TMS- Student Configuration Guide

Student Settings:

What is Student Module?

Maple CRM is specialized with end to end solution for Overseas process.

The converted / nurtured lead can be converted as Student to start the admission and visa process. CRM can build the complete flow for Education process in regards to the various countries. The counselors and experts can be designated with the work item as per the flow and will be notified on what needs to be done along with the timelines.

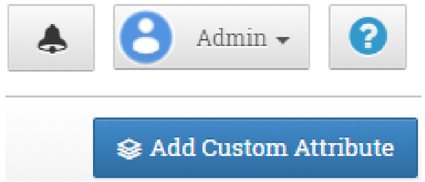
CRM provides an exclusive interface to store and manage student enquiries with customized fields and enquiry stages like application filed, documented, visa issued, etc. Consultants can easily analyze and manage the opportunities.

This would ensure that there is no manager or administration intervention required for the smooth flow of the process.

- ## How to add Student Custom Attributes ?

Description: Student fields are called as Student Custom Attributes**.** These can be added with different data types [Ex: Text box, List , Date field etc]

To Add **Student Custom Attribute,**

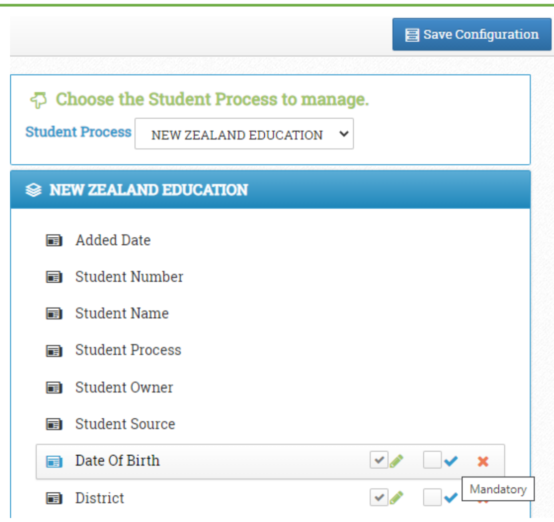


1. Go to **Settings** -> **Student Settings**-> **Custom Attribute**
2. Click on **Add Custom Attribute**
3. Give the **Attribute Name**, select the **Data Type**
4. Click on **Add**
5. This will automatically gets added to the Student Form Configuration for all the processes.

- ## How Add/Delete field in Student Form, Rename the field, Reorder the field, Mandatory/Non-Mandatory, Editable/Non Editable in Student Form Configuration ?

Description: Maple lets Admin User to customize the Add Student form page as required. User can customize the field names , order in which the field has to appear in Student Form. The same shall be reflected in the Student Manage page.

This Settings allows User to have different set of fields for every Process User choose, while Lead to Student Conversion/ Add Student.



1. Go to **Settings** -> **Student Settings**
2. Click on **Form Configuration**
3. The default and non-default fields are listed on the left section
4. User can Rename the field display names, change the order of the fields by Drag and Drop

- **To Add/ Delete field** :
  Click on the attribute under **Student Attribute** listing which will get added under **Selected Fields** and **Save Configuration**
  Click on cross red icon under **Selected field** listing to remove and **Save Configuration**
- **Mandatory/Non Mandatory field** :
  Click on green edit icon and tick on Mandatory box and click on green tick again [**Okay**] and then **Save Configuration**
  Edit the field , remove tick -> Okay -> Save Configuration
- **Editable/Non Editable** :
  Click on green edit icon, give the Display Name and click on green tick again [**Okay**] and then **Save Configuration**
- **Rename Field Name** :
  Click on green edit icon and tick on Editable box and click on green tick again [**Okay**] and then **Save Configuration**
  Edit the field , remove tick -> Okay -> Save Configuration
- Reorder/Rearrange Field **: Drag and Drop** the field under **Selected Fields** and **Save Configuration**
  Note: Ensure to click save configuration of Form configuration changes, otherwise the changes will not be saved.

- ## How to Add Student Source?

  Description : Admin User can define the list of sources from where User get the student ; FB, Indiamart, JD, LinkedIn etc. .Students can be segregated based on the sources they are received.

To Add **Student Source**,

1. Click on **Student Source** under **Student Settings**
2. Click on **Add Student Source**
3. Enter the **Source Name** and Description
4. User can also choose the color by clicking on the color shown
5. Click on **Add**

- ## How to do Lead to Student Conversion field mapping?

Description: When an lead is converted to Student to start the admission and visa process , User can have a default Lead – Student Conversion mapping form.

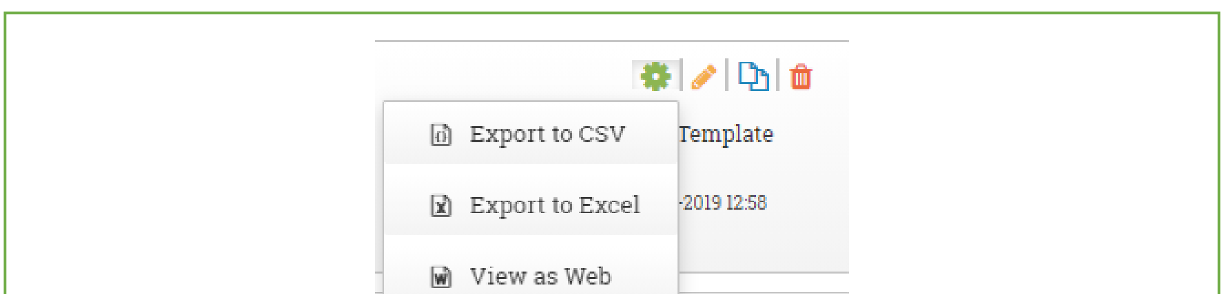
This field mapping will help User to have a default Lead – Student field mapping so within 1 or 2 clicks, the conversion can be done. All the Lead data values gets transferred to Student data field based on this mapping.

To do the **conversion mapping**, follow the below steps,

1. Click on the **Conversion Map** under **Student Settings**
2. Map the fields of **Lead with Student** fields
3. Click on **Save Field Map Configuration**
4. User can also map the Lead custom tables with Student custom tables

Note : Lead custom and Student custom tables will be configured by Maple Support Team.

- ## How to run a Student Report/ Export Student data from CRM ?



1. Go to **Reports -> Custom Reports**
2. Click on **New Report** and choose the context " **Student**"
3. Give the **Time Period** filter [Ex: Student Process equal to Australia Education] and additional filter condition [Ex: Student Status is equal to Registered]
4. Select the field required in the report under **Select Field** option
5. Click on **Generate** from the right
6. User can export the data either to **CSV / Excel/View as Web**
7. User can also **Save this as Template** for future use

Note : Max 15 fields can be taken under Select Fields.
If the report result is more than 2000, then the report will sent via mail to User.