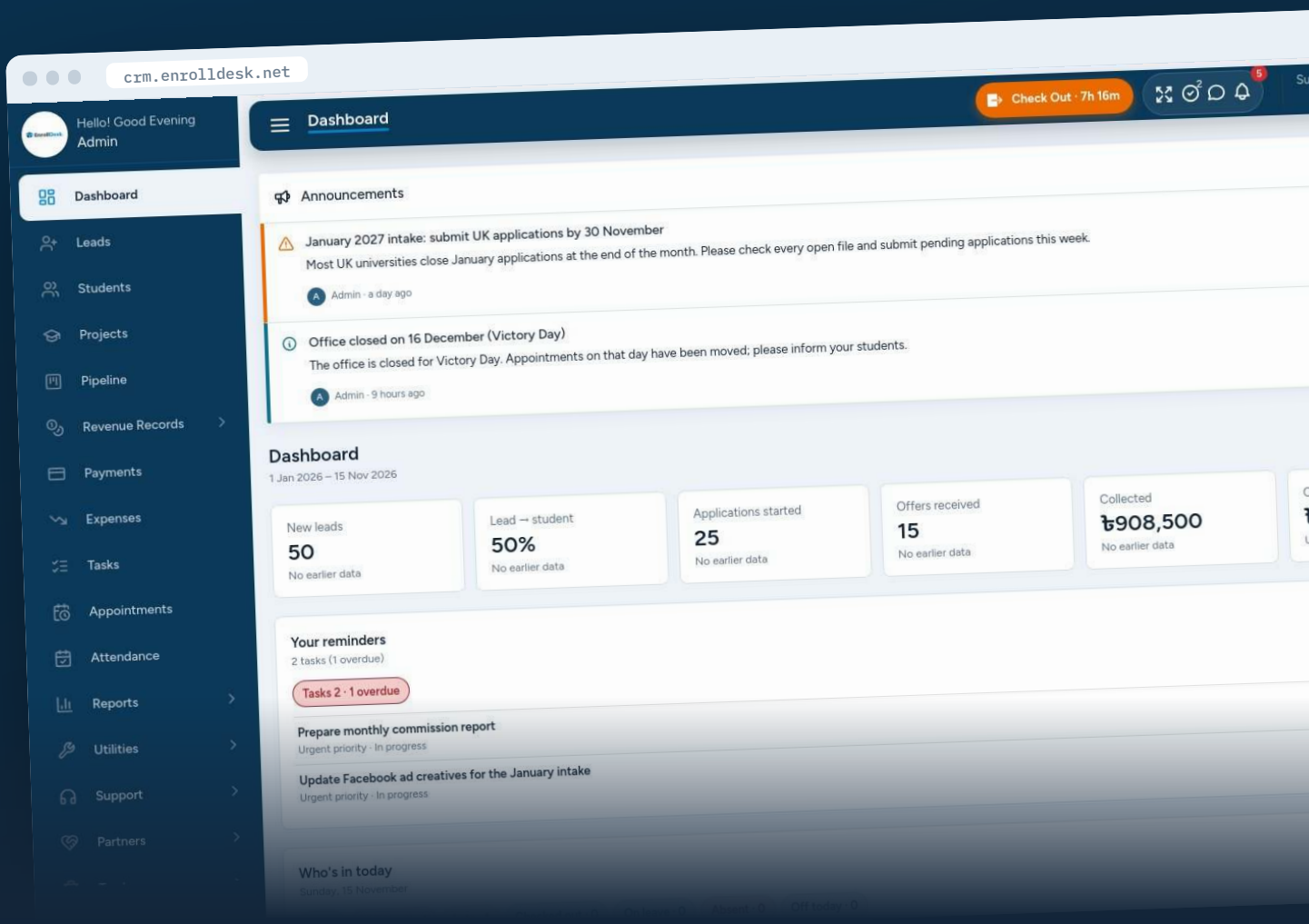
EnrollDesk.

PRODUCT GUIDE

The CRM for study-abroad and education agencies

From the first enquiry to enrolment: leads, applications, fees, partners and the office, in one system.



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OVERVIEW

What EnrollDesk is

EnrollDesk is a complete CRM for study-abroad and education agencies. It captures enquiries from Facebook and your website, helps counsellors turn them into students, manages every university application through to visa and enrolment, invoices and collects fees, pays referral partners, and runs the office: tasks, appointments, attendance, leave and expenses.

It is one system with three logins: your **staff**, your **students** and your **partner agents**. Everyone works on the same information, and each person sees only what they should.

3
LOGINS
Staff, students and partner agents each get their own secure space.

23
MODULES
From the first enquiry to enrolment, fees, commissions and the office itself.

16
REPORTS
Each with filters, charts and a finished Excel export.

24/7
AUTOMATION
Reminders, backups, recurring work and alerts that run on their own.

What this guide covers

This guide explains what EnrollDesk does, why each part matters to an agency, and how to use it. Part one gives the overview. Part two goes through the system module by module, with the features, the steps to use them and real screens. Part three covers integrations, the work the system does by itself, and how to get started. A full feature checklist is at the end.

Every screen in this guide is taken from the software itself, running on demonstration data. The names and figures shown are not real people or accounts.

OVERVIEW

Why agencies need it

Most agencies grow on spreadsheets, messaging apps and memory. That works for ten students. At a hundred it starts to cost money: enquiries that were never called back, files that stopped moving, fees nobody chased.

WITHOUT A SYSTEM	WITH ENROLLDESK
Enquiries arrive from Facebook, the website, phone calls and walk-ins, and some are never called back.	Every enquiry lands in one lead list, is shared between counsellors in turn, and carries a follow-up date that turns red when it is missed.
Application files live in spreadsheets, email threads and paper folders.	Each student has one file: universities, admission stage, documents, sponsor, visa checklist, notes, tasks and chat.
Nobody can say today which files are stuck, or where.	A pipeline board shows every file by status, how many days it has sat there, and alerts the counsellor when it sits too long.
Fees are tracked by hand, so balances and overdue amounts are guesses.	Invoices compute their own totals, their status follows the payments, and overdue invoices are flagged with the number of days.
Students call the office to ask the same question: “What is happening with my file?”	Students sign in to their own portal to see their stage, upload documents, pay, book appointments and message their counsellor.
Partner agents ask for commission statements every month.	Partners see their referred students, commissions and payouts in their own portal, calculated by the system.
Owners find out about problems at the end of the month.	A live dashboard and 16 reports show conversion, collections, outstanding money and each counsellor’s results for any period.
Staff attendance, leave, tasks and office spending sit in separate tools.	Attendance, leave, tasks, appointments and expenses are part of the same system the team already has open.

OVERVIEW

Who uses it

Three kinds of people sign in, each at their own address and each with their own view.

Agency staff

`crm.enrolldesk.net`

Owners, branch managers, counsellors, admissions and visa officers, accounts and front desk.

- Every module in this guide, limited by each person's role
- Sees their own records, or everyone's if the role allows
- Dashboard, reminders and a notification bell

Students

`crm.enrolldesk.net/client`

Every student gets a login when they become a student.

- Application stage and document checklist
- Offer letters to view and sign, invoices to pay online
- Appointments, chat, support tickets and help articles

Partner agents

`crm.enrolldesk.net/partner`

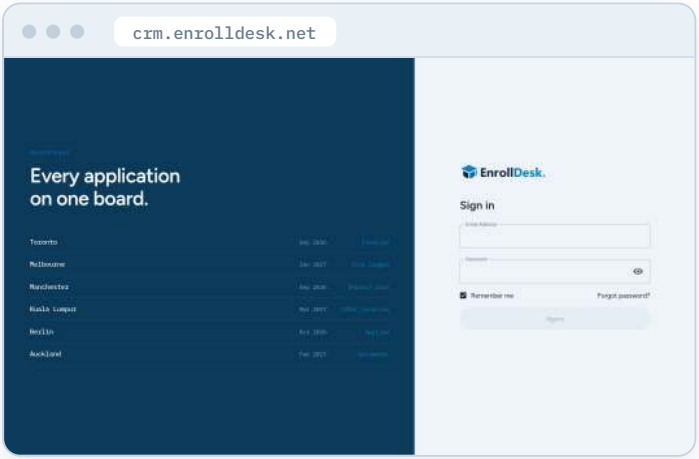
Sub-agents who refer students and earn commission.

- Their referred students and where each one stands
- Commission pending, approved and paid
- Payout history; no private student data

Inside the agency

Staff access is set by role. You create the roles; these are typical.

Owner / manager	Dashboard, reports, approvals (expenses, leave, attendance corrections), roles and settings.
Counsellor	Leads, follow-ups, students, applications, appointments, tasks and chat with students.
Admissions / visa officer	Applications, admission stages, document and visa checklists, offer letters.
Accounts	Invoices, payments, receipts, expenses, commissions, partner payouts and money reports.
Front desk	New leads, appointments, attendance and student questions.



The staff sign-in page.

OVERVIEW

The student journey

EnrollDesk follows a student from the first enquiry to enrolment. Each step below is a part of the system, described in detail in part two.

1 Enquiry
A lead arrives from Facebook, the website form, an import or the front desk.

2 Counselling
A counsellor is assigned, calls, books an appointment and records notes and follow-ups.

3 Student
The lead becomes a student in one click. Nothing is retyped and the history stays.

4 Application
The student is added to a programme; universities and courses are attached.

5 Documents
The student uploads documents in the portal; staff mark them received.

6 Offer
The admission stage moves to offer. An offer letter is generated and signed online.

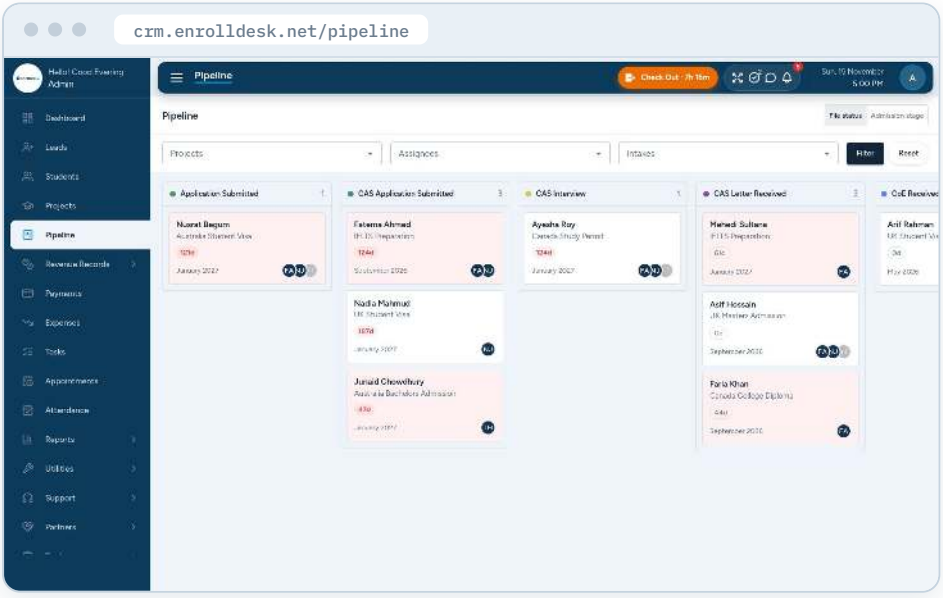
7 Fees
Invoices are issued, the student pays (online or at the office) and receipts go out by email.

8 Visa
Sponsor and embassy checklists are completed; the file moves through your own visa statuses.

9 Enrolled
The file reaches its final stage. University commission and partner commission follow.

ONE RECORD ALL THE WAY

The enquiry, the student and the application are the same record growing over time. A note written on the first phone call is still on the file when the visa is issued.



The journey as the team sees it: every file on the pipeline board.

PART TWO

Module by module

What each part of EnrollDesk does, why it matters, and how to use it.

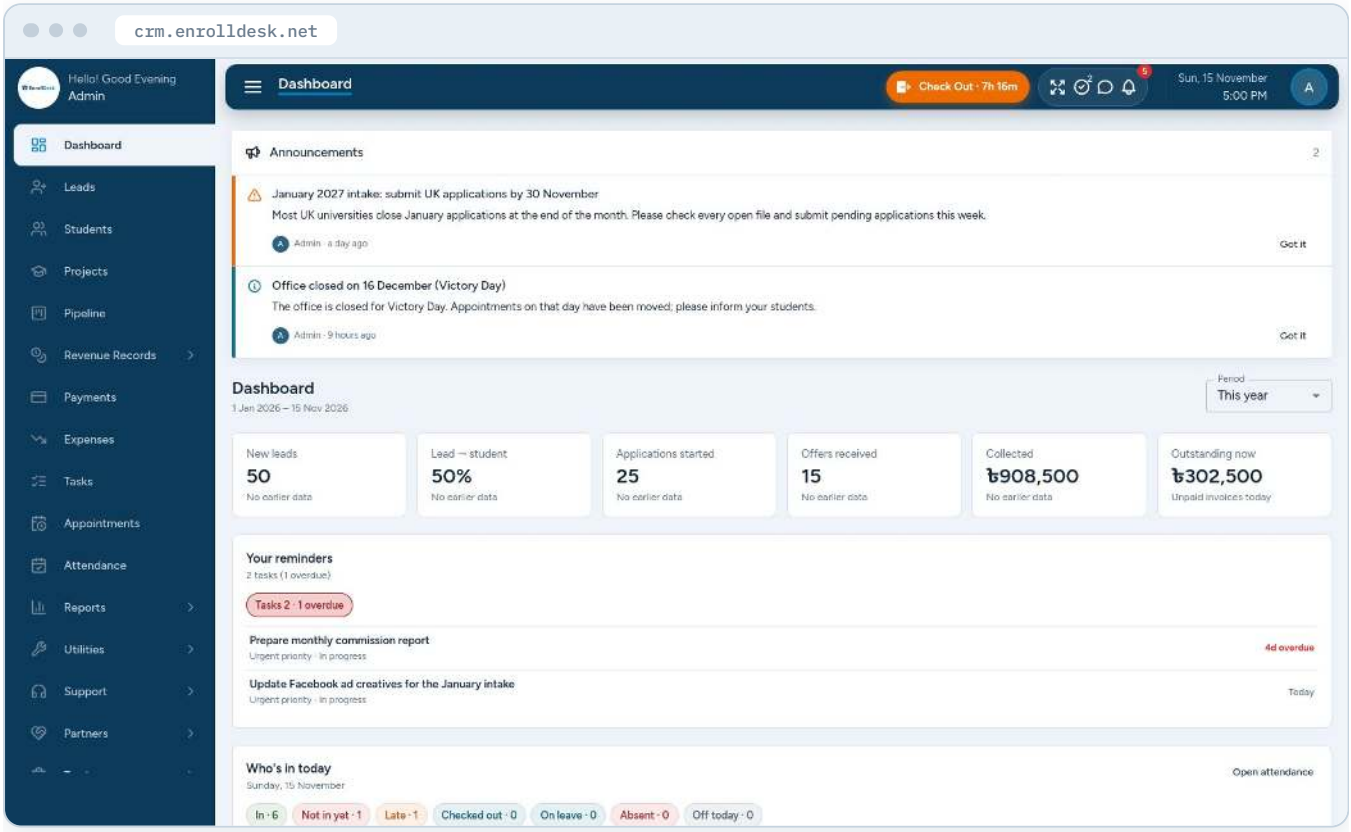
THE WHOLE AGENCY ON ONE SCREEN

01 Dashboard

The dashboard is the first screen staff see. It answers the questions an owner asks every morning: how many leads came in, how many became students, how much money was collected and how much is still owed.

WHY IT MATTERS

Decisions get made on today's numbers instead of last month's. Every person also sees their own reminders, so the day starts with what is due.



The dashboard: announcements, summary cards and your reminders.

What you can do

- **Announcements**
  Office notices at the top, with a priority. Staff press "Got it" and you can see who has read them. Urgent notices must be acknowledged.
- **Any period**
  This week, this month, this year or your own dates.
- **Who's in today**
  Who has checked in, who is late, on leave or absent.
- **Summary cards**
  New leads, lead to student conversion, applications started, offers received, money collected and money outstanding, compared with the previous period.
- **Your reminders**
  Your own overdue and due-today tasks and follow-ups.
- **Conversion funnel**
  Leads to students to applications to offers to enrolment for the chosen period.

