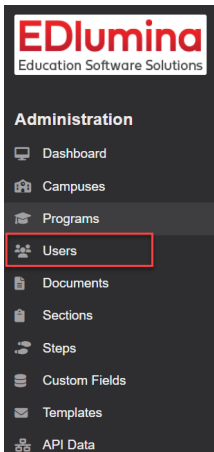
- Video: **Archive Users**
  - You can manage all the users on the platform here
  - User Roles:
  - Full Admin: Can see everything in the system (no restrictions)
  - Campus Admin: Can see everything at the campus level and has access to Campuses and Programs at the Administration level
  - Rep user: 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

![EDlumina Administration sidebar menu showing Dashboard, Campuses, Programs, Users, Documents, Sections, Steps, Custom Fields, Templates, API Data]
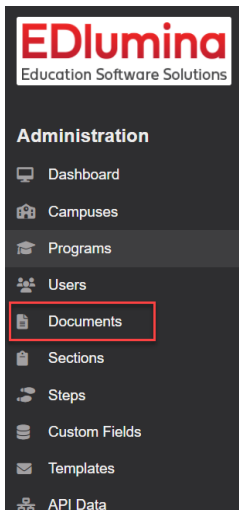
- Video: **Add & Edit Documents**
  - You can view and manage created documents here
  - You can create new documents by clicking the NEW DOCUMENT blue button on the top-right corner – This creates a new field where you can:
  - name the documents
  - choose the document type
  - include elements like 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.

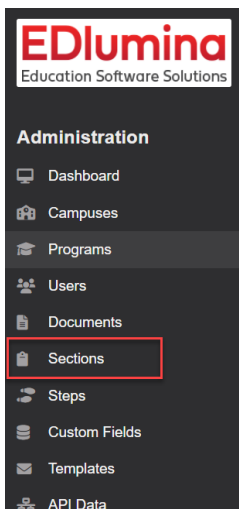| 🏠 > Documents			NEW DOCUMENT
			Manage Signatures
NAME ↑ ↓	TYPE ↑ ↓	BOXES CHECKED	
Enrollment Fee	Pre Enrollment	Take Payments	
Immunization Records	Post Enrollment	Allow Student Uploads, Require Admin Approval	
Photo ID	Pre Enrollment	Allow Student Uploads, Require Admin Approval	
High School Completion	Pre Enrollment	Allow Student Uploads	
Enrollment Agreement	Pre Enrollment	Include Educational Background, Include General Information, Include Location Information, Require Admin Approval, Take Payments	

VIEW ARCHIVED DOCUMENTS

Document Name*

New Document

Document Type

[dropdown ▲▼]

☐ 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

EDlumina
Education Software Solutions

Administration

- Dashboard
- Campuses
- Programs
- Users
- Documents
- Sections
- Steps
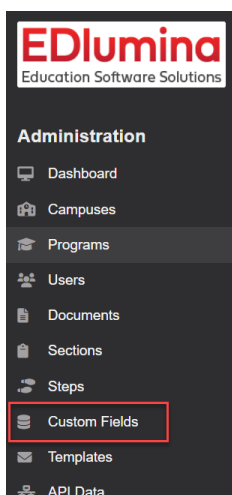- Custom Fields
- Templates
- API Data

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 button-right to save the section.
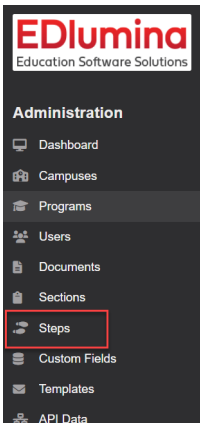
Steps

- 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.

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

🏠 | Steps | **Edit Step: Contacted**

Step name*:

Contacted

Automated Messages

Send [New Lead Email ▼] to the lead [1 ▼] [Minutes ▼] after this step. Remove

Send [Contact 1 ▼] to the lead [1 ▼] [Hours ▼] after this step. Remove

Send [Contact 2 ▼] to the lead [3 ▼] [Days ▼] after this step. Remove

Send [EDlumina HTML ▼] to the lead [10 ▼] [Days ▼] after this step. Remove

+ 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

🏠	Custom Fields	New Custom Field

Field Name*

New Field

Field Type*

[TEXT] [DROPDOWN]

ARCHIVE THIS FIELD   CREATE
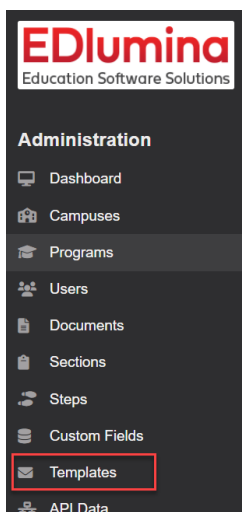
Templates (Messaging)

- 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.

