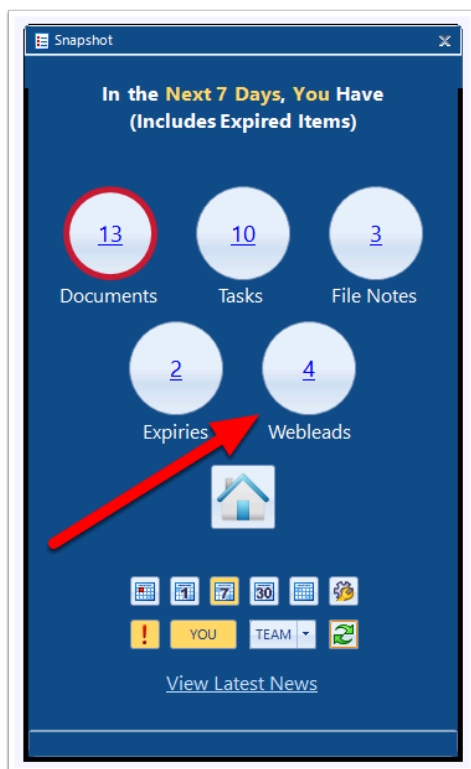


Receiving and Reviewing Webleads

Migration Manager's Webleads system allows you to receive, review and assess enquiries and initial assessment questionnaires from your own website. This instruction page deals with how Webleads are received and processed in Migration Manager

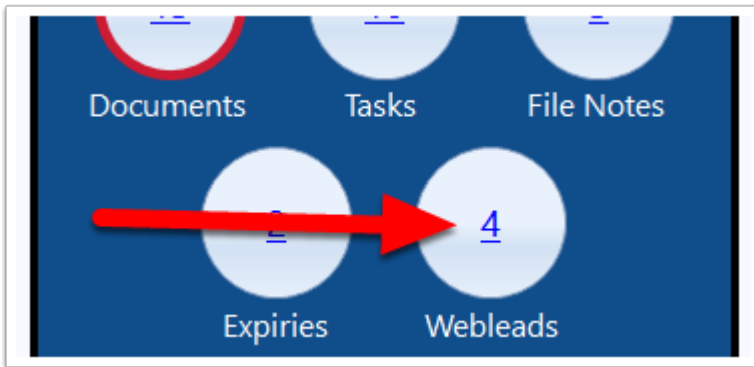
1. Notification - Snapshot

If a Weblead has been received by Migration Manager, all users will see a notification in Snapshot within the Webleads cell.



2. Open the Webleads window

To see a list of all of the Webleads which have been received and that have not yet been processed, click the Webleads number on snapshot



The list of Webleads received and not yet processed will now appear.

Documents, Progress Items & Filenotes											
Home Document Inbox Progress Items Filenotes Visa/Sponsorship Expiries WebLeads											
	First Name	Last Name	Business Name	Subject	Migrant/Spo...	RMA	Manager	Clerk	Office	Proposed ID	Email Date/Time
+	Robert	Fleming		Visa - Join my Australian...	Migrant					FLEMRO.17.0009	6/02/2017 6:59:06 PM
	Nicola	Read	ABC Kids	Visa - Work in Australia	Migrant					READNL.17.0010	6/02/2017 7:09:04 PM
	Iqbal	Singh		Visa - I'm not Sure	Migrant					SINGIQ.17.0011	6/02/2017 7:15:41 PM
	Christian	Bell		Visa - Join my Australian...	Migrant					BELLCH.17.0012	8/02/2017 2:33:26 PM

Assign the Same RMA/Clerk/Manager/Office to All Selected Rows:

RMA: Manager:

Clerk: Office:

☐ Send Inbound Emails to Document Inbox

3. Review a Weblead

To review a Weblead, click the **Review** button next to the relevant entry in the grid.