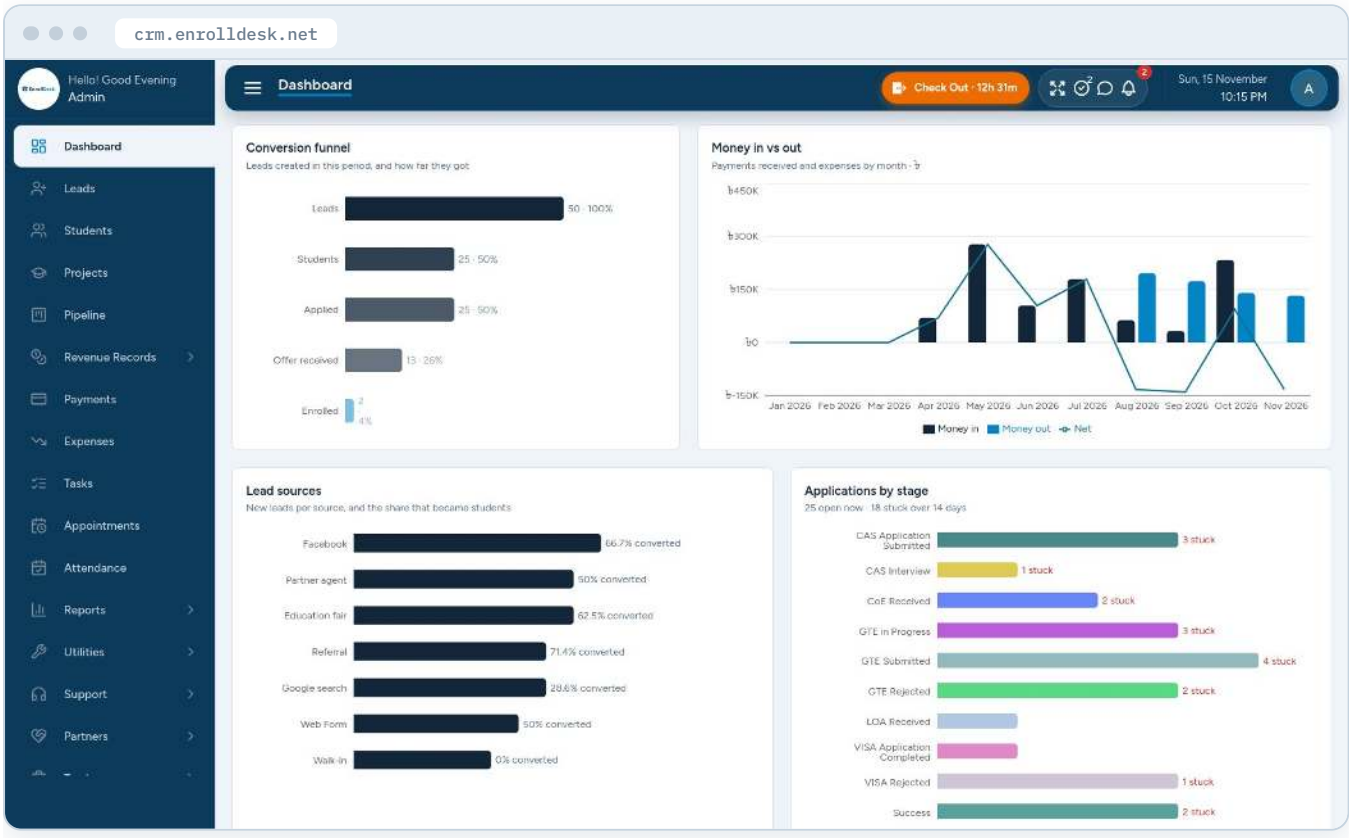
- **Money in vs out**
  Payments received and expenses by month, per currency.
- **Team boards**
  Leads converted per counsellor, the weekly “follow-up star”, lead sources, applications by stage and per intake, unpaid invoices by age.

How to use it

1. Sign in at crm.enrolldesk.net. The dashboard opens first.
2. Read the announcements and press “Got it” on each one.
3. Pick a period in the Period box (top right) to change every card and chart.
4. Open an item under “Your reminders” to go straight to that task or record.
5. Use “Open attendance” beside “Who’s in today” to see the full attendance record.

GOOD TO KNOW

Money is always shown per currency. Amounts in different currencies are never added together.



Further down: the conversion funnel, money in vs out, lead sources and applications by stage.

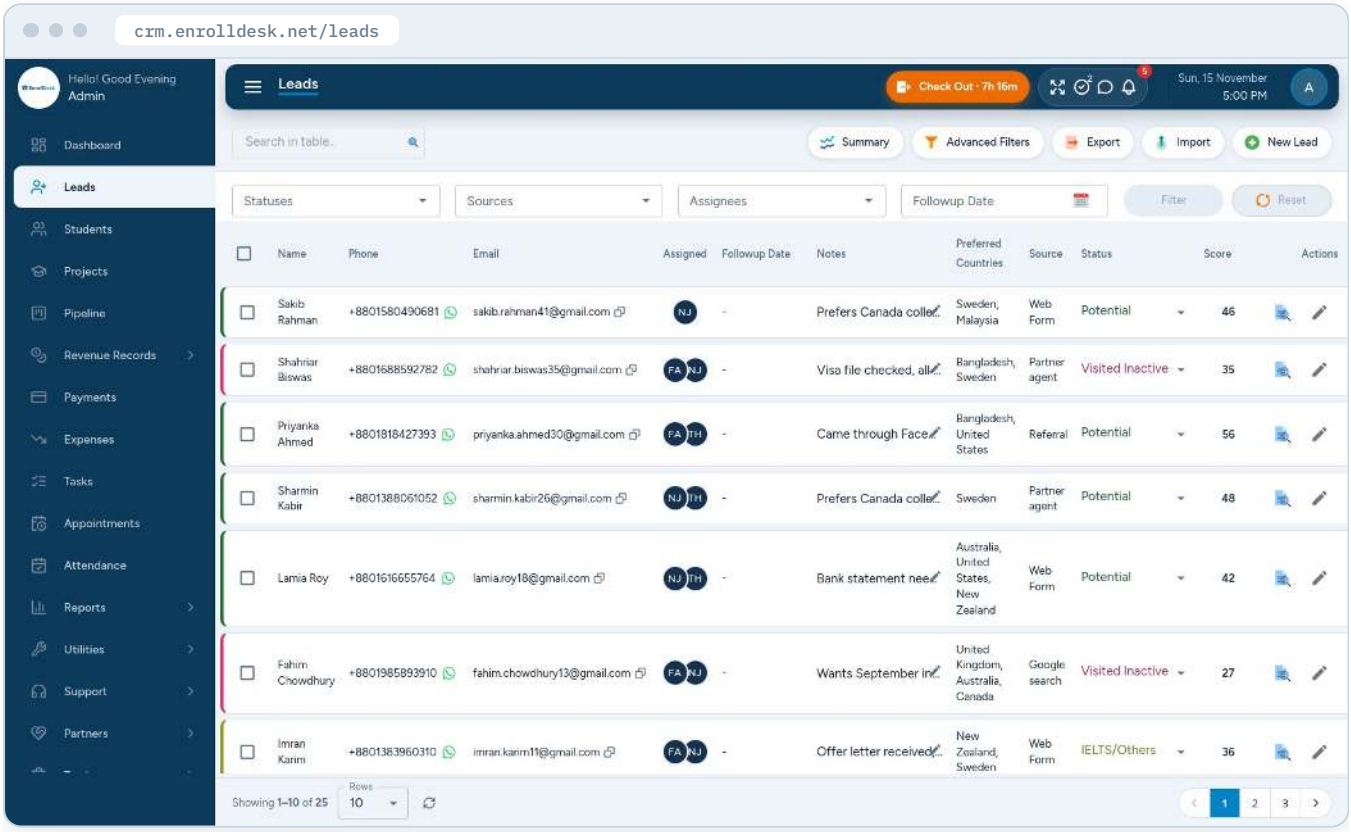
EVERY ENQUIRY, IN ONE LIST

02 Leads and lead capture

A lead is a person who has asked about studying abroad. EnrollDesk collects leads from every channel, shares them between counsellors and keeps the full picture of each one: contact details, education, English test scores, preferred countries, notes and follow-ups.

WHY IT MATTERS

An enquiry that is not called back is lost income. With one list, automatic assignment and visible follow-up dates, no enquiry depends on someone's memory.



The lead list with WhatsApp buttons, assigned counsellors, last note, source, status and lead score.

What you can do

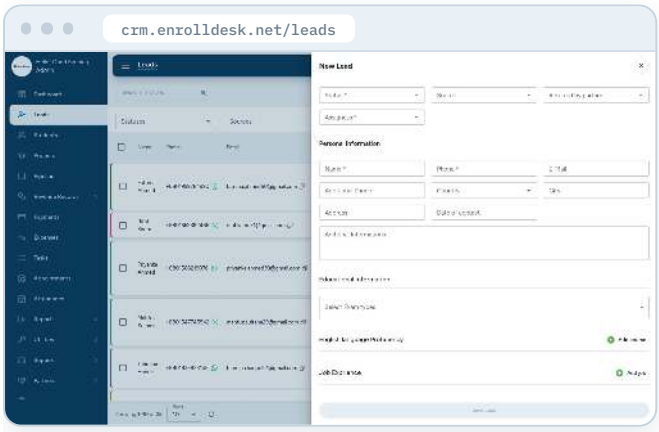
- **Capture from every channel**
  Facebook Lead Ads arrive the moment the form is submitted. The website form posts straight into the list. Staff add walk-ins and phone enquiries, and old lists are imported from Excel.
- **Duplicate check**
  The phone number is checked before a new lead is saved, and Facebook leads are matched by phone and email.
- **Automatic assignment**
  New Facebook and website leads go to your chosen counsellors in turn. Inactive staff and anyone on leave that day are skipped, and the counsellor is notified at once.
- **Full profile**
  Education history (SSC, HSC, O and A Level, Diploma, Bachelor, Masters), English tests such as IELTS, TOEFL and PTE with expiry dates, work history, preferred countries and tags.

- **Lead score**
  A score from the lead's status and source, refreshed every night, so counsellors call the warmest leads first.
- **WhatsApp button**
  One click on the phone number opens a WhatsApp chat with the student.
- **Filters, summary and export**
  Filter by status, source, assignee, follow-up date and more. "Summary" shows leads by status and source. Export to Excel or CSV.
- **Bulk actions**
  Assign, change status or source, trash or export many leads at once.
- **Follow-up dates**
  Each lead carries a follow-up date with its history. Overdue follow-ups are flagged.
- **Statuses and sources**
  Your own lead statuses and sources. Change a status directly in the list.
- **Notes, tasks, files, appointments**
  Every lead has its own notes, tasks, attachments, appointments and activity history.
- **Trash and restore**
  Deleted leads go to the trash and can be restored.

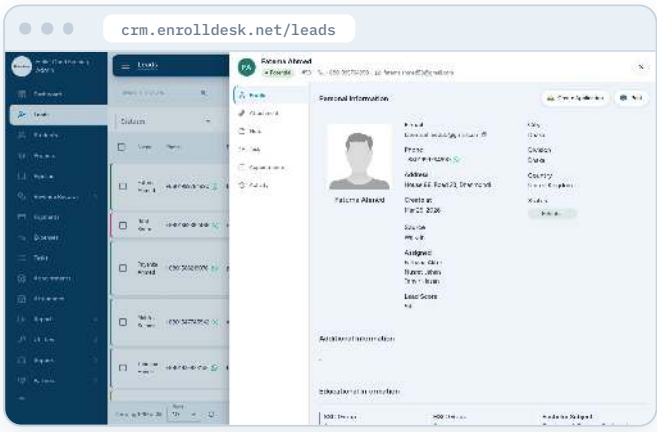
How to use it

1. Open Leads from the menu and press "New Lead".
2. Choose the Status, Source and Assignees, then enter the name and phone number. Add email, country, education, English test scores and work experience if you have them.
3. Press "Save Lead". The lead appears in the list and its assignees are notified.
4. After each call, add a note and set the next follow-up date. Change the status from the list when it moves on.
5. Open the lead (the view icon at the end of the row) to see its profile, notes, tasks, appointments and activity.
6. When the student is ready to apply, press "Create Application" in the lead. The lead becomes a student and their application file is opened.

> **GOOD TO KNOW**
> To bring in an existing list, press "Import", download the sample file, fill it in and upload it.



Adding a lead: status, source, partner, assignees, contact details and education.



A lead's profile, with "Create Application" to turn the lead into a student.

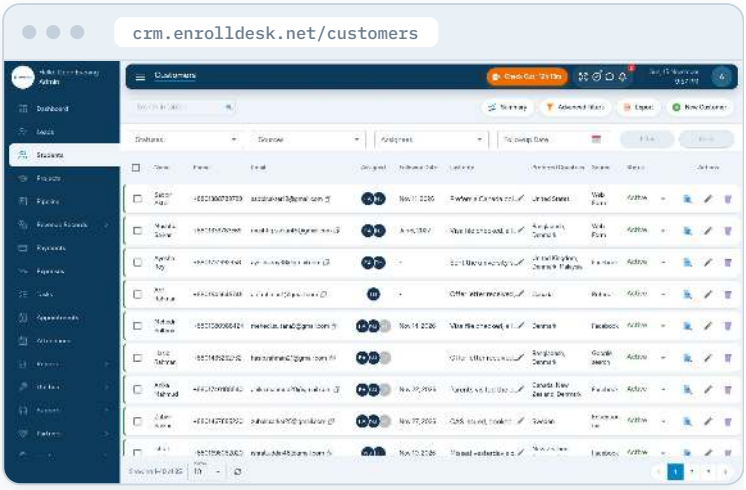
ONE RECORD, FROM ENQUIRY TO ENROLMENT

03 Students

When a lead is ready to apply they become a student. The student record is built on the lead, so the whole history (notes, calls, education, documents) comes with it. Each student also gets a login to the student portal.

WHY IT MATTERS

Counsellors and accounts work from the same record. Nobody asks the student for the same information twice.



The student list with assigned counsellors, follow-up date, last note and status.

What you can do

- **Built on the lead**
  Converting keeps every note, file and follow-up. A student can also be moved back to a lead.
- **Portal login**
  Each student gets a portal login. You decide what each student can see and do in the portal.
- **Lists that work**
  Filters, summary, Excel import and export, bulk actions, trash and restore.
- **Everything in one place**
  Profile, applications, invoices, payments, tasks, notes, attachments, appointments, emails and activity.
- **Addresses**
  Billing and shipping addresses for invoices.
- **Email from the record**
  Send an email from the student's record using your templates; every email is logged.

How to use it

1. Open Students from the menu to see everyone who has become a student.
2. Use the filters (status, source, assignee, follow-up date) or the search box to find a student.
3. Open a student to see their applications, invoices, payments and history in tabs.
4. To add a student directly, without a lead first, press "New Customer".

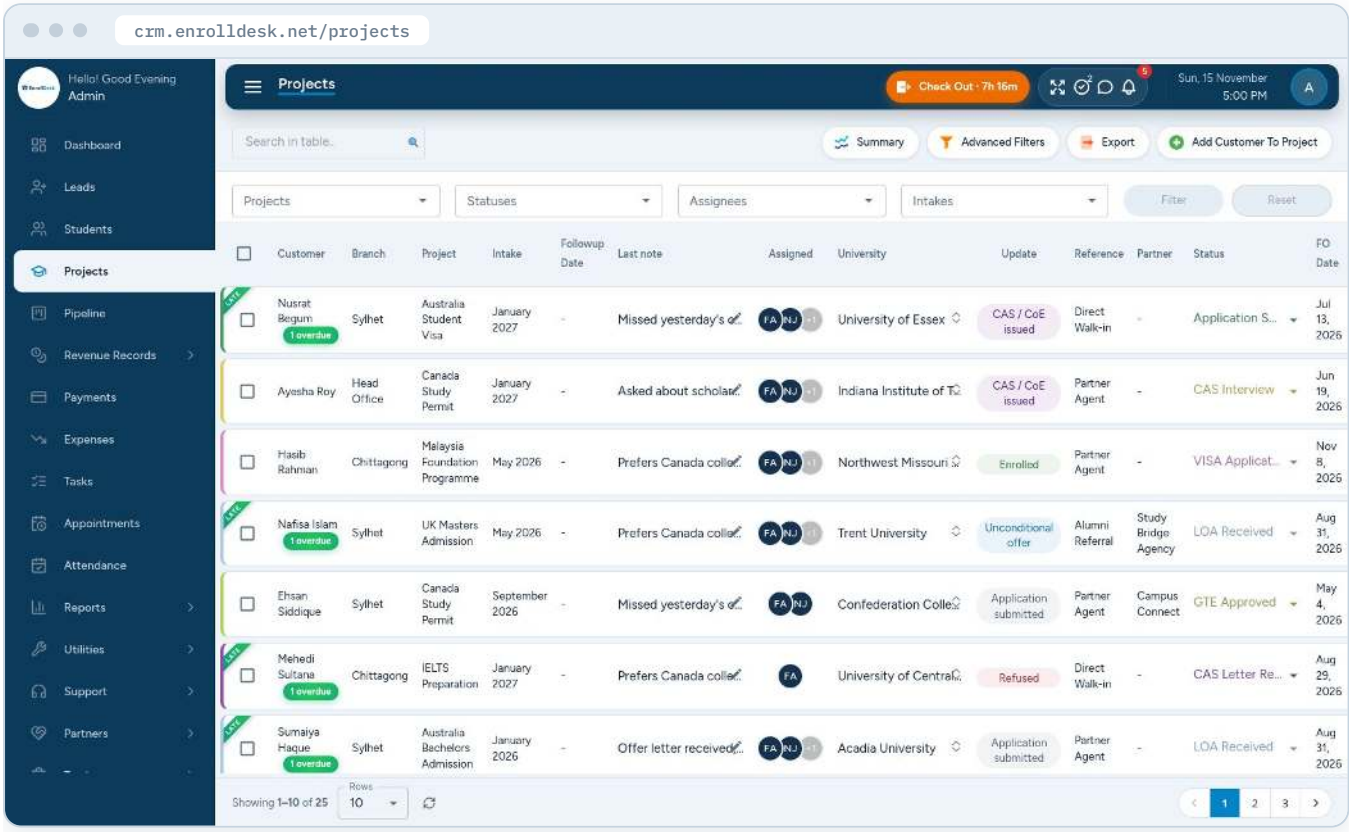
THE HEART OF THE AGENCY

04 Applications and admissions

An application is one student applying through one of your programmes, such as “UK Student Visa” or “Australia Bachelors Admission”. It holds everything about that file: the universities applied to, the admission stage of each, documents, sponsor, visa checklist, fees, tasks and the chat with the student.