MANAGE LAYOUTS   NEW TEMPLATE

All   Email   SMS   Template 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

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

NEW LAYOUT

My Layouts   EDlumina Layouts

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

VIEW ARCHIVED LAYOUTS
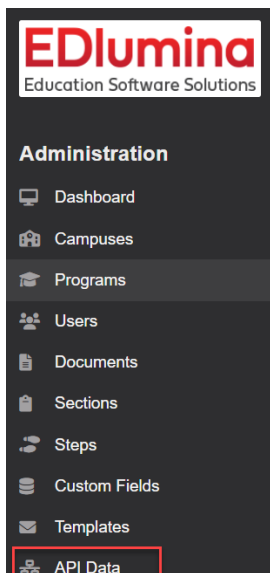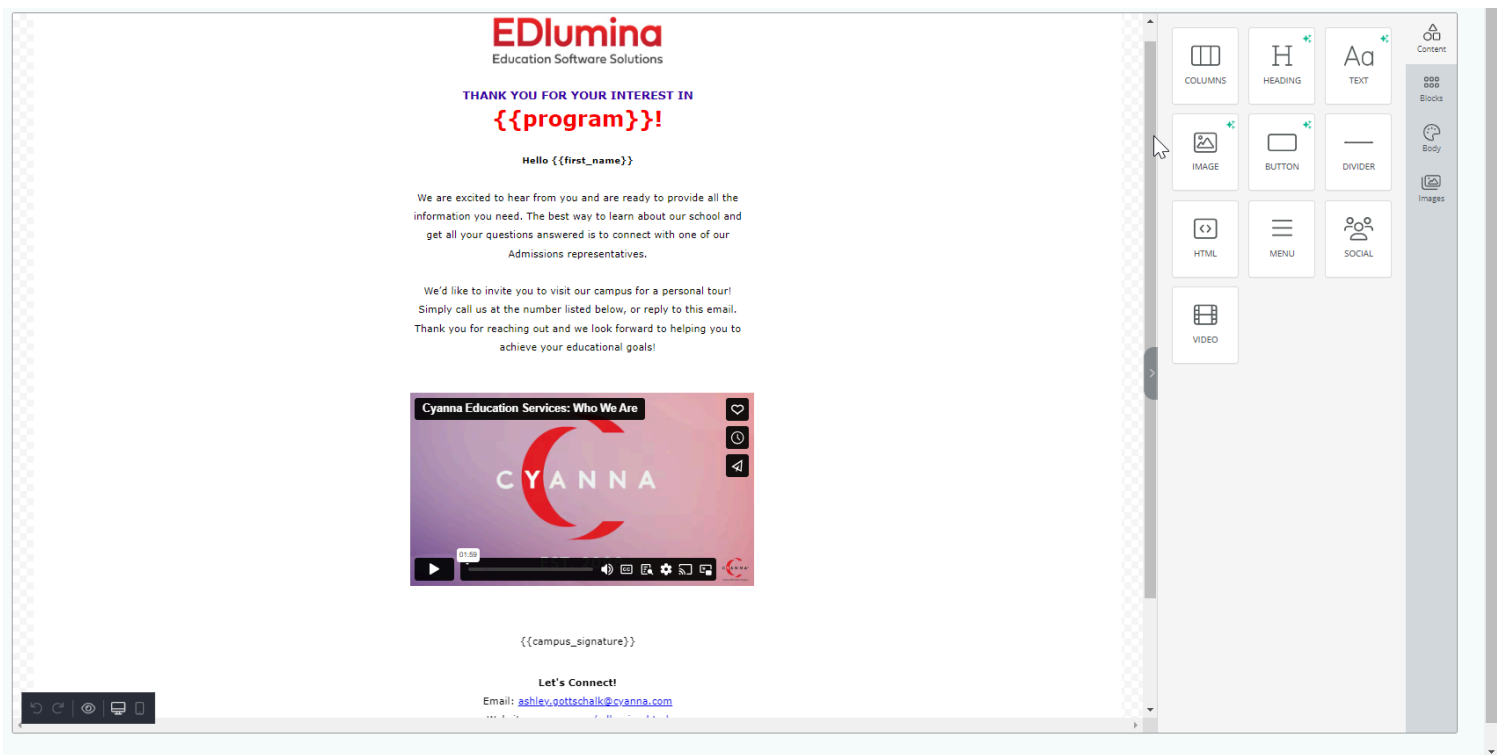
API Data

