


Setup User Defined WebLeads

Migration Manager enables users to capture enquiry emails which have been received from a website, identify these emails as leads (referred to as a WebLead) and to convert these WebLeads into a prospect Matter using the data from within the received email. In order for Migration Manager to be able to identify WebLeads, the WebLead Connect preferences in Migration Manager must be set up to recognise these website emails.


 **Important Note:** WebLeads Connect is for use with your own contact Webpage. If you wish to use the General Enquiry Webpage Migration Manager provides, then follow the instructions for [Online Assessments](#).


For WebLeads Connect the webpage you use must be one already attached to your website most websites typically have a 'contact us' page which enables someone to send an enquiry to the owner of the website. If you have a website with a 'contact us' page, then to set up WebLeads Connect so that a website enquire email is automatically recognised, follow these steps:

1. Identify Fields to be captured

First, obtain a copy of an email that you receive from your website enquiry page. You will need this email so as to be able to identify the fields that are contained within the email.


Example: In the example there are 11 fields within the email (Your email will most likely look different). The following instructions will demonstrate how to use Webleads Connect to teach Migration Manager how to process these emails through the WebLeads page and convert these enquires into a Prospect Matter.

 Web Enquiry

To  [Redacted]

First Name: James
Last Name: Fleming
Email: james@iwanttomigrate.com
Phone: 92280111
Mobile: 0408883999
Current Visa 572
Visa Expiry Date: 09/12/2018
Occupation: Hair Dresser
DOB: 26/01/1988
Country of Passport: United Kingdom
Comments: I am currently in Australia on a student Visa and I would like to know about 482 visas



2. Login as Administrator

Login to Migration Manager 

User Name:

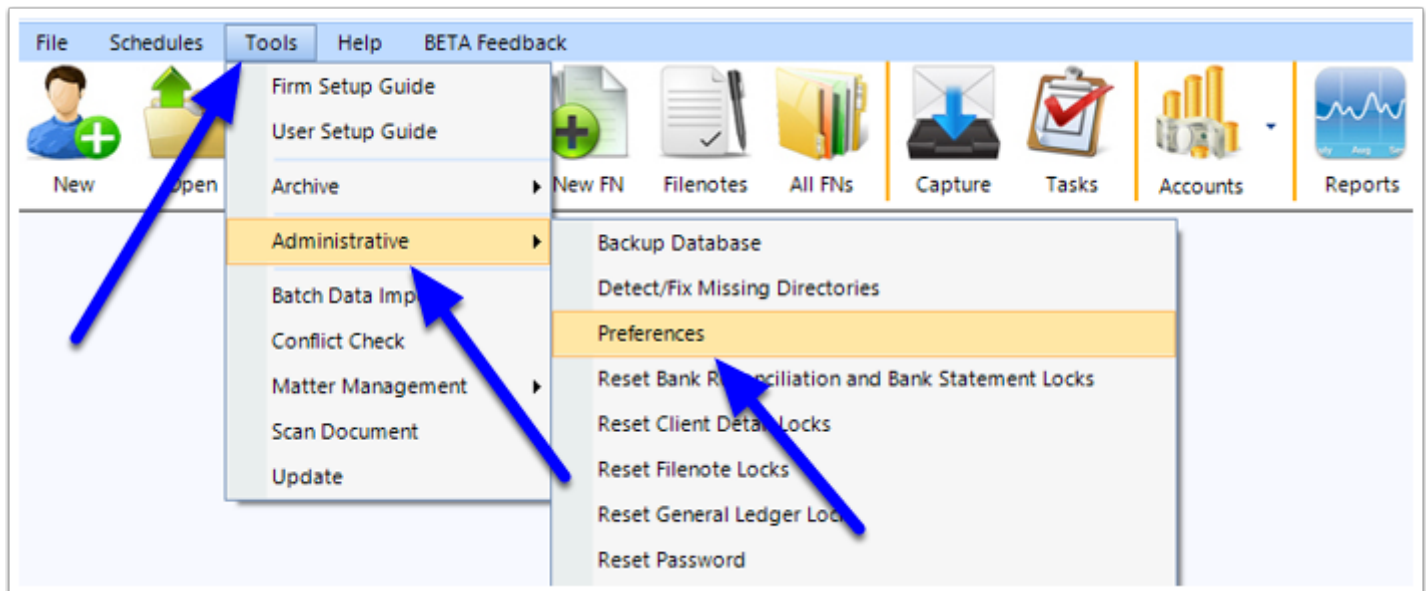
Password:

☒ I have read the [End User Agreement](#) and agree to the terms and conditions

 Cancel  Login

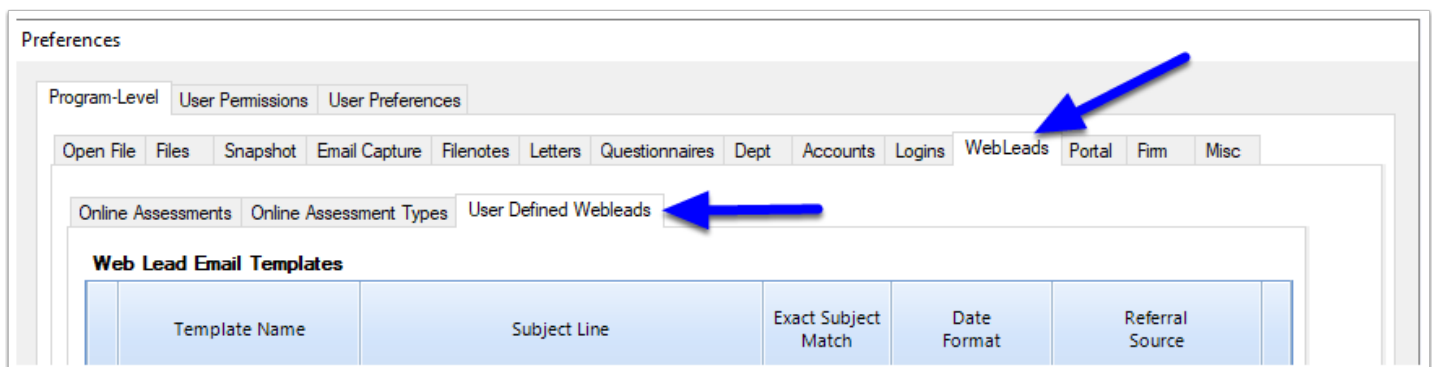
3. Go to Preferences

On the top toolbar, click **Tools**, then click **Administrative**, then click **Preferences**.



4. Go to the User Defined WebLeads tab

Once the Preferences window appears, select the **WebLeads** tab, then the **User Defined WebLeads** tab



i The WebLeads Connect tab will now be visible. If you have not previously set up this preference, you will need to first set up a Template.

Note: You can set up multiple Templates to deal with WebLeads you might receive from different websites.

5. Add a new WebLead Template

To add a WebLead Template, click the '**Add**' button in the bottom right hand corner.

Preferences

Program-Level User Permissions User Preferences


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

Online Assessments Online Assessment Types User Defined Webleads

Web Lead Email Templates

Template Name	Subject Line	Exact Subject Match	Date Format	Referral Source
Main Website Web Leads	Webleads from our primary Website	<input checked="" type="checkbox"/>	dd/mm/yyyy	Website Enquiry

Copy Edit Delete Add



6. The New WebLeads Connect Template builder page will appear.

New Web Leads Connect Template

WebLeads Email Capture Configuration

Template Name

Enter the subject line used by prospect emails from your website:
Email capture will look for emails with this subject line and convert them to prospects.

☒ Look for emails with exactly this subject line
☐ Look for emails where the subject contains this text

Enter the format used for dates in your emails. e.g. if dates are shown as 31/01/2013, enter dd/mm/yyyy

Select the referral/source to be used for WebLeads with the above subject line

Is the information in your emails:
☒ On the same line as the text that describes it e.g. DOB: 1/3/1970 ☐ On the line after the text that describes it e.g. DOB: 1/3/1970

If the same search text appears more than once in the email (eg if DOB: appears more than once):
☒ Use the first occurrence ☐ Use the last occurrence

