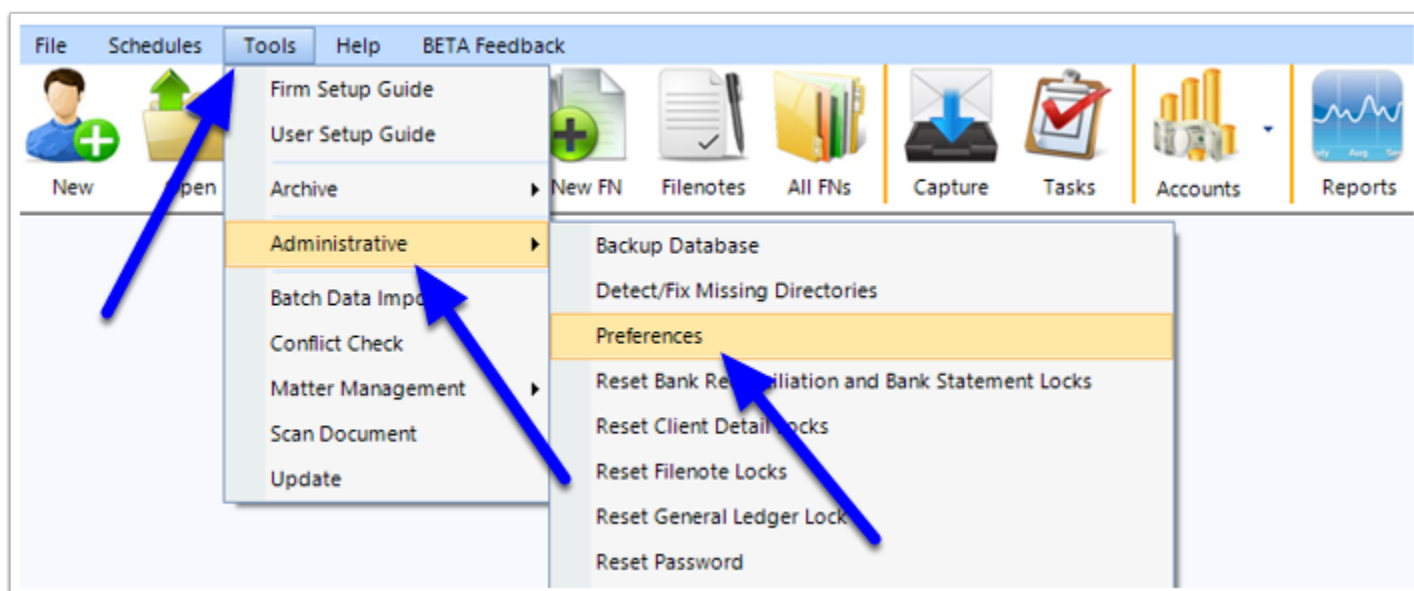


Set up Online Webleads in Migration Manager

Migration Manager's Online Webleads allows you to add an assessment questionnaire directly to your website. Before the Online Weblead is able to be added to your website, it must first be activated and setup within Migration Manager by following the instructions in this article.

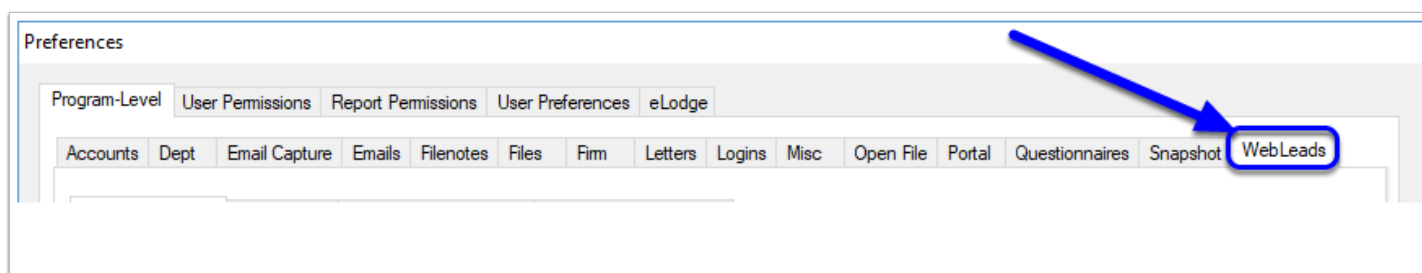
1. Accessing Webleads Preferences

From the Main Menu, select **Tools**, then **Administrative**, then **Preferences**.