- Your web developer will need this information to get your website or any marketing campaigns connected to EDlumina.
  - [API Docs/Introduction](#)

PROGRAM NAME ↑ ↓	PROGRAM ID
Paramedic	5
STNA	6
Phlebotomy	7
Cosmetology	1
Barbering	3
Skin Care	2

Campuses

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

- <u>Overview</u>
  - 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

- <u>Recent Activity</u> - new leads assigned for leads a user has been communicating with regularly

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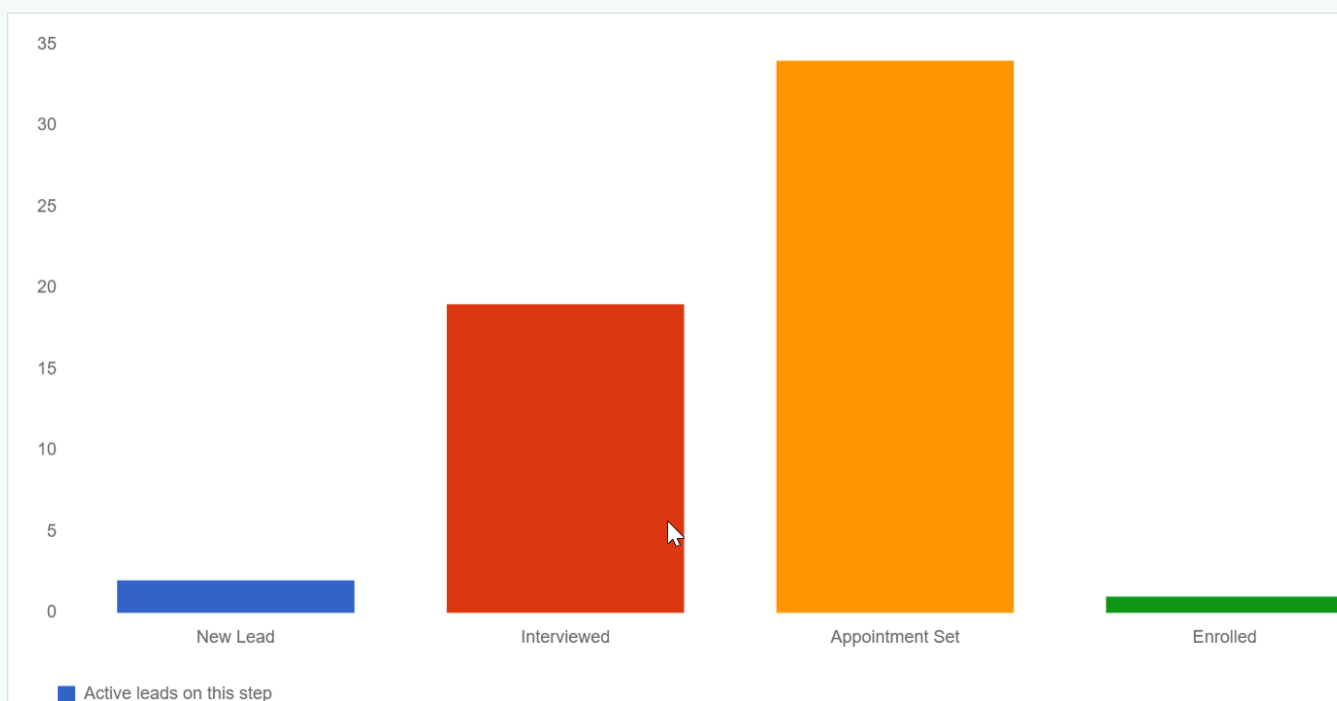- <u>Approval Pending</u> - Documents that need to be approved by the user

Upcoming Events

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

- <u>My Pipeline</u> - how many leads a user has in each pipeline step

My Pipeline bar chart showing Active leads on this step: New Lead ~2, Interviewed ~19, Appointment Set ~34, Enrolled ~1.

