Agen+cis

TRAINING MANUAL

For Front Desk & Reception

About us

Agentcis is a powerful Agency Management Software that combines smart business operations, allowing high-efficiency service process management. The software streamlines all agency data into a single platform reducing duplication & increasing productivity of the team members.

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www.agentcis.com

INDEX

1.INTRODUCTION

➔Purpose of the manual

This manual serves as a comprehensive guide for Front Desk and Reception staff to efficiently use Agentcis. It is designed to help users navigate the system, manage customer interactions, add customers, manage office check-ins, schedule appointments, handle payments, and perform other essential tasks with ease.

➔Overview of Agentcis

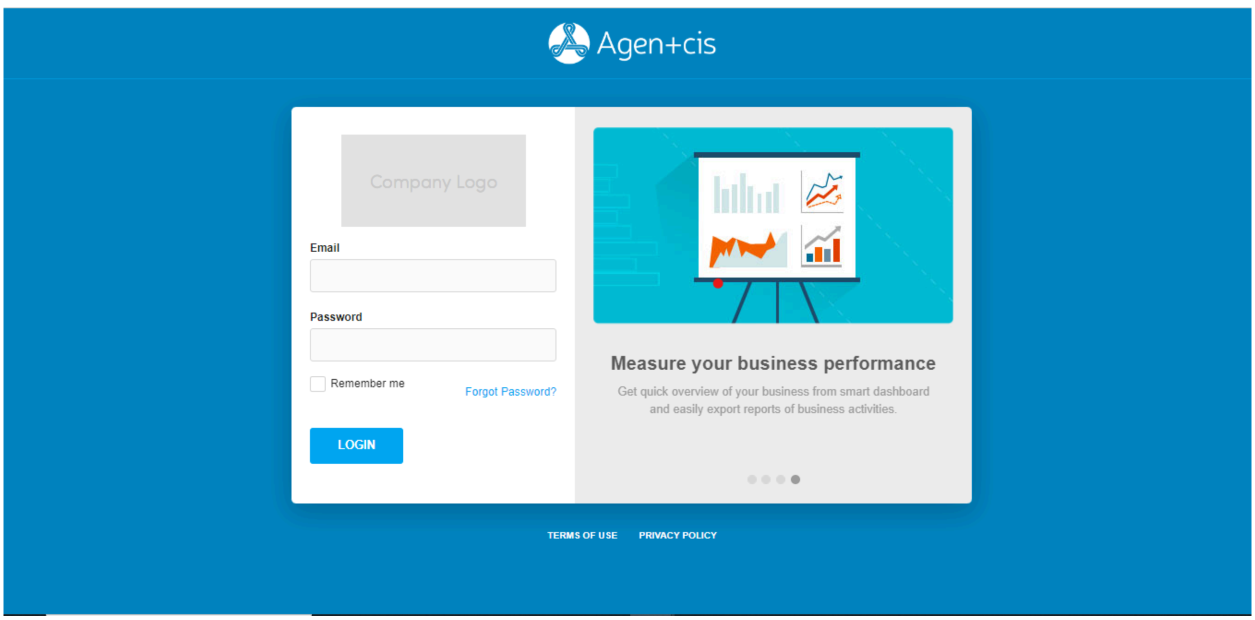
Agentcis is a powerful and user-friendly management software designed to help education and migration consultancies overcome common challenges such as time-consuming paperwork, manual data entry, incomplete sales pipelines, and communication gaps. By providing a seamless CRM solution, Agentcis enables overseas education agencies to track students and partner universities in one place. With its automation and efficient workflow management, Agentcis simplifies operations, improves coordination, and ensures a smoother business process.

2.Getting Started

Logging In and User Access

In Agentcis, users can login from their current business mail once being invited by the owner or Admin. Once you accept the invitation and set up your password, you will be directly taken to onboarding videos and then to Dashboard. To log back into your Agentcis system, please use your company subdomain followed by **agentcisapp.com**, use your email and password to log in.

💡 Please bookmark this link in your browser for easy access in the future!



If you forget your password, simply click "**Forget Password?**" and enter your email on the next page. We will send a link to reset your password, allowing you to reset a new password.

For Front Desk and Reception, the users can access manageable roles and permissions. But it can be edited later. Custom roles can also be created varying upon the Structure of your Company and work requirement.

Basically, the roles assigned to a front desk officer and receptionist are based upon adding leads, enquiries and clients, managing their information based on daily operations and communicating with them in regard to what services they are willing to take from you.

Additionally, communicating with Counsellor and admin regarding the client's terms and resources can be done within the system.

In Agentcis, we have created some permissions for the role of Front Desk and Reception as per the duties they are abiding by.

So what is the first and foremost part of Front desk and reception in Agentcis?

When a new client (termed as lead) visits your Agency for the very first time or in any way gets in contact with you through your website or filling up the Client Registration form, it is the primary duty of the front desk and reception to address them. In Agentcis, this can be done conveniently through our Client Management features such as Office Check-In.

A user can add leads, prospects and clients into the system.

Leads - Also known as Enquiries, leads are the contacts who have filled out your online lead forms or client registration form. Anyone who wants to take your services presently or might take them in the future is an enquiry.

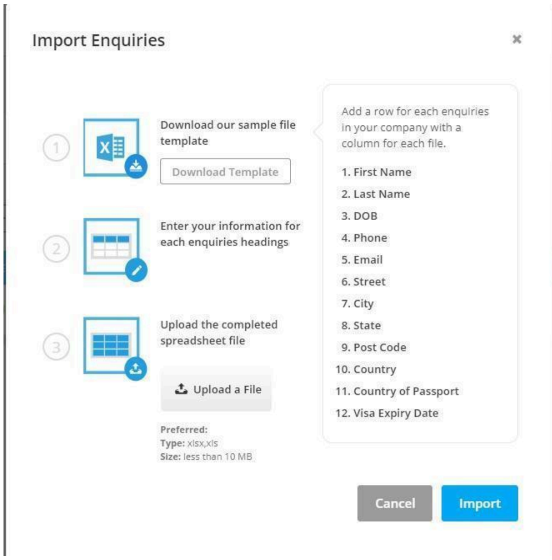
Prospects - Prospects are the contacts without any Applications but can add all the personal information, documents, quotations, and interested services.

Clients - Clients are the contacts with an Application. As soon as you add an application to a Prospect, it becomes a client. You can create an invoice for a client.

Adding New Enquiry

All the contacts that fill up the Lead Forms will be listed in the Enquiries list.

You can also import the enquiries from your device to the Agentcis system.



1. Go to the **Enquiries** tab from the **Side Navigation Bar**.
2. Click on the **Import** button.
3. You will need to download an Excel template and fill it with the data of your enquiries.
4. Upload the Excel sheet back into the system.

To convert an Enquiry into a Prospect, approve the Enquiry from their detail page and assign it to a user/assignee.

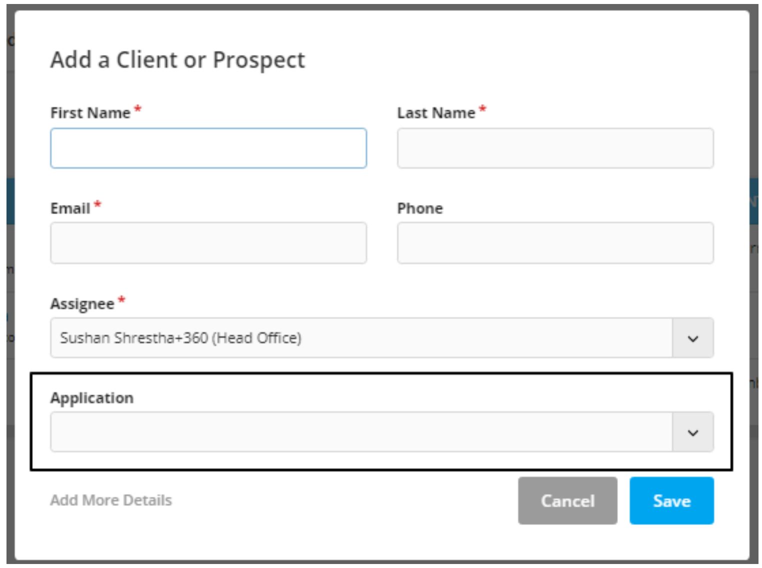
> **For example,**
>
> Mina Chen is a new contact recently assigned to you. Since no application has been added to her, she is treated as a prospect.
>
> She made a decision to get an offer letter from a Bachelor of Nursing in Australian Catholic University. You add an application to her Profile under the Application tab and she then becomes a client in Agentcis.

Adding New Contact

1. Click on the **Clients** menu, so you will be redirected to the Clients list page.

2. Click on the "**Add**" button at the right corner of the page available on both the Prospects and Client list page. A pop-up form will appear to fill in client details.

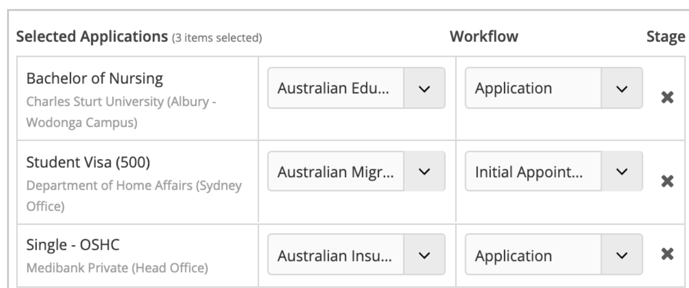
3. Please ignore the Application Section, if you are just creating a Prospect without a confirmed Application.



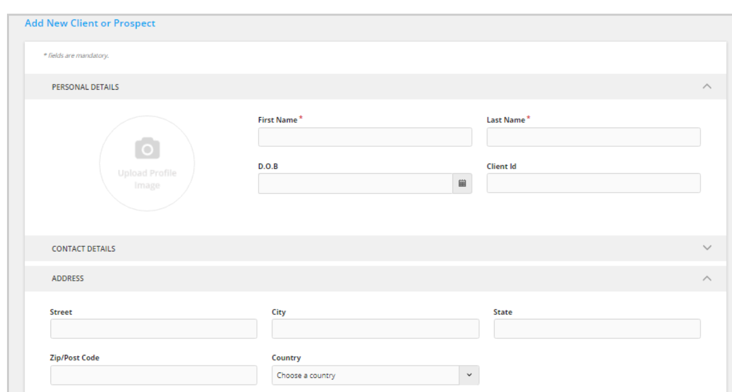
Otherwise, select courses and/or other services to start an application, which will create a Client instead of a Prospect. Please check the default workflow and stage while selecting an application. You can also add multiple applications from the given field.

For example,

Mina Chen would also like to apply for a Student Visa and get Health Insurance along with a Bachelor of Nursing course. You can simply add 3 separate applications for each service in this pop-up form.



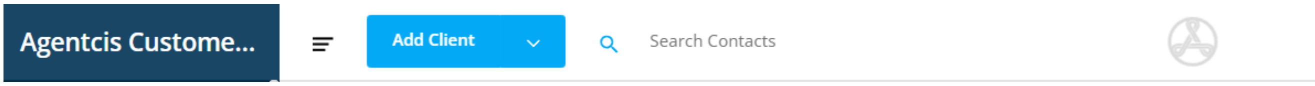
4. Click on "**Add more Details**" at the left-end corner of the pop-up form, if you want to add more information such as Personal details, Contact Details, Address, Visa Information, and Referral Source.



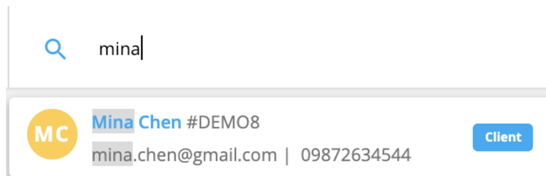
5. To Save the Prospect/Client, Click the “**Save**” button.

To convert a **Prospect** into a **Client**, an application is to be added for the prospect.

Finding or Searching for Contacts



You can quickly search for the clients or prospects (or leads) from **Top Bar**.



Simply, start typing any of the client details in the “**Search**” bar, such as first name, last name, phone, email, or client ID.

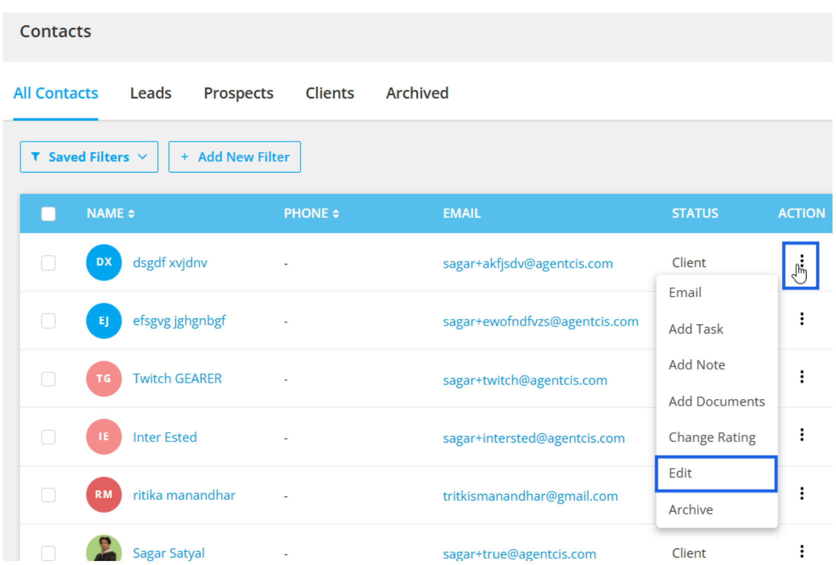
NOTE

You can also search your contacts here with Phone Number, Email Address, and even client ID in addition to First and Last Name.

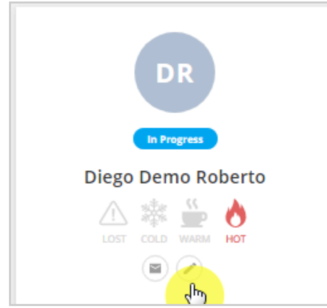
Editing Contact Details

You can edit client details either

- by clicking the “**Edit**” option in the All contacts, enquiries, prospects or clients list



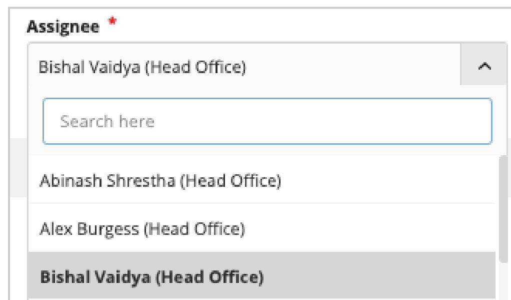
- by clicking the **edit icon** in the client or prospect profile.



Once clicked it will open a form, where you can edit all the client's details such as Personal details, Contact Details, Address, Visa Information, Referral Source, Change Assignee, and many more.

Changing Contact Assignee

When you edit Client or Prospect, there is also an option to change **Contact Assignee**. You can choose a team member, to whom you want to assign a contact and click "**Save**". New Assignee will receive a notification as soon as it is assigned.



Contact Ratings - Hot, Warm, Cold, Lost

Contact ratings are one of the best practices for lead management and can help you to focus on prioritized contacts who need to be contacted soon for conversion. You can view these ratings just under the client name in the Client Profile. You can simply click on each icon to change the client ratings.

Hot Leads or prospects can be those contacts, who are qualified and tend to undertake your service soon. An ideal time frame for conversion can be 1 week to 4 weeks.

Warm Leads or prospects can be those contacts, who are partly qualified and tend to undertake your service in the coming future. An ideal time frame for conversion can be 1 month to 3 months.

Cold Leads or prospects can be those contacts, who are not yet qualified but tend to undertake your service in the coming future. An ideal time frame for conversion can be 3 months to 6 months.

Lost Leads or Prospects can be those contacts, who will not undertake your service in the coming future.

> **NOTE**
>
> The qualification process for Hot, Warm, Cold, and Lost can vary from company to company. Please consult with your manager to identify the proper method to qualify your lead or prospect and assign them the right rating.

All ratings and changes in the rating will be recorded in the Activities section of the contact's profile. The ratings are also shown in Contact List and Contact Reports, from where you can perform further actions.

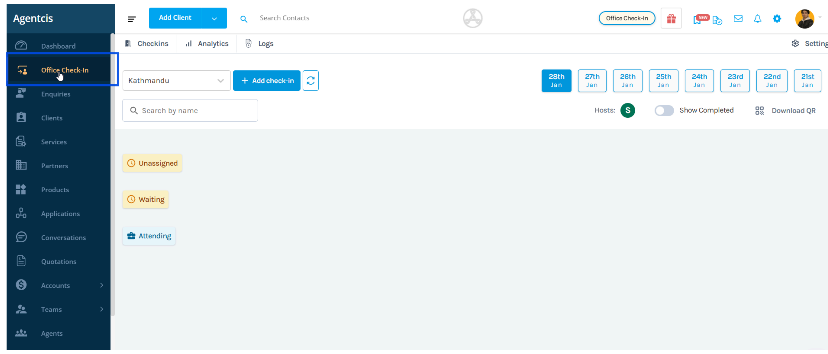
Office Check-In

This feature enables you to add clients who visit you for various purposes like Counselling, Classes, Visa Processing etc. Instead of repeatedly inputting visitor details, staff can now track office visitors more efficiently. This improvement not only saves time but also enhances the overall experience for both employees and guests, allowing teams to focus on delivering exceptional service.

How does Office Check-In work?

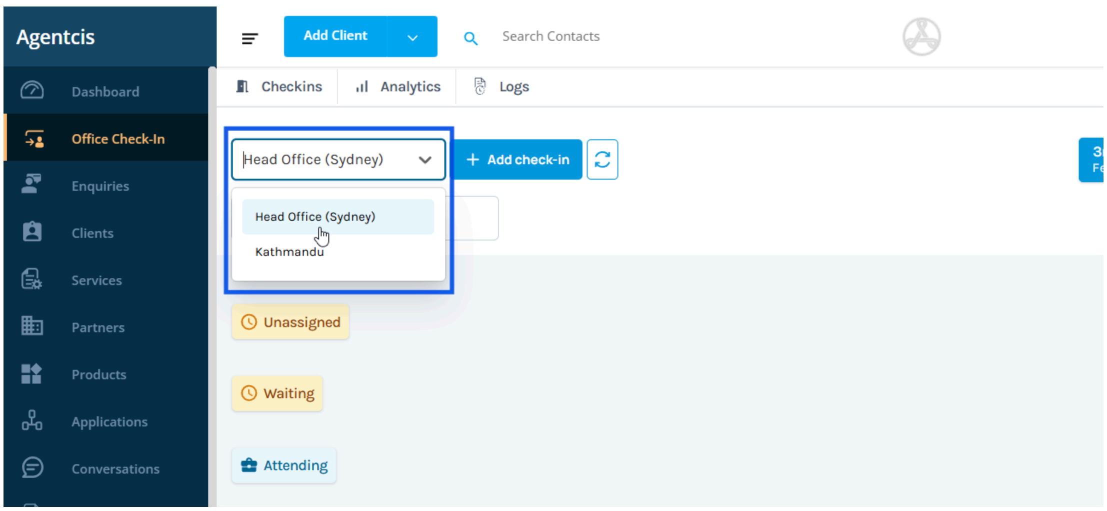
When a client visits your company or contacts you online, first collect their personal details, including name, email, and phone number. This information helps track clients, follow up on their interests, and record their progress if they choose your services.