Documents, Progress Items & Filenotes											
Home Document Inbox Progress Items Filenotes Visa/Sponsorship Expiries WebLeads											
	First Name	Last Name	Business Name	Subject	Migrant/Spo...	RMA	Manager	Clerk	Office	Proposed ID	Email Date/Time
+	Robert	Fleming		Visa - Join my Australian...	Migrant					FLEMRO.17.0009	6/02/2017 6:59:06 PM
	Nicola	Read	ABC Kids	Visa - Work in Australia	Migrant					READNL.17.0010	6/02/2017 7:09:04 PM
	Iqbal	Singh		Visa - I'm not Sure	Migrant					SINGIQ.17.0011	6/02/2017 7:15:41 PM
	Christian	Bell		Visa - Join my Australian...	Migrant					BELLCH.17.0012	8/02/2017 2:33:26 PM

The Weblead details window will now appear. This window has 3 columns:

1. The list of Questions as they appeared on the online assessment questionnaire;
2. The answers provided by the person completing the assessment questionnaire; and
3. The answers/values that will be imported in to the Matter if it is created. Note that by default the Values to Import column is left blank.

Questionnaire Answers		Values to Import
Application Type - Visa - Join my Australian Spouse/Partner		
Robert Fleming - Primary Applicant		
Prefix	Mr	
Given Names	Robert	
Surname	Fleming	
Date of Birth	11/03/1983	
Marital Status	Married	
Email	example@migrationmanager.com.au	
Mobile Country Code	1	
Mobile Number	23234234	
Passport Country	United Kingdom	
Passport Number	BF111111	
Current Location	United Kingdom	
Last Arrived in Australia		
Required to Depart Australia		
Current Visa		
Current Visa Expires		
Relationship Status	Marriage	
When did your relationship commence?	1/03/2010	
What date were you married?	12/04/2014	
Have you had any children together?	Yes	N/A
How many children have you had together?	2	
Education for Robert Fleming		
Add Qualification for Robert Fleming		

4. Update the Values to Import column

When you first open the Weblead, the Values to Import column will have no information in it. The reason for this is that it is up to the user to decide what information will in fact be imported in to Migration Manager if this Weblead is in fact turned in to a Prospect. You should review all of the information contained in the Questionnaire Answers column and decide what information should be added to the Values to Import column. There are three ways to add information to the Value to Import column:

4.1. Click the >> copy button on each section

On the right hand side of each section of data in the Questionnaire Answers column, you will see a button marked >> - this is the copy section button.

^ Robert Fleming - Primary Applicant	
Prefix	Mr
Given Names	Robert
Surname	Fleming
Date of Birth	11/03/1983
Marital Status	Married
Email	example@migrationmanager.com.au
Mobile Country Code	1
Mobile Number	23234234
Passport Country	United Kingdom
Passport Number	BF111111
Current Location	United Kingdom
Last Arrived in Australia	
Required to Depart Australia	
Current Visa	
Current Visa Expires	

By clicking the >> copy section button, you will copy all of the data from the section in the Questionnaire Answer column across to the corresponding Values to Import column.

Questionnaire Answers		Values to Import
^ Application Type - Visa - Join my Australian Spouse/Partner		
^ Robert Fleming - Primary Applicant		
Prefix	Mr	Mr
Given Names	Robert	Robert
Surname	Fleming	Fleming
Date of Birth	11/03/1983	11/03/1983
Marital Status	Married	Married
Email	example@migrationmanager.com.au	example@migrationmanager.com.au
Mobile Country Code	1	1
Mobile Number	23234234	23234234
Passport Country	United Kingdom	
Passport Number	BF111111	
Current Location	United Kingdom	
Last Arrived in Australia		
Required to Depart Australia		
Current Visa		
Current Visa Expires		