Admissions

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

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)
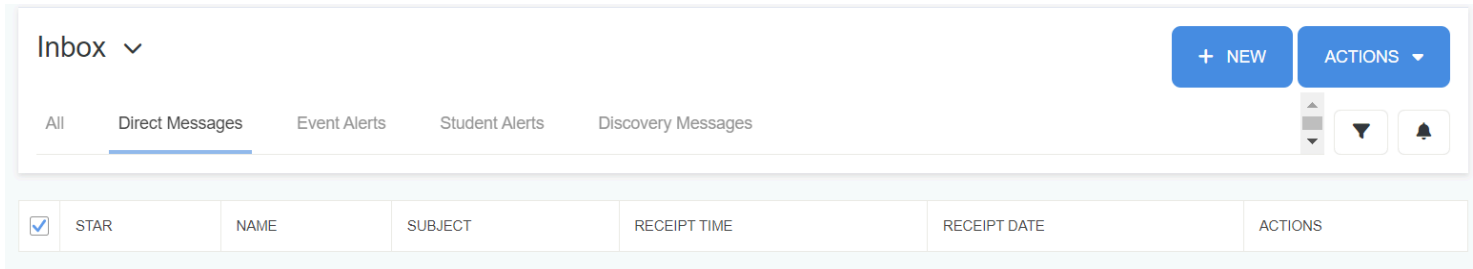
- <u>+New:</u> Allows you to search a lead and send a message right from the inbox
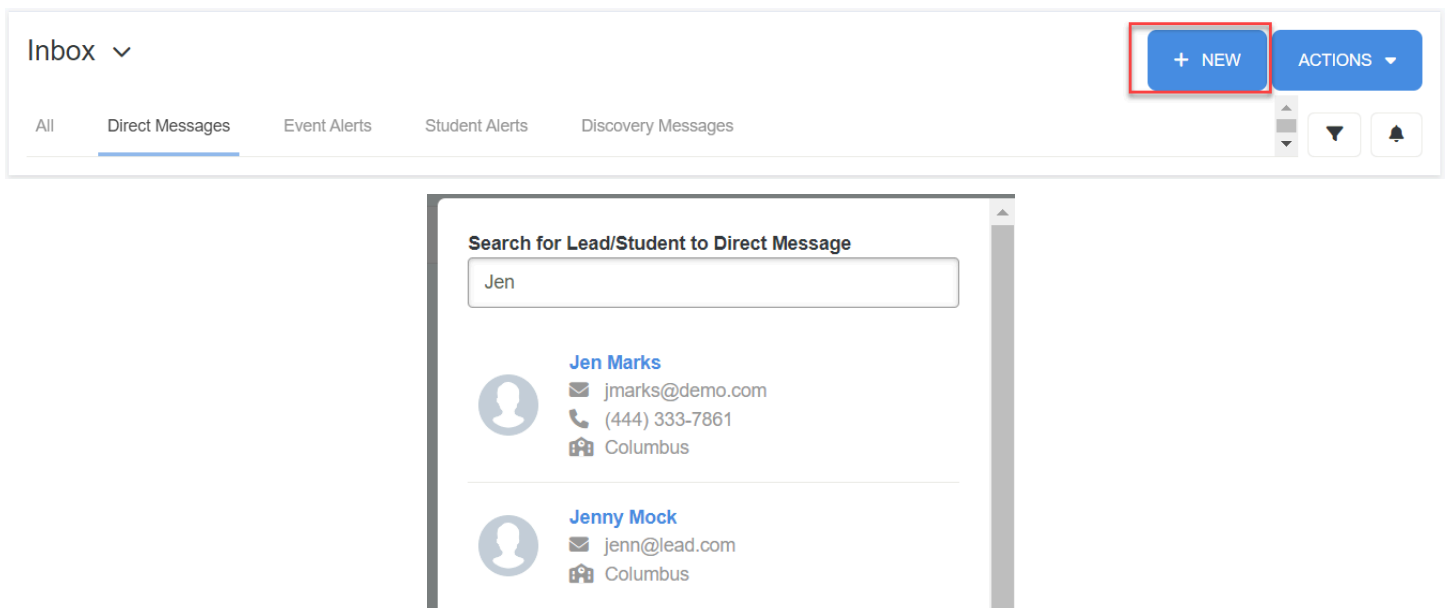
- <u>Actions:</u> You can take mass action by clicking on the blue ACTION button on the top-right corner. This will allow you to:
  - Mark all as read
  - Mark all as unread
  - Mark all as archived