💡 If you don't have access to this feature, you may need to log into Migration Manager as user **Administrator**.

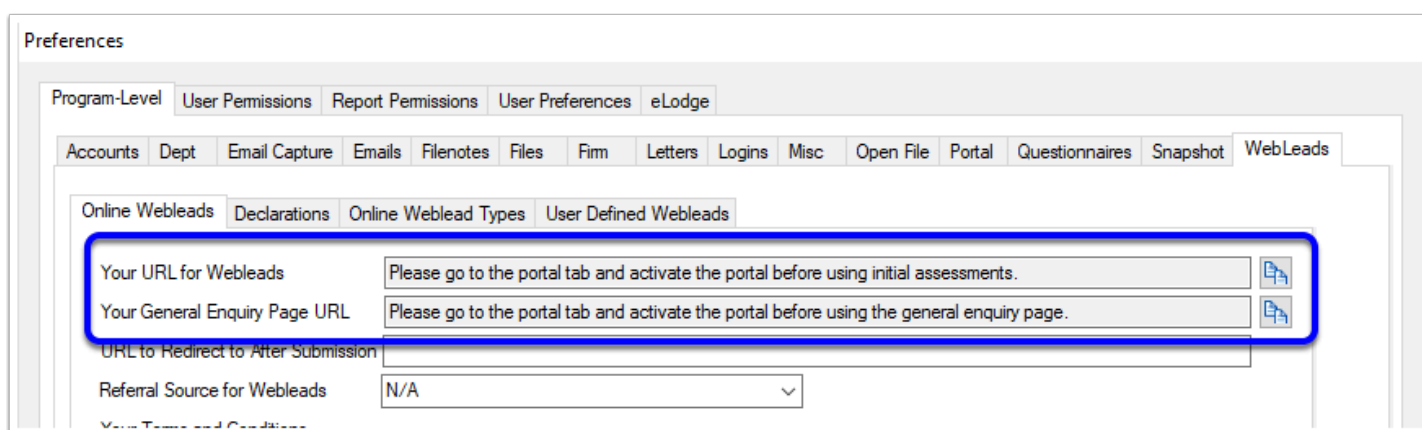
Select the **Webleads** tab.



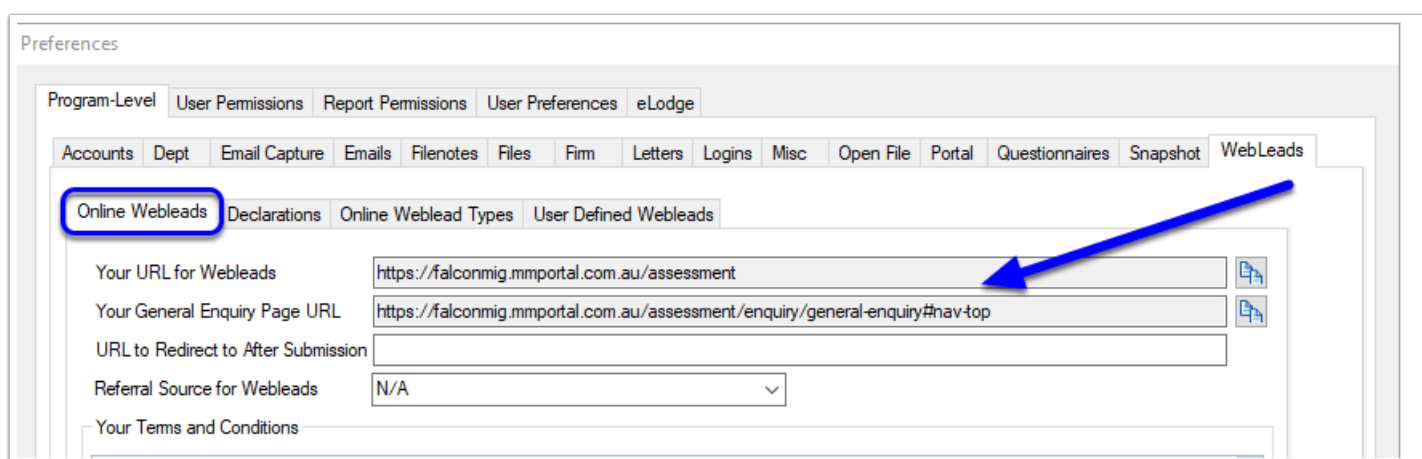
2. Activate the Portal

If you have not previously activated the Portal in Migration Manager, you will need to attend to that first before you can set up your Online Webleads page. (There will be a notification in the URL Field saying you need to activate the Portal).