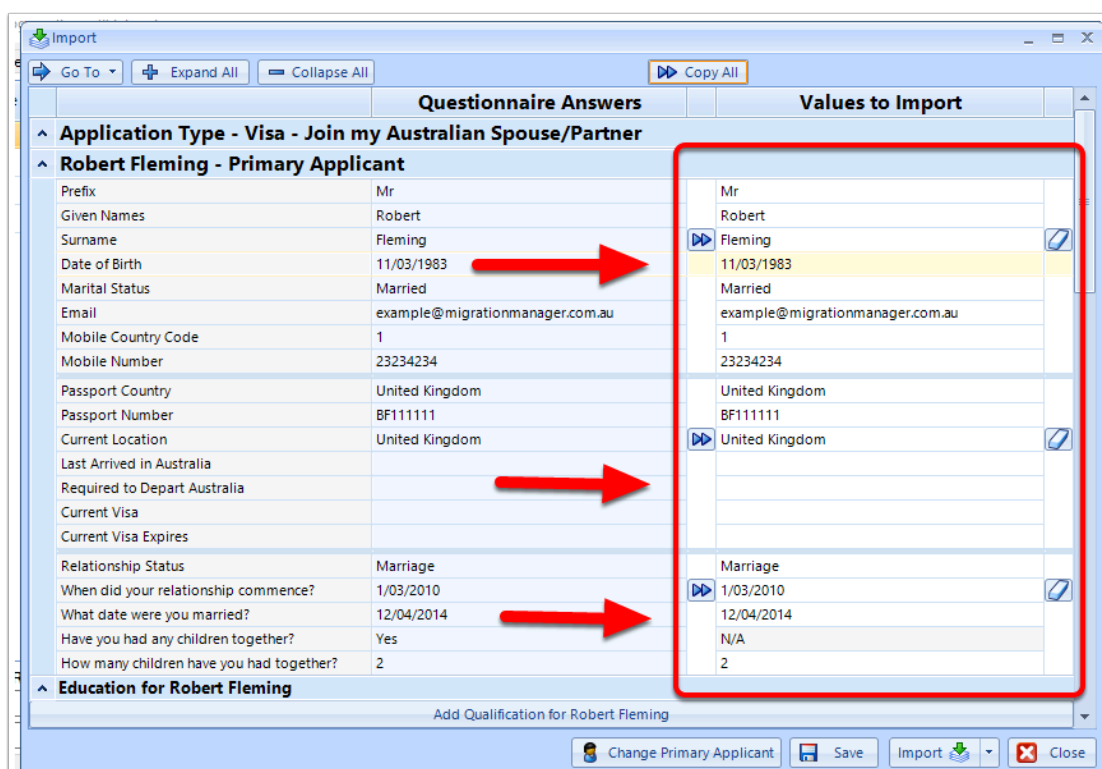
Repeat this for each section that you want to copy the data across for.

4.2. Click the Copy All button

If you are satisfied with all of the data that appears in the Questionnaire Answers column, you can move all of it at one time in to the Values to Import column by clicking the **Copy All** button.



By clicking the **Copy All** button on the top of the page, all of the information contained in the Questionnaire Answers column will be copied in to the Values to Import column



4.3. Manually Add text and sections

You can at any stage manually type or edit information in the Values to Import column. To add information, just click on the relevant cell in the grid and start typing.

Go To + Expand All - Collapse All Copy All

Questionnaire Answers		Values to Import
Relationship Status	Marriage	
When did your relationship commence?	1/03/2010	
What date were you married?	12/04/2014	
Have you had any children together?	Yes	N/A
How many children have you had together?	2	
Education for Robert Fleming		
Type		Diploma
Institution		
Course Name		
Country		
Postcode		
Start Date		
End Date		
Add Qualification for Robert Fleming		
Add English Test for Robert Fleming		
Add Skills Assessment for Robert Fleming		
Work History for Robert Fleming		
Add Work History for Robert Fleming		
Health and Character for Robert Fleming		

You can also add whole additional sections if you want to add even more information by clicking the **"Add..."** button in the relevant section.