- <u>Filters:</u> Allows you to search anything in the inbox by key world or dates

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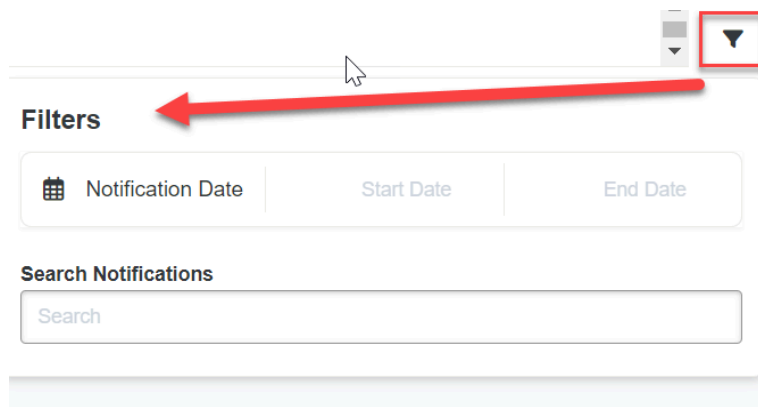
- Notifications: By clicking/checking the boxes, this will send specific alerts to your email. Uncheck the box you do not wish to receive email notifications for. This will still notify you in the inbox.
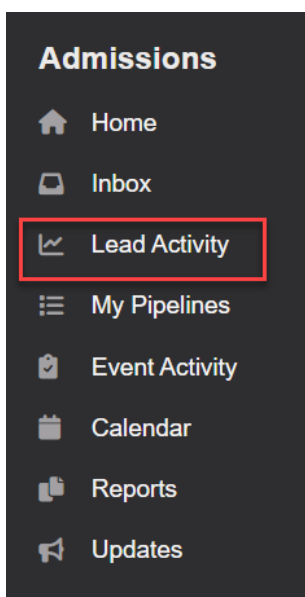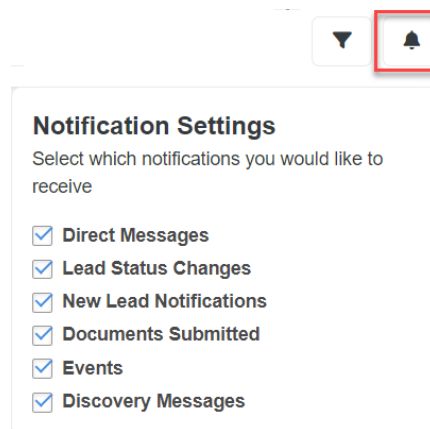
Lead Activity

- 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

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- ○ 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

- ● <u>Actions:</u>
  - ○ 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

- Add Lead
  - Manually add a lead by clicking and completing the fields

- 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

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Cyanna Education Services – edluminasupport@cyanna.com – *revised date: 3/20/2024*
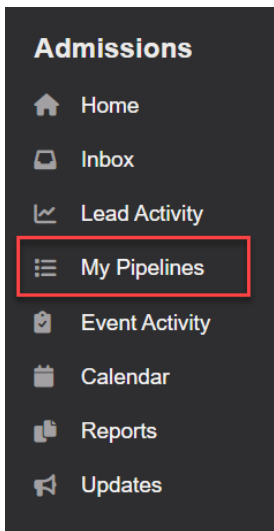
My Pipelines

- 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.

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 |

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

Admissions

- 🏠 Home
- 📥 Inbox
- 📈 Lead Activity
- ☰ My Pipelines
- 📋 Event Activity
- 📅 **Calendar**
- 📖 Reports
- 📣 Updates

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

Calendar | ADD EVENT

Samantha Bauer ▾

October 2023

‹ › TODAY

MONTH WEEK DAY

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6 8:30 Admissions Meeting	7
8	9 8:45 Jen Marks	10	11 2:30 Betty Finn 10:00 Kennedy Cook	12 8:30 Admissions Meeting	13	14
15 5:30 Jenny Brinkley	16 6:45 Jenny Stokes: Friend coming with her	17 2:00 Joey Burrs	18 1:45 Melinda Good	19 8:30 Admissions Meeting	20	21
22 8:15 Jim Smith	23 3:15 Erin Smith 5:15 Alex Bard: Follow-Up	24 5:00 Megan Smith 7:00 Kara Wallace: Bringing Friend	25 6:45 Chris Smith 10:00 Erin Smith: Bringing a friend	26	27 8:30 Admissions Meeting 9:45 Susan Burns 6:30 Samantha Klopfer	28 2:45 Sally Mayfield 6:45 Donny Stewart: Pay Application Fee
29 10:30 Joan Osgood	30 7:30 Aaron Smith: Facility Tour	31 8:00 Adam Bardelang	1 10:30 Jenny Mock 12:00 Jenny Mock: FAFSA Complete 12:00 Kara Wallace 2:00 Jenny Brinkley	2 8:30 Admissions Meeting	3	4