You can add a check-in by selecting the Office Check-In from the left side navigation bar. Here are the steps to add a Check-In:

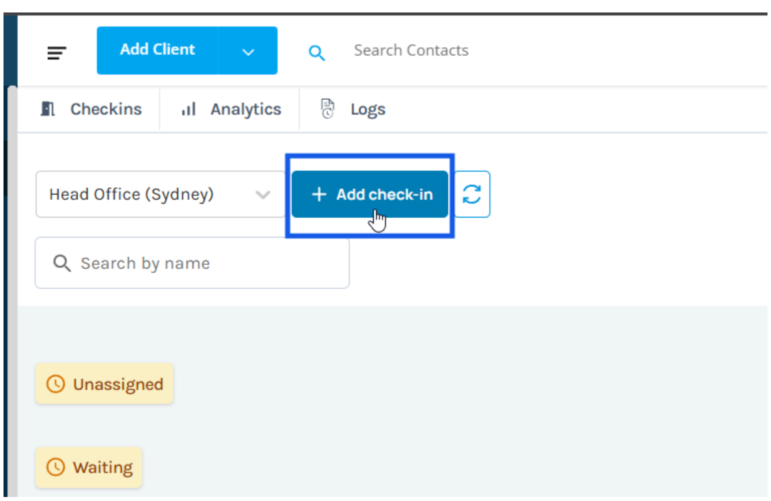


Step 1: Click on **Office Check-In** from the left-side navigation bar.

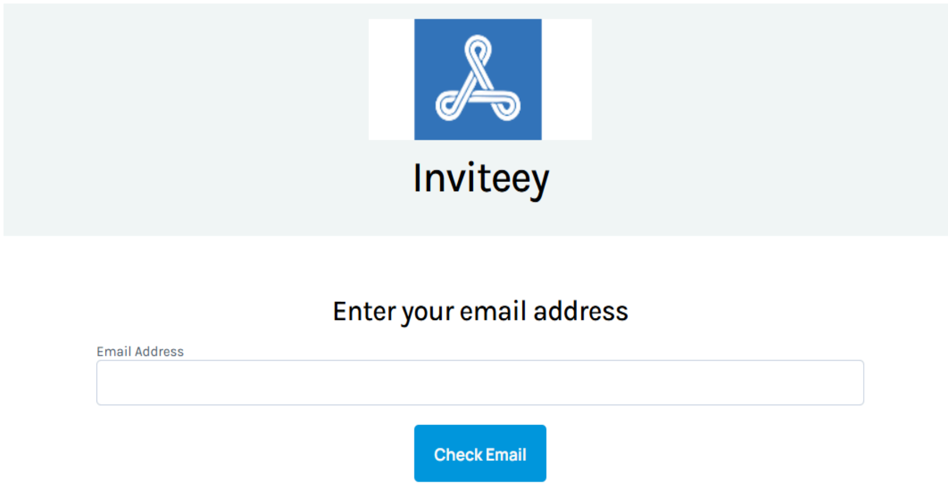
Step 2: Select your designated Office from where you are working or from where the client is checking in.

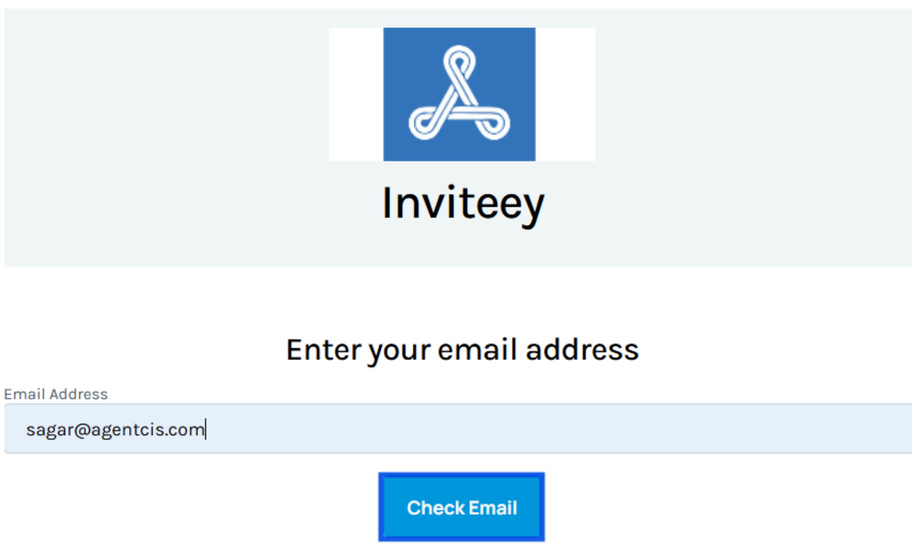


Step 3: After selecting the Office, click on **Add Check-In**.

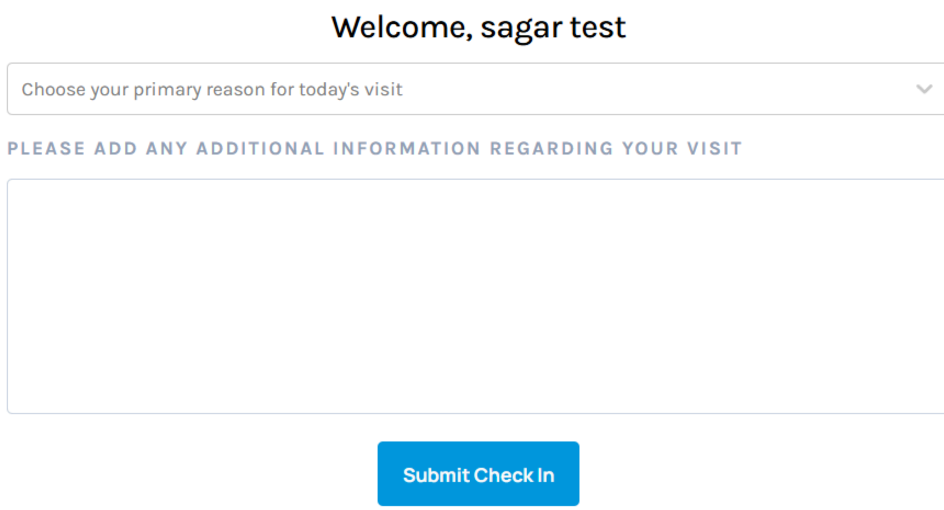


Step 4: You will jump to a new tab. Enter the client's email address in the provided field and click 'Check Email' to verify if it is valid.

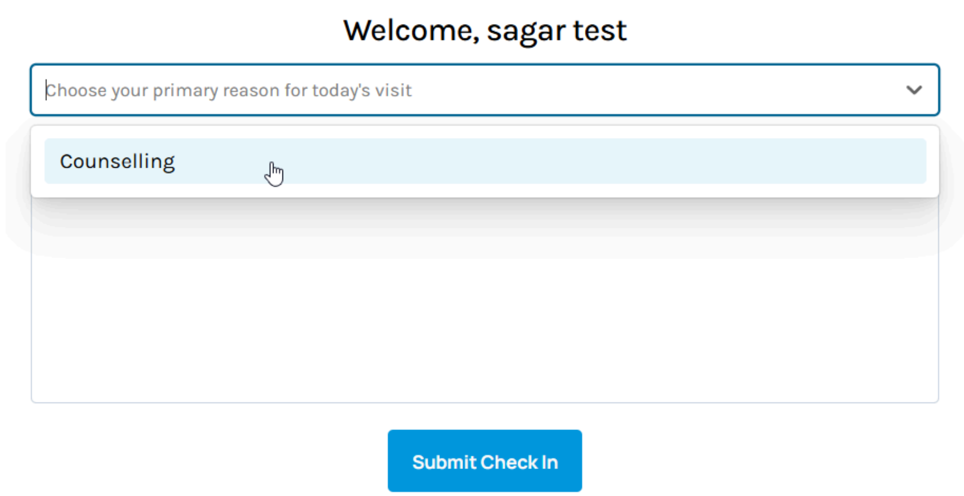




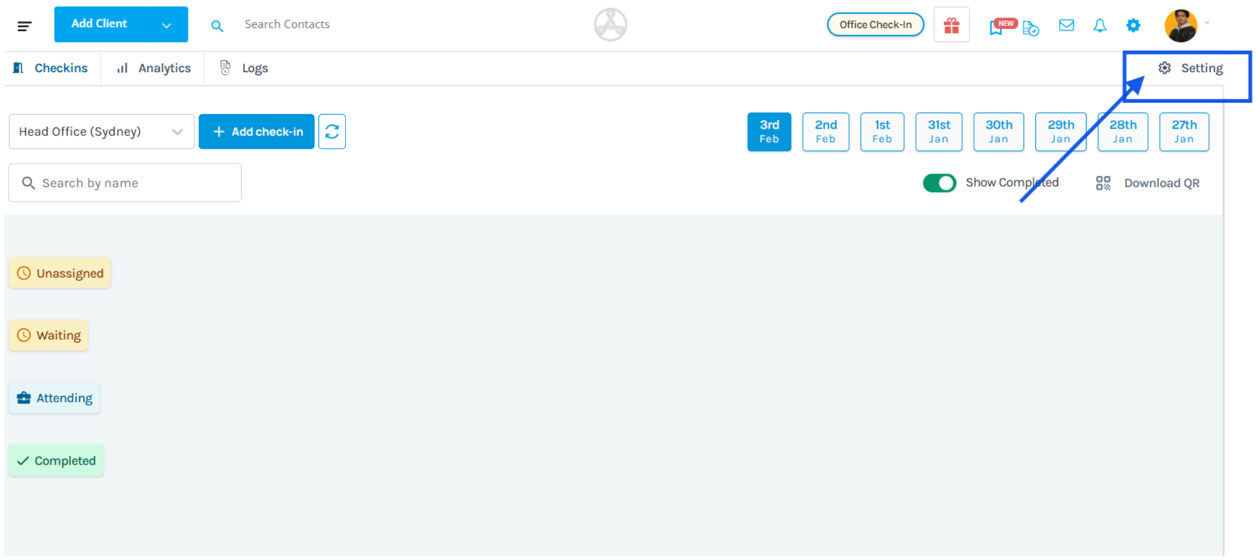
Step 5: After you click on the Check Email option, a dropdown field will appear to add the client's primary reason of visit and other additional information if any.



Step 6: Select a visit option from the dropdown.

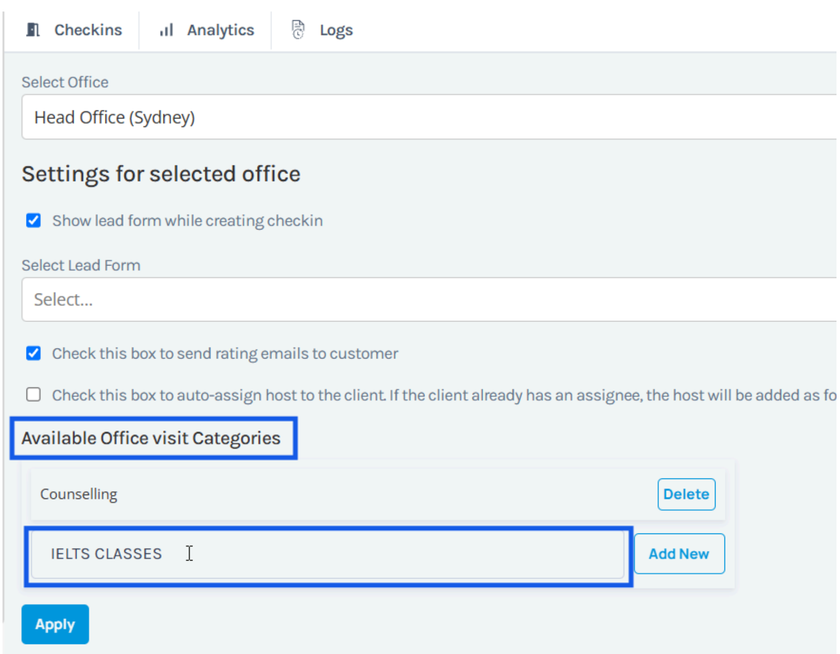


Note: You can edit and add what reasons you want to display in the Office Visit Categories. To do so, go to office check-in settings from the top right of the office check-in page.

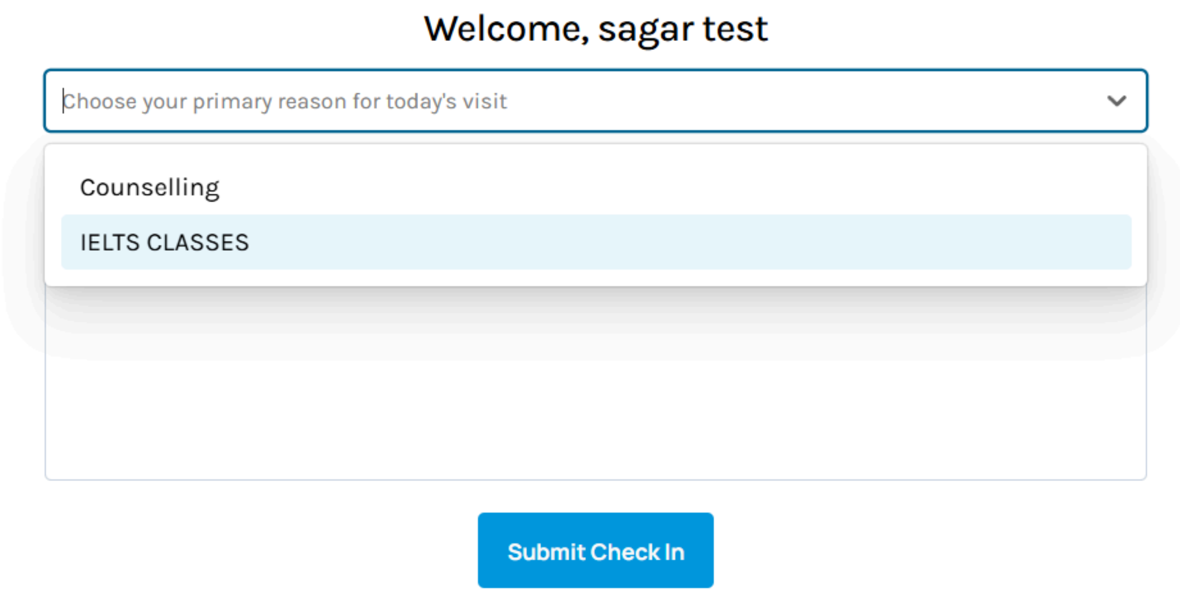


In the Office Visit Categories, fill in the blank space in **Available Office Visit Categories** and click on **Add New**. You can add as many categories as you want but note that, first you will need to fill up the blank field and then select on Add New.

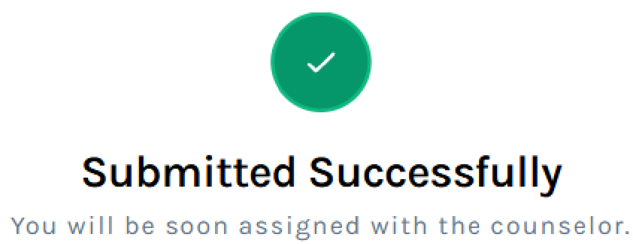
Then a new category will be added.



Click on the Apply button and check if the category has been added or not by adding a check-in.

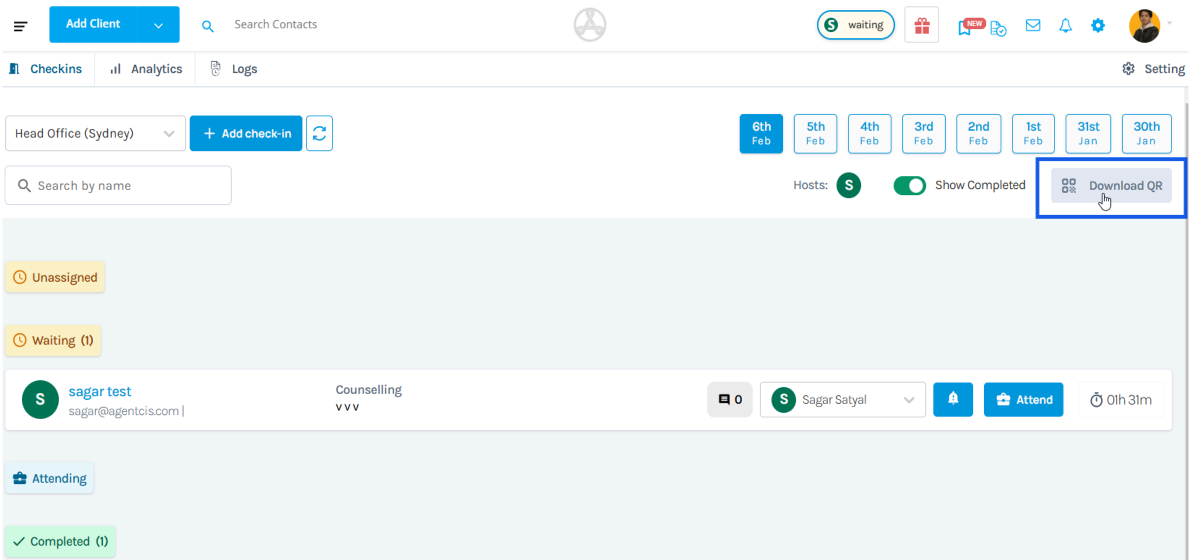


Step 7: After filling necessary details, click on **Submit Check-In**.



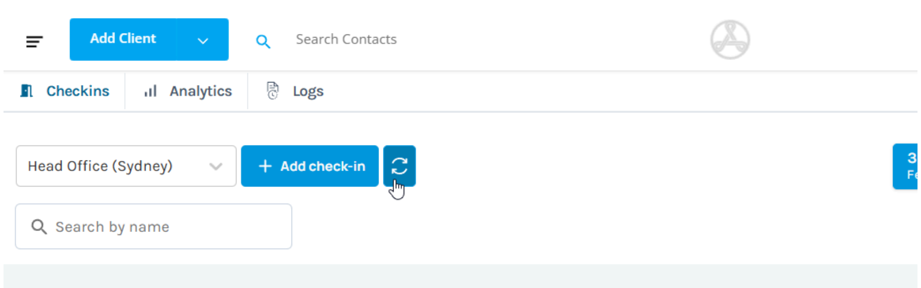
Or, you can directly download the qr code and place it at your desk so that clients can scan the qr code and fill up the check-in form.

Each branch office has its own unique QR code. Users can generate and download the QR code for a specific branch by clicking the **"Download QR"** button.

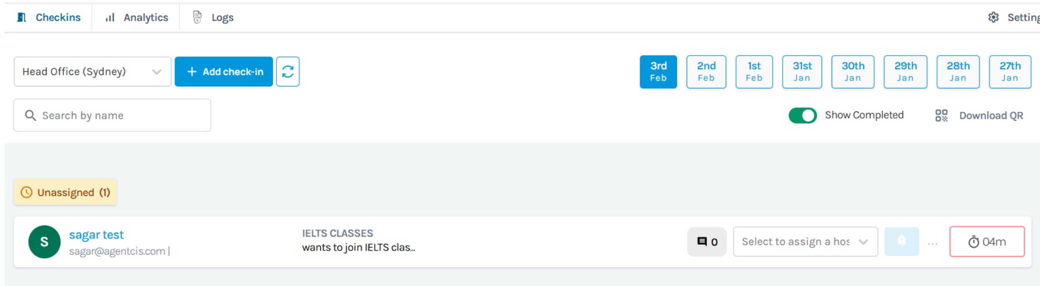


After your clients submit the check-in using the qr code, you will receive an unassigned check-in.