How many children have you had together?		
Education for Robert Fleming		
Type		
Institution		
Course Name		
Country		
Postcode		
Start Date		
End Date		
Add Qualification for Robert Fleming		
Add English Test for Robert Fleming		
Add Skills Assessment for Robert Fleming		
Work History for Robert Fleming		
Add Work History for Robert Fleming		

! Important: Please note that not all of the information from the Questionnaire Answers can be imported in to the Migration Manager database as there may be questions asked in the Questionnaire for which there are no corresponding fields in the database. For example, some of the Health and Character questions in the Questionnaire are very generic for which there is no corresponding location in Migration Manager. If a field can not be imported in to Migration Manager, the cell will be marked N/A

Add Work History for Fleming Julietta

^ Health and Character for Fleming Julietta		
Does this applicant have any health conditions?	No	N/A
Has this applicant ever committed a criminal offence?	No	N/A
Has this applicant previously had an Australian visa refused?	No	N/A
Has this applicant previously had an Australian visa cancelled?	No	N/A
^ Comments and Questions		
Additional Information		N/A
How likely are you to appoint a migration agent?	Likely	N/A
When do you plan to start the process?	Within 3 months	N/A
RMA		
Manager		
Clerk		
Office		

5. Review and Remove Unnecessary Data

If you have added information to the Values to Import Column that you do not want to, you can either edit/delete a single entry by clicking on the cell and making changes, or you can remove an entire section by clicking the erase button next to each section

Questionnaire Answers		Values to Import
^ Application Type - Visa - Join my Australian Spouse/Partner		
^ Robert Fleming - Primary Applicant		
Prefix	Mr	Mr
Given Names	Robert	Robert
Surname	Fleming	Fleming
Date of Birth	11/03/1983	11/03/1983
Marital Status	Married	Married
Email	example@migrationmanager.com.au	example@migrationmanager.com.au
Mobile Country Code	1	1
Mobile Number	23234234	23234234
Passport Country	United Kingdom	United Kingdom
Passport Number	BF111111	BF111111
Current Location	United Kingdom	United Kingdom
Last Arrived in Australia		
Required to Depart Australia		
Current Visa		
Current Visa Expires		

Marital Status	Married	Married
Email	example@migrationmanager.com.au	example@migrationmanager.com.au
Mobile Country Code	1	1
Mobile Number	23234234	23234234
Passport Country	United Kingdom	
Passport Number	BF111111	
Current Location	United Kingdom	
Last Arrived in Australia		
Required to Depart Australia		
Current Visa		
Current Visa Expires		

6. Set the Responsible Staff Members

Before you can import a Weblead in to Migration Manager as a Prospect, you must assign some responsible Staff members who will have conduct of the matter. To do this, go to the bottom of the review window.

Go To
Expand All
Collapse All
Copy All

	Questionnaire Answers	Values to Import
Current Visa		
Current Visa Expires		
Education for Fleming Julietta		
	Add Qualification for Fleming Julietta	
	Add English Test for Fleming Julietta	
	Add Skills Assessment for Fleming Julietta	
Work History for Fleming Julietta		
	Add Work History for Fleming Julietta	
Health and Character for Fleming Julietta		
Does this applicant have any health conditions?	No	N/A
Has this applicant ever committed a criminal offence?	No	N/A
Has this applicant previously had an Australian visa refused?	No	N/A
Has this applicant previously had an Australian visa cancelled?	No	N/A
Comments and Questions		
Additional Information		N/A
How likely are you to appoint a migration agent?	Likely	N/A
When do you plan to start the process?	Within 3 months	N/A
RMA		
Manager		
Clerk		
Office		

Change Primary Applicant
Save
Import
Close

For all or any of the rows, click on the Value to Import column and select from one of the available staff members.

Comments and Questions		
Additional Information		N/A
How likely are you to appoint a migration agent?	Likely	N/A
When do you plan to start the process?	Within 3 months	N/A
RMA		Kelly Smith
Manager		
Clerk		
Office		

Change Primary Applicant

Close

Amelia Jay
Kelly Seal
Kylie Cooper
Marcus Wattle

If you have Offices set up, you can also select one of these in the Office row.

Comments and Questions		
Additional Information		N/A
How likely are you to appoint a migration agent?	Likely	N/A
When do you plan to start the process?	Within 3 months	N/A
RMA		Kelly Smith
Manager		Amelia Jay
Clerk		Marcus Wattle
Office		Sydney

Change Primary Applicant

Close

Perth
Sydney

7. Import the Weblead as Prospect

When you have finished reviewing and editing the Weblead, you can convert the Weblead in to a matter in Migration Manager by clicking the **Import** button or the **Import and Open** button. If you select **Import and Open**, the matter will be opened once the import has been completed.