WHY IT MATTERS

This is where your service is delivered. One complete file per student means any colleague can pick it up, and the student always knows where they stand.



The application list: branch, programme, intake, last note, university, admission stage, partner and file status.

What you can do

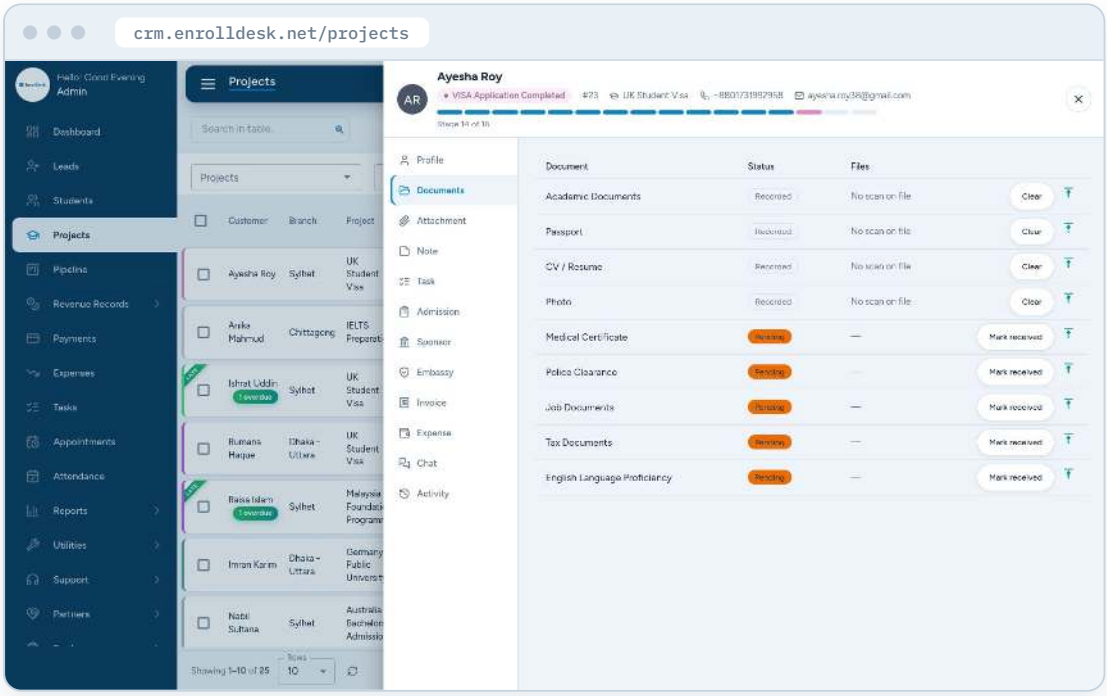
- **Your programmes**
  Set up the programmes you sell, each with its own fees. Duplicate a programme to create a similar one.
- **Admission stages**
  Your own stages, for example Application submitted, Conditional offer, Unconditional offer, CAS / CoE issued, Enrolled. Every change is kept as a timeline.
- **Document checklist**
  The documents each application needs. Students upload them in the portal and staff mark them received.
- **Many universities per file**
  Attach one or several universities and courses to an application, each with its own intake and admission stage.
- **File status**
  Your own file statuses for the visa journey, with branch, intake, reference and partner agent on each file.
- **Offer letters with e-signature**
  Generate a PDF offer letter. The student reads and signs it in their portal.

- **Sponsors and proof of funds**
  Record sponsors with their profession and the fields you need for each profession.
- **Chat with the student**
  A live chat inside each application, with files.
- **Follow-ups and progress**
  Follow-up dates with overdue flags, and a progress bar for each file.
- **Embassy and visa checklist**
  A visa checklist with fields you define.
- **Stuck-file alerts**
  Files that sit too long in one status notify their counsellors automatically.
- **Lists that work**
  See your own files or everyone's, filter, summarise, export, change assignees in bulk, trash and restore.

How to use it

1. Open a lead and press "Create Application", or open Projects and press "Add Customer To Project".
2. Choose the programme, branch and intake, and who is assigned to the file.
3. Open the application and go to the Admission tab. Press "New Admission Details" to add each university and course.
4. On the Documents tab, see what has arrived. Press "Mark received" for documents handed in at the office.
5. Move the admission stage as the university replies. The student is notified and sees it in their portal.
6. Use the Sponsor and Embassy tabs for proof of funds and the visa checklist, and the Chat tab to talk to the student.

> **GOOD TO KNOW**
> The menu calls this screen "Projects". Each row is one student's application file.



The document checklist inside an application, with "Mark received".

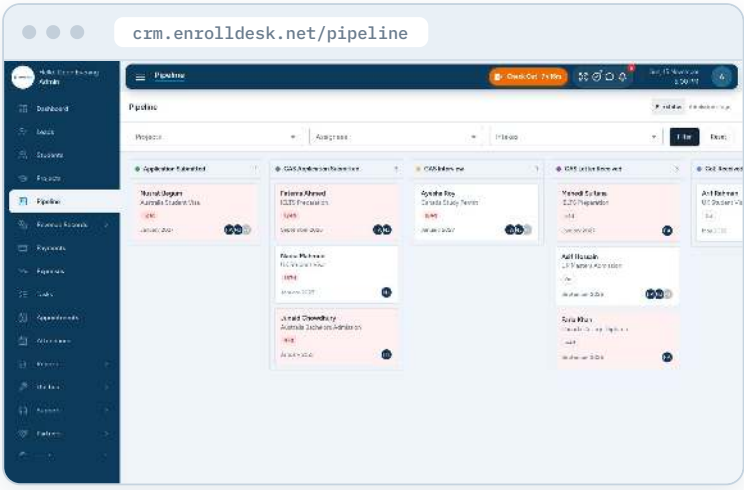
SEE EVERY FILE MOVE

05 Pipeline board

The pipeline board shows every application as a card in a column. Each column is one of your statuses. Drag a card to the next column to move the file forward.

WHY IT MATTERS

A manager sees the whole workload at a glance: how many files are at each stage and which ones have stopped moving.



The pipeline board by file status. Red counters show files that have sat too long.

What you can do

- **Two views**
  Group files by file status, or group university applications by admission stage (one card per university).
- **Days in status**
  Every card shows how many days the file has been in its column.
- **Counts and filters**
  A count on every column, and filters for programme, assignee and intake.
- **Drag to move**
  Drag a card to another column to change its status.
- **Stuck files stand out**
  Files past your limit are highlighted, and their counsellors are alerted every night.

How to use it

1. Open Pipeline from the menu.
2. Choose “File status” or “Admission stage” at the top right.
3. Filter by programme, assignee or intake if you want a smaller board.
4. Drag a card to the next column when the file moves on.
5. Look for the red day counters: those files need attention first.

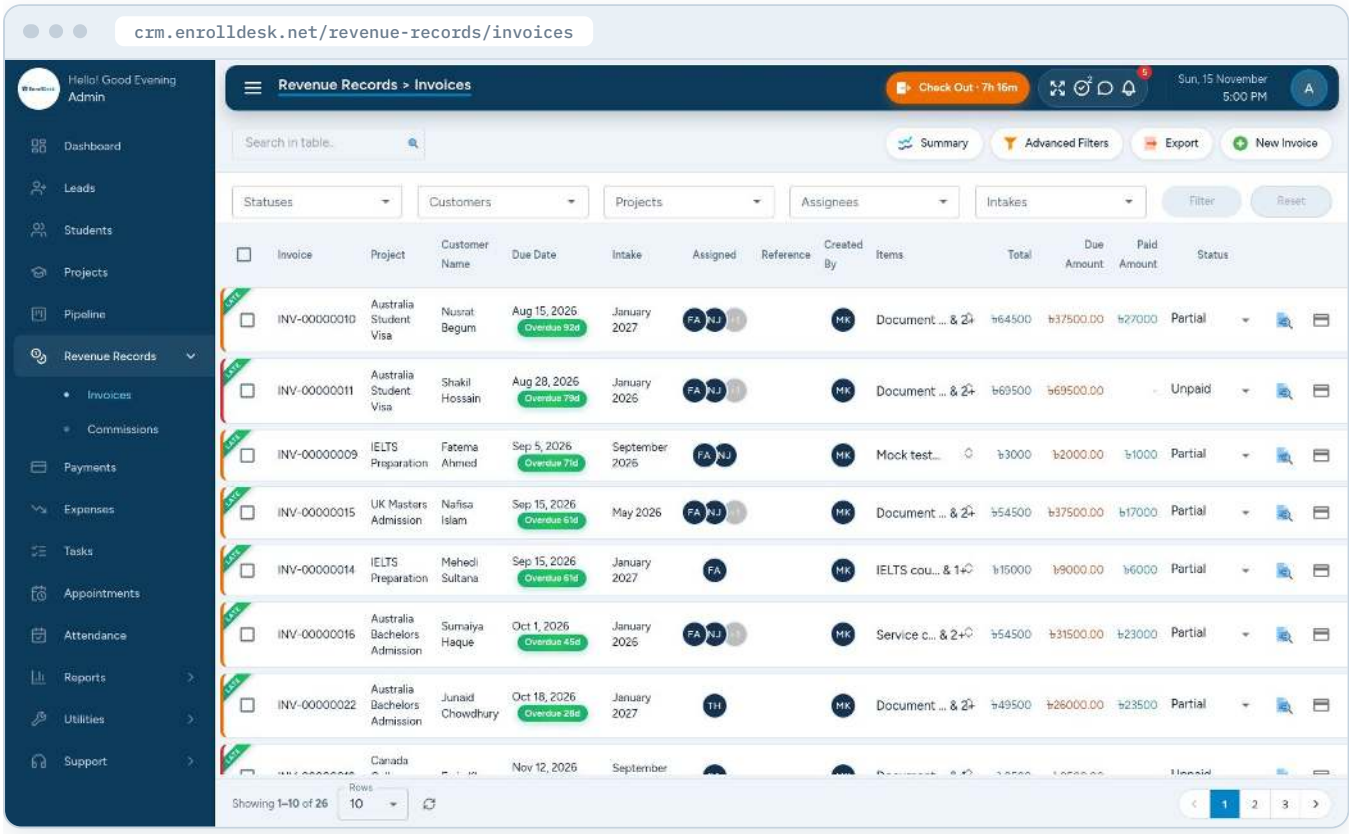
FEES YOU CAN TRUST

06 Invoices and payments

Invoices are raised per student and programme, using the fees you set for that programme. The system computes the totals, tracks every payment and always knows the balance.

WHY IT MATTERS

The balance on an invoice is the one figure a student, a counsellor and the accountant must agree on. Here it is calculated, never typed.



Invoices with overdue badges, total, amount due, amount paid and status.

What you can do

- **Totals computed for you**
  Subtotal, tax and discount on each line, added up by the system.
- **Overdue at a glance**
  Overdue invoices carry a “LATE” ribbon and the number of days overdue.
- **Online payment**
  Students pay from their portal through SSLCommerz (BDT), in full or in part. Each payment is confirmed with the gateway before it is recorded.
- **Status follows the money**
  Unpaid, partial or paid is set by the payments recorded, so it cannot be wrong. You can also put an invoice on hold.
- **Any payment method**
  Cash, bKash, Nagad, bank transfer, card, cheque and any method you add, with a transaction reference and proof upload.
- **PDF invoice and receipt**
  Download, print or email the invoice. A PDF receipt is emailed to the student automatically after every payment.

- **Credit notes, refunds, write-offs**
  Each adjustment is numbered and can be cancelled with a reason. Refunds are tied to the payment they return.
- **Payments list**
  Every payment across all invoices, with filters, summary, export and receipt resend.
- **Multi-currency**
  Each invoice has its own currency. Payments are always in the invoice's currency.
- **Payment history**
  A log of every payment created, edited, deleted or refunded, and who did it.
- **Reminders to students**
  Students are reminded before the due date, on the day and while the invoice is overdue.
- **Lists that work**
  Duplicate an invoice, change the due date, bulk actions, export with a summary sheet, trash and restore.

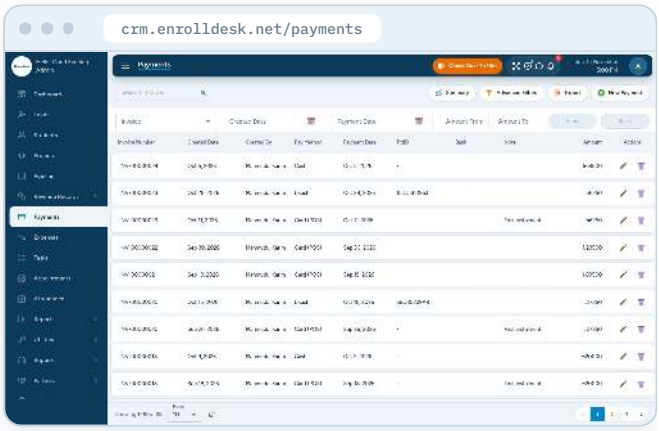
How to use it

1. Open Revenue Records, then Invoices, and press "New Invoice".
2. Choose the student and programme. Add the fee lines; the total is calculated for you. Set the due date and save.
3. Open the invoice and press "Email" to send it to the student, or "PDF" to download it.
4. When the student pays, open the Payments tab of the invoice (or Payments in the menu, then "New Payment"). Enter the amount, method and reference.
5. The status changes to partial or paid by itself, and the receipt is emailed to the student.
6. For a correction, use the Adjustments tab: credit note, refund or write-off.

> **GOOD TO KNOW**
> A payment can never be more than the balance, and can never be dated in the future.



Inside an invoice: lines, payments, balance due, and PDF, Email and Print.



Every payment, with method and transaction reference.

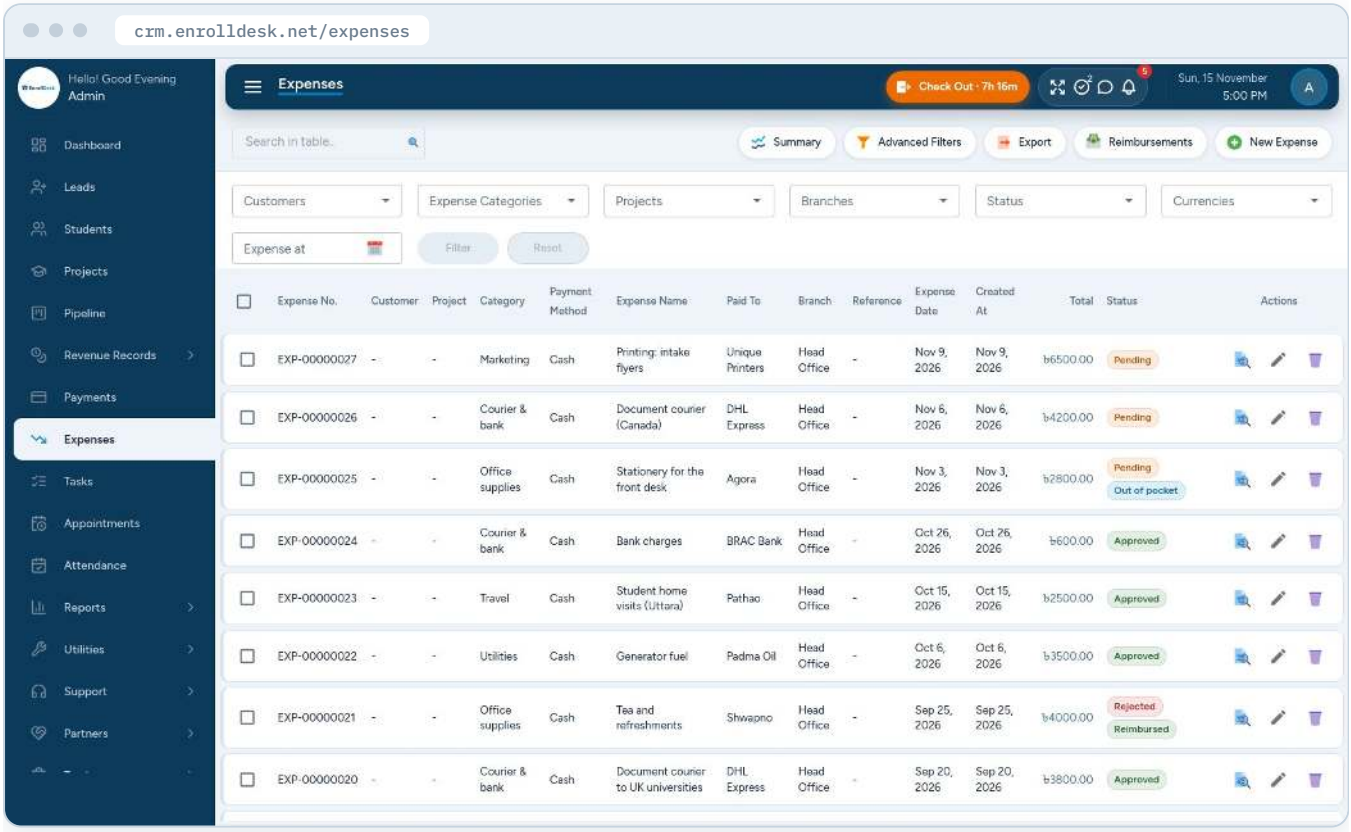
OFFICE SPENDING UNDER CONTROL

07 Expenses

Record what the office spends: rent, marketing, courier, utilities and anything else. Staff expenses wait for approval, out-of-pocket spending is tracked until it is paid back, and budgets show where the money goes.