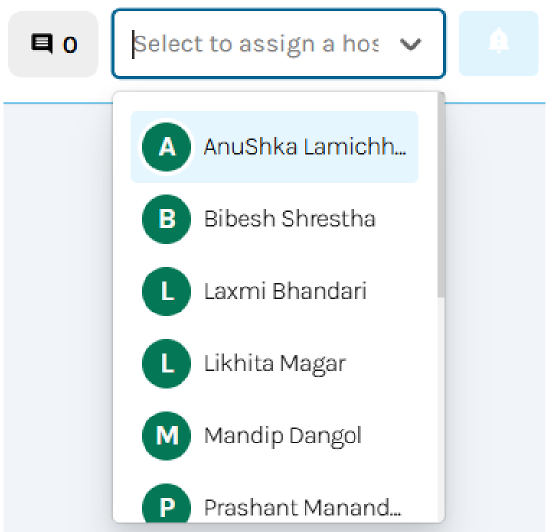
You can go back to Agentcis page. Click on the refresh button to refresh the Check-In.



You will see an unassigned check-in that the students filled by scanning the QR code.

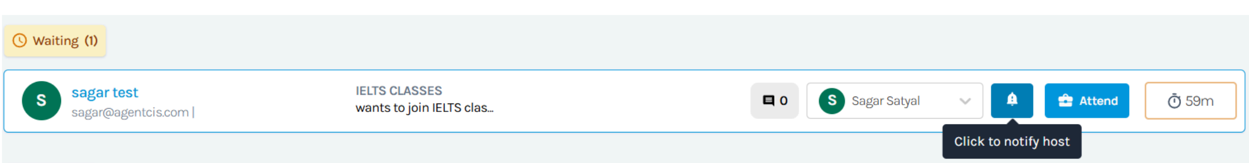


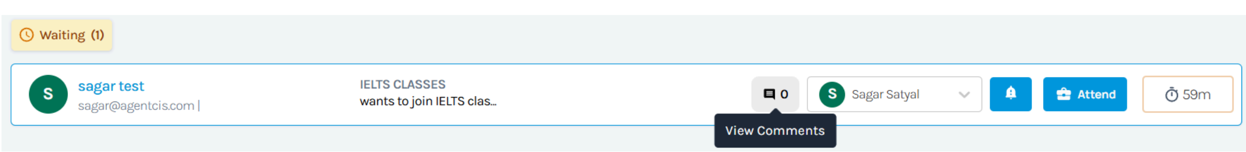
Step 8: Click on 'Select to assign a host' to assign the client to a counsellor.



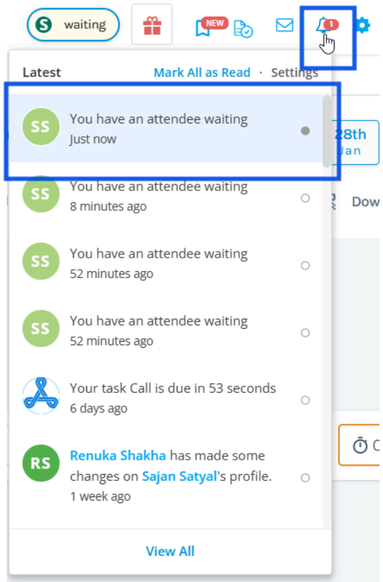
After selecting a host, the client will be transferred to the check-in of that counsellor to whom it is assigned.

You can also notify the counsellor, add comments and also see the waiting time since that client has been checked-in.

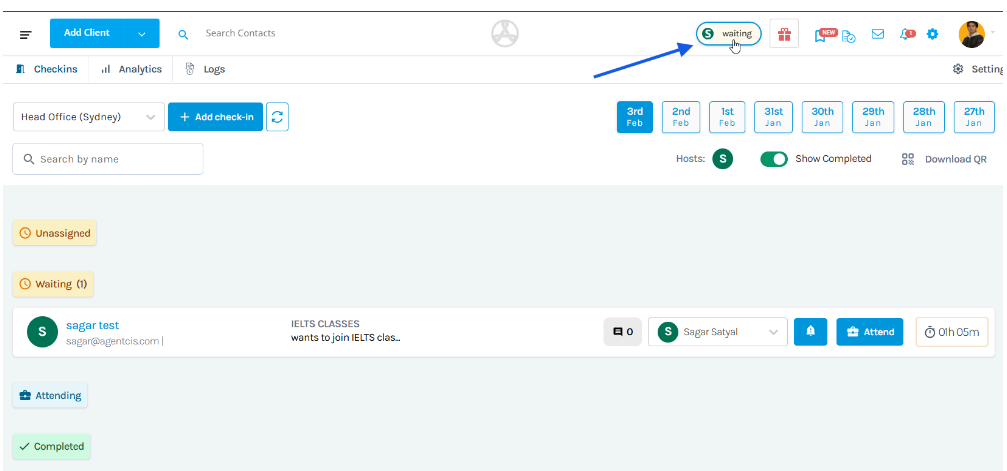




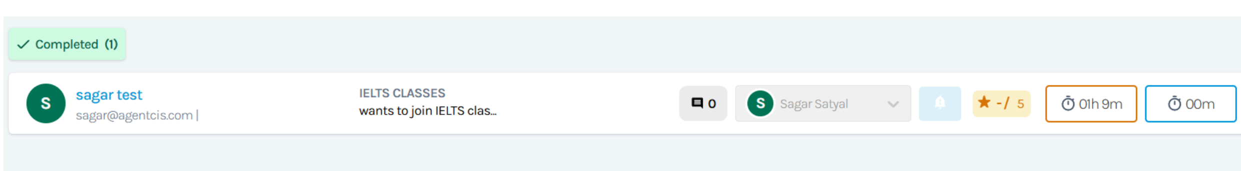
When you click on notify host, the counsellor will be notified with a desktop notification and Agentcis System notification.

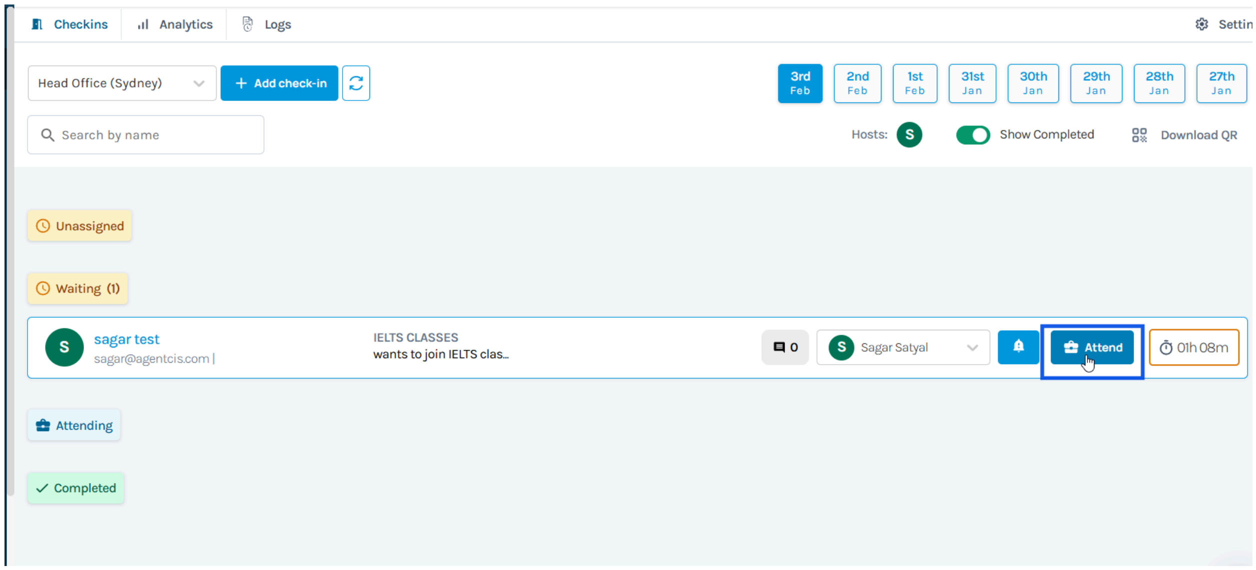


The host will also receive a pop-up icon at the top once they are assigned clients.

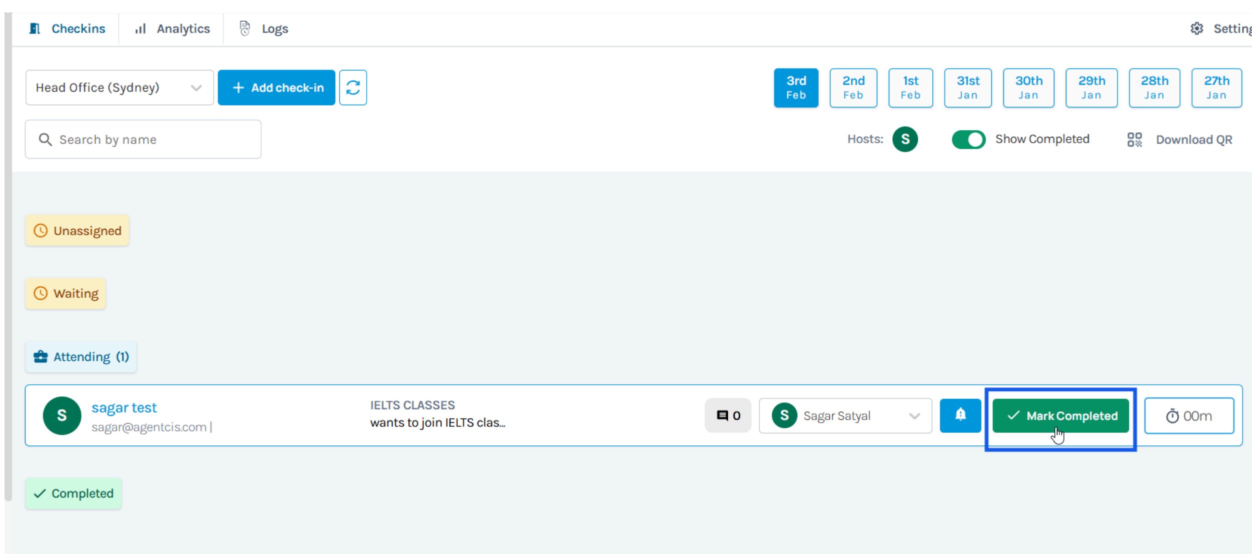


After the host is assigned with clients, they need to click on the **Attend** option and after attending the client, they can mark them as **completed**.

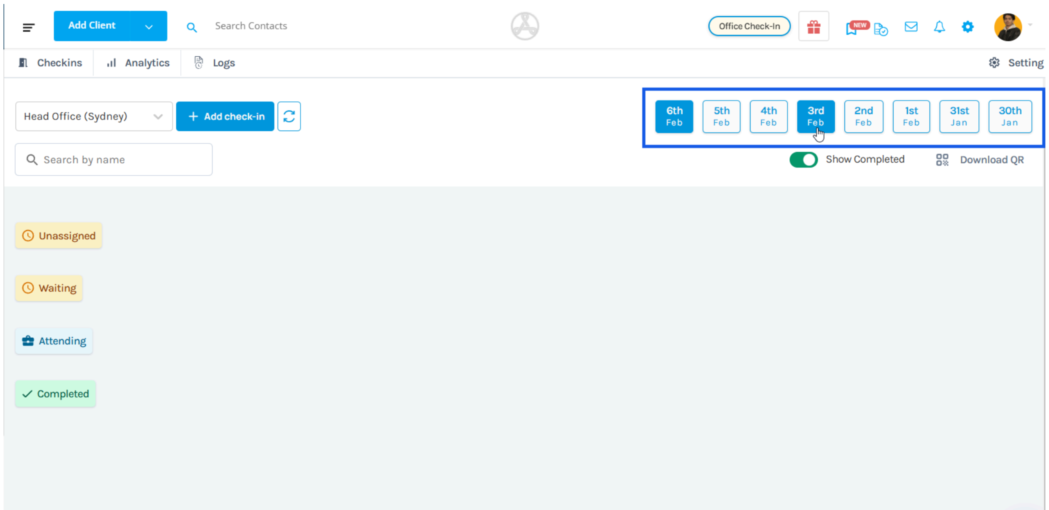


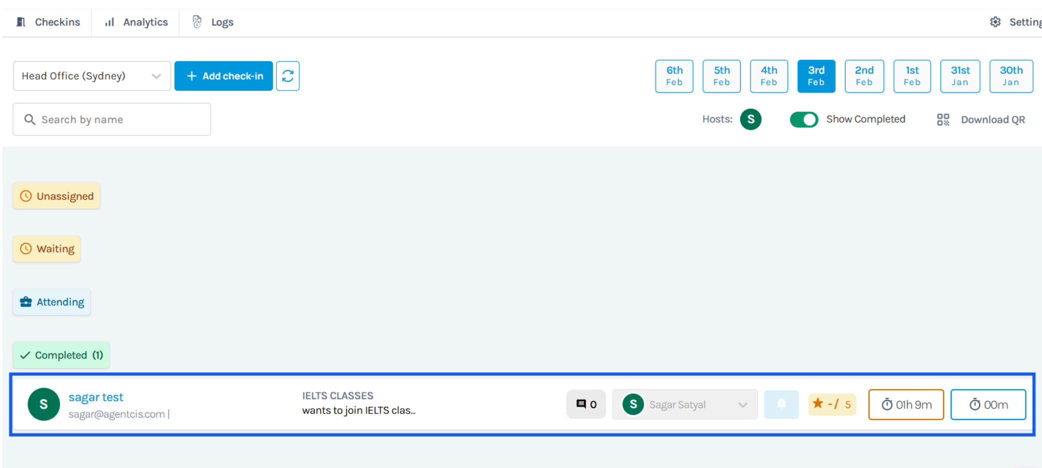


After attending, the check-in will move to the attending Section. After you complete the check-in with all the necessary activities, mark it as completed and it will move to the completed section.



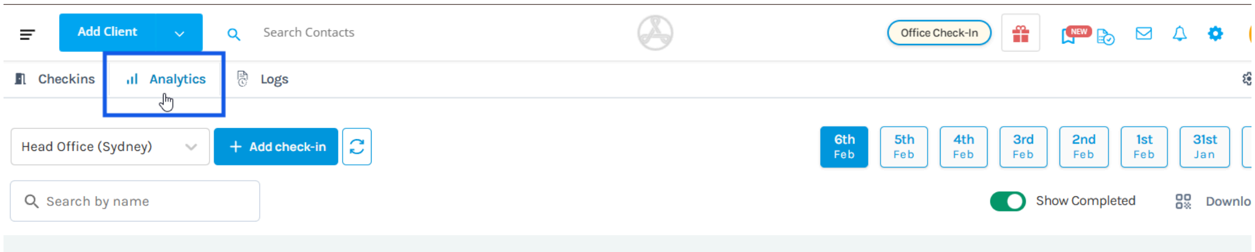
From these date buttons, you can also see the check-ins of previous working days up to a week.



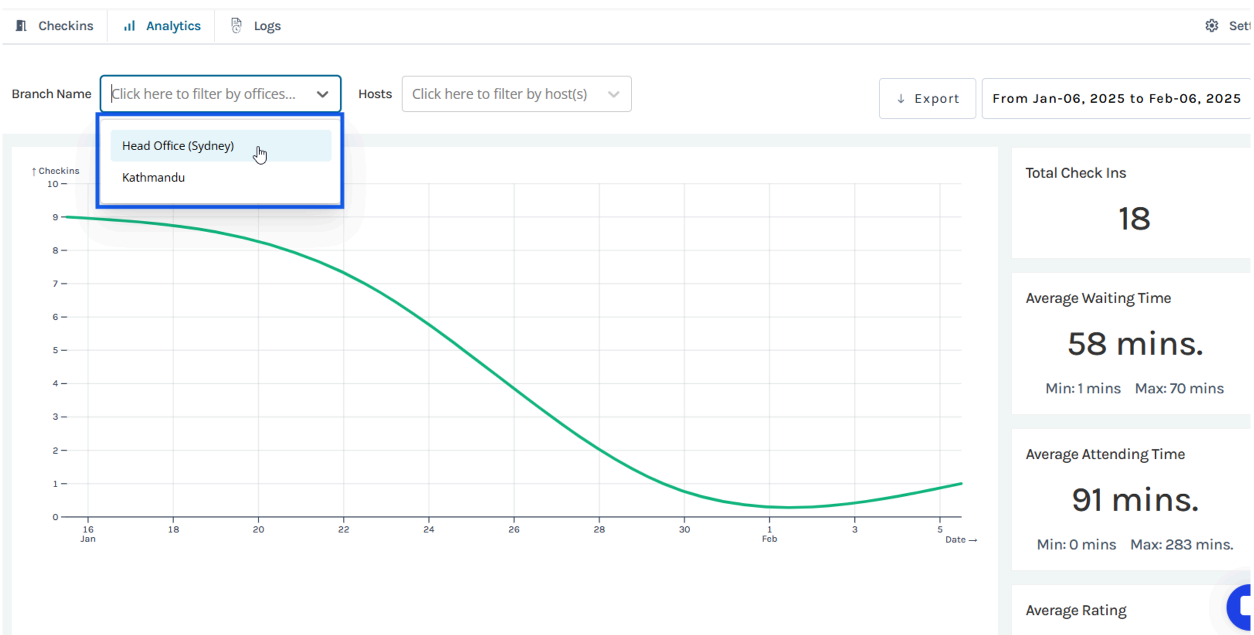


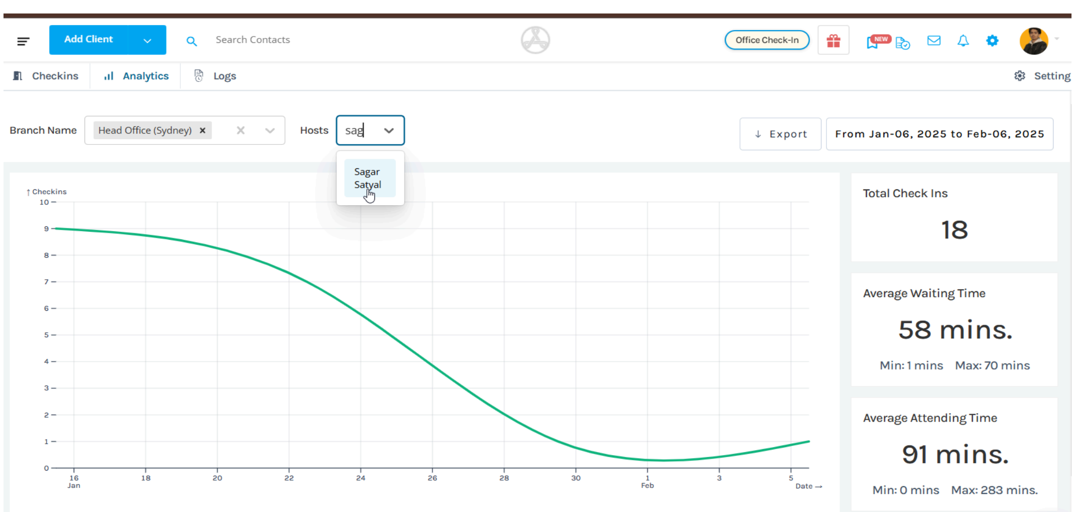
Exporting reports of the Check-In

But if you want check-in reports for more than 7 days, you need to go to Analytics from the top left section of the Office check-in page. From here, you can also extract reports of your office check-in depending on the offices & branches, users and dates.