For instructions on how to activate the Portal, please see: [Setting Up the Secure Client Portal](#)



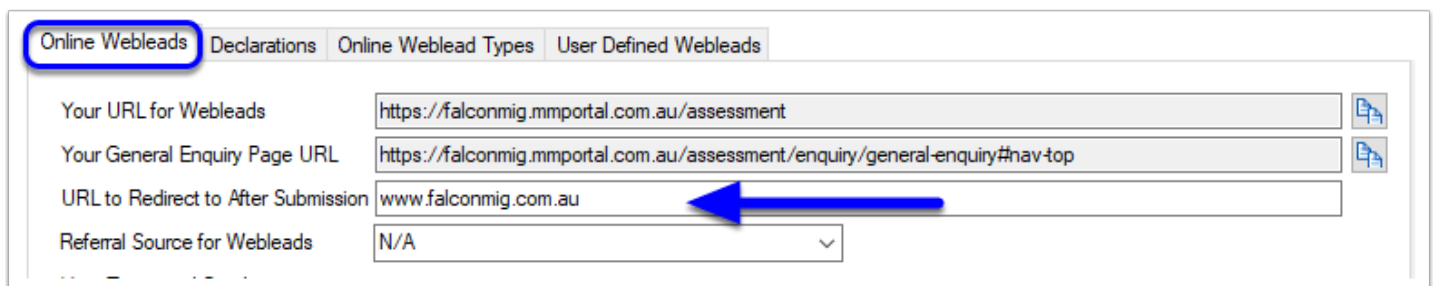
Once the Portal has been activated, you will see URL links for your Weblead Assessments page and General Enquiry page. These URLs are based on your Portal URL.



i Note: the Initial Assessment URL is for the page with all of the different online assessment questionnaires that you have setup. The General Enquiry page is a single page for generic enquiries. You can choose whether to have one or both of these links on your website.

3. Enter the URL redirection for after submission

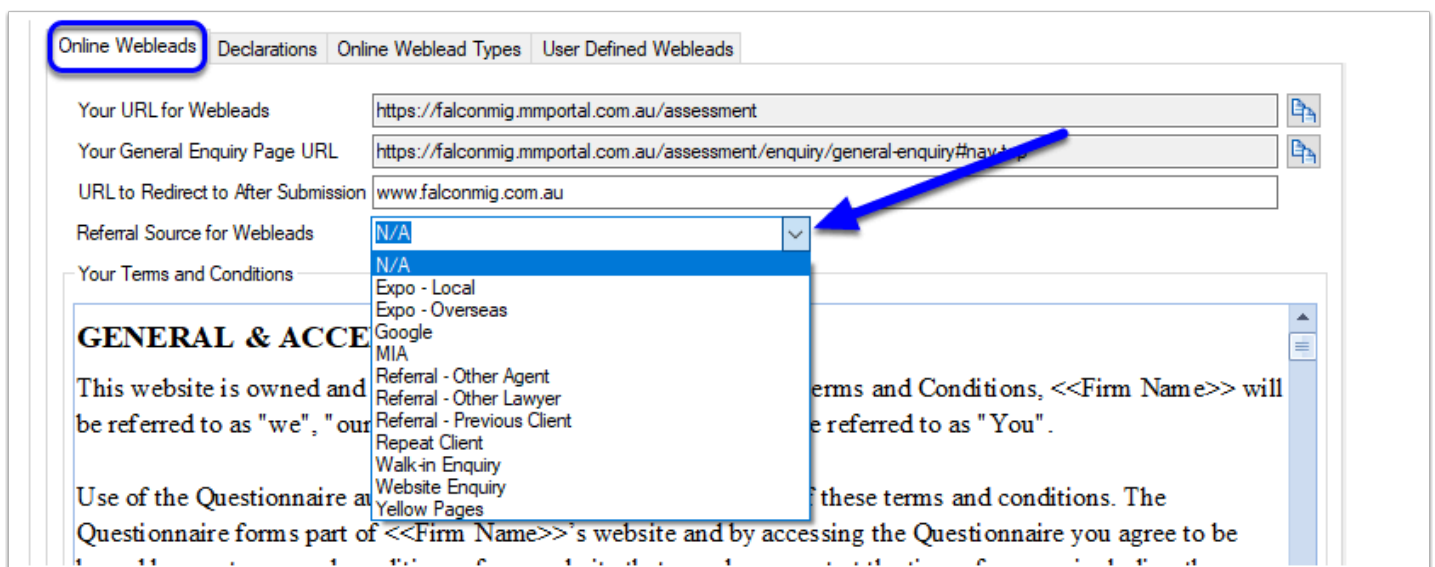
Once a client completes a General Enquiry or Weblead, you can choose where you would like their web browser to direct to (for example your Website's Home Page). Enter this Website address in the **URL to Redirect to After Submission** field.



