CampusLogin | Leads

Administration Training Manual

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1. **Inputting New Leads**
    a. To enter a new lead manually select the "Leads" tab at the top of the page
    b. Then select "Input a New Contact" under the "Contacts" heading on the left navigation
    c. Ensure that the "Contact Type" (the first drop down) is set to the "Leads" database
    d. Enter as much information as you have on the lead (Name, Phone, Email, etc)
    e. Select the recruiter the lead should be assigned to
    f. Hit the save button anywhere on the lead profile to create the lead
    g. The lead will then appear on the new lead list for the assigned recruiter
2. **Searching Your Database**
    a. You can find the search tools under the "Contacts" heading on the left navigation
    b. To find a lead by name, email, or telephone use "Quick Search"
    c. To query your database by any field on your lead profile use the "Advanced Search"
    d. The "Advanced Search" is also used when mass communicating. You will see links in the results to send mass emails, text messages, and print letters
    e. You can click the "View" button to go to the leads profile
3. **Lead Profile**
    a. Contact information is automatically filled in from your web forms
    b. You are able to add/update the profile (be sure to save your changes)
    c. The middle column contains all of the details about the prospect
    d. The right column provides all of the communication history (Notes, Phone Calls, Incoming Email, Outgoing Email, Mass Emails, Text Messages, Letters and Appointments)
    e. You are able to take notes, and use the "Follow Up Options" to contact the lead
4. **Appointments**

a. When you select “Schedule a Follow Up” from the lead profile you will be taken to the calendar page
b. You can select another users calendar in the “Staff” drop down at the top of the calendar if you wish to schedule the follow up on someone else’s calendar
c. Double click on the day/time you would like on the calendar, or you can add the follow up to the generic call list at the bottom of the page by clicking on the date
d. When scheduling an appointment, you must select an appointment type
e. If you are the one that needs to complete the phone call, you can open the scheduled call and save a phone call outcome (Call Attempted, Call Received, Call Left Message, Call Complete) to show that the phone call was completed
f. For all appointments, you must specify if the appointment showed (all appointments are defaulted to no show and you can manually mark that they showed)
g. When dispositioning any calendar appointments, you are able to schedule your next follow up on the same screen
h. All appointments appear in the prospects communication history and on your calendar

Mass Communication

1. **Mass Communication**
    a. In the “Advanced Search” results you will see short cut links to “Send a Mass Email”, “Print Mass Letters” or “Send Mass Text Message” to your targeted group of leads
    b. These options are also available on the left navigation
    c. If you do an “Advanced Search” with too many results to call in one day you are able to create a “Call Campaign” and work that group of leads over a longer period of time
2. **Templates**
    a. If you wish to save an templates for future use (E-Mail, Letter or Text Message) you can create them using the “Edit Templates” page
    b. These templates will appear when you send a message or print a letter
    c. You can draw any field into your template from the contact sheet of the lead (such as First Name, Program Name, Start Date, etc) by using the “Insert Field” drop down