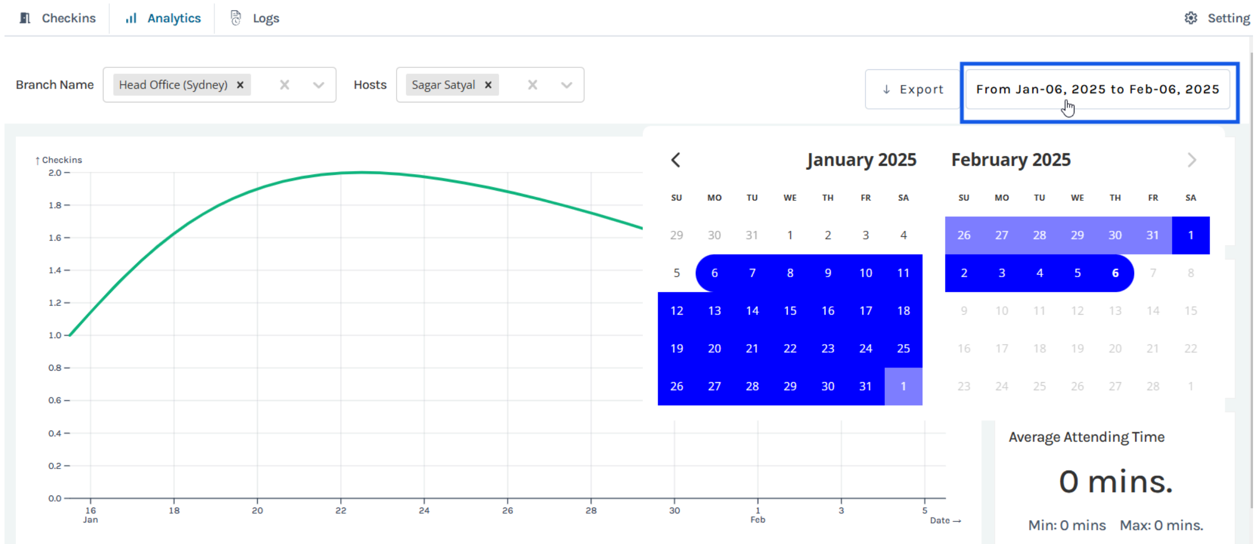


Then select the required office and host.

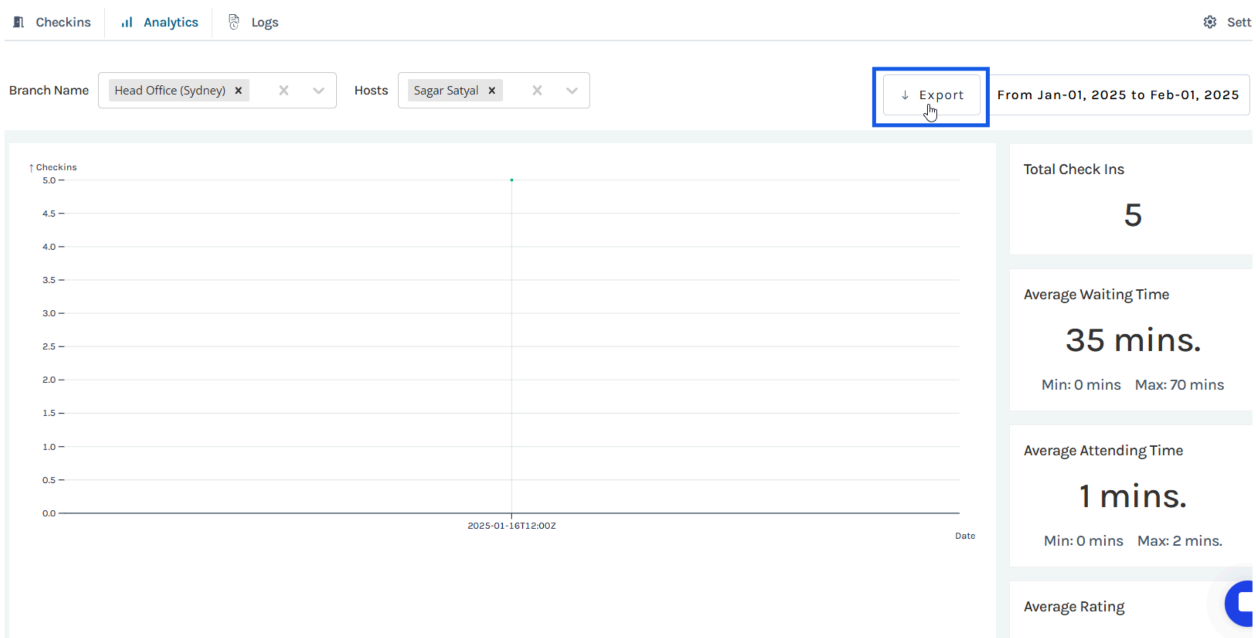


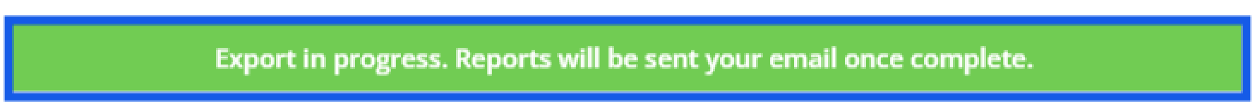


You can also manually select the dates between which you want to extract reports.



Now, click on the export icon and you will receive a message pop up saying your reports will be delivered in email.



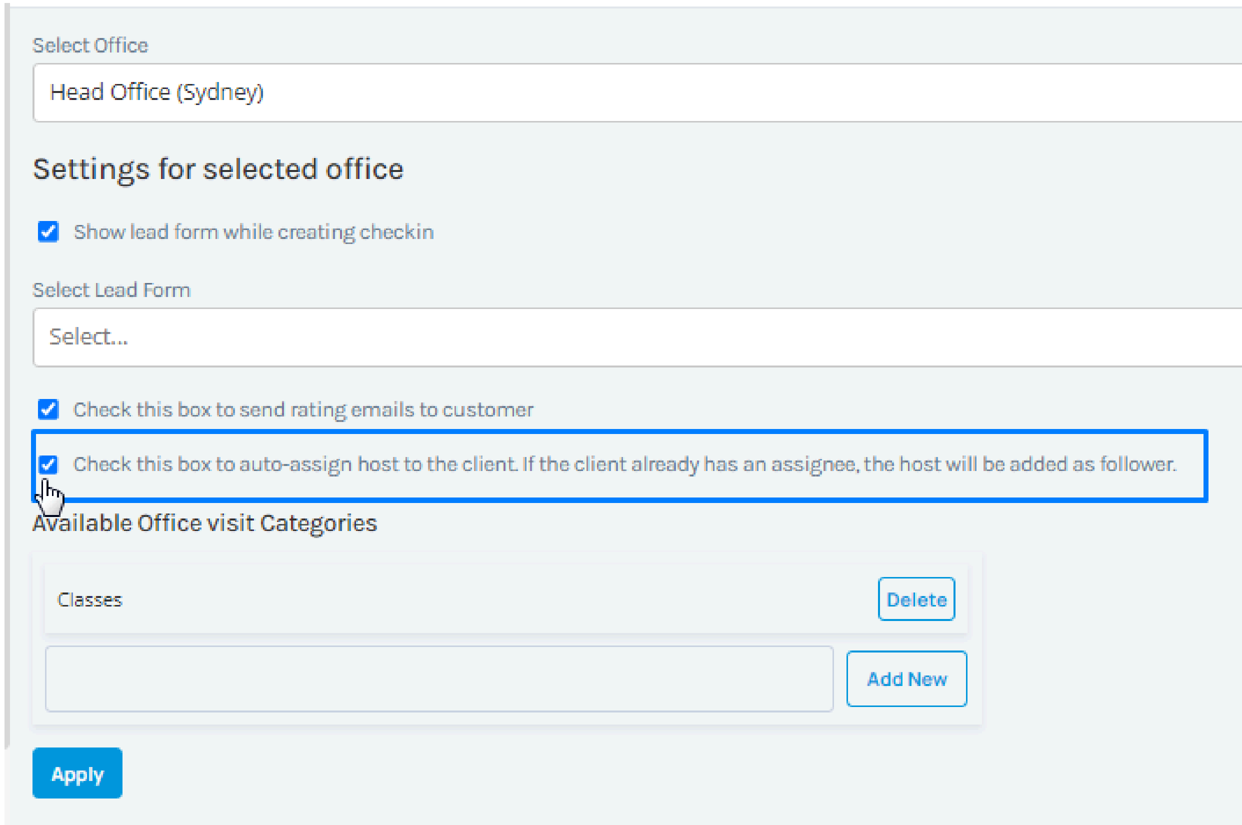


Download the file and you will get your required report in an excel file.

Other Office-Check In features

Auto assign host to the client

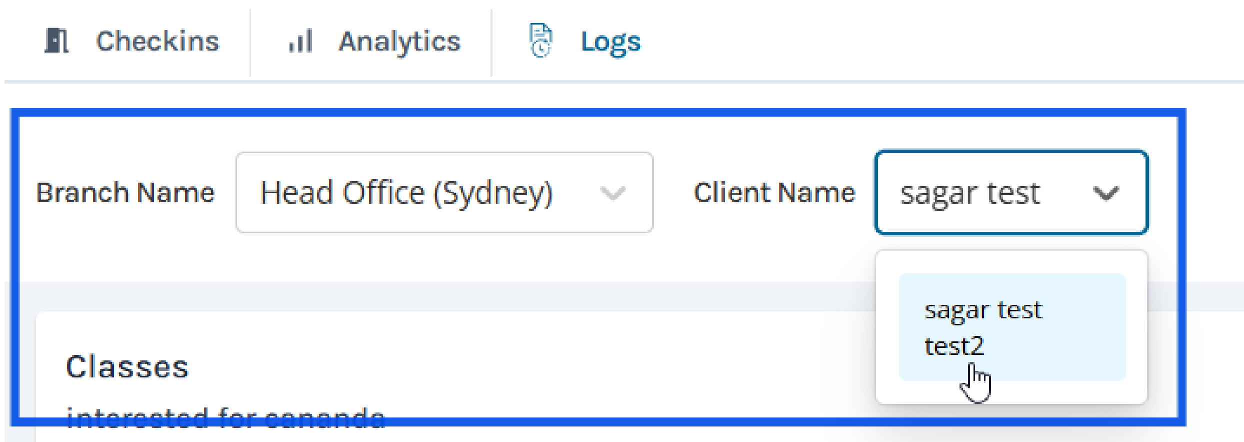
If you want the visitor that is already registered in the system and has an assignee to be assigned automatically then select the option "**check this box to auto-assign host to the client, if the client already has an assignee, the host will be added as a follower**".



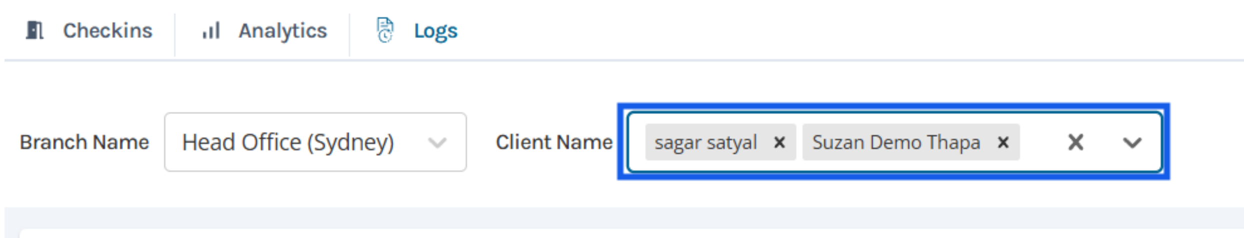
Tracking Check-in logs

You can also track the logs of your check-ins. Go to Logs from the office check-in page, select your Branch Name.

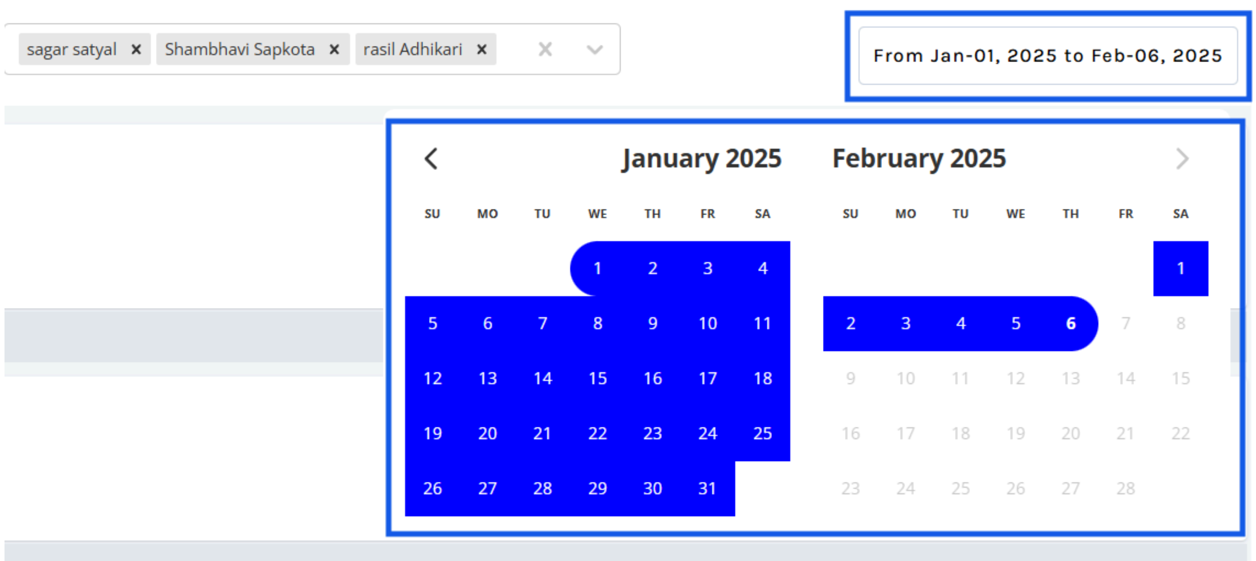
You can also search by Client's name.



Note: You can select multiple clients by searching their name at once.

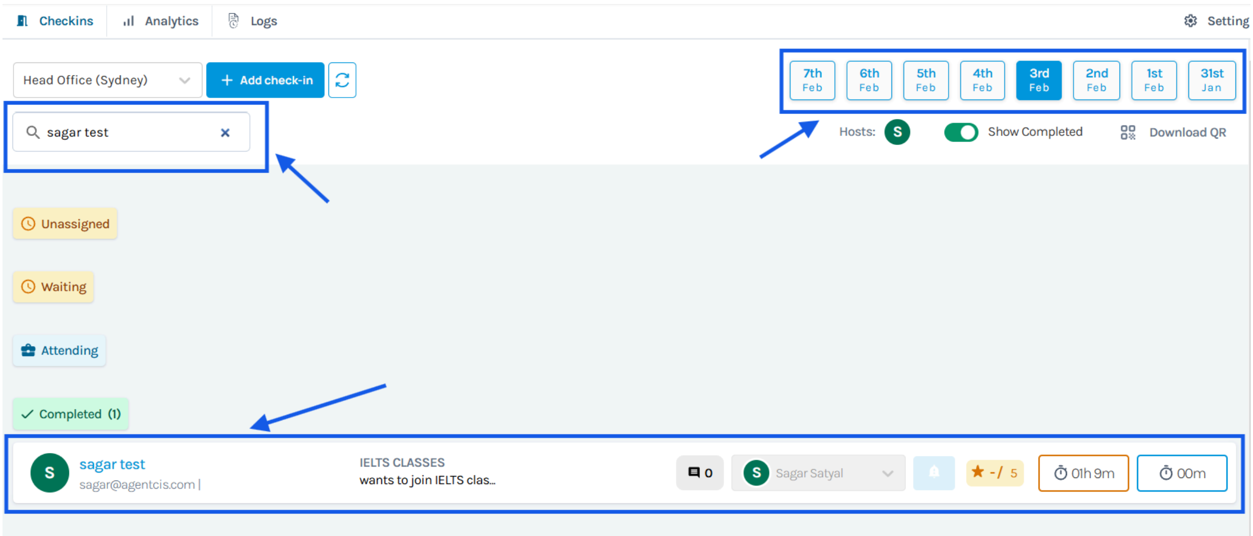


Then, select your desired date range filter and your log for the selected office, client/s and date interval will be automatically displayed.



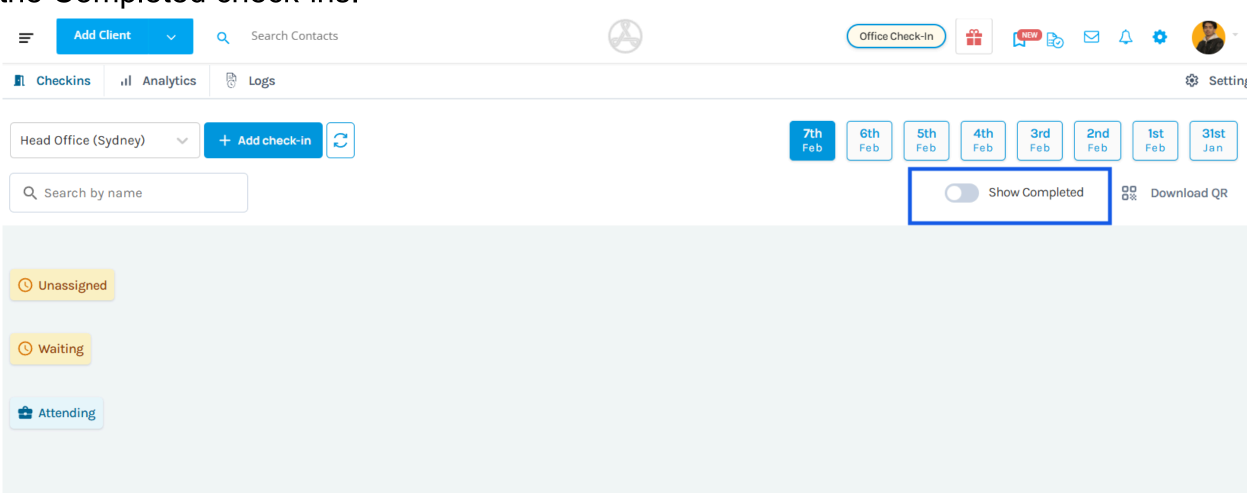
Searching Clients records

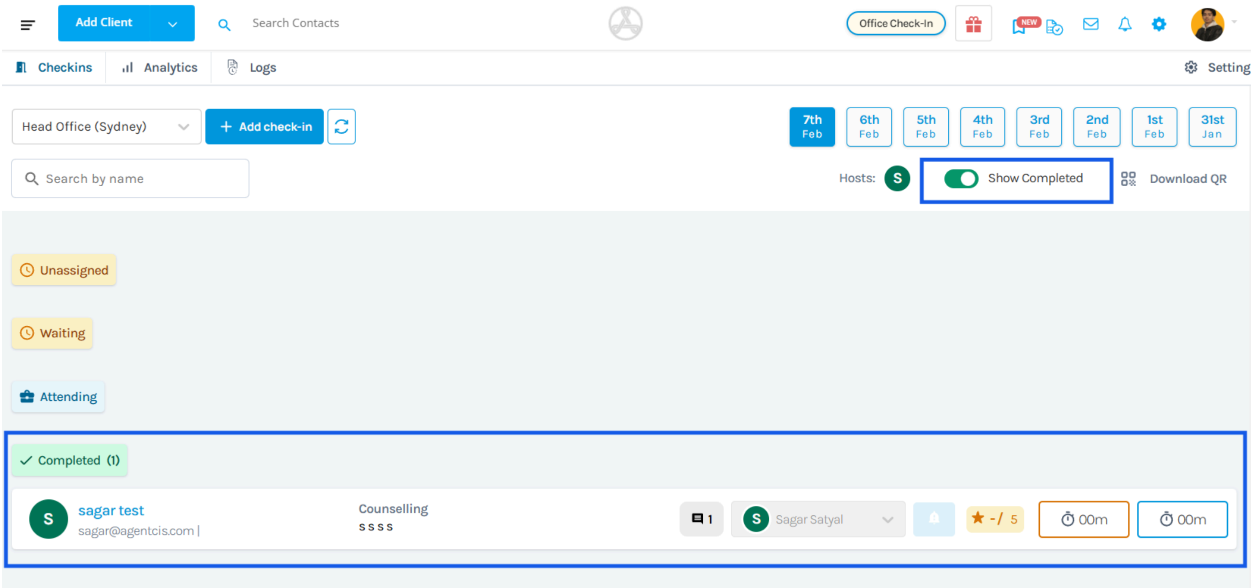
If you have many checkins in a working day, then you can also view the client's check-in records by searching their names and using the date filter range.