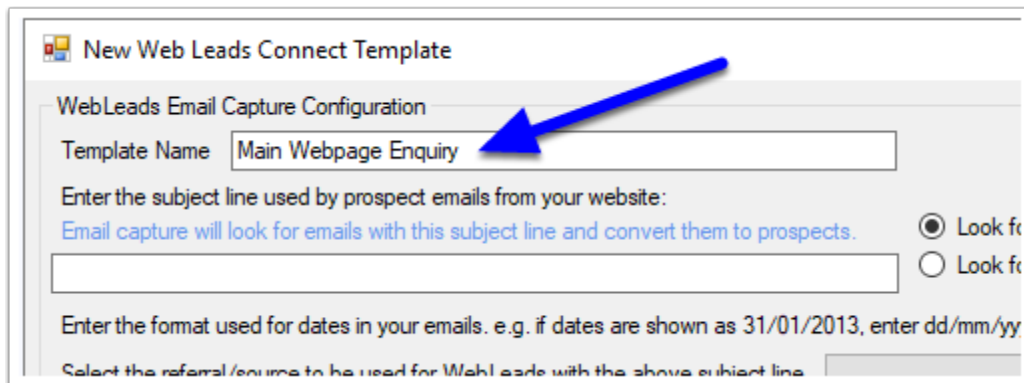
If your prospect emails include comments/notes, how can we determine when the comment/note ends?
☒ The comment/note ends after the first line break ☐ The comment/note ends after the first empty line
☐ The comment/note ends when the following text is found:

Information to Import from Prospect Emails

1. Choose a piece of information to capture 2. Enter the text that will be used to search for this information in the email. e.g. if the date of birth is always preceded by DOB: in the email, you would enter DOB: for the date of birth 3. Click Add

Information	Text to Search For
<input type="text"/>	<input type="text"/>

7. First, give the Template a name, for example, the name of the website that this enquiry will be received from.



New Web Leads Connect Template

WebLeads Email Capture Configuration

Template Name

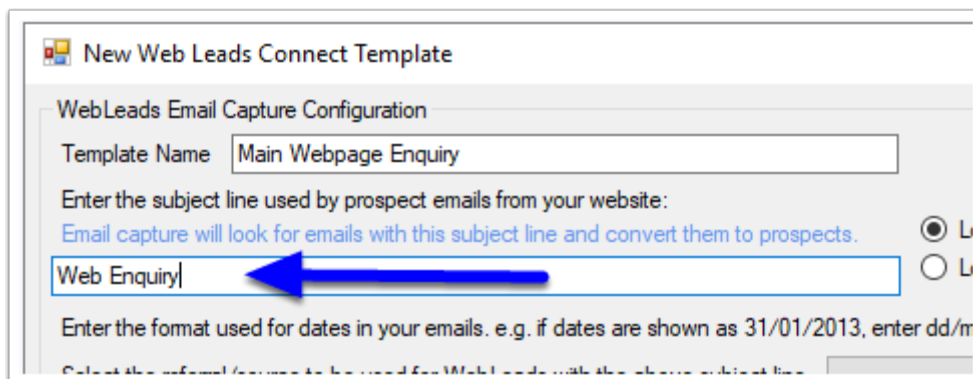
Enter the subject line used by prospect emails from your website:
Email capture will look for emails with this subject line and convert them to prospects.

☒ Look for
☐ Look for

Enter the format used for dates in your emails. e.g. if dates are shown as 31/01/2013, enter dd/mm/yy

Select the referral/source to be used for WebLeads with the above subject line

8. Next, specify what subject line your web enquiry emails contain – Migration Manager uses this email subject line to identify that these emails are from your website.



New Web Leads Connect Template

WebLeads Email Capture Configuration

Template Name

Enter the subject line used by prospect emails from your website:
Email capture will look for emails with this subject line and convert them to prospects.