WHY IT MATTERS

Profit is income minus spending. With expenses in the same system as income, the profit figure in your reports is real.



Expenses with category, payee, branch and approval status.

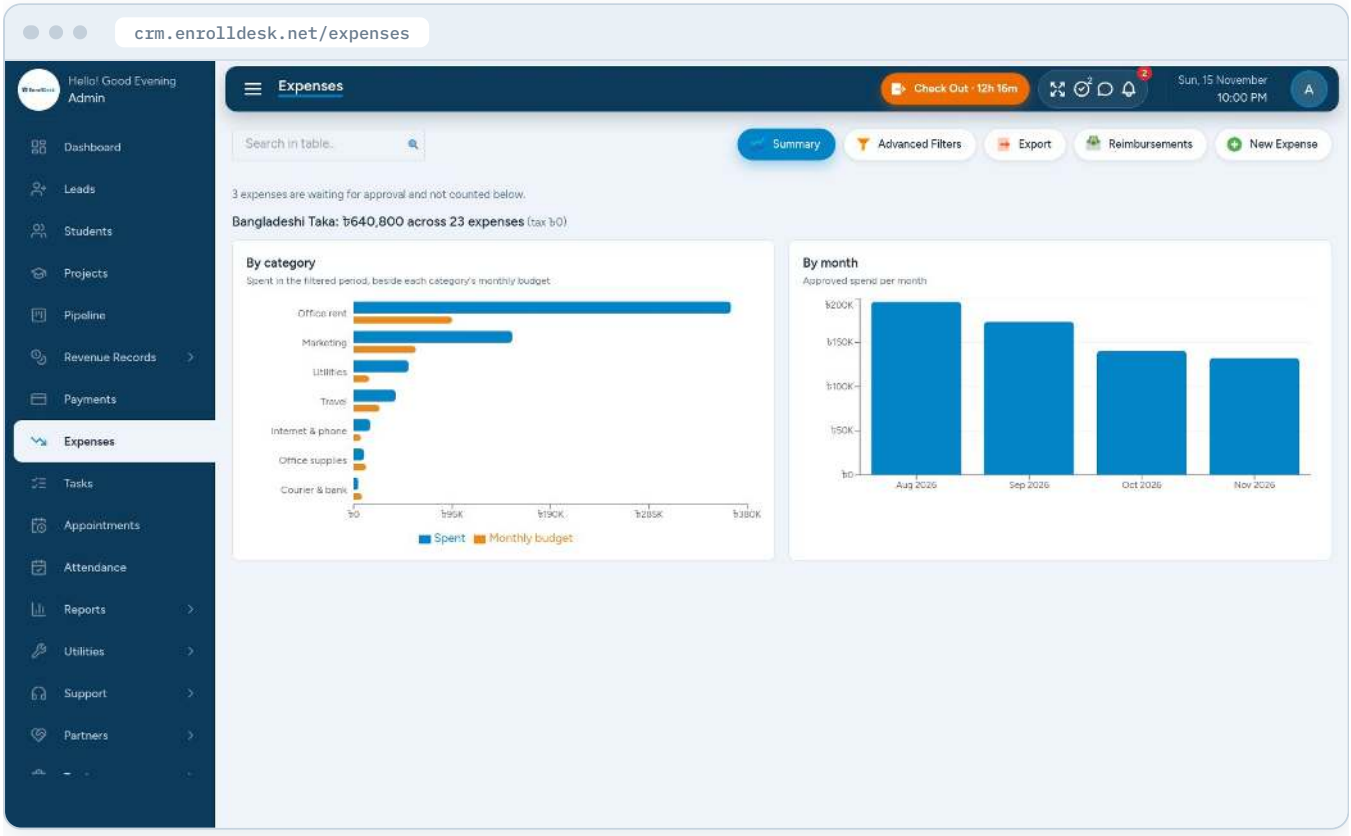
What you can do

- **Expense lines**
  Items with amount, tax and discount, a payee, category, branch and currency, and the receipt attached.
- **Out of pocket**
  Record who paid from their own pocket, then mark it reimbursed with the method and reference. “Reimbursements” lists everything still owed to staff.
- **Monthly budgets**
  Set a monthly budget per category and see spending beside it.
- **Approval**
  Expenses entered by staff wait for an approver. Approve or reject with a reason. Only approved spending counts in totals and reports.
- **Recurring expenses**
  Rent and subscriptions repeat by themselves: weekly, monthly or yearly.
- **Summary charts**
  Spending by category and by month, per currency.

- **Payee suggestions**
  Payees you have used before are suggested as you type.
- **Lists that work**
  Filters, export, bulk actions, trash and restore.
- **Voucher PDF and email**
  Print or email an expense voucher.

How to use it

1. Open Expenses and press “New Expense”.
2. Choose the category, branch and payee, add the lines and attach the receipt. If a staff member paid from their own pocket, record who.
3. Save. A staff member’s expense shows as Pending until an approver approves it.
4. Approvers open the expense and approve or reject it.
5. Press “Reimbursements” to see what is owed to staff and mark it paid.
6. Press “Summary” to see spending by category against the monthly budget.



The expense summary: spending by category beside its monthly budget, and by month.

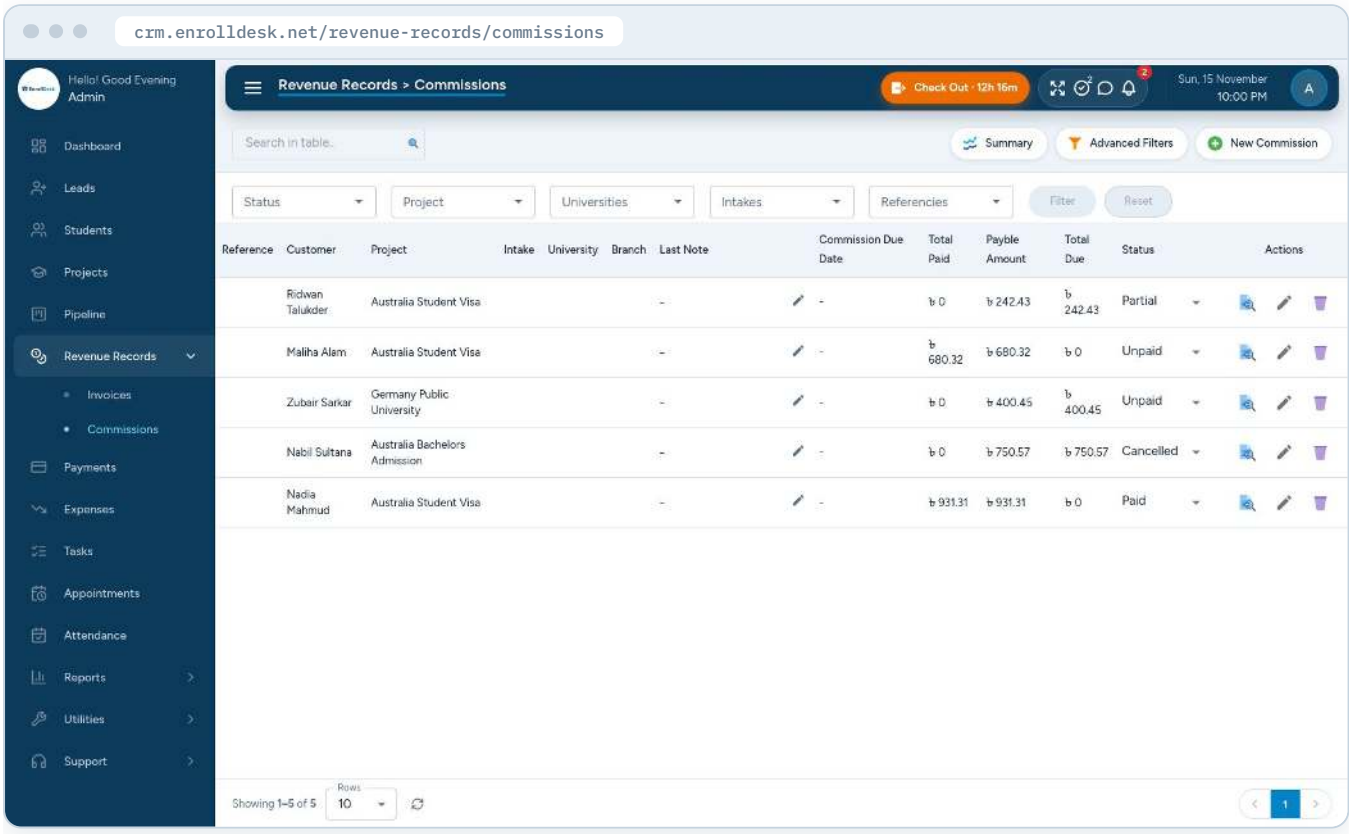
EARN IT, TRACK IT, PAY IT

08 Commissions and partner agents

EnrollDesk tracks money in both directions: the commission universities owe you for enrolled students, and the commission you owe partner agents who referred those students.

WHY IT MATTERS

Commission is often the largest income of an agency and the easiest to lose track of. Recording it per student and per semester means nothing is forgotten, and partners trust statements they can see themselves.



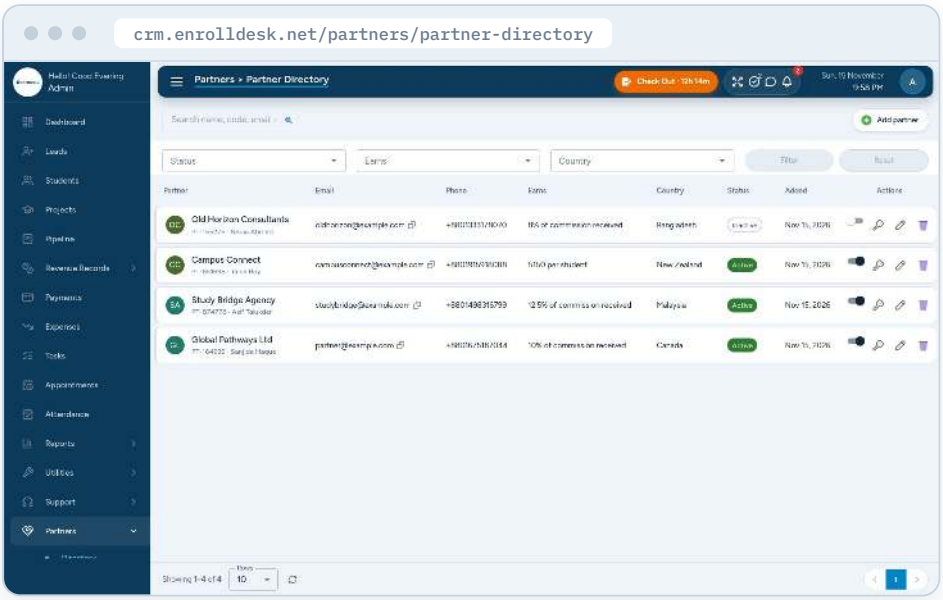
University commissions: total paid, payable amount and total due per student.

What you can do

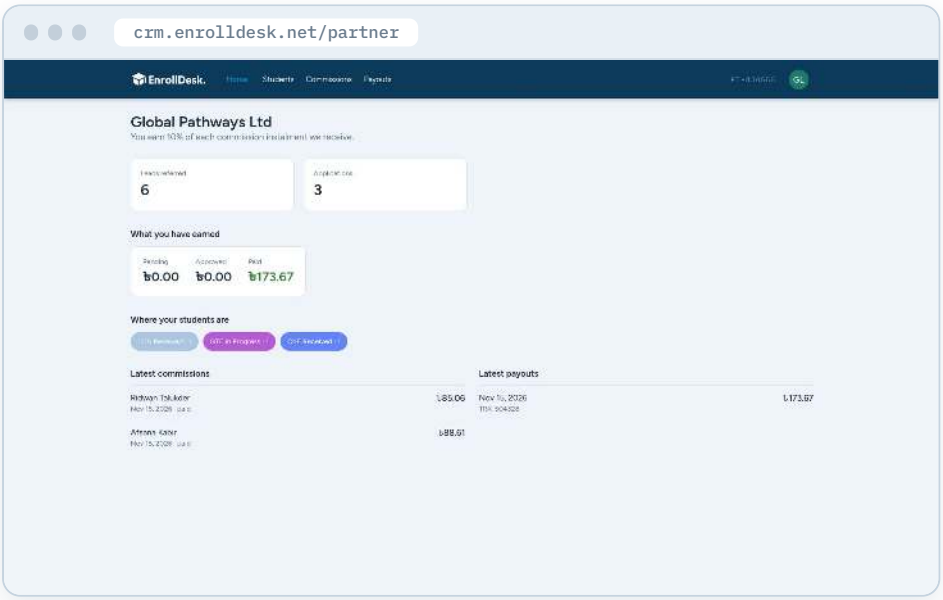
- **University commission**
  A commission record per student and university, by semester, with due dates, follow-ups, payment status and notes.
- **Automatic partner commission**
  When a university pays you, the partner's commission is calculated from their rule. Amounts already paid are never changed; corrections are added as separate lines.
- **Partner portal**
  Partners sign in to see their referred students, commission and payouts. They never see students' private details or documents.
- **Partner directory**
  Each partner's profile, status and commission rule: a share of what you receive, or a flat fee per student.
- **Approve and pay**
  Approve commissions, then group them into a payout for one partner in one currency, with a reference.
- **Reports**
  Commission Receivable and Partner Performance.

How to use it

1. Open Partners, then Directory, and press “Add partner”. Enter their details and commission rule. They receive a portal login.
2. When adding a lead, choose the partner under “Referred by partner”. The partner stays on the student’s file.
3. Record university commission under Revenue Records, then Commissions, with “New Commission”.
4. When the university pays an instalment, mark it paid. The partner’s commission is created automatically.
5. Open Partners, then Commissions, to approve what is owed, and Payouts to record a payment to the partner.



The partner directory with each partner’s commission rule.



The partner’s own portal: referrals, commission and payouts.

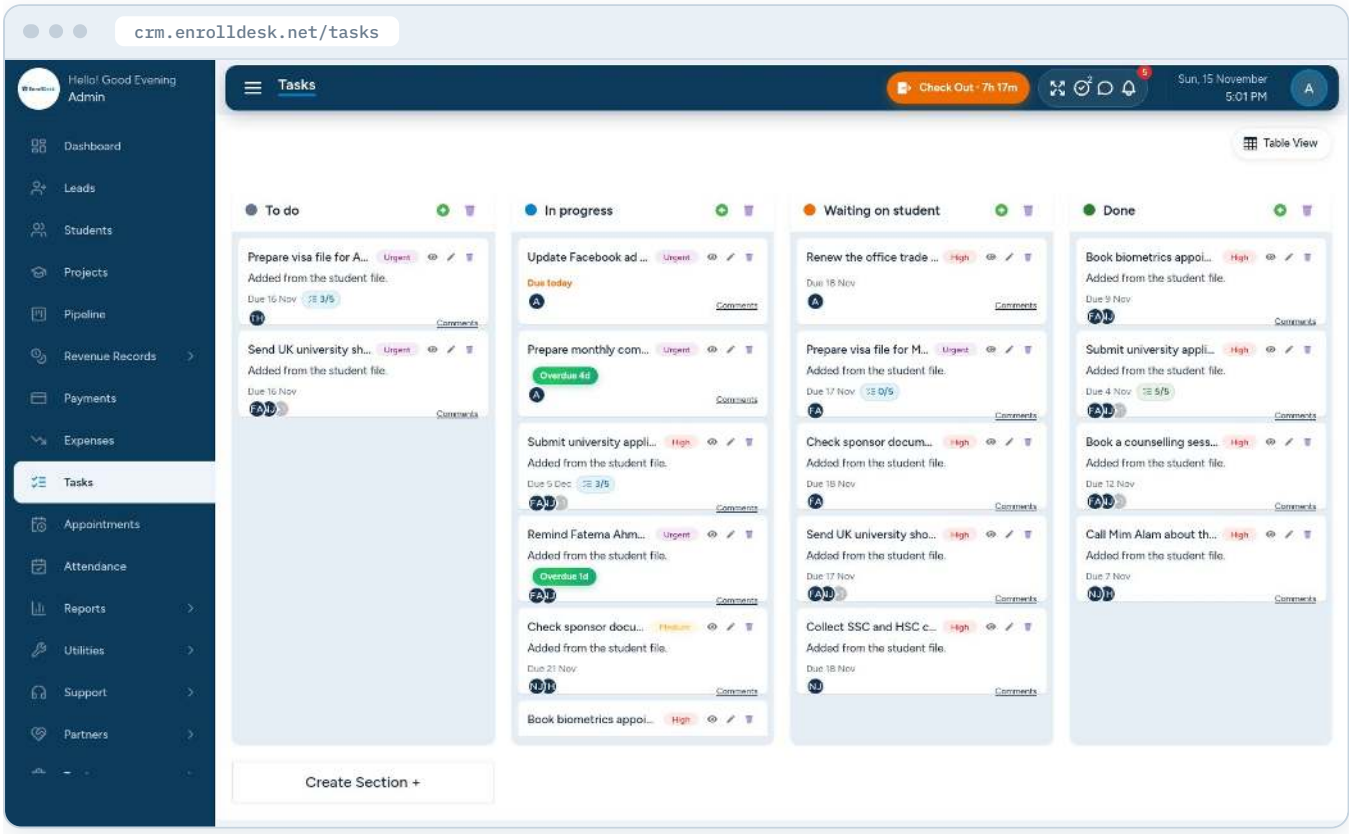
NOTHING FALLS THROUGH

09 Tasks

Tasks are the to-do list of the whole agency. A task can stand alone or belong to a lead, student, application or invoice, and it shows up for the people assigned to it.