The screenshot shows the 'Online Webleads' tab selected in a configuration interface. The 'URL to Redirect to After Submission' field is highlighted with a blue arrow pointing to it. The field contains the text 'www.falconmig.com.au'. Other fields include 'Your URL for Webleads' (https://falconmig.mmportal.com.au/assessment), 'Your General Enquiry Page URL' (https://falconmig.mmportal.com.au/assessment/enquiry/general-enquiry#nav-top), and 'Referral Source for Webleads' (N/A).

4. Assign the default Referral Source

When you convert a Weblead in to a matter, you can choose for the Matter to have a default **referral source** recorded such as 'Website Enquiry'. To set the default referral source, choose one of the options from the **referral source dropdown**.



The screenshot shows the 'Online Webleads' tab selected in a configuration interface. The 'Referral Source for Webleads' dropdown menu is open, showing a list of options: N/A, Expo - Local, Expo - Overseas, Google, MIA, Referral - Other Agent, Referral - Other Lawyer, Referral - Previous Client, Repeat Client, Walk-in Enquiry, Website Enquiry, and Yellow Pages. A blue arrow points to the dropdown menu. Other fields include 'Your URL for Webleads' (https://falconmig.mmportal.com.au/assessment), 'Your General Enquiry Page URL' (https://falconmig.mmportal.com.au/assessment/enquiry/general-enquiry#nav-top), and 'URL to Redirect to After Submission' (www.falconmig.com.au).

5. Terms and Conditions

Prior to the submission of an Online Weblead questionnaire, the person completing the assessment/enquiry will be required to agree to a set of terms and conditions. You will need to create these terms and conditions within the preferences window prior to being able to use any of the online assessment pages. You can choose to create your own terms and conditions, use the default terms and conditions unedited, or use and edit the defaults. If you want to use the defaults, click **Use Default**.

Online Webleads Declarations Online Weblead Types User Defined Webleads

Your URL for Webleads:

Your General Enquiry Page URL:

URL to Redirect to After Submission:

Referral Source for Webleads:

Your Terms and Conditions

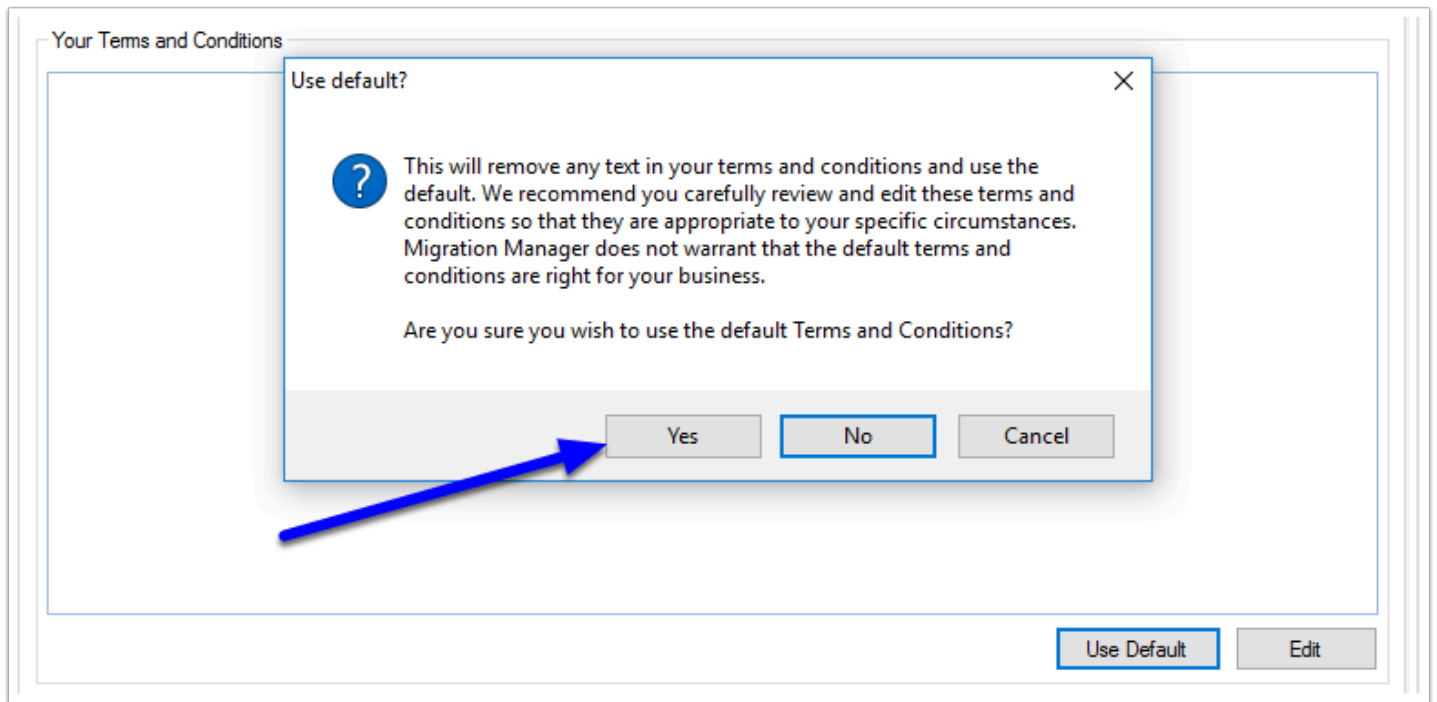
GENERAL & ACCEPTANCE

This website is owned and operated by <<Firm Name>>. In these Terms and Conditions, <<Firm Name>> will be referred to as "we", "our", "us" and the user of the website will be referred to as "You".

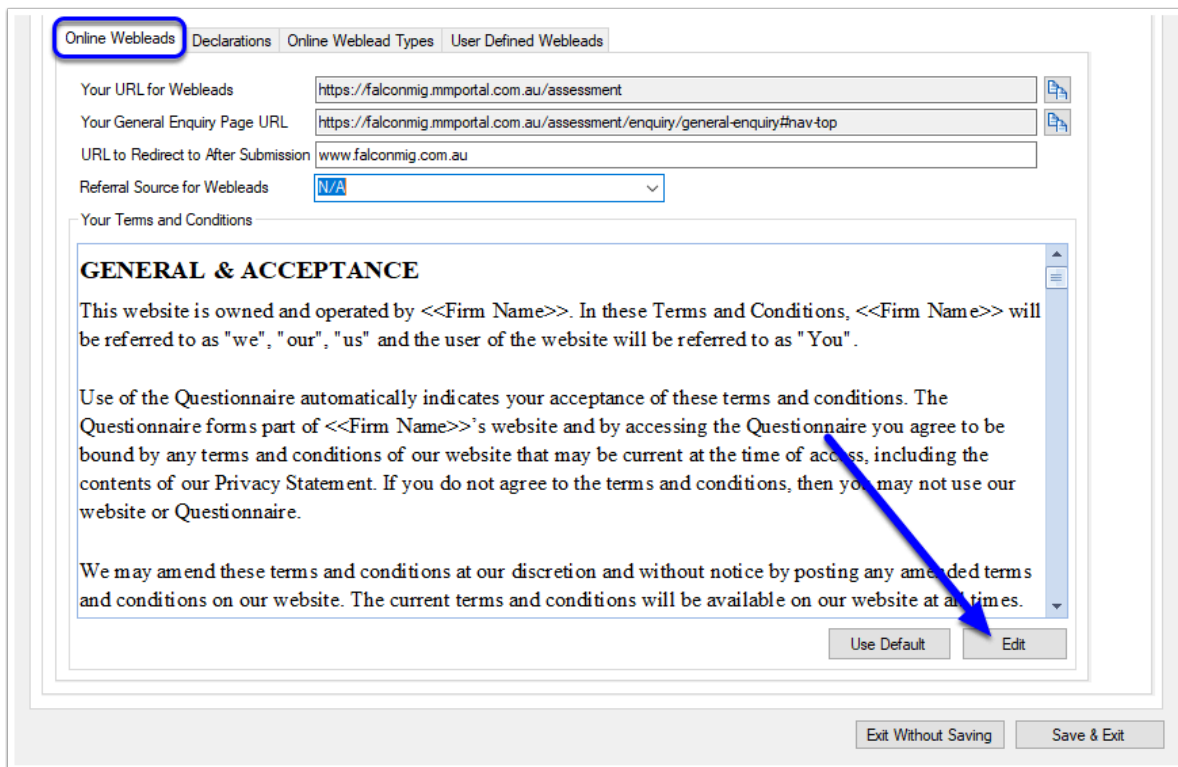
Use of the Questionnaire automatically indicates your acceptance of these terms and conditions. The Questionnaire forms part of <<Firm Name>>'s website and by accessing the Questionnaire you agree to be bound by any terms and conditions of our website that may be current at the time of access, including the contents of our Privacy Statement. If you do not agree to the terms and conditions, then you may not use our website or Questionnaire.