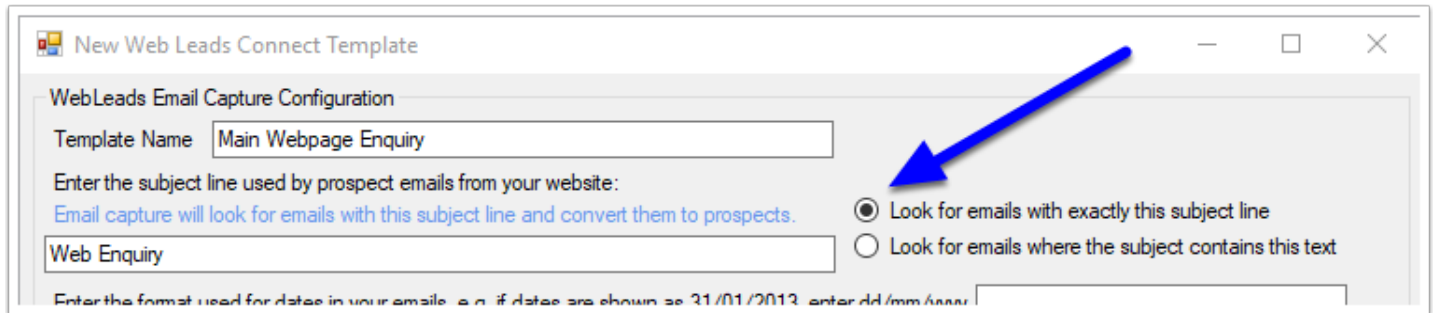
☒ L
☐ L

Web Enquiry

Enter the format used for dates in your emails. e.g. if dates are shown as 31/01/2013, enter dd/mm

Select the referral/source to be used for WebLeads with the above subject line

9. You then need to specify whether Migration Manager should only look for emails with the exact specified subject line or whether it should look for subject lines which contain the specified text. Choosing the second option is more flexible but may result in some false positives.



New Web Leads Connect Template

WebLeads Email Capture Configuration

Template Name

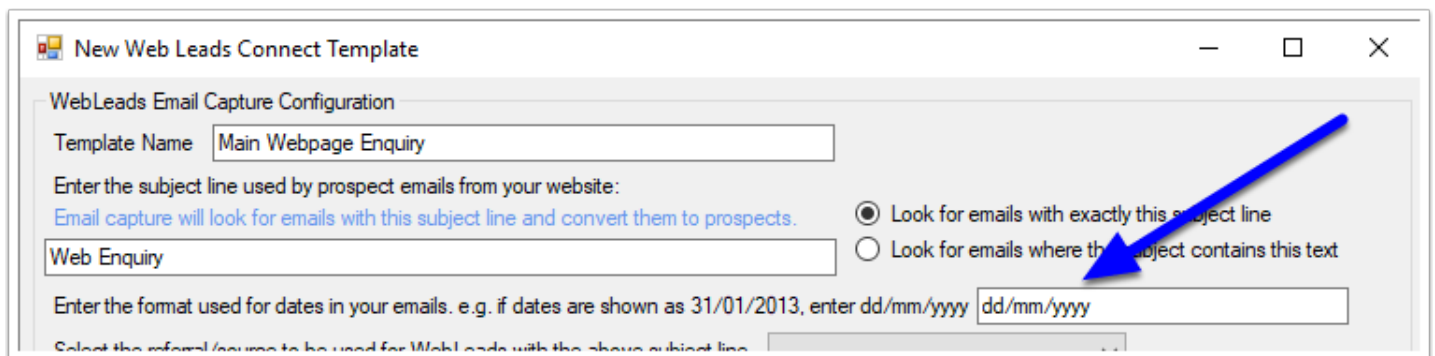
Enter the subject line used by prospect emails from your website:
Email capture will look for emails with this subject line and convert them to prospects.

Enter the format used for dates in your emails. e.g. if dates are shown as 31/01/2013, enter dd/mm/yyyy

☒ Look for emails with exactly this subject line
☐ Look for emails where the subject contains this text

10. Next you need to specify what date format your website uses.

i Note: If your website is hosted in Australia it is likely that the date format will be dd/mm/yyyy. Overseas hosted websites may show dates in a different format and therefore you need to set this preference accordingly – look to your WebLead email to see how dates are shown (if they are shown).