Display Completed Section

You can change whether to display the completed check-ins section or not. Just select on this **Show Completed** button to make the section appear or disable it to not show the Completed check-ins.



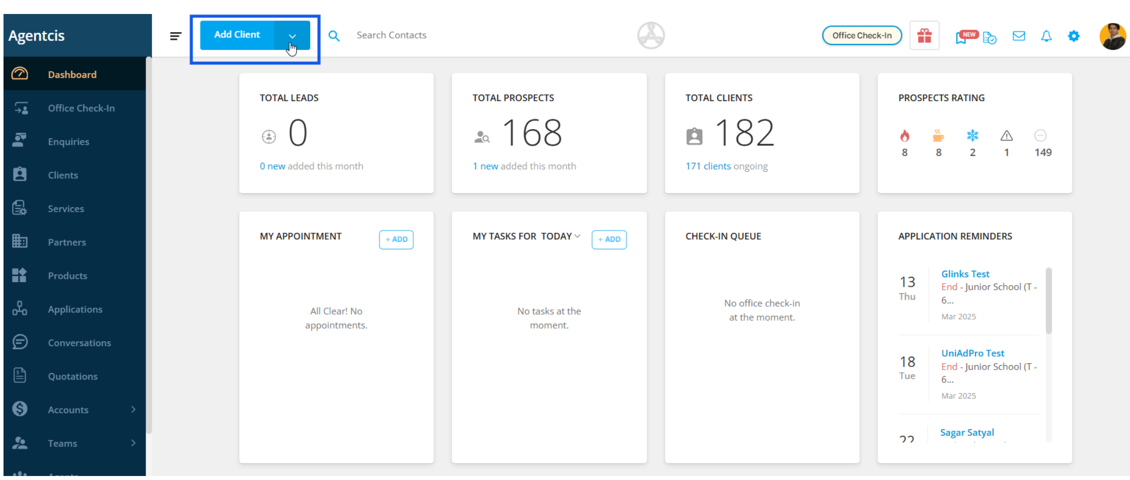


Task Management

Creating Tasks

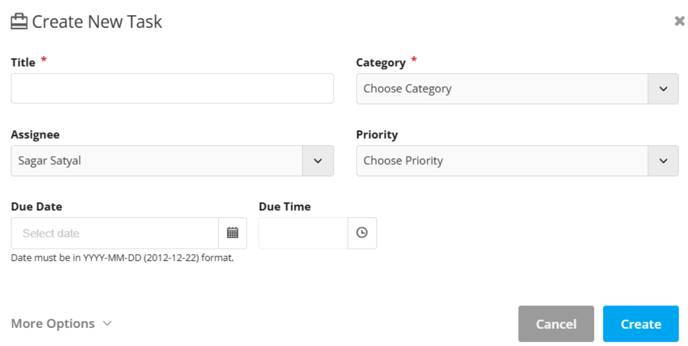
Agentcis helps you manage tasks, collaborate with your team, and get notifications for updates. Tasks can be categorized as reminders, calls, emails, and more. You can create tasks from multiple pages for easy access linked to contacts, applications, or partners.
To create a task:

Step 1: Click the dropdown icon in the top-right info bar, accessible from any page in Agentcis.

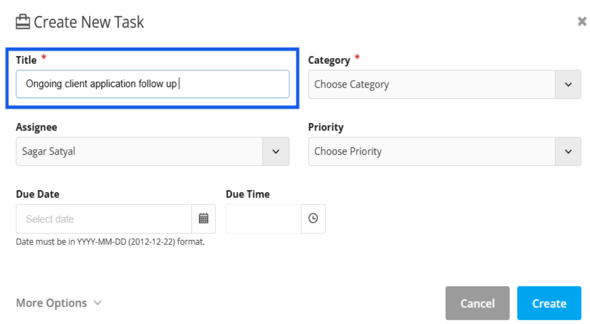


Step 2: Select on Add Task.

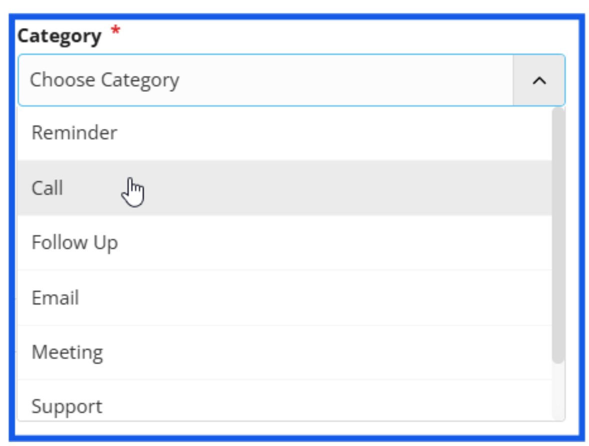
Step 3: This will open a **Create New task** panel on the right.



Step 4: Input your Task title.

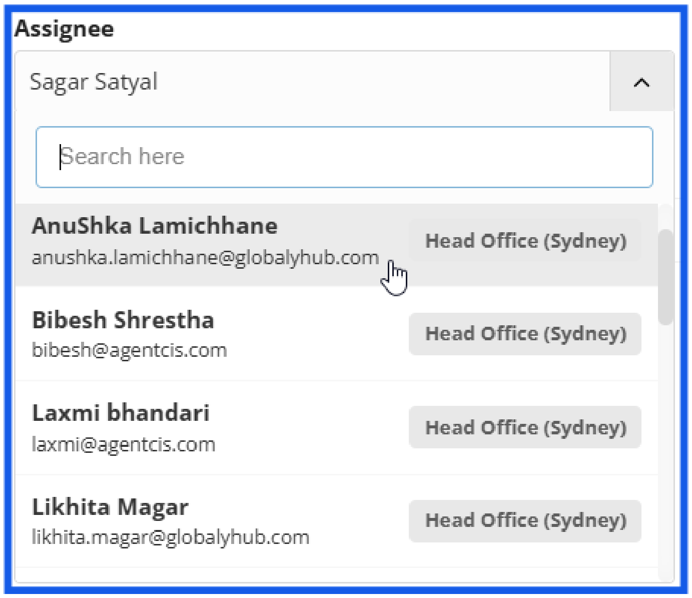


Step 5: Choose your task category from the dropdown.



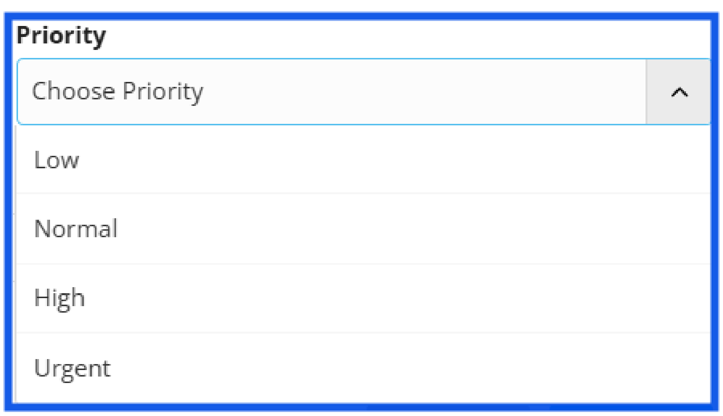
NOTE

You will be auto-assigned to a new task that you are creating. You can also assign other users by selecting on the dropdown in Assignee.



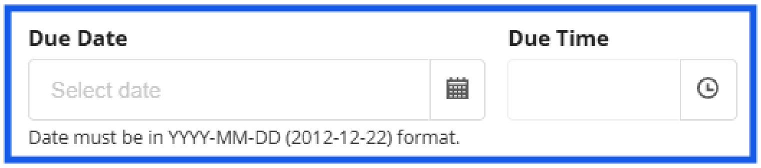
Setting Priority for the task

You can set the priority of a task using the dropdown menu based on its urgency and importance.



Setting Task Due Date and Due Time

Set the task Due Date and Due Time if you want the task to be completed on a specified date and time.



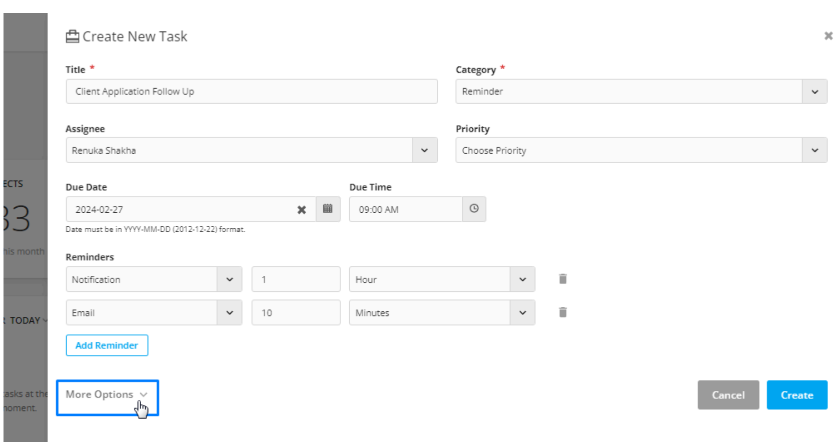
Adding Reminders

You can set reminders for email or system notifications to alert the assignee before the task is due.

For example, a 10-minute email reminder sends a notification 10 minutes before the deadline.

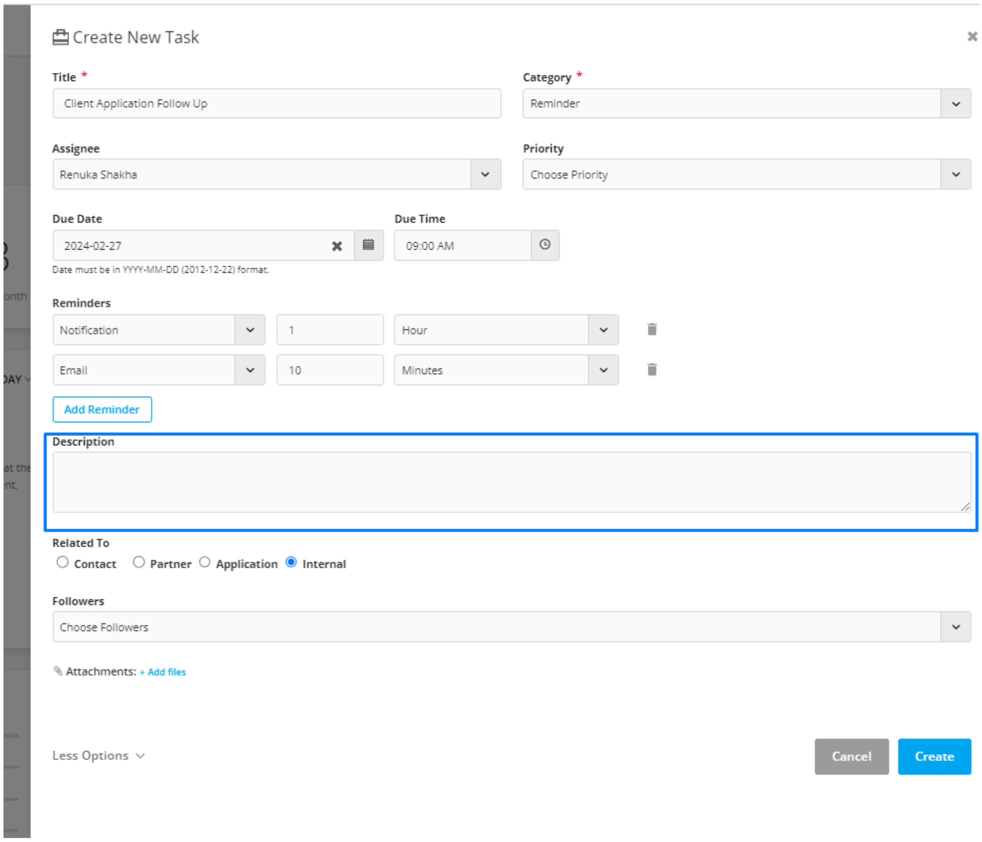
More Options

To add more details to the task, click "More Options."



Add Task Description

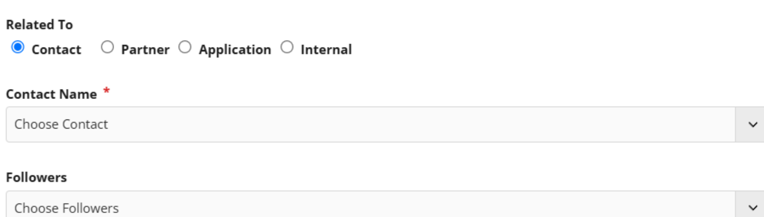
Add description helps to view tasks in more detail.



Linking a task

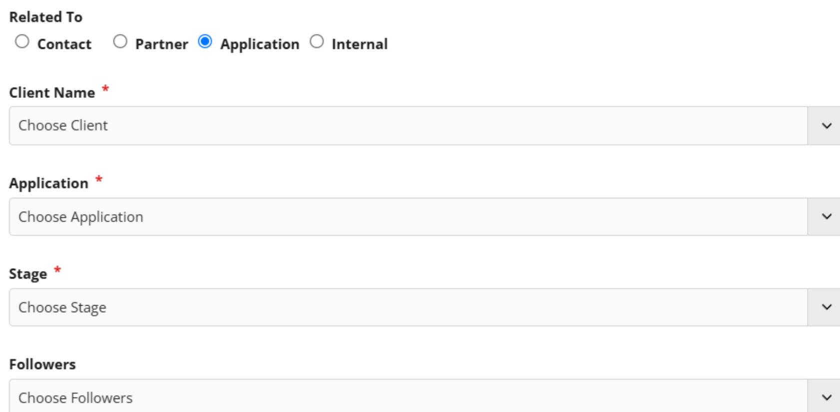
Linking a task to a contact, application, partner, or internal helps with tracking.

Linking the task with contact

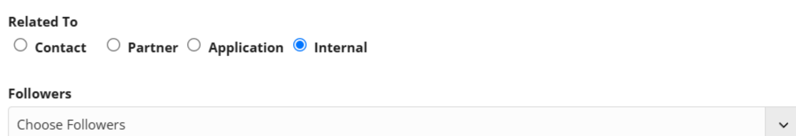


Linking the task with Partner

Linking the task with Application

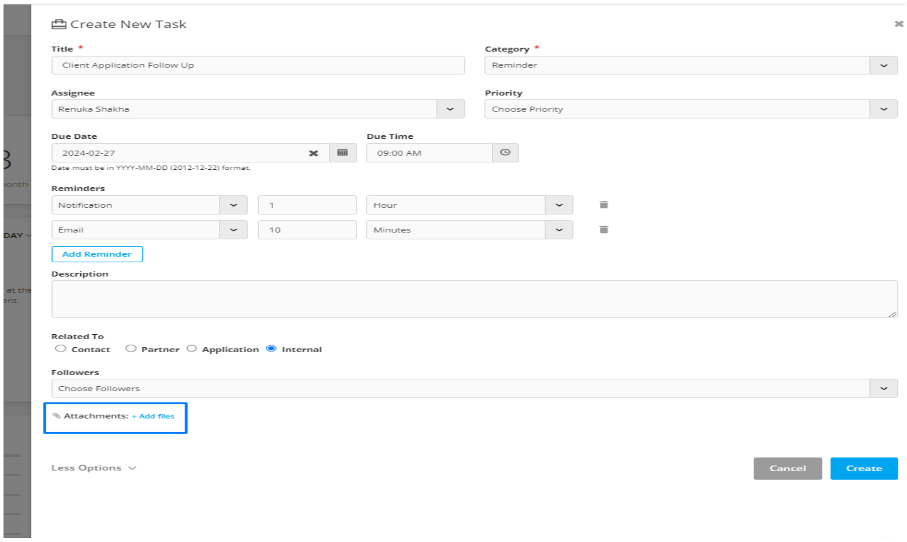


Choose "Internal" if the task isn’t related to any party. You can also add followers to your internal tasks if the tasks require supervision and collaboration with other team members.



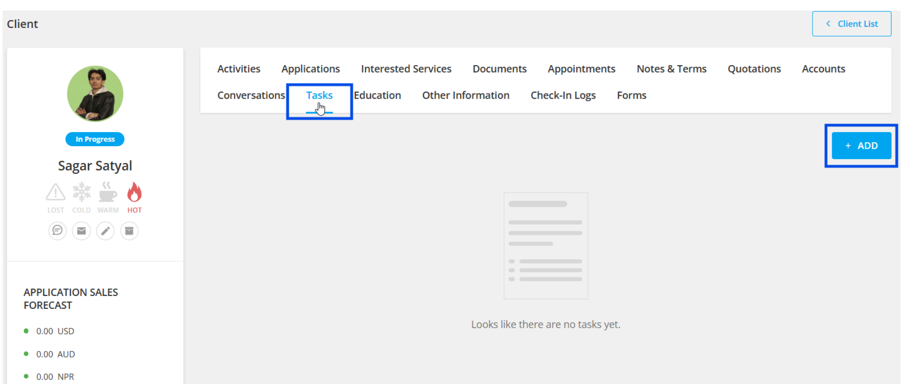
Attaching files and documents

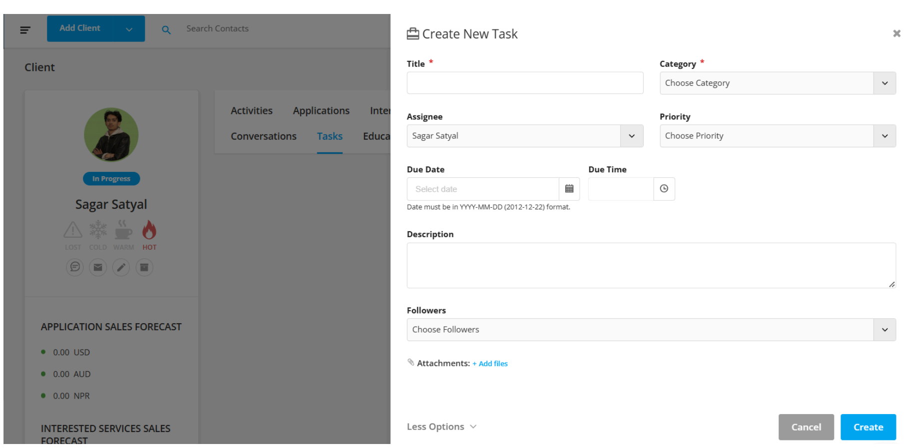
You can add documents and files to the task if required.