We may amend these terms and conditions at our discretion and without notice by posting any amended terms and conditions on our website. The current terms and conditions will be available on our website at all times.

You will be prompted to confirm that you do in fact want to use the default terms and conditions, and that you are strongly encouraged to review and modify the defaults to fit your particular circumstances. To proceed, click **Yes** to confirm you understand.



The Terms and Conditions will now be set. You should now edit these Terms and Conditions to fit your circumstances by clicking the **Edit** button.



The edit window will now appear. Make any required changes and click **Save** to finish editing.

Options

Clipboard Font Paragraph Editing & Proofing Styles

Field Chooser

FirmName

This is optional. If you leave this blank, the default terms and conditions will be displayed to your clients in the portal.

GENERAL & ACCEPTANCE

This website is owned and operated by <<Firm Name>>. In these Terms and Conditions, <<Firm Name>> will be referred to as "we", "our", "us" and the user of the website will be referred to as "You".

Use of the Questionnaire automatically indicates your acceptance of these terms and conditions. The Questionnaire forms part of <<Firm Name>>'s website and by accessing the Questionnaire you agree to be bound by any terms and conditions of our website that may be current at the time of access, including the contents of our Privacy Statement. If you do not agree to the terms and conditions, then you may not use our website or Questionnaire.

We may amend these terms and conditions at our discretion and without notice by posting any amended terms and conditions on our website. The current terms and conditions will be available on our website at all times. By continuing to use the Questionnaire you accept and

Use Default Terms and Conditions Cancel Save



6. Set the Online Assessment Declarations

Before the end user can submit their Online Weblead to you, they have to agree to a declaration. The **Declarations** tab allows you to set out the declarations/consents that the user that that the end user must answer . There can be up to 4 declarations/consents on an assessment, and you are able to edit/delete 3 of these - to comply with the requirements of the European Union's GDPR the declarations and consents need to be sufficiently granular to enable informed consent to take place.

Online Webleads **Declarations** Online Weblead Types User Defined Webleads

This information is used to create a Weblead Declarations section that the Weblead user must agree to before they can click submit.

Description	Text
➔ Heading	Declarations
Legal Text	< <FirmName>> will use the personal information you have provided in this form to assess your situation, communicate with you and where applicable, provide assistance. By clicking Submit you agree to us handling your data in accordance with our Assessment < <TermsAndConditions>> and Privacy Policy.
Text for First Yes/No Question (Required)	I understand and accept the < <FirmName>> Assessment < <TermsAndConditions>>.
Text for Second Yes/No Question (Optional - leave blank to hide)	I consent to < <FirmName>> using the information I have provided to contact me by email with updates and information.
Text for Third Yes/No Question (Optional - leave blank to hide)	I confirm that the information I have provided is True and Correct and I consent to < <FirmName>> conducting any and all necessary enquiries to determine my eligibility including performing any Visa Entitlement Check with immigration authorities.
Text for Fourth Yes/No Question (Optional - leave blank to hide)	



 Update Web Page
  Edit

To edit a declaration/consent, click on the section you wish to edit and then click the **Edit** button.

Online Webleads **Declarations** Online Weblead Types User Defined Webleads

This information is used to create a Weblead Declarations section that the Weblead user must agree to before they can click submit.