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

🏠 Home
🖥 Inbox
📈 Lead Activity
☰ My Pipelines
📋 Event Activity
📅 Calendar
📕 Reports
📢 Updates

Reports

- *See Reporting Manual*

Updates

- Video: <u>Knowledge Base</u>
  - 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   Knowlege Base

[Search for a knowlege base video]

EDlumina

INTRODUCING

Automated Reports For Admin Users

Powered by ⓒ CYANNA®

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.

EDlumina

INTRODUCING

EDlumina's Enrollment Pipeline

Powered by ⓒ CYANNA®

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.

Lead Profile Page

All Lead Information can be managed here. When on the Lead Profile Page, click on any of the leads to open up a Lead Profile page in a new tab. 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 change this lead to orange. This lead will not show in the "Hot Lead Filter" in Lead Activity.

Status Icon - Active or Inactive

- 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. An inactive lead means that the lead was closed at some point and can be reactivated under 'Actions' (see below)

Actions Icon

- 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 Functions section of this document.
- Remove/Upload Avatar
    - Allows you to upload a picture of the student or image of your choosing and remove if needed
- 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. *Close- Do Not Contact will not allow any messaging to go out to the lead.*
- Reactivating a Lead
    - A previously closed lead can be reactivated by pressing the REACTIVATE option at the bottom of the Actions options.
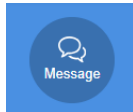
- Message Icon

- 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.
    - To send an Email or text message, whichever the lead prefers by selecting one of the options at the top of the message panel. (Lead Preferred defaults to what the lead chooses)
    - Quick Record: Users can send an audio or video message via email or SMS. There are time restraints on this - *Best practice is 15 seconds for sms and 30 seconds for email.*
    - 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. *files types can be received as well as sent - audio, video, image, text and pdf.*
    - 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

Pipeline

- 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 Pipeline" on the right hand side of the screen for the bar to appear.
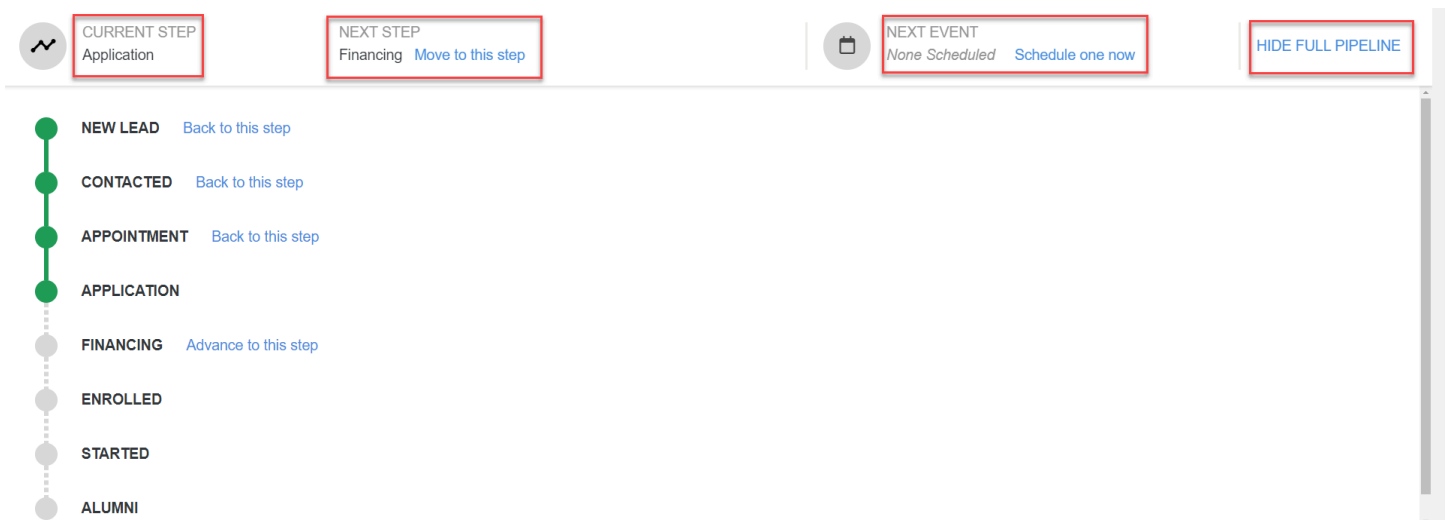
- Current Step
  - The step that the lead is currently at in the process.