After filling all the details, click on the Create button and your task will be created.

You can also create tasks for clients from their own profile. This allows you to manage clients on an individual basis.



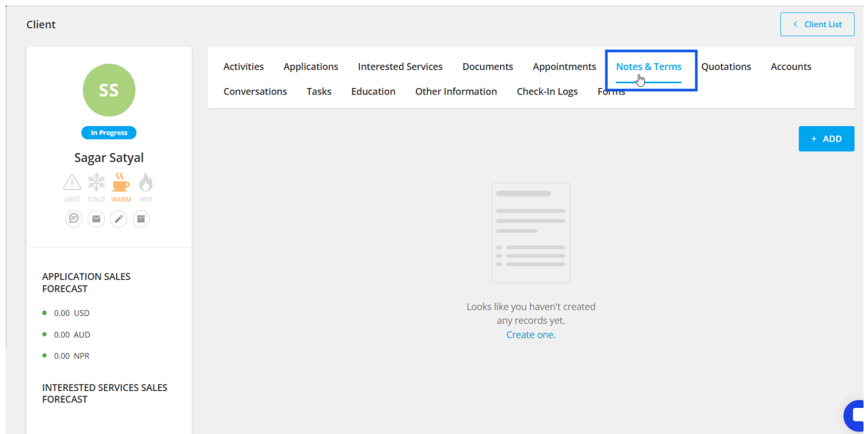


Notes & Terms

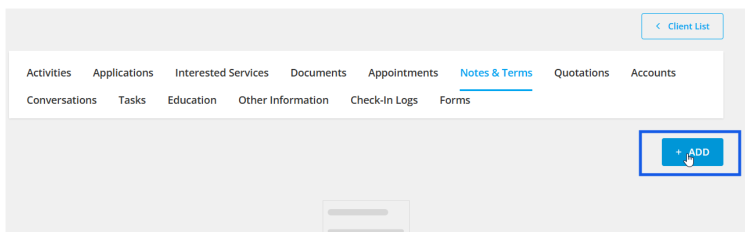
Agentcis Notes let you quickly add and save details about contacts, clients, applications, and partners.

Adding Notes and Terms for a client

Step 1:
To the client you want to add notes for, go to their client's profile page and Click on **Notes & Terms** from the Client navigation page.

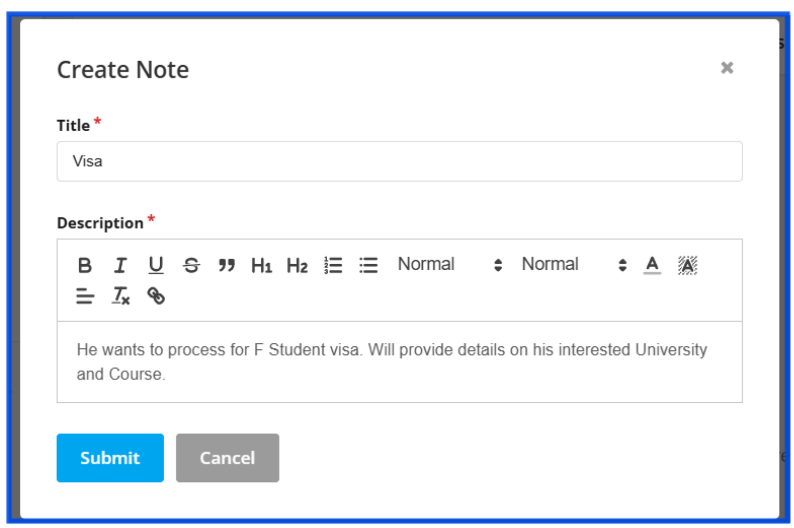


Step 2: Click on the **Add** button.

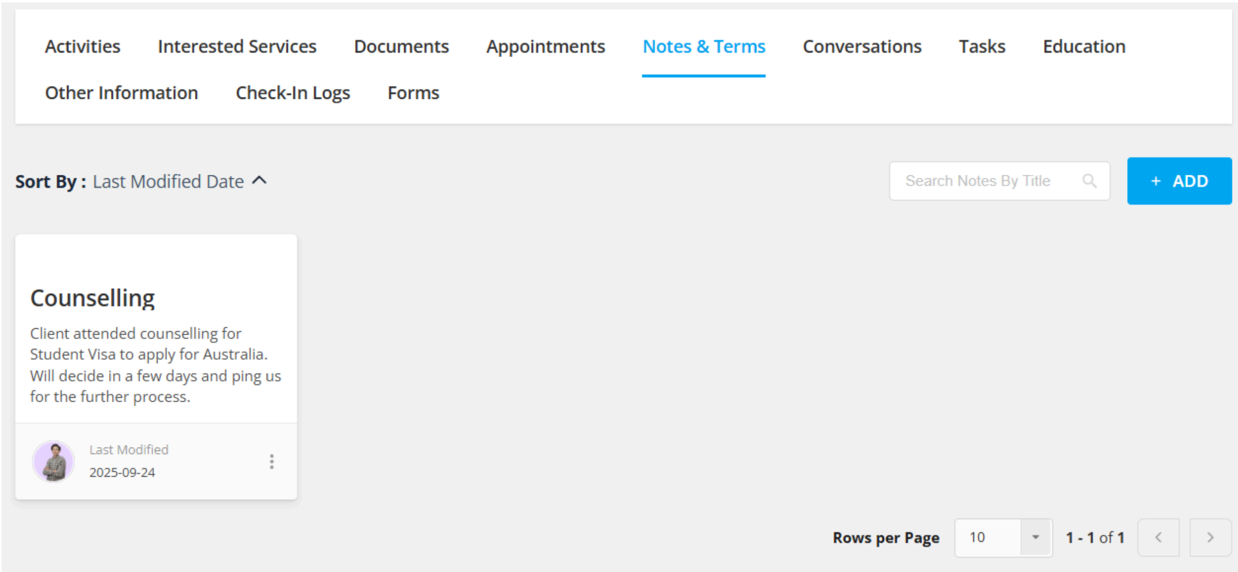


Step 3: Add your Note **Title** and **Description**. It can be any information obtained through recent communication with this client and decisions made by that client in taking your service.

A **text formatting toolbar** is also available to add formatting options like bold, italics, underline, lists, headings and more for styling text in the description.



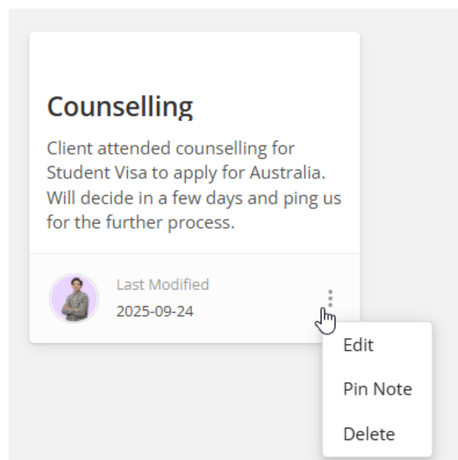
Step 4: After filling necessary information, click on Submit and your Note is created.



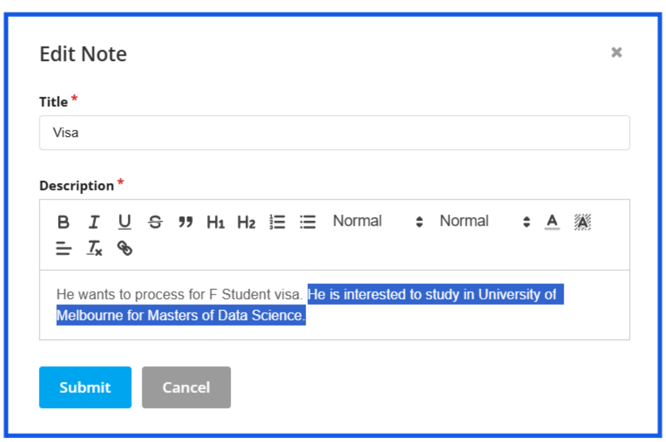
Editing Notes & Terms

You can edit and make changes to the notes you have already created.

Just click on the **three dot icon** in the notes that you want to edit and select edit.

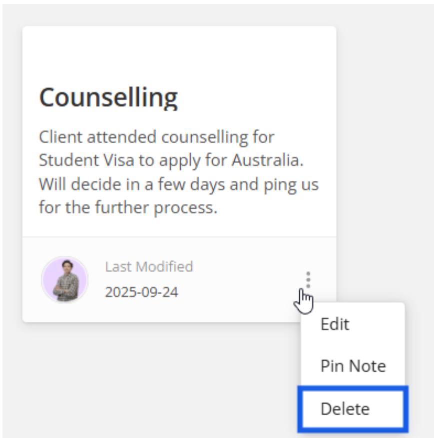


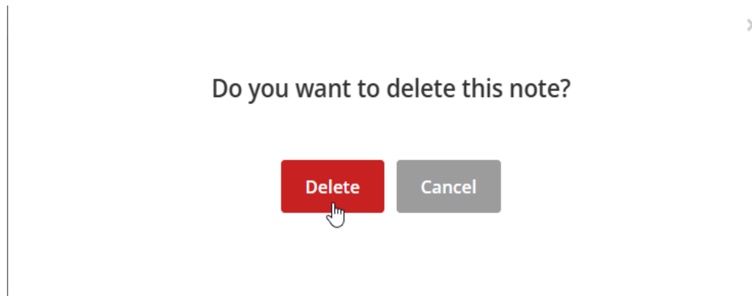
After making necessary changes, click on **Submit**.



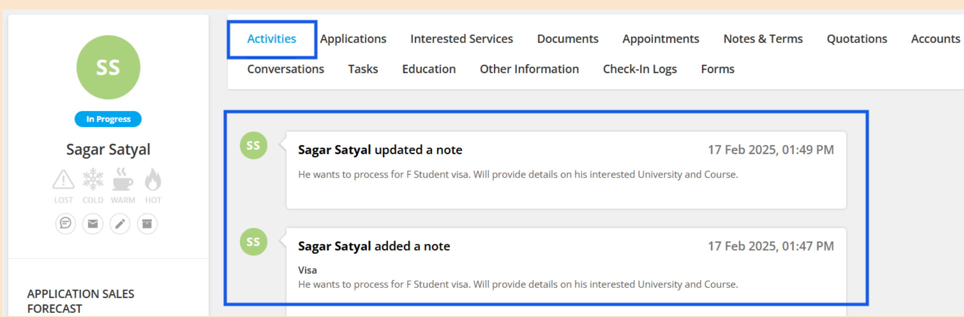
Deleting a Note

To delete a note, click on the three dot icon and select **Delete**.





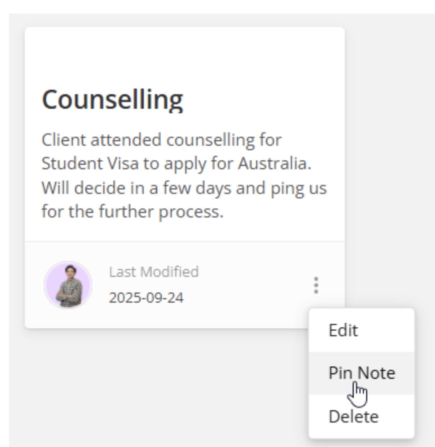
> **NOTE**
>
> Notes are saved under the **Notes & Terms** tab by date and recorded in the **Activities** tab.



Pinning Notes

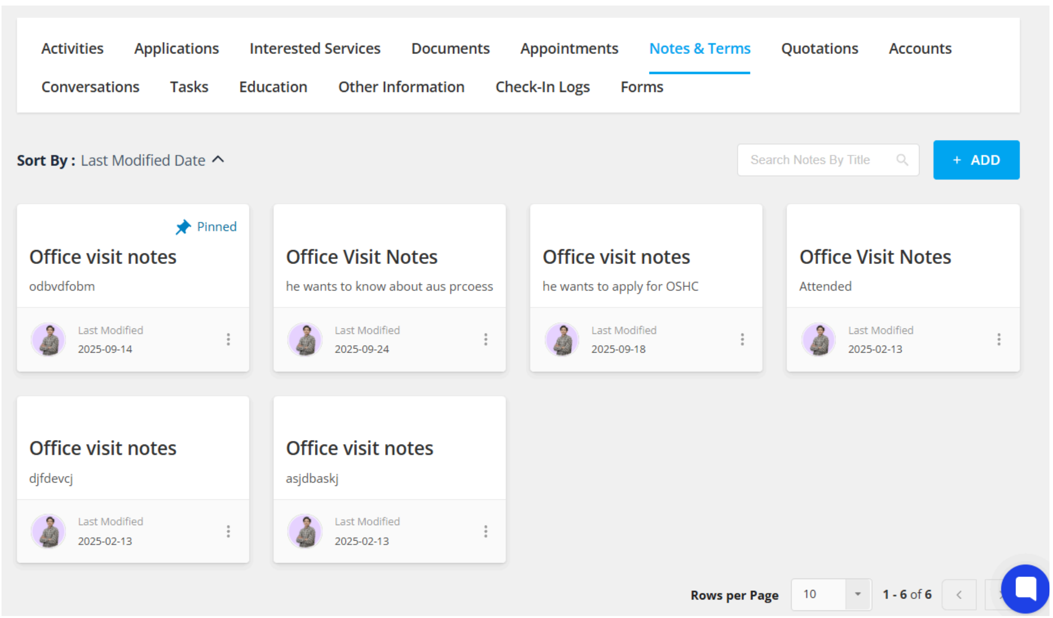
Purpose

Important or frequently referenced notes can be pinned so that they always appear at the top of the notes list, regardless of chronological order or other filters. This ensures critical information remains visible.



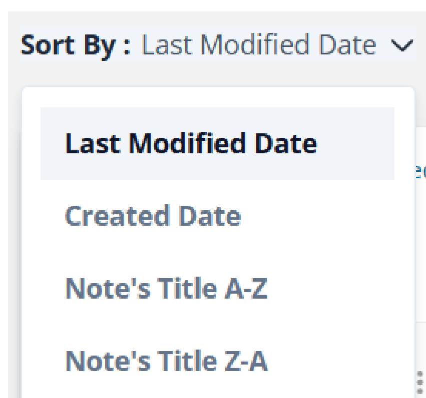
When to Use

- You have a note that contains key updates or instructions to revisit frequently.
- You want to expose a note to all users immediately without them having to search.
- You wish to permanently prioritize a note above others.



Sorting Notes

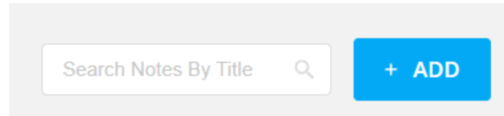
Sorting notes provides flexibility in how they are viewed and organized.



This way you can filter out the order of the notes based
On the last modified date, created date and alphabetical order of the note’s title.

Searching Notes

When a contact has many notes, scrolling through the entire list can be inefficient. The **Search Notes** feature enables users to quickly find a specific note by title or keyword, saving time and improving usability.

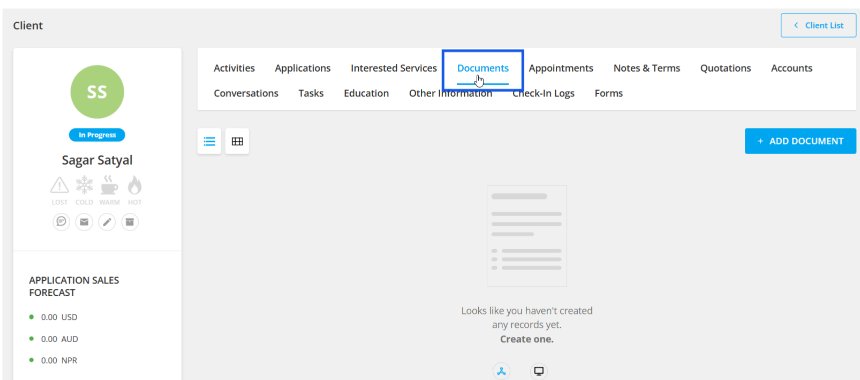


Uploading documents for clients

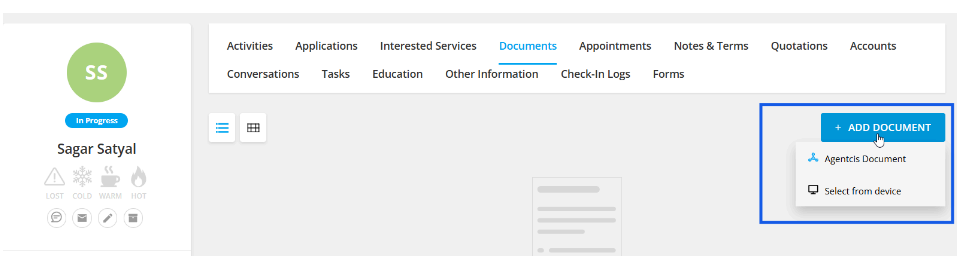
You can upload documents for clients. Documents can be both provided by clients and created by you for the clients as per the requirement.

To upload a document for a client,

First you need to go to the client's profile page and select Documents from the navigation.



Then hover to the **+ADD DOCUMENT** icon. Two options **Agentcis Document** and **Select from Device** will be automatically displayed.

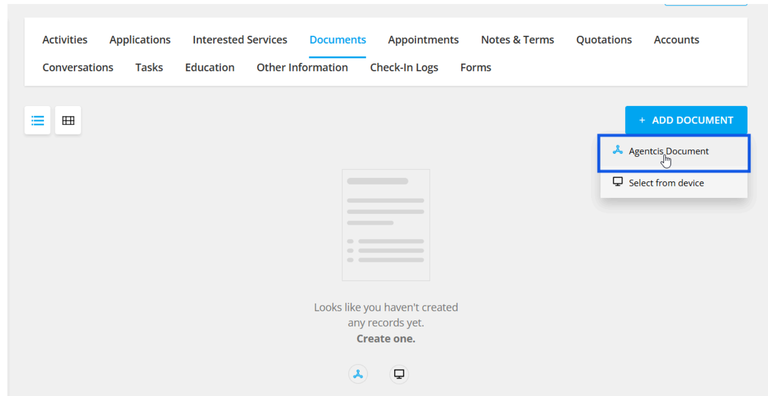


You will upload documents from your local computer and Agentcis.