WHY IT MATTERS

Admissions work is a chain of small deadlines. A missed one can cost a student their intake. Tasks make each deadline visible to the person responsible and to their manager.



The task board with priorities, checklists, due dates and overdue badges.

What you can do

- **Board or table**
  A Kanban board with your own columns, or a table with filters.
- **Automatic priority**
  Priority rises by itself as the due date gets close. It is never lowered automatically.
- **Repeating tasks**
  Daily, weekly or monthly tasks that create themselves.
- **Assignees and followers**
  Several people can be assigned, and others can follow.
- **Priorities**
  Low, medium, high and urgent.
- **Checklists**
  Steps inside a task, with progress such as 3/5.
- **Task templates**
  Apply a ready set of tasks to a lead or application in one click, for example “Visa file”.
- **Comments and files**
  Live comments and attachments on every task.

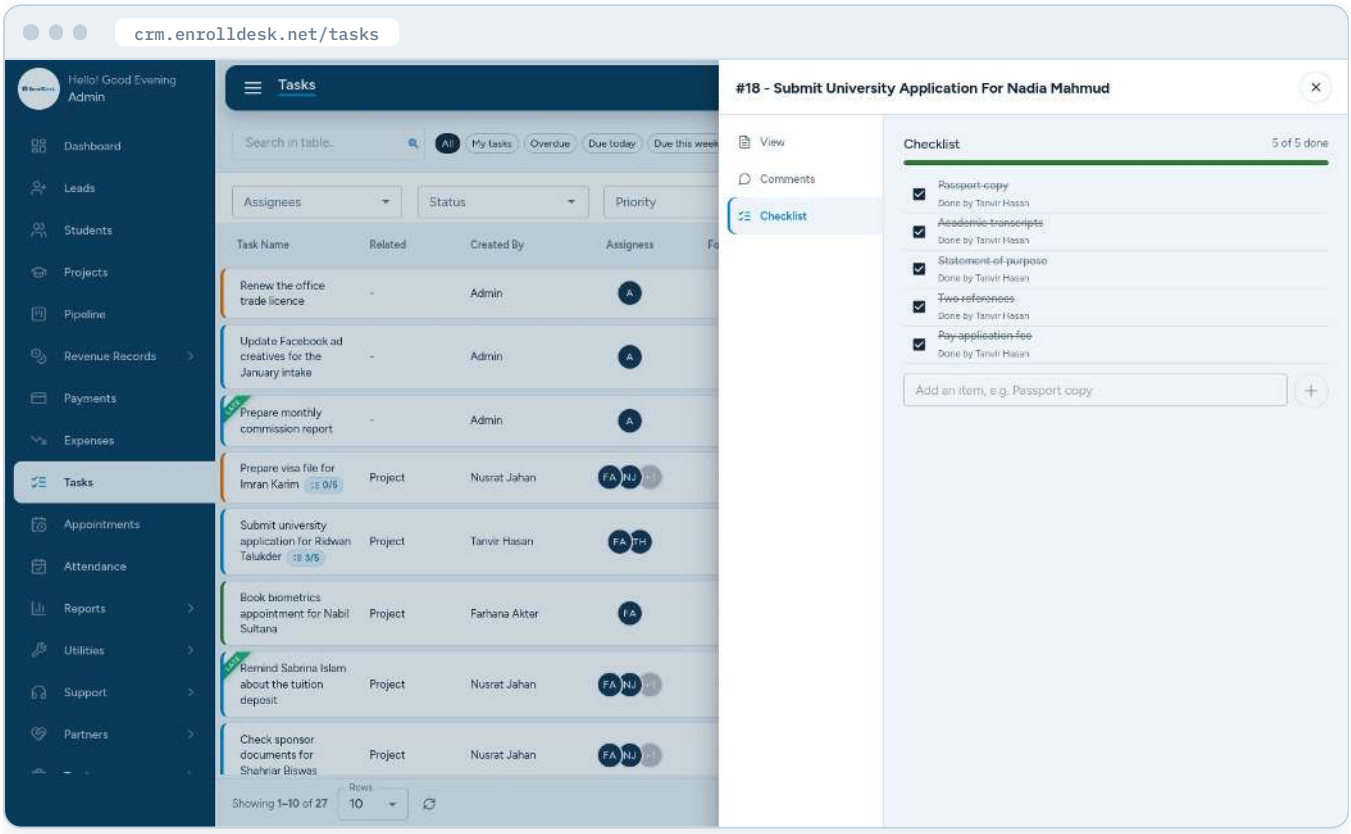
- **Quick filters**
  My tasks, overdue, due today, due this week.
- **Personal to-do list**
  A private to-do list in the top bar for each person.

How to use it

1. Open Tasks. Press “Kanban View” for the board or “Table View” for the list.
2. Add a task with the green plus on a column. Set the priority, due date and assignees.
3. Add a checklist for multi-step work and tick the steps as you go.
4. Drag the card to the next column as work moves on.
5. Use the quick filters to see only your tasks, or only what is overdue.

GOOD TO KNOW

To create tasks on a student’s file, use the Task tab inside the lead, student or application.



A checklist inside a task. Each step shows who completed it.

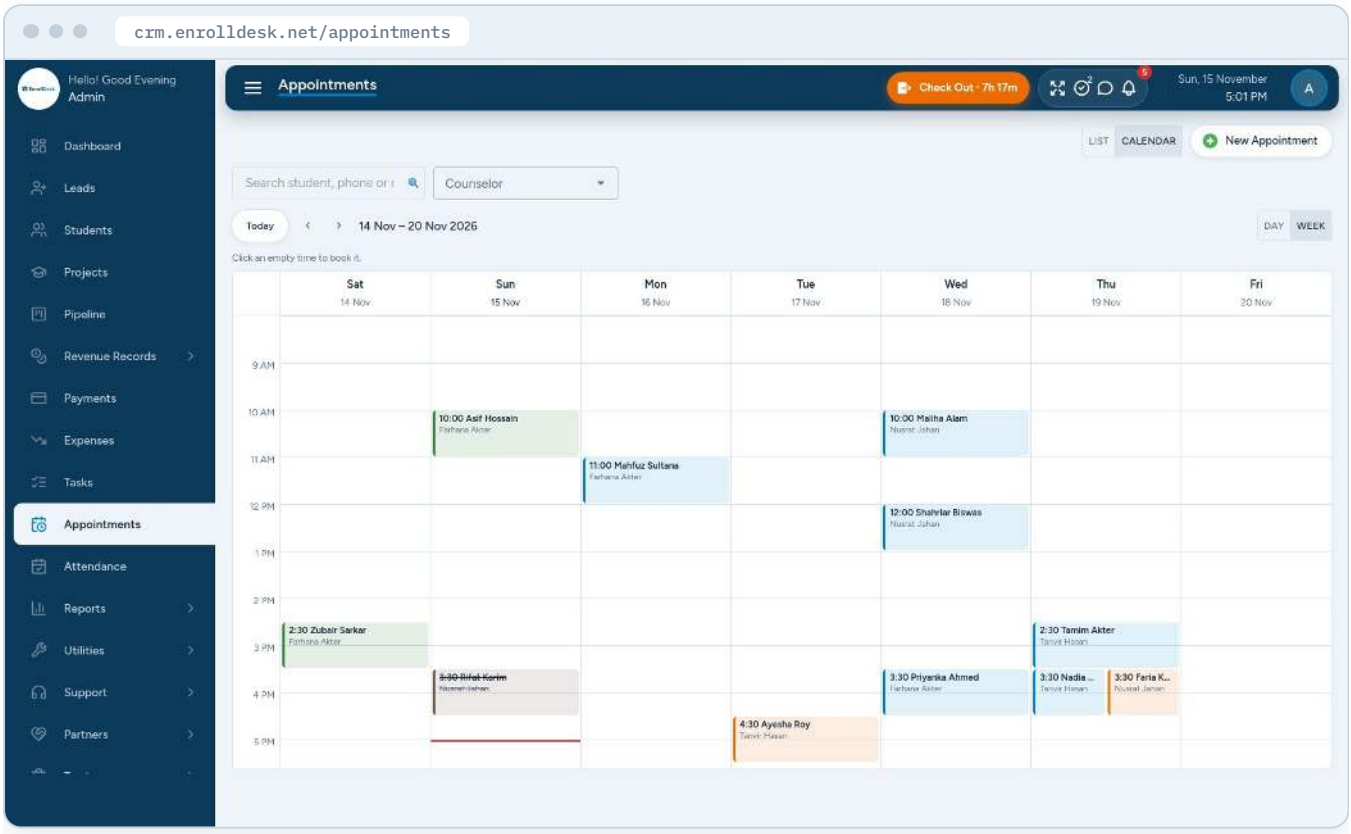
COUNSELLING SESSIONS, BOOKED PROPERLY

10 Appointments

Counsellors set their weekly hours, and appointments are booked into the free slots: by staff, or by students from their portal. A meeting can be in the office, by phone or online.

WHY IT MATTERS

Counselling time is what an agency sells first. A shared calendar avoids double booking, and reminders reduce no-shows.



The week calendar. Click an empty time to book it.

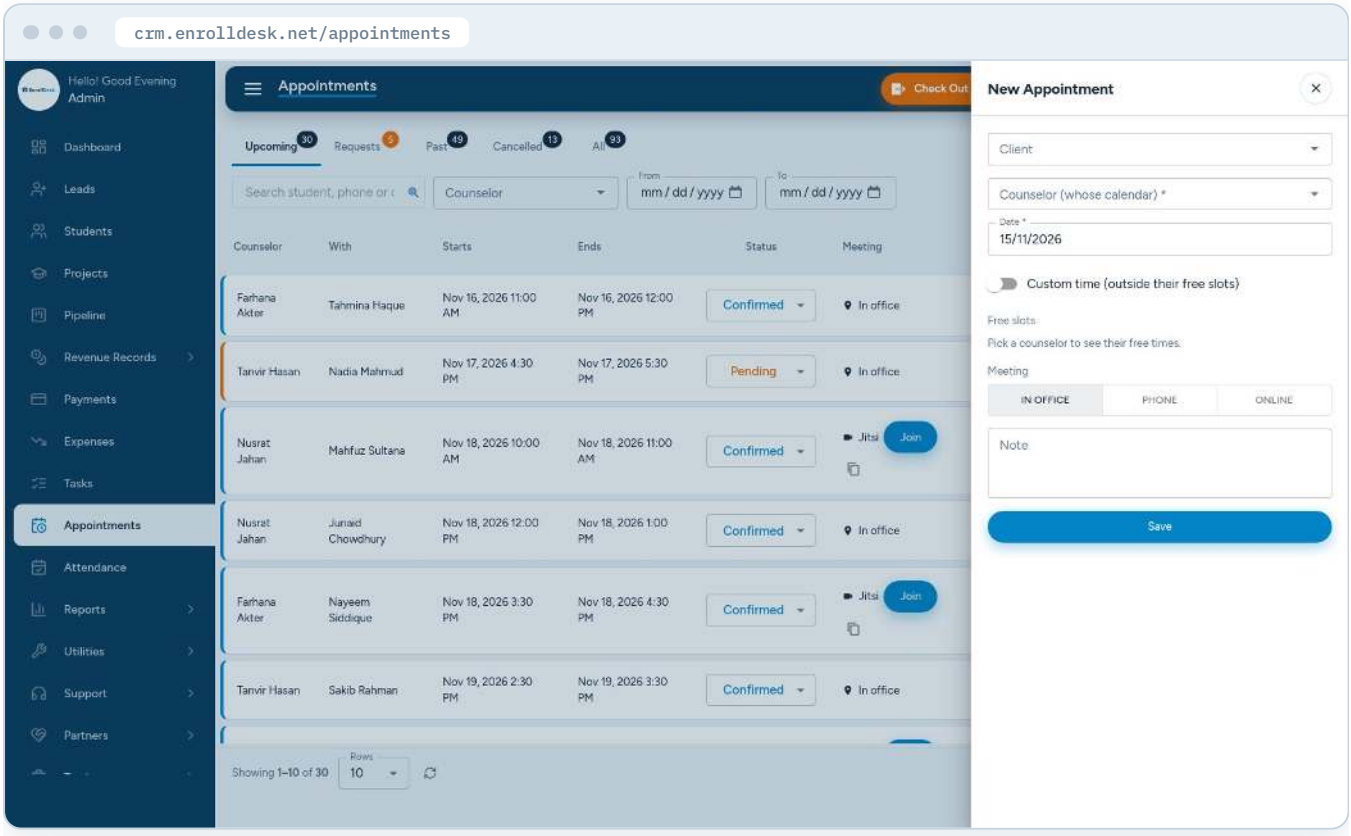
What you can do

- **Calendar and list**
  A day or week calendar, or a list with tabs: Upcoming, Requests, Past, Cancelled and All.
- **In office, phone or online**
  For online meetings a Google Meet link is created automatically on your Google account, with Jitsi as a fallback, or paste your own link.
- **Outcome and no-show**
  Complete an appointment with an outcome note, or mark a no-show.
- **Free slots**
  Slots come from each counsellor's weekly availability. Holidays, leave and booked times are skipped. Two people cannot be booked into the same slot.
- **Students book themselves**
  Students book, reschedule and cancel from their portal; staff confirm requests.
- **Reminders**
  Counsellors see the day's appointments in their morning summary. Students are reminded the day before by notification and email, with the Join link.

- **My availability**
  Each counsellor sets and pauses their own weekly hours.
- **Report**
  Appointments by counsellor: outcomes, no-show rate and meeting type.

How to use it

1. Each counsellor sets their weekly hours once, under Setup, then Other, then My Availability.
2. Open Appointments and press “New Appointment”.
3. Choose the client, the counsellor and the date. Pick one of the free slots shown, or switch on “Custom time”.
4. Choose In office, Phone or Online, add a note and save. The student is notified.
5. On the day, press “Join” for an online meeting. Afterwards, mark it completed with an outcome note, or as a no-show.
6. Switch to “Calendar” to see the week for all counsellors, and click an empty time to book it.



Booking an appointment: client, counsellor, date, free slots and meeting type.

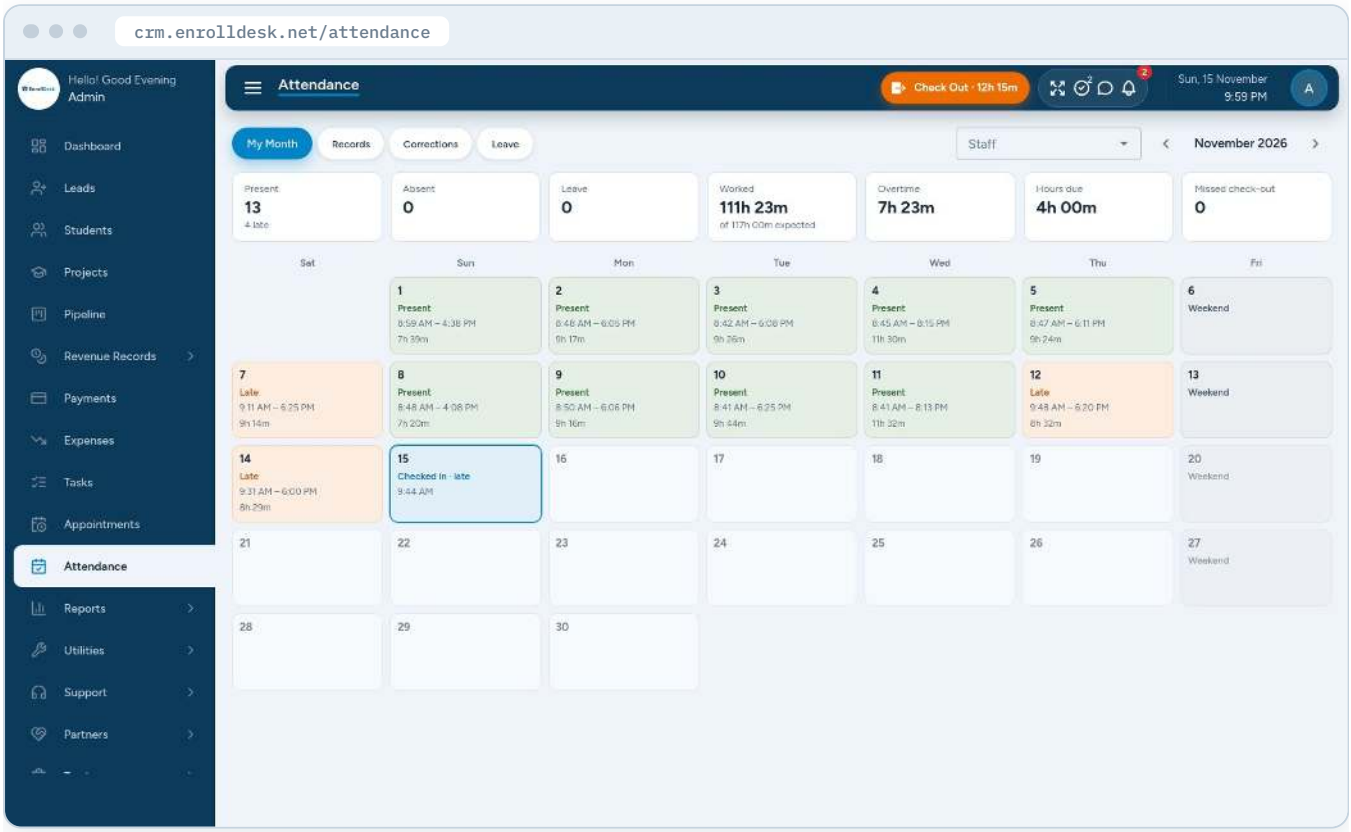
THE TEAM, ACCOUNTED FOR

11 Attendance and leave

Staff check in and out from the top bar. The system works out lateness, overtime and hours due from each person's shift, and manages leave requests and balances.