_____

- Next Step
  - 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.
- Next Event
  - A new event can be scheduled here or under the **"Events"** tab in the lead profile page.

Show/HideProgress Bar

- Allows the movement of the lead to the next steps in the pipeline. Steps cannot be skipped in the pipeline. However, you can move backward steps in the pipeline, if needed.

There are 6 main sections of the Lead's Profile Page. ***You can click any of these tabs to jump to these sections quickly.***

Lead Information	Events	Notes	Financing	Documents	Enrollment

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

Lead for	Campus	Lead Owner
Cyanna Demo Site	**Columbus**	**Samantha Bauer**

Step	Program of Interest	Secondary Lead Owner
Application	**Cosmetology**	No Information

Lead in	Lead Source	Vendor Source
December 07, 2023	**event**	**Career Fair**

Initial Contact Made	Cohort	Cohort / Start Time
February 29th, 2024 1:38 PM	**Undecided Start Date (February 1st, 2022)**	No Information

Academic Outcome	Student ID	
No Information	**673**	

- System Track Information
  - Lead For: The Instance/School Name setup during Implementation
  - Campus: Campus the lead is assigned to
  - Lead Owner: User lead is assigned to and will receive all communication from this lead
  - Step: What Step of the Pipeline this lead is in
  - Program of Interest: Program lead is assigned to
  - Secondary Lead Owner: This user will be copied on all communication with the lead owner. This can be set manually here in the lead profile page or you can set it to assign automatically under Campuses.
  - Lead In: The date the lead came into or was entered manually into EDlumina
  - Lead Source: A predetermined field that your marketing team can set to see where a lead was generated.
  - 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 populating from the school website or various contact forms.
  - Initial Contact Made: This needs to be marked for reporting purposes. This was intended to be used as soon as the user engages/actively communicates with a lead. This is something that needs to be done manually.
  - Cohort: Every lead needs to be assigned to a cohort/start date
  - Cohort/Start Time: User can select a day/night option here to keep track of leads and when they are starting
  - Academic Outcome: Users can mark this as enrolled students reach a certain outcome so users will know what that outcome for the student is. This also can be pulled in reporting. *See Academic Outcomes report.*
  - Student ID: EDlumina generates a student ID when they are entered into EDlumina. This cannot be edited.

- Custom Fields: These can be added (See Administration>Custom Fields) If utilizing, this is where they will be on the Lead Profile Page.

Custom Fields

Emergency Contact Name & Relationship:	Emergency Contact Phone:	T Shirt Size
Chris Salmos - Husband	4569087645	Large

- Contact Information: All information can be edited and updated if needed and can be pulled in reporting or in Advanced Searches if completed.

Contact Information

Prefered Contact Method
E-mail

Email
jamesalmos@email.com

Allow Emails
Yes

Primary Phone
(876) 908-5432

Mobile Phone

Home Phone

International Phone

Allow Calls or Texts
Yes

Best time to call:
Mornings

Mailing Address
1134 Main St

Mailing Address (cont)

City
Columbus

State
Ohio

Zip or Postal Code
43235

County
Franklin

Country
United States

● General Information: All information can be edited and updated if needed and can be pulled in reporting or in Advanced Searches.

General Information

Name
Jane   Salmos

Race/Ethinicity
White

Date of Birth
11/30/1984

Gender
No Information
Female

Marital Status
Married

U.S. Citizen
Yes

VA/Military
No

High School Attended
Evergreen High School

Highest Degree Earned
Associate Level

High School Graduation Year
2003

● General Comments:
  ○ Extra comments about the lead can be added here. This also is an open text field that can be directed through an API by your marketing team.
  ○ Attachments can be added here (or in Notes). The lead will not be able to see these items. Only users who have access to this lead.