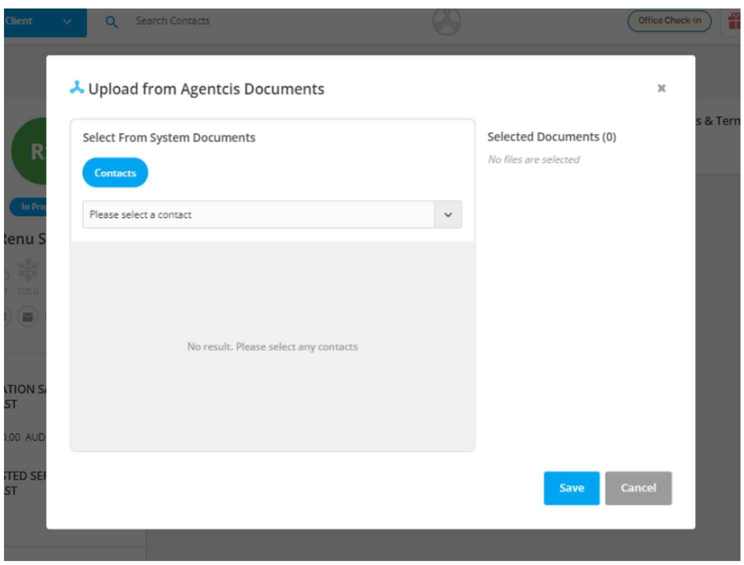
Agentcis Document

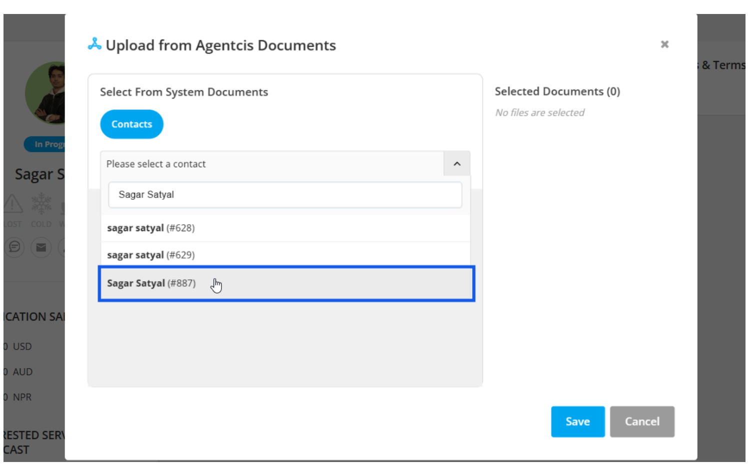
You can pre-add documents all at once in Agentcis. This will make you select documents easily without searching for them in your local computer.

Step 1: Click on **Agentcis Document** Option.



Step 2: Select a contact by searching from whom you want to add documents from.

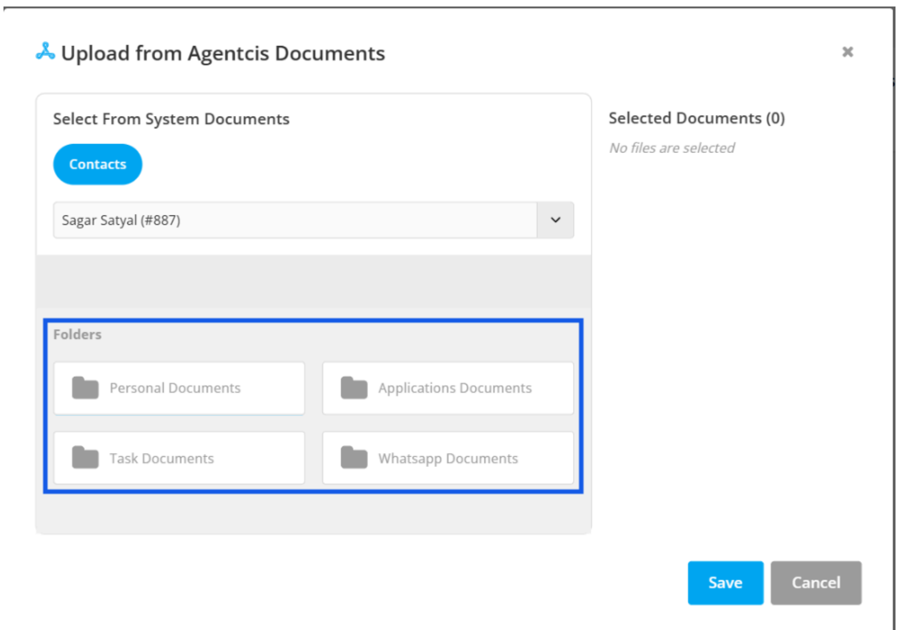


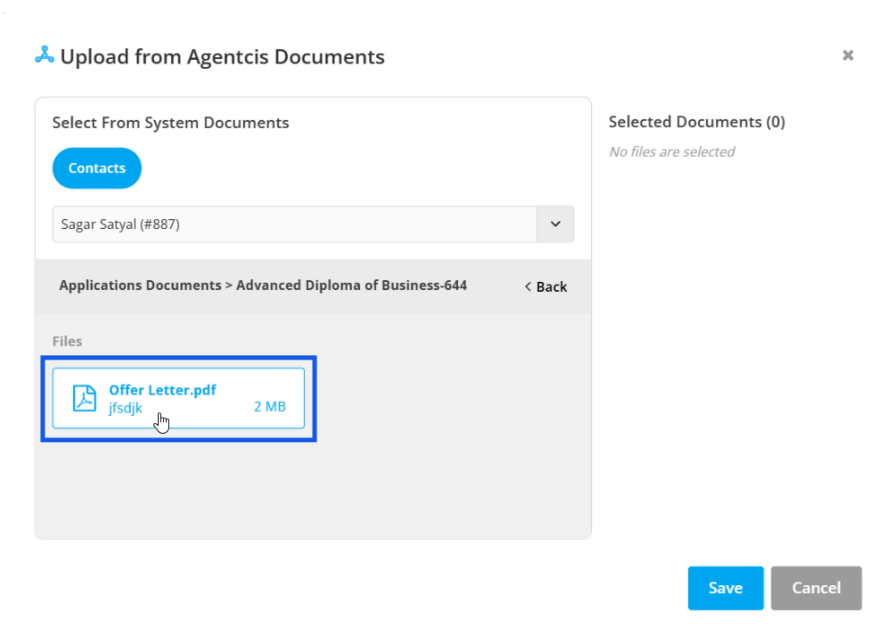


Step 3: After selecting a contact, three folders will appear:

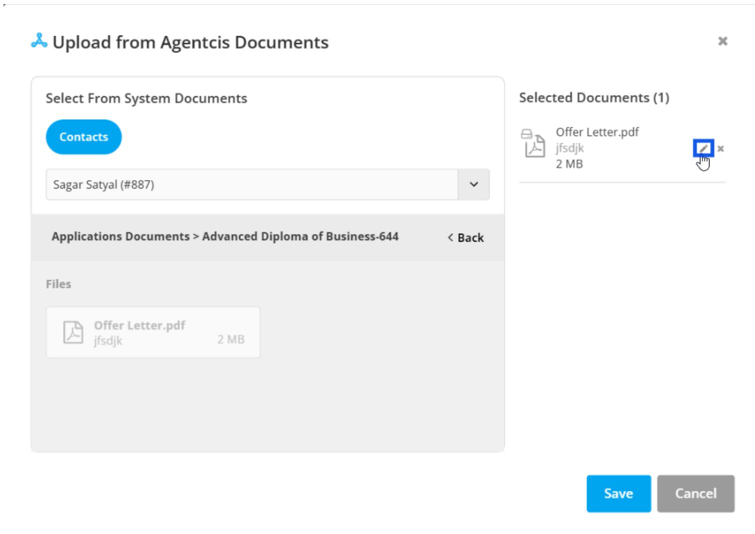
- **Personal Documents** - documents that are saved in the contact profile directly.
- **Application Documents** - each application has a subfolder with its related documents.
- **Task Documents** - documents that are saved in the tasks related to the contact.

Step 4: Select the required documents from the destination folder.

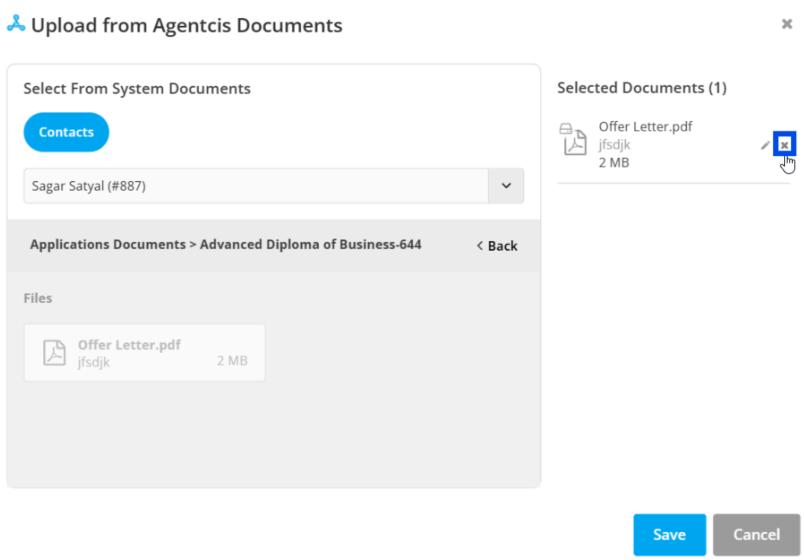




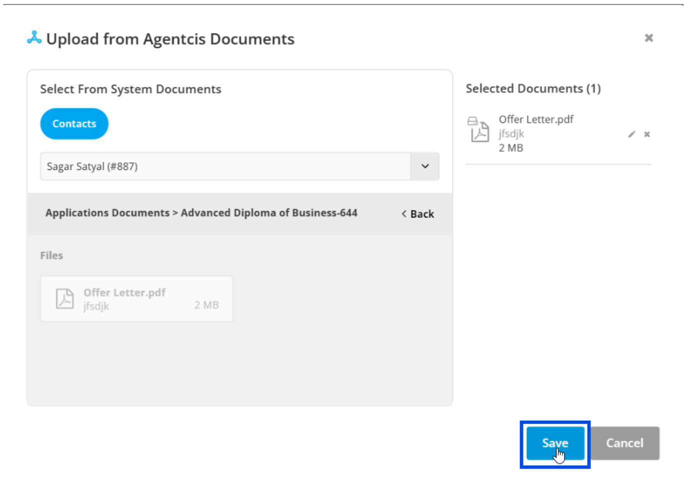
You can edit the name of the document from this edit icon.



To remove the document from the selected list, click on the remove icon.



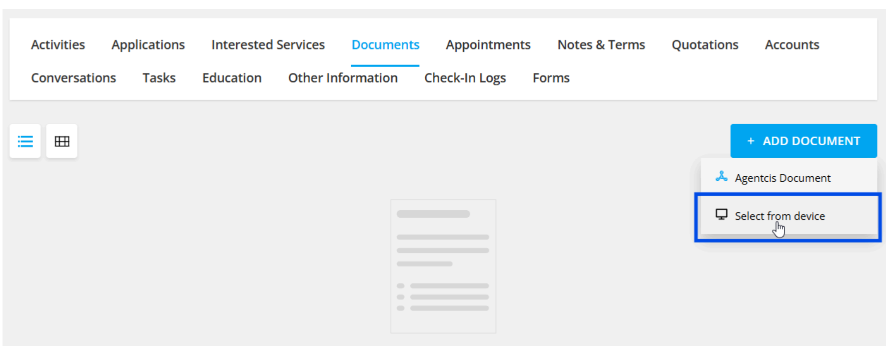
Once you're done selecting the documents, click on the Save icon to Save the document.



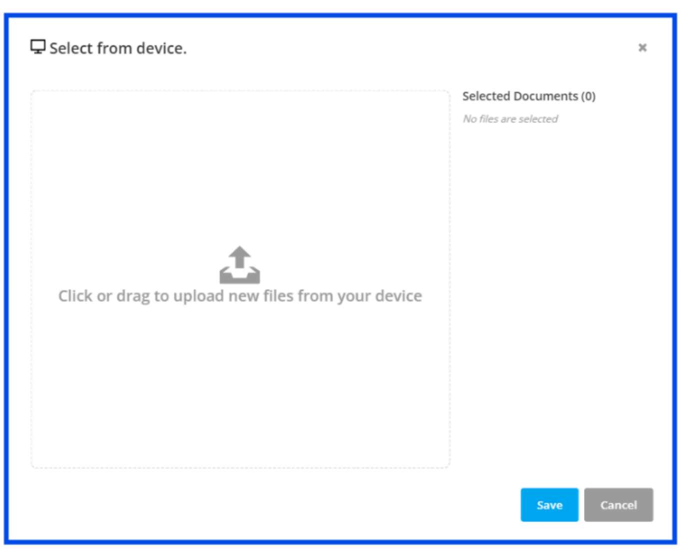
Selecting documents from local device

You can also upload documents for clients from your local device or computer.
To do this,

Step 1: Click on Select from device.



Step 2: You will see a pop up box, here you need to **click or drag to upload new files from your device**.



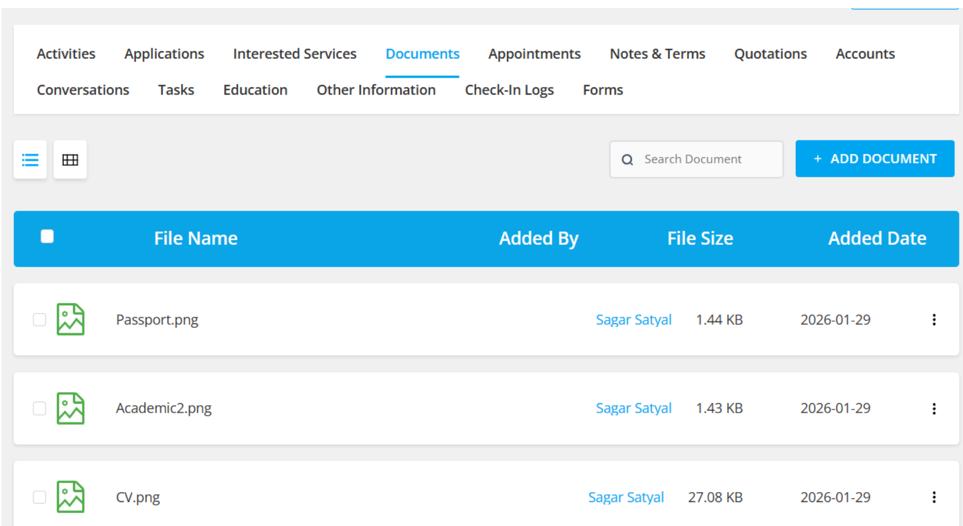
You will be directed to select the required files from your file explorer. Select the files and click on **Save.**

Downloading Documents (Individual and Bulk)

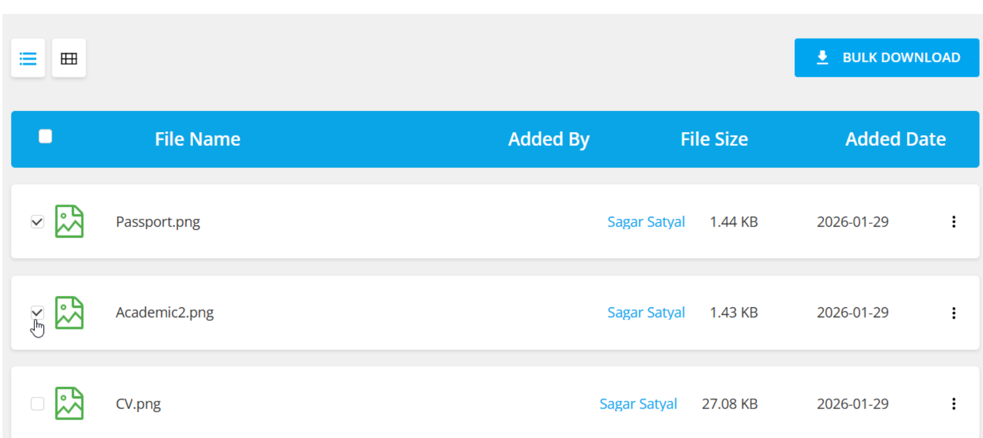
After the documents have been uploaded in the respective contact's profile. Users can easily download them by selecting the required or all at one time.

This way the documents can easily be handled and kept for future reference and important records.

After the documents are listed in the Documents Section within a contact's profile, the documents can be simply selected and downloaded one by one.



Or once a document in the list is selected, the bulk document download toggle will appear at the top.

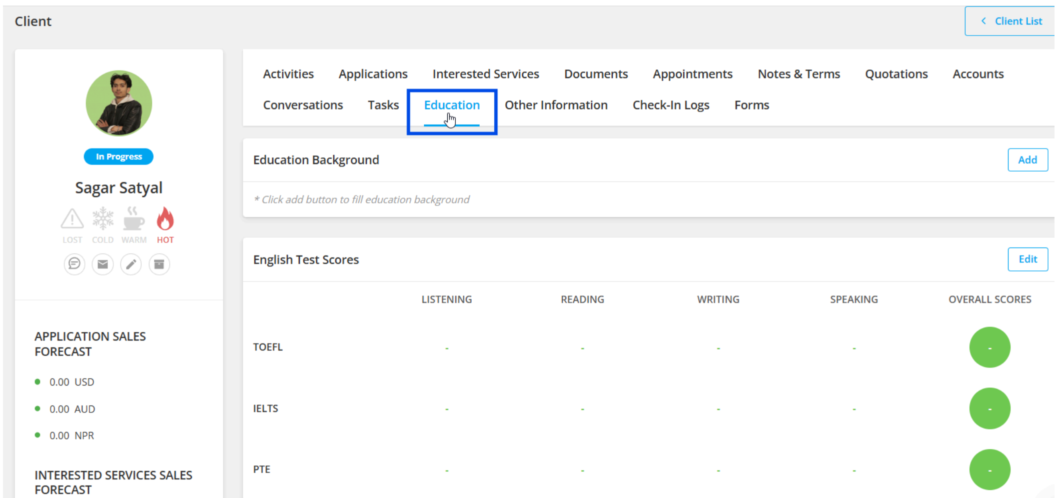


By clicking on it, all the documents appearing in this section will be downloaded in a compressed ZIP file for easy access.

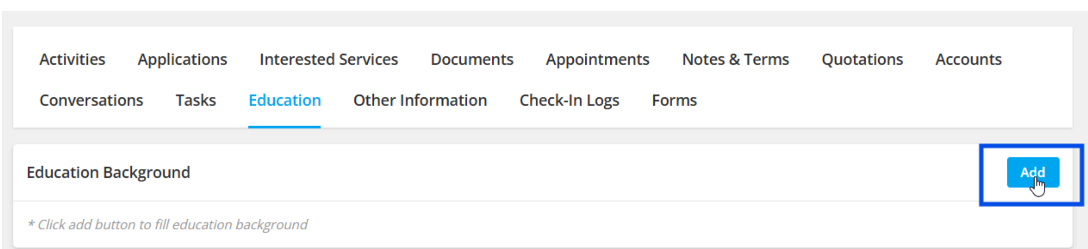
Adding Education details

To add education details for a client,

Step 1: Go to the client's profile page. There you will see a section named **Education.** Click on the Education tab.

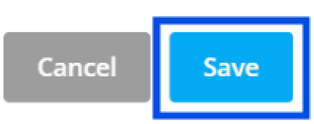


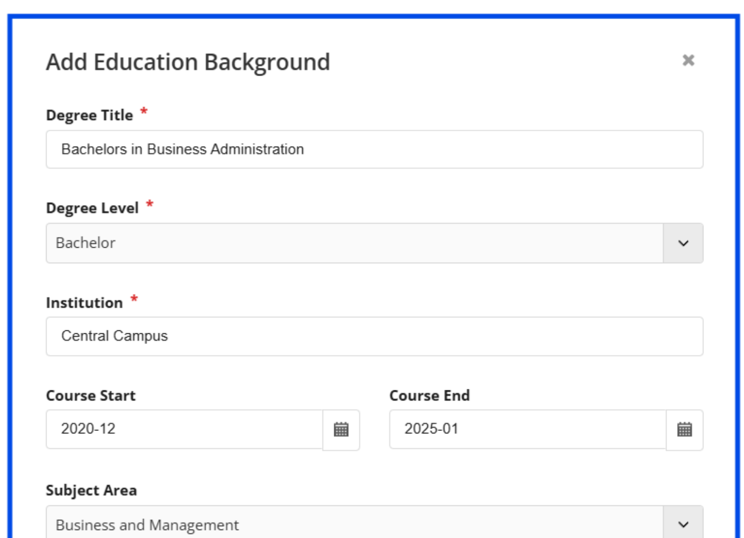
Step 2: Click on the **Add** icon from the right side.