WHY IT MATTERS

Attendance and leave touch payroll and fairness. One record that staff can see themselves ends the arguments, and approved leave automatically keeps people out of the appointment calendar and the lead rotation.



My Month: days present and late, hours worked, overtime and hours due.

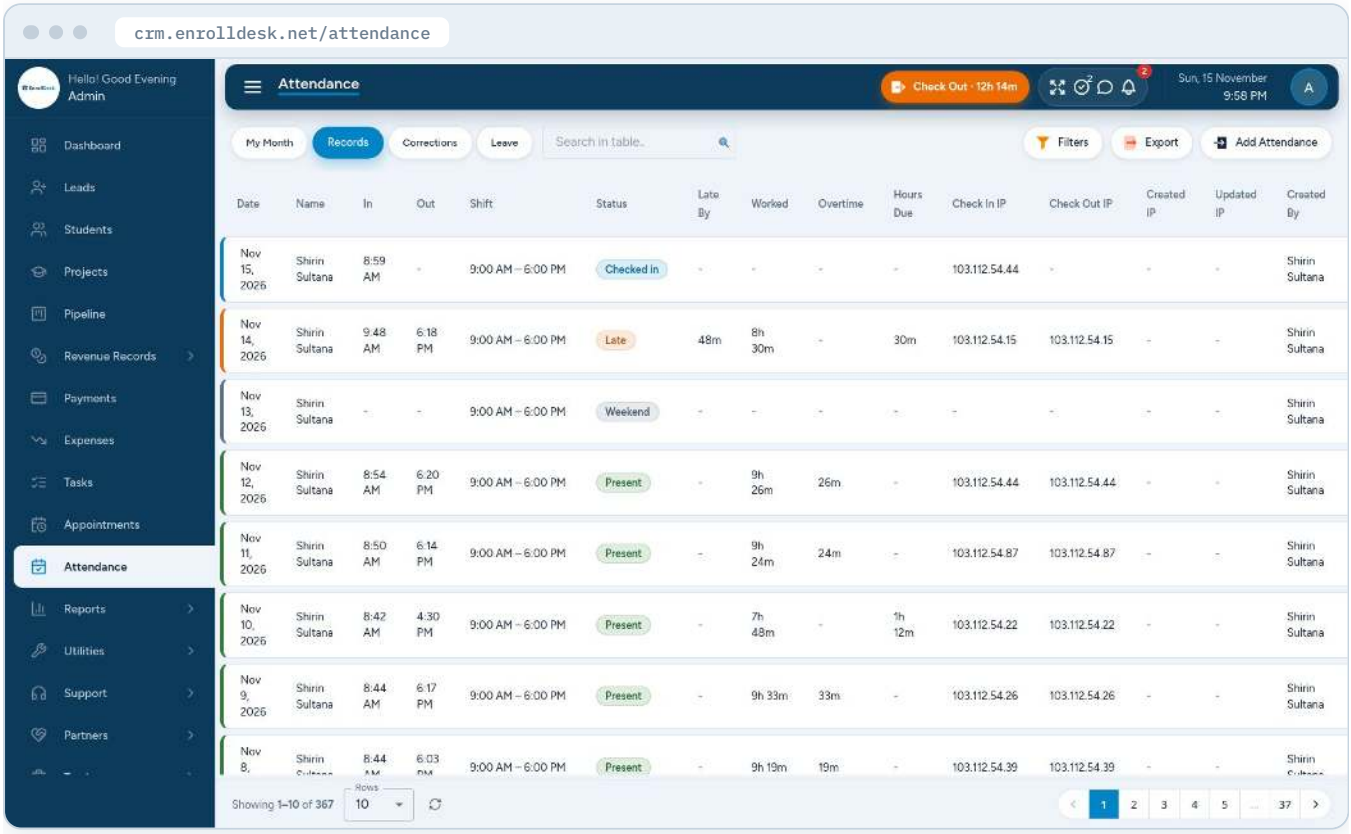
What you can do

- **Check in and check out**
  One button in the top bar, with the time and network address recorded.
- **Shifts and late grace**
  Shifts with their own times, and a company-wide grace period before a check-in counts as late.
- **Missed check-out corrections**
  Staff request a correction; a manager approves it.
- **Leave types and balances**
  Paid and unpaid leave types with yearly days, per-person allowances and live balances.
- **My Month**
  A calendar of each person's month: present, late, leave, hours worked, overtime and hours due.
- **Weekends and holidays**
  Weekends per person, and holidays that can repeat every year.
- **Edit history**
  Every manual change to an attendance record is kept.
- **Leave requests**
  Full or half days, with the working days counted for you. Managers approve or reject.

- **Team view and export**
  Who is in today, team records, timesheets and Excel export.
- **Report**
  Attendance rate per person for any period.

How to use it

1. Press “Check In” in the top bar when you start, and “Check Out” when you leave.
2. Open Attendance to see “My Month”: your days, hours and overtime.
3. Forgot to check out? Open Corrections and send a request to your manager.
4. To take leave, open the Leave tab, choose the type and dates, and send the request.
5. Managers approve corrections and leave from the same tabs, and see the whole team under Records.



Team records: check-in and check-out times, lateness, hours worked and overtime.

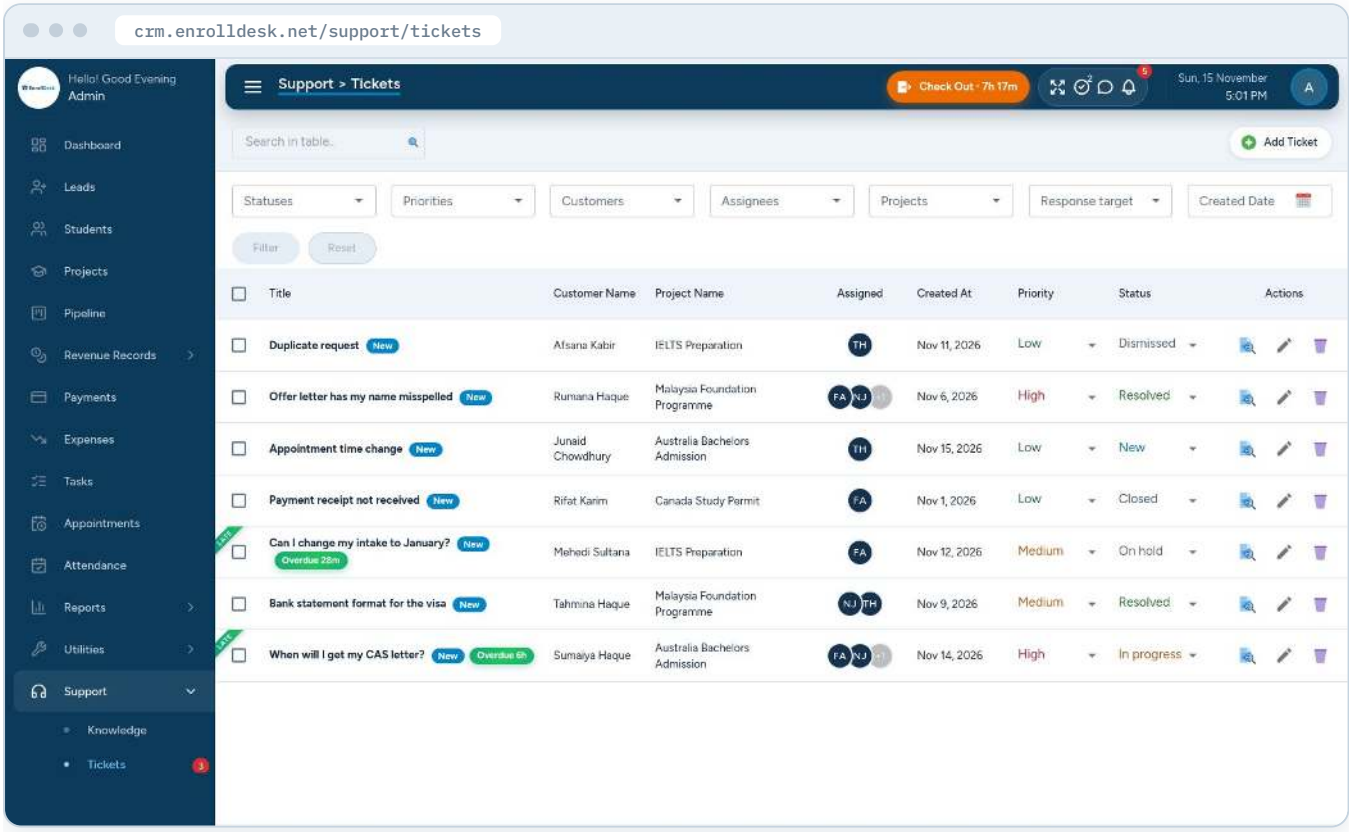
TICKETS, HELP ARTICLES, CHAT AND EMAIL

12 Student support

Students raise questions as tickets from their portal. Staff answer with a response target on every ticket. Help articles answer the common questions before they are asked, and chat keeps day-to-day conversation on the student's file.

WHY IT MATTERS

Fast, recorded answers build trust. Students are spending their family's savings, and they judge the agency by how quickly it replies.



Tickets with overdue badges, priority and status.

What you can do

- **Tickets**
  Students open tickets on their applications. Staff reply with formatted text and files.
- **Status and priority**
  New, in progress, on hold, resolved, dismissed and closed; low, medium and high priority.
- **Canned replies**
  Saved answers for common questions, inserted in one click.
- **Response targets**
  Set a first-response and resolution target for each priority. Overdue tickets are flagged and can be filtered.
- **Internal notes**
  Notes between staff that the student never sees.
- **Ratings**
  Students rate the answer from 1 to 5 when a ticket is resolved. Resolved tickets close by themselves after 7 days.

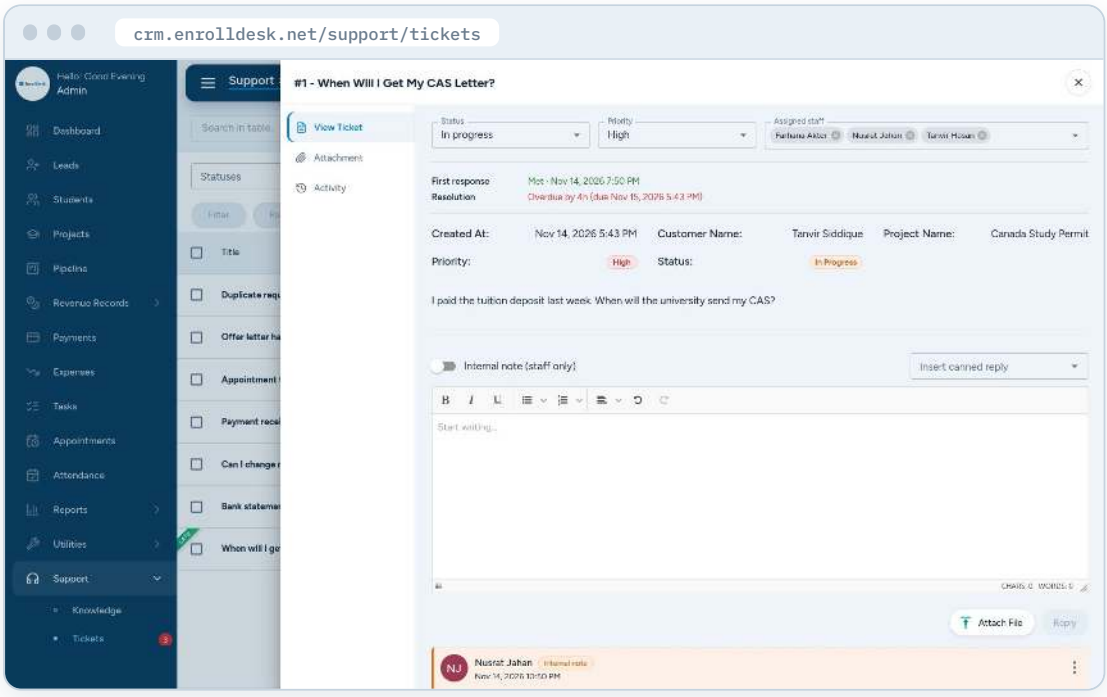
- **Knowledge base**
  Help articles in categories with attachments. Students search, sort and vote whether an article helped.
- **Email**
  Send email from a lead, student, application or expense using templates with placeholders. Every email is logged on the record.
- **Chat**
  Live chat between staff and student inside each application, with files and unread counts.
- **Report**
  Tickets: response times, targets met and ratings.

How to use it

1. Open Support, then Tickets, to see every ticket with its priority and status.
2. Open a ticket and reply. Use a canned reply for common answers, or add an internal note for colleagues.
3. Change the status as you work. The student is notified of each change.
4. Watch the “Overdue” badges: those tickets have passed their response target.
5. Write help articles under Support, then Knowledge, with “New Knowledge”, so students can find answers themselves.

GOOD TO KNOW

Set the response targets under Setup, then Settings, then Tickets.



Inside a ticket: response targets, the student’s question, canned replies and the internal-note switch.

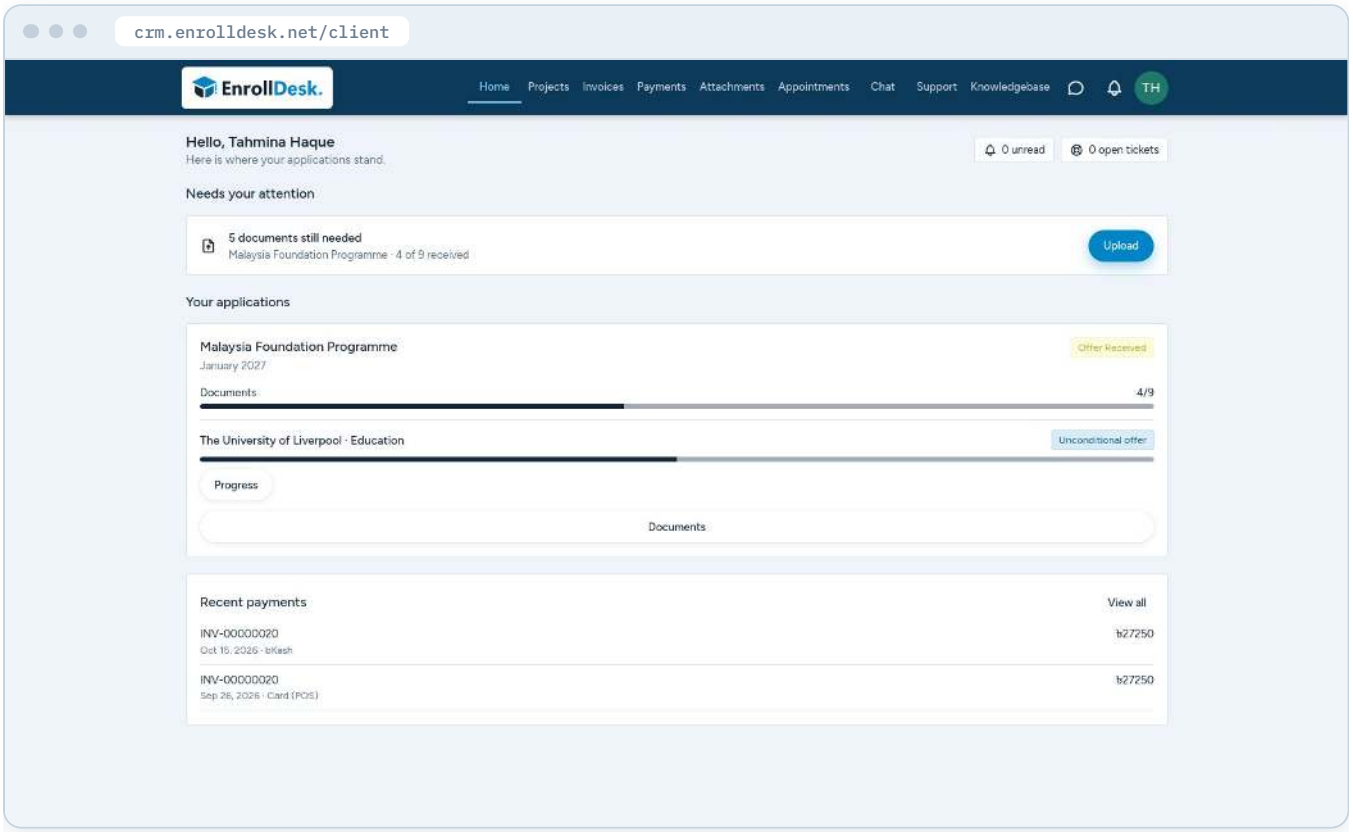
YOUR STUDENTS' OWN SPACE

13 Student portal

Every student signs in at crm.enrolldesk.net/client. The portal shows what needs their attention first, then where each application stands. It works on a phone as well as a computer.