New Web Leads Connect Template

WebLeads Email Capture Configuration

Template Name

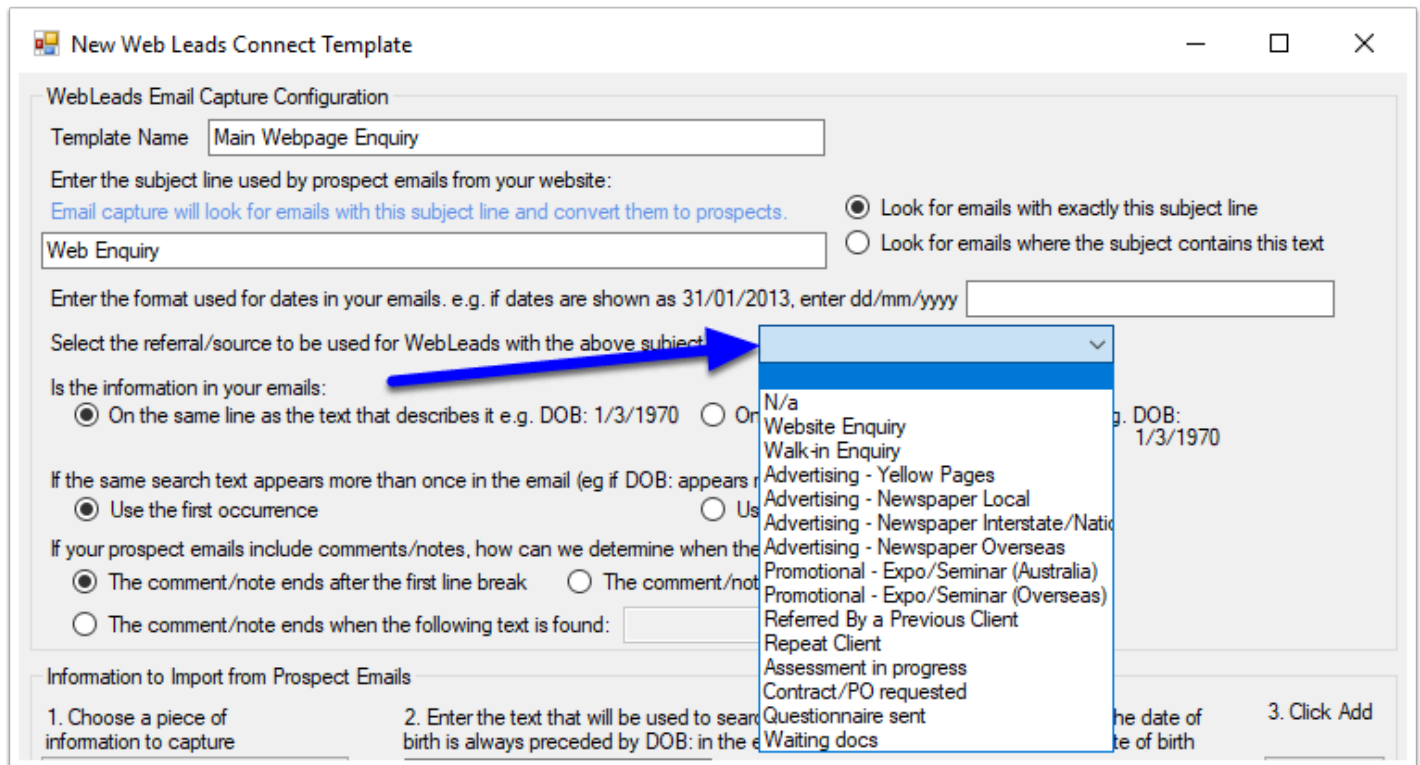
Enter the subject line used by prospect emails from your website:
Email capture will look for emails with this subject line and convert them to prospects.

Enter the format used for dates in your emails. e.g. if dates are shown as 31/01/2013, enter dd/mm/yyyy

☒ Look for emails with exactly this subject line
☐ Look for emails where the subject contains this text

11. If you wish you can specify how any prospect Matter created from a WebLead will record its referral source by selecting from the drop-down list of referral sources. This

referral source will appear on the Prospect Cover Page if the Weblead is converted into a Prospect. Note: your list of referral sources will differ from the example



New Web Leads Connect Template

WebLeads Email Capture Configuration

Template Name:

Enter the subject line used by prospect emails from your website:
Email capture will look for emails with this subject line and convert them to prospects.