Manager		Amelia Jay
Clerk		Marcus Wattle
Office		Sydney

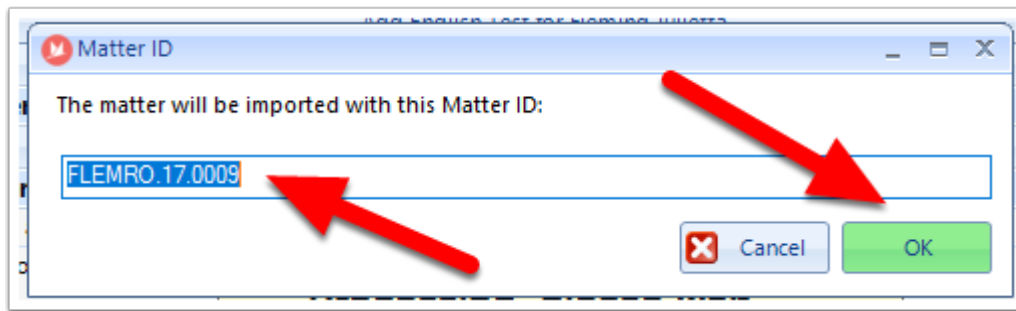
Change Primary Applicant

Import

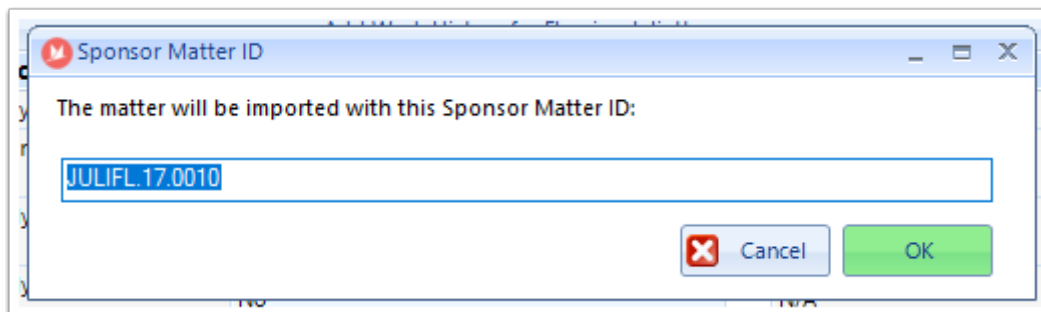
Close

Import
Import and Open

After you have clicked the Import button, you will need to specify a Matter ID. Click the **OK** button to complete the import.