Description	Text
Heading	Declarations
Legal Text	< <FirmName>> will use the personal information you have provided in this form to assess your situation, communicate with you and where applicable, provide assistance. By clicking Submit you agree to us handling your data in accordance with our Assessment < <TermsAndConditions>> and Privacy Policy.
Text for First Yes/No Question (Required)	I understand and accept the < <FirmName>> Assessment < <TermsAndConditions>>.
➔ Text for Second Yes/No Question (Optional - leave blank to hide)	I consent to < <FirmName>> using the information I have provided to contact me by email with updates and information.
Text for Third Yes/No Question (Optional - leave blank to hide)	I confirm that the information I have provided is True and Correct and I consent to < <FirmName>> conducting any and all necessary enquiries to determine my eligibility including performing any Visa Entitlement Check with immigration authorities.
Text for Fourth Yes/No Question (Optional - leave blank to hide)	

 Update Web Page
  Edit

The Edit Declaration Item window will now appear. This window allows you to:

1. Set the category of the declaration/consent.

- Set the text of the declaration/consent. Note that on the left hand side is a Field Chooser which allows you to insert specific merge fields in to the declaration such as a link to your Privacy Policy (see [How to link your Privacy Policy to the Portal and Assessment App](#))

Make the required changes and then click **Save and Close**.

create an Assessment Declarations section that the Assessment user must agree to before they can click subm

scr

Edit Declaration Item

Item Description

Text for Second Yes/No Question
(Optional - leave blank to hide)

Yes/No Question Class

Marketing

Field Chooser

Text to Show on the Online Assessment

FirmName
PrivacyPolicy
TermsAndConc

I consent to <<FirmName>> using the information I have provided to contact me by email with updates and information.

Cancel Use Default Save and Close



Note: If you don't want to use a particular declaration or consent, leave the Text section blank and the declaration will not appear on the Online Weblead.

7. Select Types of Webleads

Next you will be required to select which types of Webleads you would like to display on your Online Weblead page. Note that by default no options are set, so you will need to select at least one option prior to being able to use the Online Webleads. To set which types of assessments will appear, go to the **Online Webleads Types** tab and **tick** which Webleads you want to have appear on your online Weblead page.



Important: Only select those options which apply to the type of visa / appeal / matter that you want to receive enquires in relation to.

Preferences

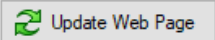
Program-Level User Permissions Report Permissions User Preferences eLodge

Accounts Dept Email Capture Emails Filenotes Files Firm Letters Logins Misc Open File Portal Questionnaires Snapshot WebLeads

Online Webleads Declarations **Online Weblead Types** User Defined Webleads

Include these Types of Webleads on the Online Webleads Page:

<p>I would Like to Apply for a Visa:</p> <p><input type="checkbox"/> Study in Australia</p> <p><input type="checkbox"/> Work in Australia</p> <p><input type="checkbox"/> Live and Work as a Skilled Migrant</p> <p><input type="checkbox"/> Join my Australian Spouse/Partner</p> <p><input type="checkbox"/> Join my Parents</p> <p><input type="checkbox"/> Join my Child</p> <p><input type="checkbox"/> Visit Australia</p> <p><input type="checkbox"/> Own a Business</p> <p><input type="checkbox"/> I'm not Sure</p>	<p>I would Like to Sponsor a Family Member for:</p> <p><input type="checkbox"/> A Child Visa</p> <p><input type="checkbox"/> A Partner/Spouse Visa</p> <p><input type="checkbox"/> A Parent Visa</p> <p><input type="checkbox"/> I'm not Sure</p> <p>I would Like to Sponsor an Employee for:</p> <p><input type="checkbox"/> A Temporary Work Visa</p> <p><input type="checkbox"/> A Permanent Residence Visa</p> <p><input type="checkbox"/> I'm not Sure</p>	<p>I would Like to Apply to Appeal for:</p> <p><input type="checkbox"/> A Visa Refusal</p> <p><input type="checkbox"/> A Cancelled Visa</p>
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When you have finished making your selections, click the **Update Web Page** button to push the changes through to the website.