Web Enquiry:

Enter the format used for dates in your emails. e.g. if dates are shown as 31/01/2013, enter dd/mm/yyyy

Select the referral/source to be used for WebLeads with the above subject:

Is the information in your emails:

☒ On the same line as the text that describes it e.g. DOB: 1/3/1970 ☐ On the line below the text that describes it e.g. DOB: 1/3/1970

If the same search text appears more than once in the email (eg if DOB: appears more than once):

☒ Use the first occurrence ☐ Use the last occurrence

If your prospect emails include comments/notes, how can we determine when the comment/note ends?

☒ The comment/note ends after the first line break ☐ The comment/note ends when the following text is found:

Information to Import from Prospect Emails

1. Choose a piece of information to capture:

2. Enter the text that will be used to search for the information:

3. Click Add

Referral sources dropdown menu:

- N/a
- Website Enquiry
- Walk-in Enquiry
- Advertising - Yellow Pages
- Advertising - Newspaper Local
- Advertising - Newspaper Interstate/National
- Advertising - Newspaper Overseas
- Promotional - Expo/Seminar (Australia)
- Promotional - Expo/Seminar (Overseas)
- Referred By a Previous Client
- Repeat Client
- Assessment in progress
- Contract/PO requested
- Questionnaire sent
- Waiting docs

12. Next you must specify where the data in the web enquiry email is located. You will need to review the email to see whether the data is listed next to each heading or on the line below each heading

i Example: in the example email shown at Step 1, the data appears on the same line as the heading.

Edit Web Leads Connect Template

WebLeads Email Capture Configuration

Template Name

Enter the subject line used by prospect emails from your website:
 Email capture will look for emails with this subject line and convert them to prospects.

Web Enquiry

Enter the format used for dates in your emails. e.g. if dates are shown as 31/01/2013, enter dd/mm/yyyy

Select the referral/source to be used for WebLeads with the above subject line

Is the information in your emails:

☒ On the same line as the text that describes it e.g. DOB: 1/3/1970 ☐ On the line after the text that describes it e.g. DOB: 1/3/1970

13. If you're email contains multiple fields that are the same (such as date of birth), you need to specify how Webleads is to handle this (Webleads can only read one of each field type).

Enter the format used for dates in your emails. e.g. if dates are shown as 31/01/2013, enter dd/mm/yyyy

Select the referral/source to be used for WebLeads with the above subject line

Is the information in your emails:

☒ On the same line as the text that describes it e.g. DOB: 1/3/1970 ☐ On the line after the text that describes it e.g. DOB: 1/3/1970

If the same search text appears more than once in the email (eg if DOB: appears more than once):

☒ Use the first occurrence ☐ Use the last occurrence

If your prospect emails include comments/notes, how can we determine when the comment/note ends?

☒ The comment/note ends after the first line break ☐ The comment/note ends after the first empty line

☐ The comment/note ends when the following text is found:

14. If your enquiry emails contain a comments section, you must specify at what point the comments section ends so that Migration Manager can determine the text it should read. Again, you will need to look at your email to determine this – for most users choosing the first option will be satisfactory but you may need to test this to determine the best results.

If your prospect emails include comments/notes, how can we determine when the comment/note *ends*?

☒ The comment/note ends after the first line break ☐ The comment/note ends after the first empty line

☐ The comment/note ends when the following text is found:

15. Now you must specify what fields from your web enquiry email you wish to import and how Migration Manager is to identify these fields.


i Note: Through the WebLeads Connect system, Migration Manager is able to import all of the fields contained within the Prospect Cover Page. Please note however that you do not need to import all of the listed fields and you will only be able to import those fields that actually appear in the WebLead