General Comments

B I U S list options Normal ▼ Sans Serif ▼ A highlight Tx link image mic   ☺

Attachments:
[Choose Files] No file chosen

_____

- SAVE!
  - Make sure you click SAVE after anything that has been edited or updated on the lead profile to ensure it saves!

CANCEL   **SAVE**
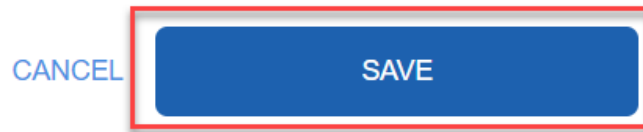
Events

- 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:
  - Canceled
  - Rescheduled
- If an event is marked as No Show two additional options are presented for the event, "No Show - Reschedule" and "No Show - Canceled"
  - If "No Show - Reschedule" is selected the event will be moved to Reschedule - After.
  - If "No Show - Canceled" is selected the event will be moved to Canceled - 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.
  - 'Canceled Prior' is the number of events that were marked as "Canceled" prior to the event taking place.
  - No Shows are events marked as 'No Show'
  - 'Reschedule After' are marked as a Reschedule after the event has passed and marked as a "No Show".
  - 'Canceled After' are marked as Canceled after the event has passed 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.

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. This can also show as a 'header' on Lead Activity Page
- Attachments can be added here (and in General Comments) that the lead will not have access to.

- Tagging in Notes:
  - You can tag another user in notes if you need to get their attention on something. You would put @ then choose the user. They would then get a notification in your Inbox that you have been tagged in a note.

Financing

- This keeps track of all of the financing that the lead has paid or is planning to pay.
  - **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.
  - **Canceled** Financing is used to keep track of the financing that gets canceled or rejected.

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

Financing
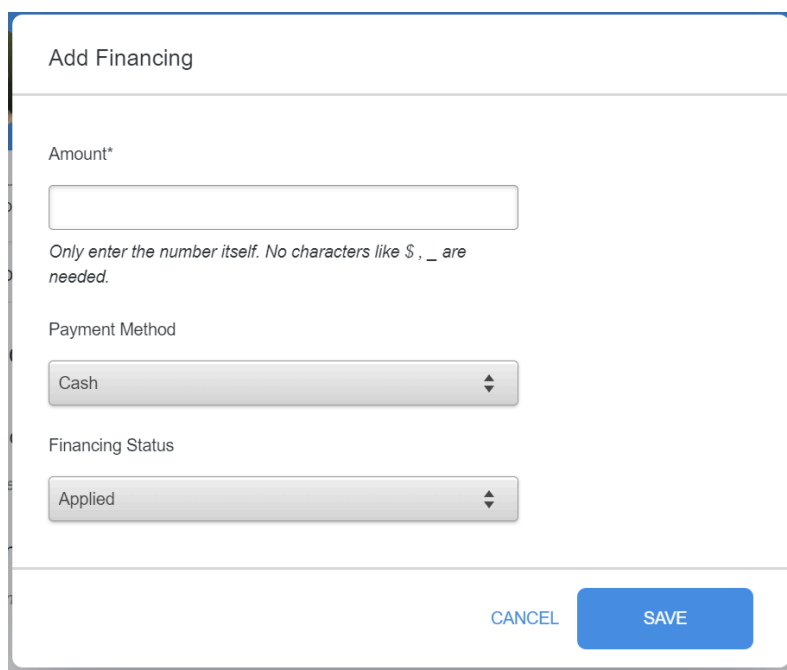
ADD FINANCING

Prospective Financing

No prospective financing

Confirmed Financing

No confirmed financing

Add Financing

Amount*

_____

Only enter the number itself. No characters like $, _ are needed.

Payment Method

| Cash | ⬍ |

Financing Status

| Applied | ⬍ |

CANCEL   SAVE

- 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: Click SAVE when you are done.
  - Applied
  - In Process
  - Approved
  - Cancelled

- 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.

Prospective Financing

Cash • **$1,000.00** • **In Process**

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.

- **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.

Student View:

Click the blue **SUBMIT** button.

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*

Enrollment

Schedule Enrollment

Program of interest	Cohort
Barbering	**Undecided Start Date (Deadline: 2/11/2062 Start: 2/1/2022)**

Enrollment Status
Enrolled

Enrolled Date	Days Between Lead In and Enrolled
3/19/2024	**18**

STARTED   NO START

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