Preferences


Program-Level User Permissions Report Permissions User Preferences eLodge

Accounts Dept Email Capture Emails Filenotes Files Firm Letters Logins Misc Open File Portal Questionnaires Snapshot WebLeads

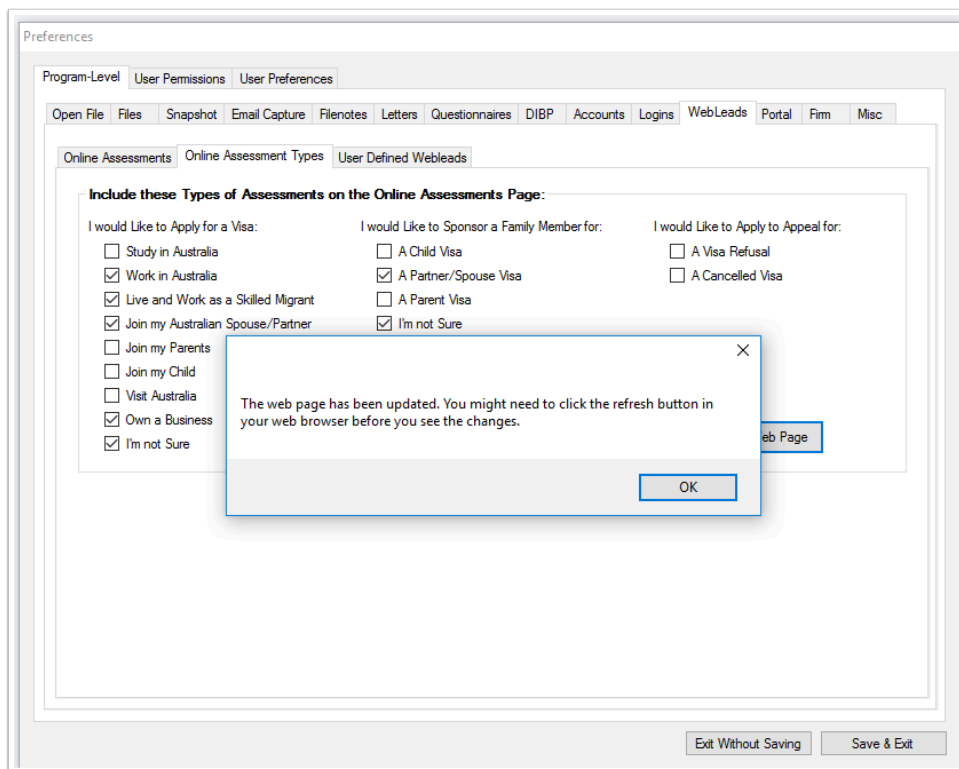
Online Webleads Declarations Online Weblead Types User Defined Webleads

Include these Types of Webleads on the Online Webleads Page:

<p>I would Like to Apply for a Visa:</p> <p><input type="checkbox"/> Study in Australia</p> <p><input checked="" type="checkbox"/> Work in Australia</p> <p><input checked="" type="checkbox"/> Live and Work as a Skilled Migrant</p> <p><input checked="" type="checkbox"/> Join my Australian Spouse/Partner</p> <p><input type="checkbox"/> Join my Parents</p> <p><input type="checkbox"/> Join my Child</p> <p><input type="checkbox"/> Visit Australia</p> <p><input checked="" type="checkbox"/> Own a Business</p> <p><input checked="" type="checkbox"/> I'm not Sure</p>	<p>I would Like to Sponsor a Family Member for:</p> <p><input type="checkbox"/> A Child Visa</p> <p><input checked="" type="checkbox"/> A Partner/Spouse Visa</p> <p><input type="checkbox"/> A Parent Visa</p> <p><input checked="" type="checkbox"/> I'm not Sure</p> <p>I would Like to Sponsor an Employee for:</p> <p><input checked="" type="checkbox"/> A Temporary Work Visa</p> <p><input checked="" type="checkbox"/> A Permanent Residence Visa</p> <p><input checked="" type="checkbox"/> I'm not Sure</p>	<p>I would Like to Apply to Appeal for:</p> <p><input type="checkbox"/> A Visa Refusal</p> <p><input type="checkbox"/> A Cancelled Visa</p>
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Note that you will be prompted to refresh your browser to see the changes. Click **OK**.



Webpage View

Your Online Assessment page will now present the options you have set in preferences.

Assessment Form

I would like to

Apply for a Visa

To

Work in Australia
Live and work as a Skilled Migrant
Join my Australian Spouse/Partner
Own a business
I'm not sure