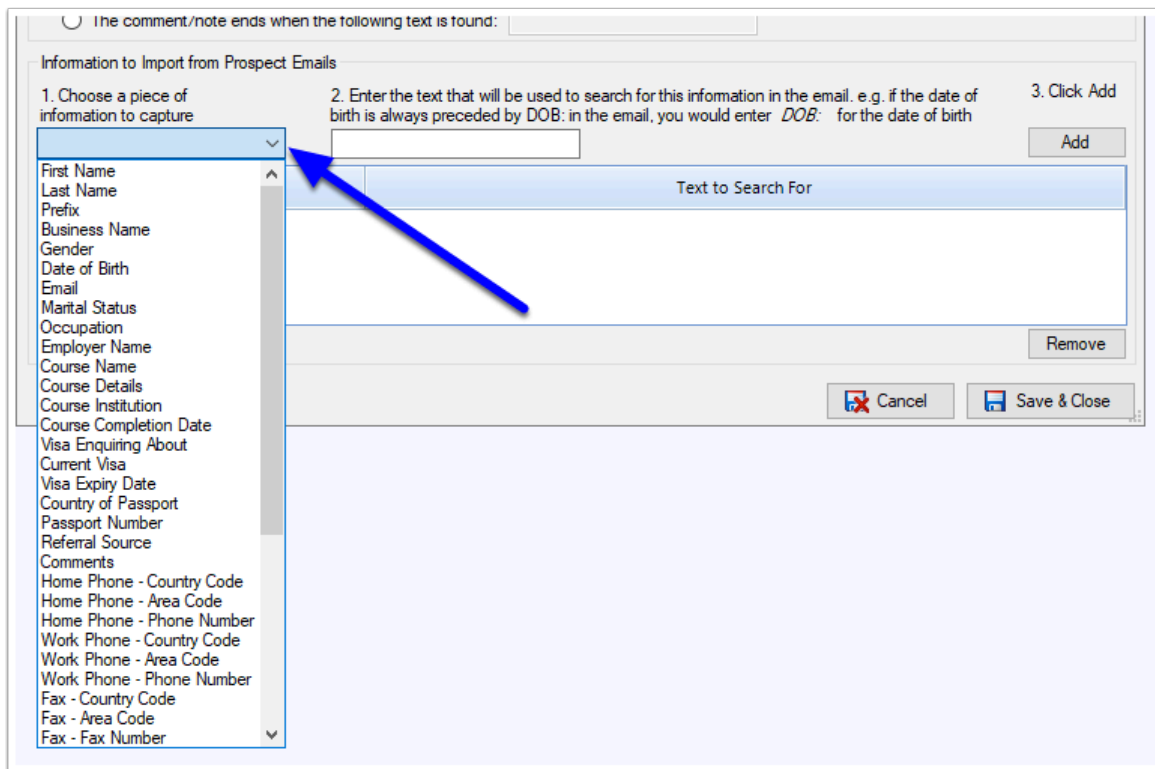
Information to Import from Prospect Emails

1. Choose a piece of information to capture 2. Enter the text that will be used to search for this information in the email. e.g. if the date of birth is always preceded by DOB: in the email, you would enter *DOB:* for the date of birth 3. Click Add


Information	Text to Search For
<div><div></div></div>	

16. To specify a field, first, choose the piece of information you wish to capture by clicking the dropdown box (again, the available list is based on the Prospect Cover Page).

 **Recommendation:** It is recommended that you choose items in the order that they appear on your enquiry email.



17. Next you must specify the heading which appears in the enquiry email so that Migration Manager can identify it. Then click Add

 **Important:** You must specify the heading as it exactly appears, including any punctuation. In the example the heading used to identify the first name reads ' First Name: ' which includes a colon.

Information to Import from Prospect Emails

1. Choose a piece of information to capture
First Name

2. Enter the text that will be used to search for this information in the email. e.g. if the date of birth is always preceded by DOB: in the email, you would enter *DOB:* for the date of birth
First Name:

3. Click Add

Information	Text to Search For

18. Repeat this process until you have added all of the fields you want to capture from the web enquiry email.

Information to Import from Prospect Emails

1. Choose a piece of information to capture
Comments

2. Enter the text that will be used to search for this information in the email. e.g. if the date of birth is always preceded by DOB: in the email, you would enter *DOB:* for the date of birth

3. Click Add

Information	Text to Search For
Date of Birth	DOB:
Country of Passport	Country of Passport:
Comments	Comments:

Remove

Cancel Save & Close

19. To edit any entry, right click the entry and chose 'Edit'.

Information to Import from Prospect Emails

1. Choose a piece of information to capture
Comments

2. Enter the text that will be used to search for this information in the email. e.g. if the date of birth is always preceded by DOB: in the email, you would enter *DOB:* for the date of birth

3. Click Add

Information	Text to Search For
Date of Birth	DOB:
Country of Passport	Country of Passport:
Comments	Comments:

Remove

Copy
Paste
Edit

Cancel Save & Close

20. To remove any entry, click the entry and then click the 'Remove' button in the bottom right hand corner.

Information to Import from Prospect Emails

1. Choose a piece of information to capture
Comments

2. Enter the text that will be used to search for this information in the email. e.g. if the date of birth is always preceded by DOB: in the email, you would enter *DOB:* for the date of birth

3. Click Add

Information	Text to Search For
Date of Birth	DOB:
Country of Passport	Country of Passport:
Comments	Comments:

Remove

Cancel Save & Close

21. When you have finished adding all the fields you wish to capture, click the 'Save & Close' button and then in the main preferences window click "Save & Exit".

i Note: If you want to add more profiles for different webpages repeat the above steps.

Information to Import from Prospect Emails

1. Choose a piece of information to capture
Comments

2. Enter the text that will be used to search for this information in the email. e.g. if the date of birth is always preceded by DOB: in the email, you would enter *DOB:* for the date of birth

3. Click Add

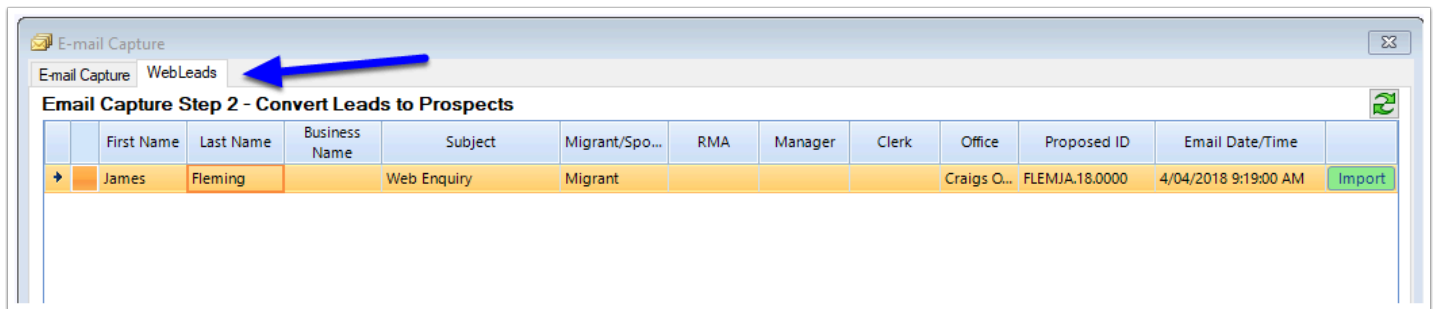
Information	Text to Search For
Date of Birth	DOB:
Country of Passport	Country of Passport:
Comments	Comments:

Remove

Cancel Save & Close


22. Any email which is now received from your website which contains the relevant subject line will now

automatically be identified as a WebLead in the email capture window.



The screenshot shows a software window titled "E-mail Capture" with two tabs: "Email Capture" and "WebLeads". A blue arrow points to the "WebLeads" tab. Below the tabs, the window is titled "Email Capture Step 2 - Convert Leads to Prospects". It contains a table with the following columns: First Name, Last Name, Business Name, Subject, Migrant/Spo..., RMA, Manager, Clerk, Office, Proposed ID, Email Date/Time, and an "Import" button. The table has one data row for James Fleming, with a subject of "Web Enquiry" and a status of "Migrant".

	First Name	Last Name	Business Name	Subject	Migrant/Spo...	RMA	Manager	Clerk	Office	Proposed ID	Email Date/Time	
→	James	Fleming		Web Enquiry	Migrant				Craigs O...	FLEMJA,18.0000	4/04/2018 9:19:00 AM	Import

 For instructions on how to capture, process and convert webleads, please see [Importing Prospects from WebLeads Connect](#)