WHY IT MATTERS

A student who can see their own progress calls less and trusts more. Documents and payments arrive sooner because the portal asks for them directly.



The student's home page: documents needed, application stage and recent payments.

What you can do

- **What to do next**
  The home page lists what needs attention: documents to upload, an offer letter to sign, an invoice to pay, an appointment coming up.
- **Document upload**
  The checklist of required documents, with upload.
- **Invoices and payments**
  View and download invoices and receipts, and pay online in full or in part.
- **Chat and tickets**
  Message the counsellor, raise a ticket, rate the answer.
- **Application progress**
  Each application with its stage, a progress bar and the admission timeline.
- **Offer letters**
  View the offer letter and sign it online.
- **Appointments**
  Book a free slot, choose in office, phone or online, join, reschedule or cancel.
- **Help articles**
  Search the knowledge base and vote on articles.

- **Visa and sponsor checklists**
  See what is still needed for the visa file.
- **Profile and password**
  Edit the profile and photo, change the password, or reset a forgotten one with a one-time code.
- **Notifications**
  A bell with links straight to the item.

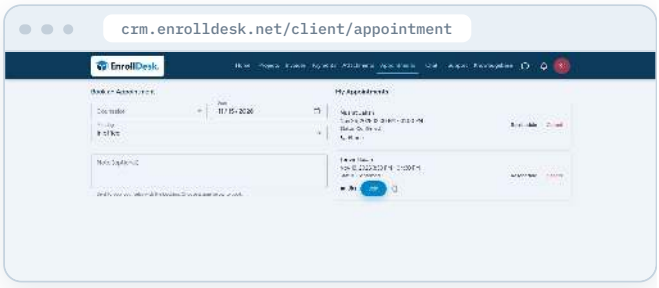
How to use it

1. The student signs in at crm.enrolldesk.net/client with the login created for them.
2. Under “Needs your attention” they press “Upload” to send missing documents.
3. Under “Your applications” they see the stage of each university application and press “Progress” for the timeline.
4. They open Invoices to pay online, and Appointments to book a session.
5. They use Chat for quick questions and Support for tickets.

> **GOOD TO KNOW**
> You control what each student can see. Open the student and use the portal permissions.



The student’s invoices, with “Pay Now” for online payment.



Booking an appointment, and joining, rescheduling or cancelling one.

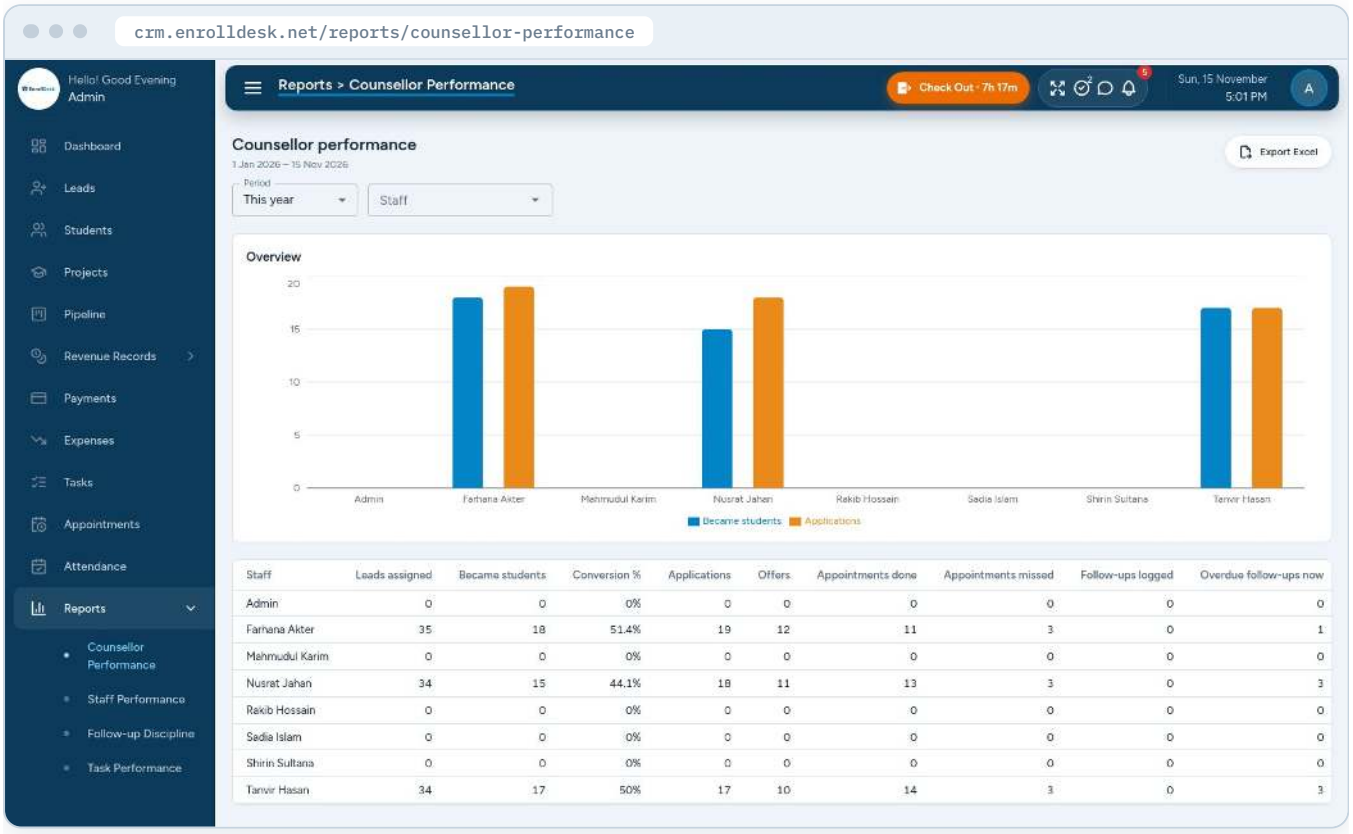
ANSWERS, NOT SPREADSHEETS

14 Reports

Sixteen reports cover sales, the team, money and partners. Each one has filters, a chart, a summary and an Excel export that is ready to send: styled, with real dates and numbers and a summary sheet.

WHY IT MATTERS

A report that takes a day to assemble is read once a month. A report that is always ready gets read every week, and problems are caught while they are small.



Counsellor Performance: conversion, applications, offers and appointments per person.

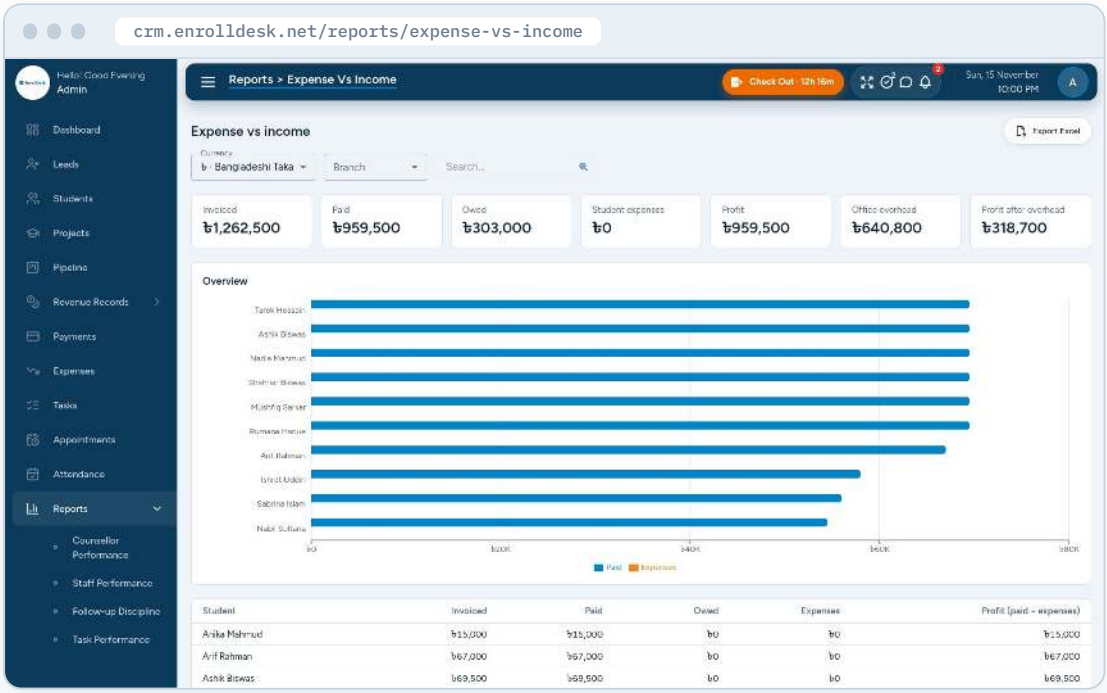
What you can do

- **Counsellor Performance**
  Leads, conversions, applications, offers, appointments and overdue follow-ups per counsellor.
- **Follow-up Discipline**
  Who is keeping up with follow-ups and who is not.
- **Tickets**
  Response times, targets met and student ratings.
- **Attendance**
  Attendance rate, lateness and hours per person.
- **Staff Performance (weekly)**
  Leads converted per person each week, and the follow-up star.
- **Task Performance**
  Tasks finished on time and overdue, per person.
- **Appointments**
  Completed, no-shows, cancelled and meeting types per counsellor.
- **Lead Source Value**
  Which sources bring leads that become students and income.

- **University Performance**
  Applications and results per university.
- **Partner Performance**
  Referrals and results per partner agent.
- **Unpaid Invoices**
  What is owed, by age.
- **Expense vs Income**
  Invoiced, paid, owed, office overhead and profit after overhead, per student and branch.
- **University Targets**
  Targets per university against actual numbers.
- **Collections**
  Money received by date, method and bank.
- **Commission Receivable**
  Commission universities still owe you.
- **Budget vs Actual**
  Spending against each category's budget.

How to use it

1. Open Reports in the menu and choose a report.
2. Set the period and any filters, such as staff, currency or branch.
3. Read the summary cards and the chart, then the table below.
4. Press "Export Excel" to download the same figures as a finished workbook.
5. For a weekly email of the main numbers, add the recipients under Setup, then Settings, then App ("Weekly Digest Emails"). It is sent every Monday.



Expense vs Income: invoiced, paid, owed, office overhead and profit after overhead.

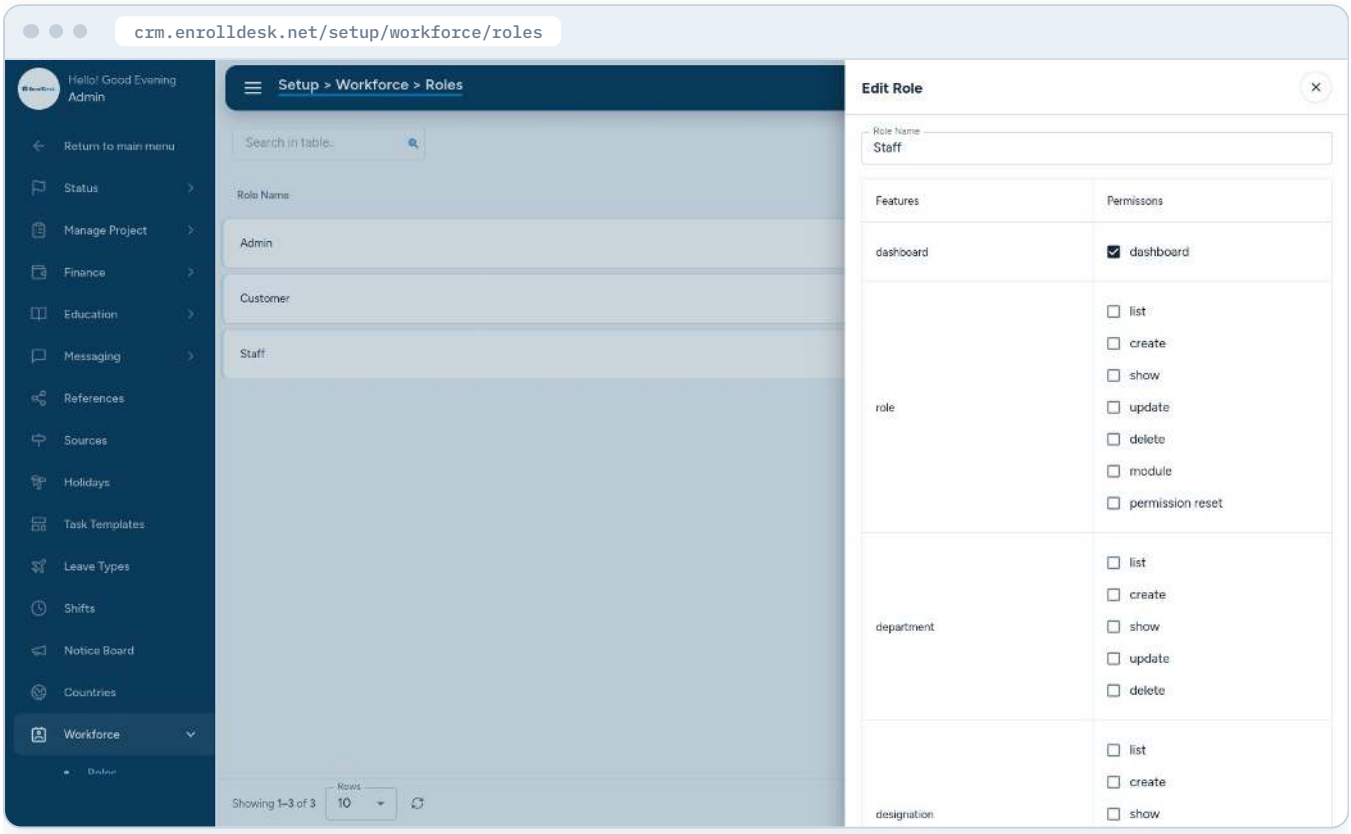
THE RIGHT ACCESS FOR EACH PERSON

15 Roles, permissions and security

Every screen and every button is a separate permission. You build roles from those permissions, and each staff member gets exactly the access their job needs.

WHY IT MATTERS

Your data is your business: student details, money, commission rates. Staff should see what they need and nothing more, and every change should be traceable.



Editing a role: one tick box for every action on every module.