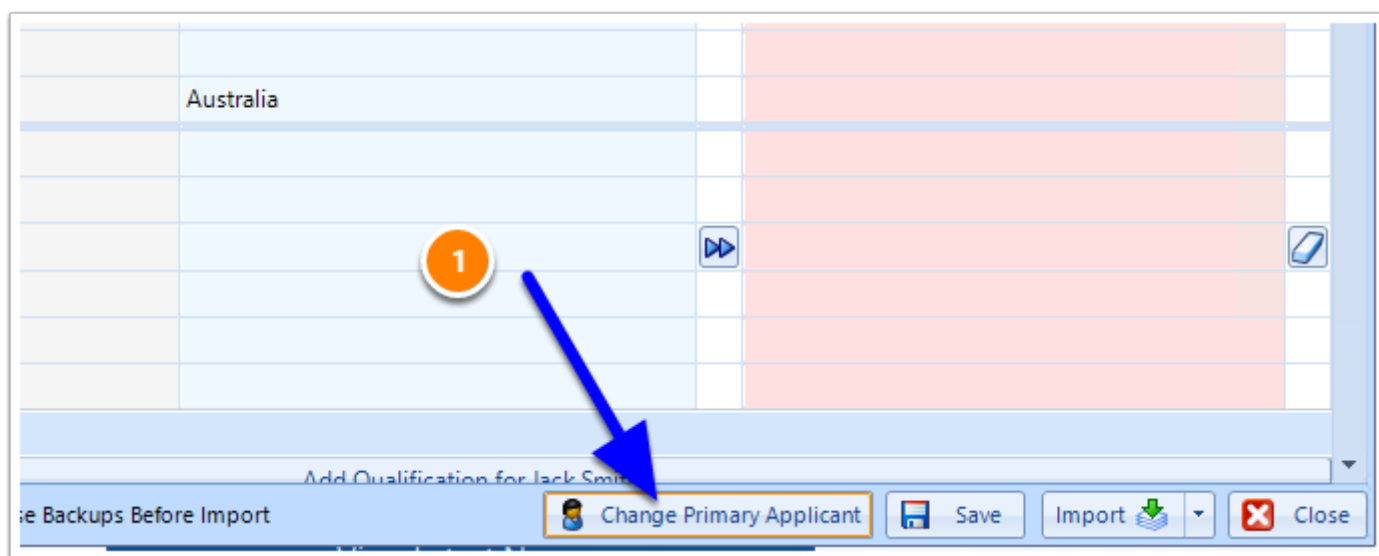
- i** Note: If details of a business or family sponsor have been included in the Initial Questionnaire, you will be asked to confirm a Matter ID for this file as well.



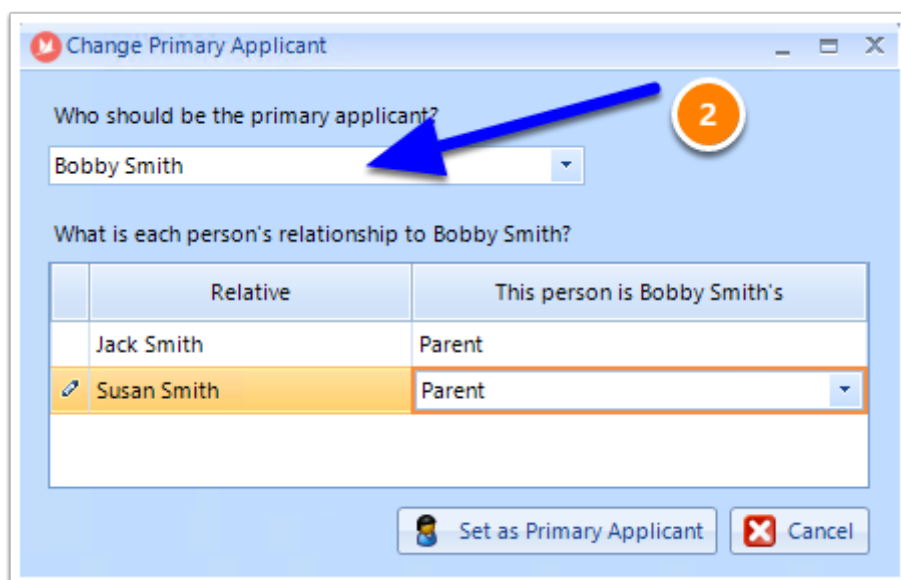
- i** Note: If the client has marked the incorrect person as the Primary Applicant, you can **Change the Primary Applicant** at time of import.

Changing the Primary Applicant

1. Click the 'Change **Primary Applicant**' button.



2. Select who you would like as the **Primary Applicant**.




3. Select the relationship of that person to the other applicants in the Weblead.



Change Primary Applicant

Who should be the primary applicant?

Bobby Smith

What is each person's relationship to Bobby Smith?

	Relative	This person is Bobby Smith's
	Jack Smith	Parent
	Susan Smith	Parent

 Set as Primary Applicant  Cancel

3


4. Click '**Set as Primary Applicant**'



Change Primary Applicant

Who should be the primary applicant?

Bobby Smith

What is each person's relationship to Bobby Smith?

	Relative	This person is Bobby Smith's
	Jack Smith	Parent
	Susan Smith	Parent

 Set as Primary Applicant  Cancel

4