What you can do

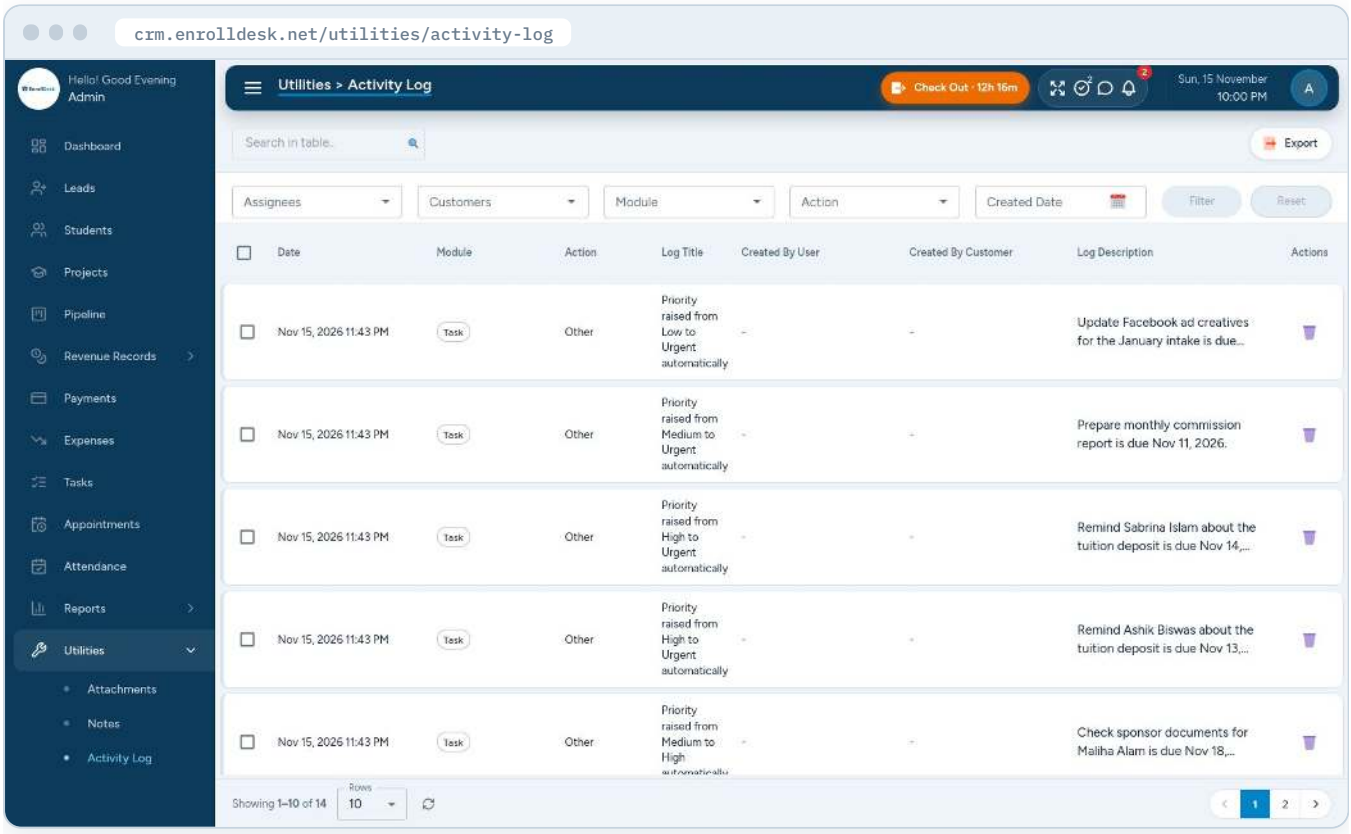
- **Permission per action**
  List, create, edit, delete, export and bulk actions are separate permissions on every module.
- **Roles**
  Create as many roles as you need. A role is a template applied to each staff member, and can be reset per person.
- **Sign-in protection**
  Limited sign-in attempts, password reset by one-time code, and a list of active sessions with “sign out other devices”.
- **Own or all records**
  A counsellor can see only the leads, students and files assigned to them, while a manager sees everyone’s.
- **Activity log**
  Who did what, when, and from which network address, on every module. Each record also has its own activity tab.
- **Trash and restore**
  Deleted leads, students, applications, invoices, expenses and tickets go to a trash and can be restored.

- **Daily backups**
  The database is backed up every night, copied to your Google Drive, and the newest 14 backups are kept. Admins are alerted if a backup fails.
- **Separate portals**
  Students and partners have their own logins and only ever see their own data.
- **Your own Google Drive**
  Optionally store documents, payment proofs and chat files in the agency's own Google Drive.

How to use it

1. Open Setup, then Workforce, then Roles, and press "New Role".
2. Name the role and tick the permissions it should have, module by module.
3. Add each staff member under Setup, then Workforce, then Staff, and choose their role, department, designation and shift.
4. To review what happened, open Utilities, then Activity Log, and filter by person, module or date.
5. To take a backup now, open Utilities, then Backup, and press "Back up now".

> **GOOD TO KNOW**
> Start with two roles, Manager and Counsellor, and add more only when you need them.



The activity log: every change, by module and action.

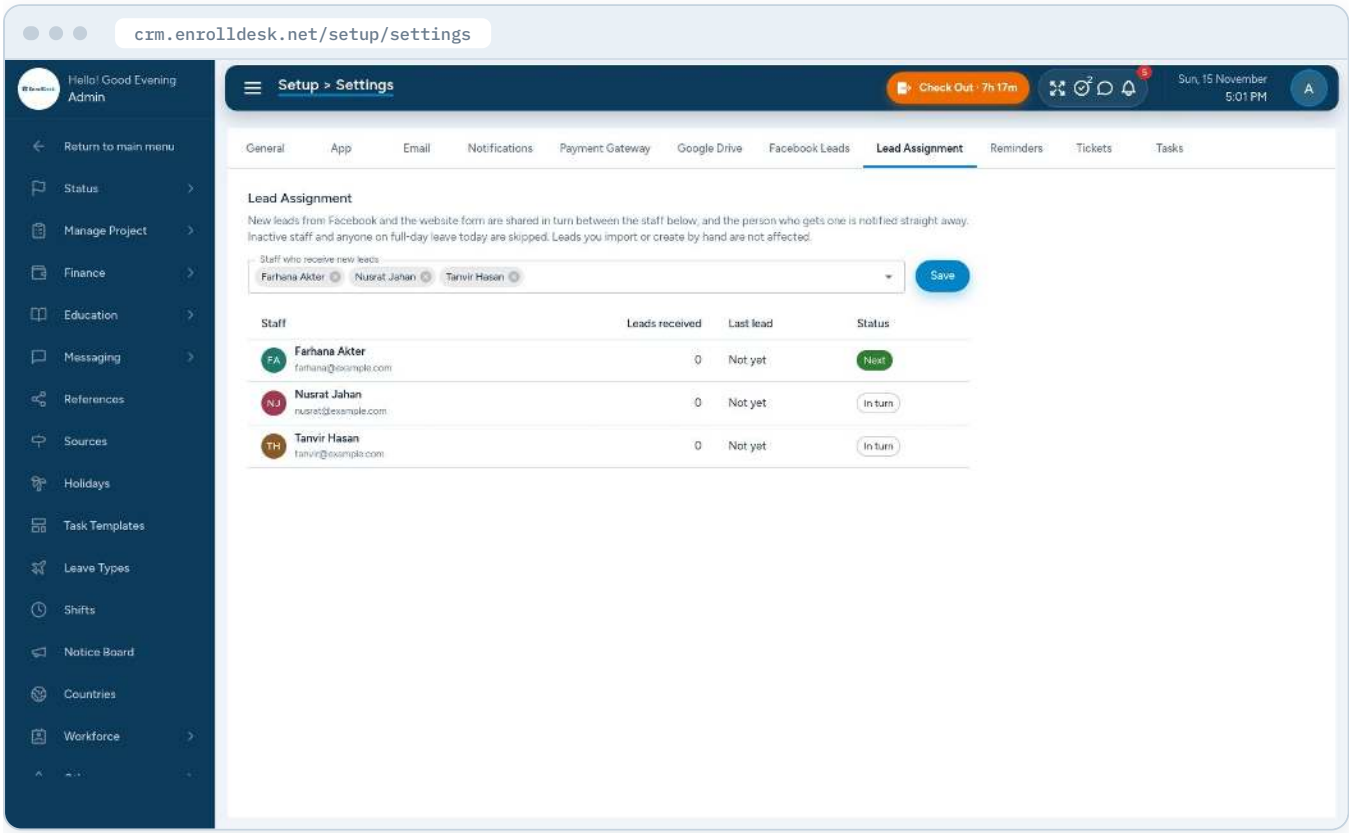
CONNECTED TO THE TOOLS YOU ALREADY USE

16 Settings and integrations

Everything is set up from the browser, under Setup. There is no code to write. Connect your Facebook page, Google account, payment gateway and email once, and they keep working.

WHY IT MATTERS

An agency should not need a developer to change a status name, add a fee or connect its Facebook page.



Lead Assignment: new Facebook and website leads go round these counsellors in turn.

What you can do

- **General and App**
  Your name, logo and favicon; date and time format, timezone, currency, office hours and late grace.
- **Email templates**
  Templates with placeholders, and a default template per module.
- **Lead Assignment**
  Choose which staff receive new leads in turn.
- **Email**
  Send through your own SMTP server or Mailgun, with your own sender name and address.
- **Live notifications**
  Notifications, chat and announcements update live through Pusher.
- **Reminders**
  Switch daily reminders on or off and set how many days ahead students are reminded.

- **Tickets and Tasks**
  Response targets per ticket priority, and the windows for automatic task priority.
- **Your own lists**
  Statuses for leads, files, admissions and tasks; branches, programmes, intakes and fees; currencies, banks and payment methods; expense categories and budgets; universities, subjects and English tests; sources, references and countries; holidays, leave types and shifts.
- **Custom fields**
  Add your own fields to leads, students, applications, invoices, tasks, tickets, staff and expenses.
- **Light and dark mode**
  Each person chooses their own.

How to use it

1. Open Setup, then Settings. Each tab is one area: General, App, Email, Notifications, Payment Gateway, Google Drive, Facebook Leads, Lead Assignment, Reminders, Tickets and Tasks.
2. Fill in a tab and press “Save”. Connection tabs show whether the service is connected.
3. Open Lead Assignment and choose the staff who should receive new leads.
4. Use the other Setup menus (Status, Manage Project, Finance, Education and more) to enter your own lists.

Integrations

EnrollDesk connects to the services an agency already uses. Each one is switched on from Setup, then Settings.

Facebook Lead Ads	Leads from your Facebook lead forms arrive instantly, with duplicate matching and automatic retry.
Website form	A lead form for your website, with a link per source, posting straight into the lead list.
WhatsApp	A WhatsApp button on every phone number opens the chat.
Google Drive	Documents, payment proofs, chat files and nightly backups stored in your own Drive.
Google Meet	Meeting links created automatically for online appointments (Jitsi as fallback).
SSLCommerz	Online payment of invoices by students, in BDT, in full or in part.
Email (SMTP or Mailgun)	All email is sent from your own address.
Pusher	Live notifications, chat and announcements.
Excel and CSV	Import leads and students; export any list and every report.

PART THREE

Running it

The work the system does by itself, getting started, daily routines and the full feature checklist.

RUNNING IT

What runs by itself

A good system does the remembering. These jobs run on their own, every day, without anyone pressing a button.

Every morning, 10:00	Each staff member gets one summary of their own day: appointments, due and overdue tasks, follow-ups, invoices to chase and English test scores about to expire. By notification and email.
Every morning, 10:00	Students are reminded of invoices due soon, due today or overdue, and of tomorrow's appointment (with the Join link).
The moment it happens	New Facebook and website leads are assigned to the next counsellor, who is notified at once.
After every payment	A PDF receipt is emailed to the student.
Every night	Attendance is completed for the day (absent, weekend, holiday, leave); holidays roll forward to next year.
Every night	Repeating tasks and expenses are created; task priority rises as due dates approach; lead scores are refreshed.
Every night	Counsellors are alerted to application files that have sat too long in one status.
Every night	Resolved tickets with no reply for 7 days are closed.
Every night, 02:30	The database is backed up and copied to Google Drive; the newest 14 backups are kept.
Every Monday	A weekly digest of the main numbers is emailed to the addresses you choose.

RUNNING IT

Getting started

A new agency is usually ready to work in a few days. This is the order that works. You do not need every module on day one: leads, students, applications and invoices cover the core.

1 Your agency
Setup, then Settings: name, logo, timezone, currency and office hours.

2 Your team
Create roles, then add each staff member with their role, department and shift.

3 Your programmes
Add branches, programmes, intakes and the fees for each programme.

4 Your statuses
Check the lead statuses, file statuses and admission stages match how you work.

5 Your email
Enter your SMTP or Mailgun details so invoices, receipts and reminders come from your address.

6 Your leads
Import your existing leads from Excel. Connect Facebook Lead Ads and the website form.

7 Lead rotation
Choose which counsellors receive new leads.

8 Counsellor hours
Each counsellor sets their weekly availability for appointments.

9 Payments and files
Connect SSLCommerz for online payment and Google Drive for documents and backups.

10 Go live
Convert your active students, raise their invoices, and invite students and partners to their portals.

A day with EnrollDesk

Counsellor

1. Check in, then read the announcements and "Your reminders" on the dashboard.
2. Open Leads: call today's and overdue follow-ups, add a note after each call, set the next date.
3. Hold the day's appointments; mark each one completed with an outcome note.
4. Move application files forward and reply to student chats and tickets.
5. Check out.

Accounts

1. Record payments received and check that receipts went out.
2. Open Unpaid Invoices and chase what is overdue.
3. Approve pending expenses and reimburse staff.
4. Record university commission received; approve partner commission and payouts.

Owner / manager

1. Read the dashboard for the period: leads, conversion, collected, outstanding.
2. Open the pipeline board and look at files with red day counters.
3. Approve leave and attendance corrections.
4. Once a week, read Counsellor Performance and Expense vs Income.

APPENDIX

Full feature checklist

163 features, grouped by area.

Across the whole system

- A separate permission for every action
- Own or all records, per role
- Live notifications with links to the record
- Activity log on every module
- Notes, tasks, attachments and email on records
- Custom fields on eight record types
- Styled Excel and CSV exports with summary sheets
- Excel import for leads and students
- Trash and restore
- Multi-currency, never added across currencies
- Optional storage in your own Google Drive
- Light and dark mode
- Works on phone, tablet and computer
- Every record opens by its own link
- One-time-code password reset for all logins
- Active sessions with sign out other devices

Leads

- Lead list with search, filters and saved columns
- Summary by status and source
- Education history, seven levels
- English test scores with expiry
- Work history and preferred countries
- Lead score, refreshed nightly
- Your own statuses and sources
- Several assignees per lead
- Follow-up dates with history and overdue flags
- Duplicate check by phone
- WhatsApp button on phone numbers
- Tabs: profile, tasks, notes, files, appointments, activity
- Create an application from the lead
- Bulk assign, status, source, trash, export
- Website lead form with a link per source
- Facebook Lead Ads with retry and health page
- Automatic round-robin assignment

Students

- Student record built on the lead
- Billing and shipping addresses
- Portal login per student
- Portal permissions per student
- Tabs: applications, invoices, payments, tasks, notes, files
- Email from the record, with log
- Import, export, bulk actions, trash
- Move a student back to a lead

Applications

- Programmes with their own fees
- Duplicate a programme
- Branch, intake, reference and partner per file
- Many universities and courses per file
- Your own admission stages with timeline
- Your own file statuses
- Document checklist with student upload
- PDF offer letter with e-signature
- Sponsors with profession fields
- Embassy and visa checklist
- Chat with the student inside the file
- Follow-up dates and progress
- Stuck-file alerts
- Pipeline board by status or stage
- Drag and drop between columns
- Days-in-status on every card

Invoices and payments

- Invoices from programme fees
- Totals, tax and discount computed
- Status follows the payments
- Hold and inactive set by hand
- Overdue ribbon with days
- Any payment method with proof upload
- Online payment via SSLCommerz (BDT)
- Part payments
- PDF invoice by email
- Automatic PDF receipts
- Credit notes, refunds and write-offs
- Payment history log
- Payments list with summary and export
- Duplicate invoice, change due date
- Due and overdue reminders to students

Expenses

- Lines with tax and discount
- Payee suggestions
- Receipt upload
- Category, branch and currency
- Approval with reason
- Out-of-pocket and reimbursement
- Recurring weekly, monthly or yearly
- Monthly budgets per category
- Summary charts per currency
- Voucher PDF and email

Commissions and partners

- University commission by semester
- Due dates, follow-ups and status
- Partner directory
- Revenue share or flat fee per student
- Automatic partner commission
- Approve and void commissions
- Payouts per partner and currency
- Partner portal: students, commission, payouts
- Partner password reset

Tasks and appointments

- Task table and Kanban board
- Your own task statuses
- Four priorities, raised automatically
- Assignees, followers and tags
- Checklists with progress
- Repeating tasks
- Task templates
- Live comments and attachments
- Quick filters and personal to-do list
- Appointment list with five tabs
- Day and week calendar
- Free-slot picker from weekly availability
- In office, phone or online
- Google Meet or Jitsi links
- Students book, reschedule and cancel
- Outcome notes and no-show
- Day-before reminders

Attendance, leave and staff

- Check in and out with network address
- My Month calendar with totals
- Shifts and late grace
- Weekends per person
- Holidays that repeat yearly
- Missed check-out corrections
- Edit history
- Leave types, allowances and balances
- Full and half-day requests
- Leave blocks slots and lead rotation
- Staff profiles and documents
- Departments and designations
- Announcements with read receipts
- Timesheets and export

Support

- Tickets from the student portal
- Response and resolution targets
- Six statuses, three priorities
- Internal notes
- Canned replies
- Student ratings
- Auto-close after 7 days
- Unread markers
- Knowledge base with categories
- Search, sort and helpful votes
- Live chat with files
- Email templates with placeholders

Student portal

- Next actions on the home page
- Application stage and timeline
- Document upload
- View and sign offer letters
- Invoices, receipts and online payment
- Book, join, reschedule, cancel appointments
- Tickets, chat and help articles
- Visa and sponsor checklists
- Profile, photo and password
- Notifications with links

Dashboard and reports

- Summary cards against the previous period
- Conversion funnel
- Money in vs out per currency
- Team boards and follow-up star
- Who's in today
- Your reminders
- Period presets and custom dates
- 16 reports with filters and charts
- Excel export on every report
- Weekly digest email

Administration

- Roles with a permission editor
- Attachments and notes managers
- Activity log with filters and export
- Nightly backup to Google Drive
- Backup failure alerts
- Eleven settings tabs
- Email via SMTP or Mailgun
- Your own lists for every dropdown
- Set up from the browser

EnrollDesk.

NEXT STEP

See it with your own agency in mind

Ask us for a walkthrough. We will show you the system on demonstration data and answer your questions.

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