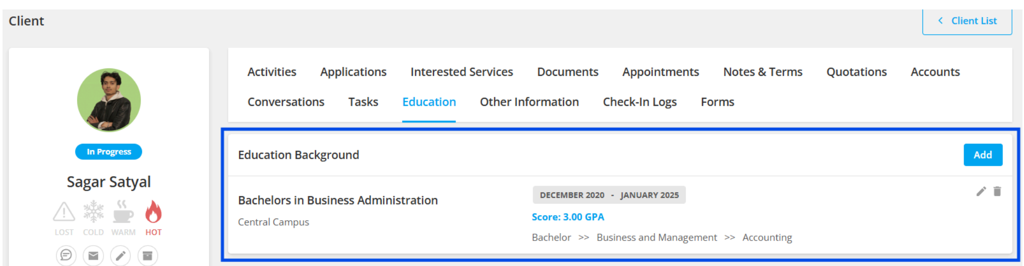
Step 3: Fill up the fields with necessary information of the client as provided by the client.

Step 4: Click on the Save button.





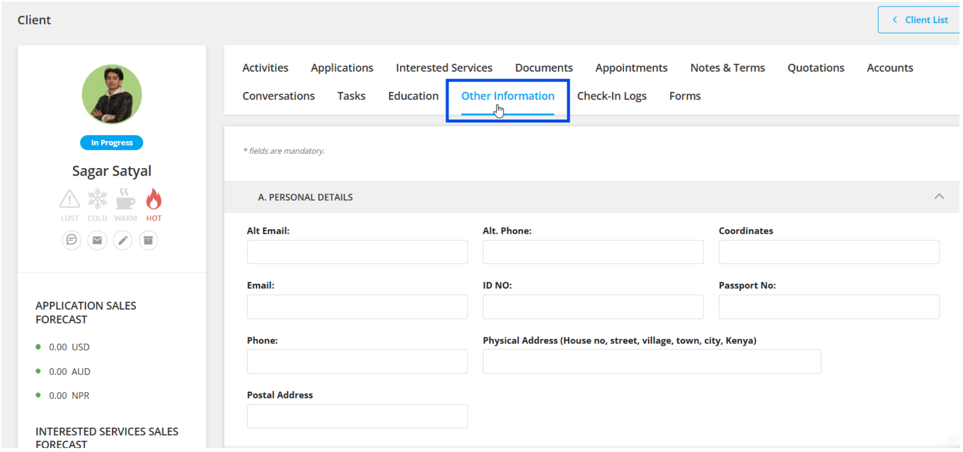
The information will be displayed under the same tab like this:



Adding Additional Client Details

If there is a requirement of adding or including more details of the client, there is a separate tab within the client's profile namely, **Other Information.**

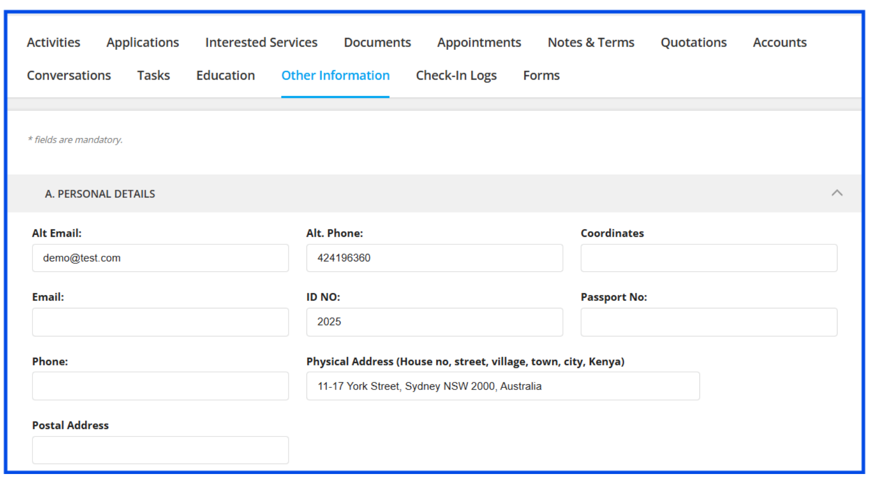
Step 1: Go to the Client's profile and Select Other Information tab.



NOTE

In this tab, only the sections and custom fields that you have added to the system will be displayed. To know more about custom fields, go through this link: https://support.agentcis.com/en/articles/215-creating-custom-field

Step 2: Fill in the custom field details as required.



Step 3: Click on the Save button by scrolling down the page.

Setting Appointments

Agentcis makes it easy to schedule meetings with your contacts or partners. Once scheduled, a calendar invite is sent automatically to the client's or partner's email, and they can add it to their calendar for reminders.

Key Features:

✅ Easy meeting scheduling with contacts and partners

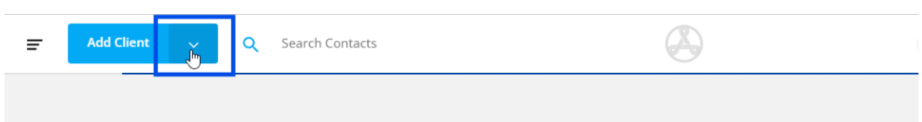
✅ Automatic calendar invite sent after scheduling

✅ Integration with calendar apps for reminders

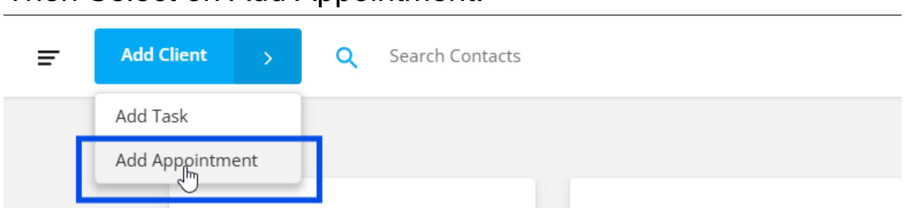
You can set appointments directly from the top bar or through client and Partner's profile page.

To add appointment directly from the top bar,

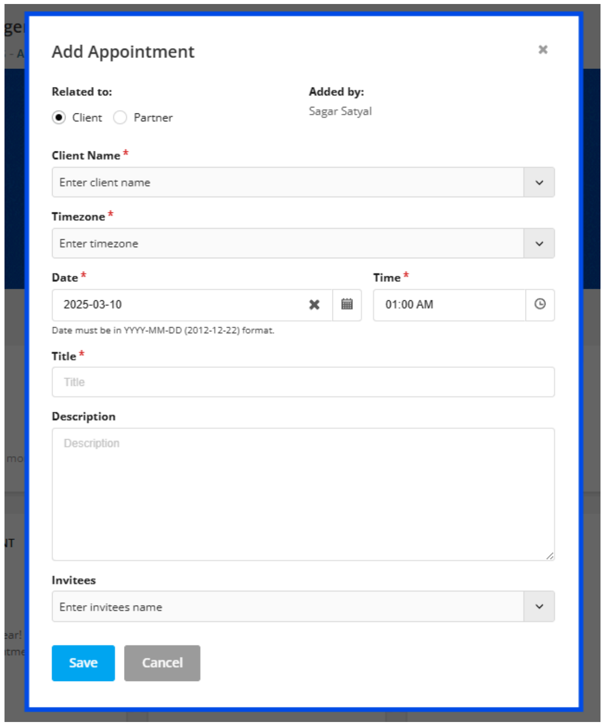
1. Click on the dropdown beside the Add Client option.



Then Select on Add Appointment.

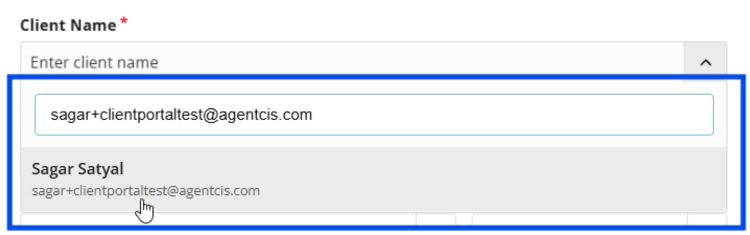


2. A popup window will appear to fill the details for setting an appointment. Here you need to select for whom you are creating the appointment for like Partner or Client.

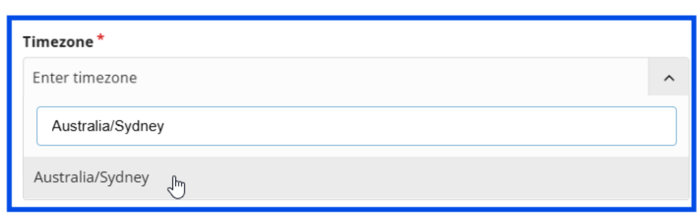
   First let's set an appointment for a client by clicking on the client option in the **Related to:** 

Section.

3. Select a client for whom you are creating the appointment for. You can search clients by their name or email in the **Client Name*** section.

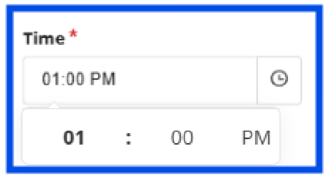


4. Then you will have to choose the time zone in which you are scheduling the appointment. You



can also search the time zone in the given format.

5. Select the time for the appointment.

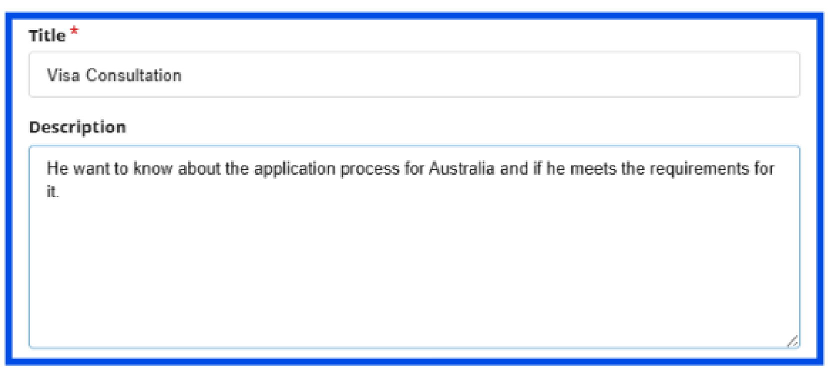


6. Title field requires you to insert the title for your appointment such as: **Initial Consultation**, **Visa Consultation** (For clients) and **Partnership Agreement Discussion**, **Admission Process Briefing**, **Client Consultation Sessions** (For Partners).

   So let's name the **Title*** 'Visa Consultation' as we are setting the appointment for a client.

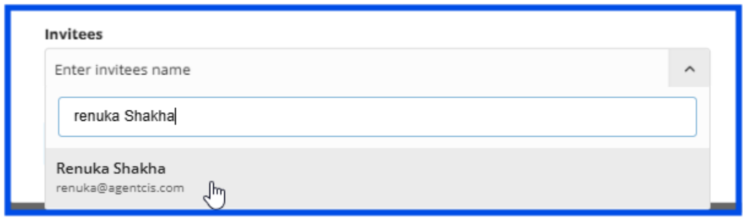
7. In the Description field, you can add more details to the appointment relating to the title.

   For e.g. My client Sagar Satyal wants to get guidance on the application process for Australia Education and ensure they meet all requirements. So I can add this information in the description so that it will be informative for the counsellor while dealing with the client.



8. In the invitees section, you can add counselors, admission officers and followers from within your team to add and notify them about the appointment.

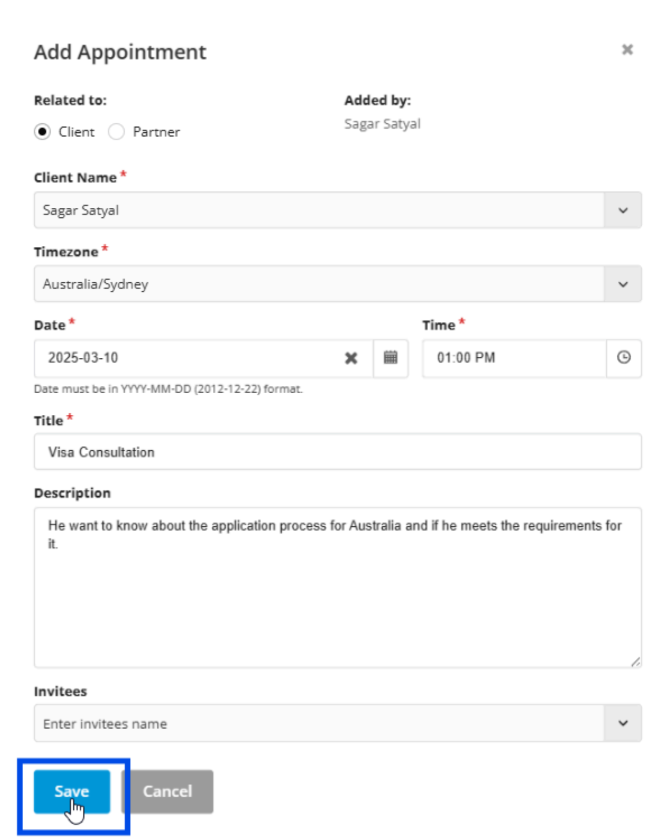
So I will be adding **Renuka Sakha** as Invitee who is our Australian Counselor as the client is interested in taking services for Australian Education.



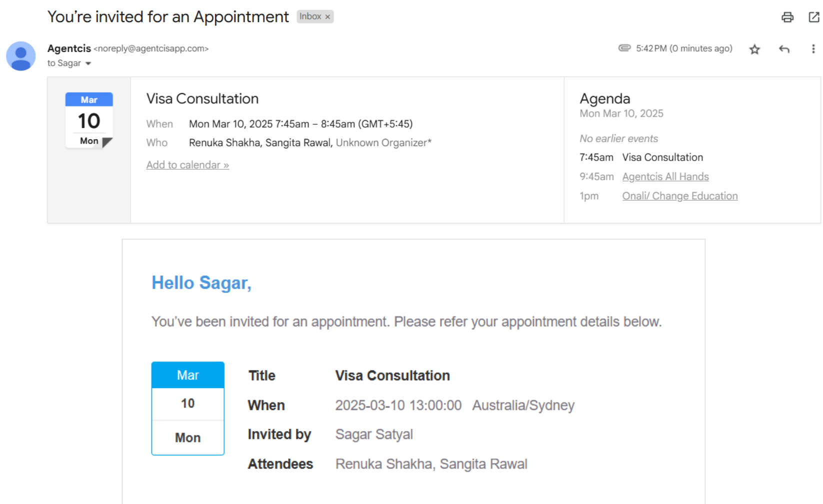
NOTE

You can add multiple users in the Invitees Section.

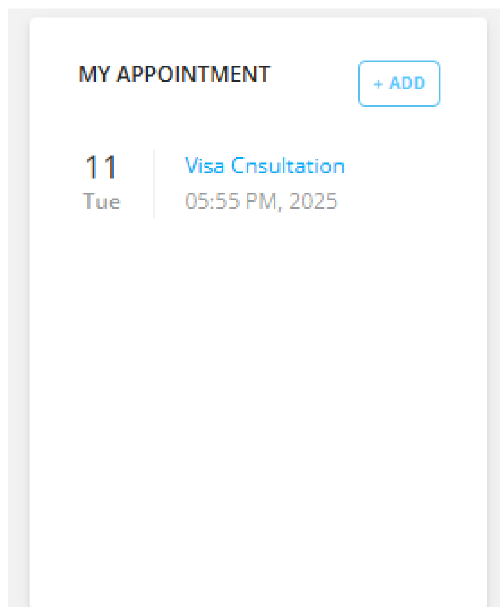
9. After filling all the details, click on the Save button to save the appointment.

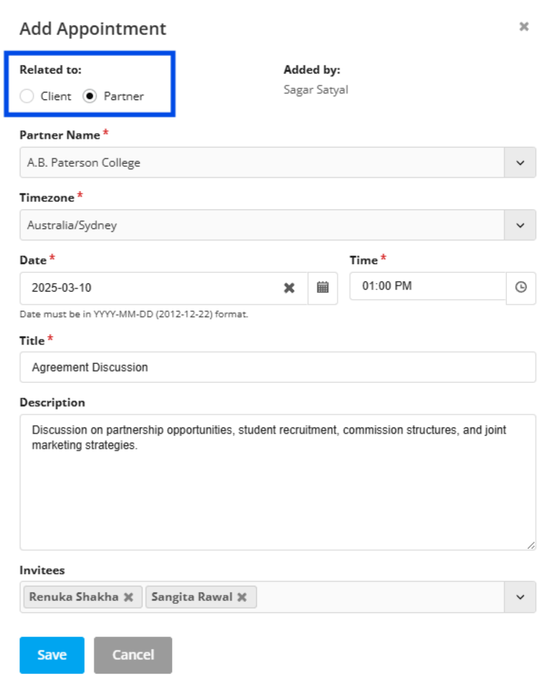


After saving the appointment, a calendar invitation will be automatically sent to the client and the invitee/s.



On the appointment day, you will see the appointment on your Agentcis Dashboard.





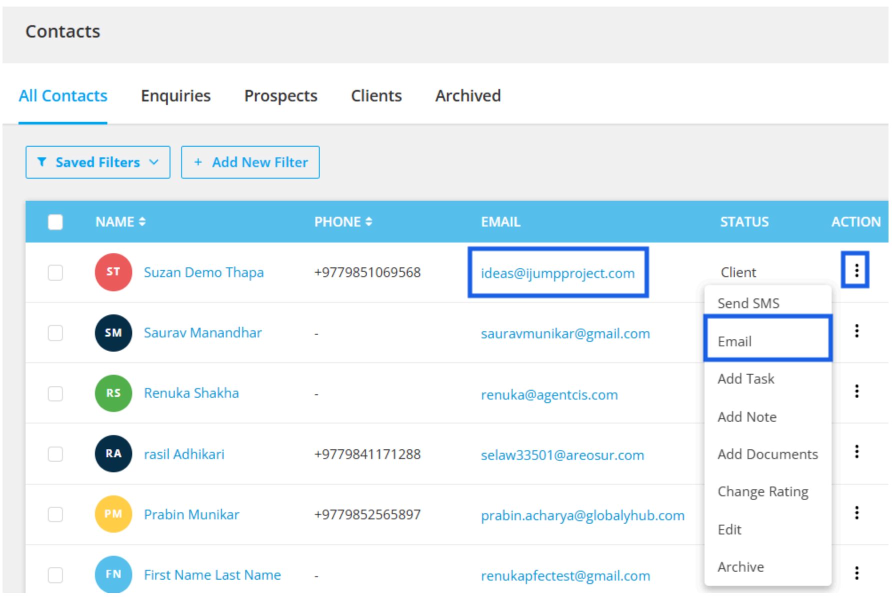
Note: Adding Appointments for Partners is also the same. You just need to select on Partner options from the **Related to:** section.

Sending email, sms and whatsapp messages to contacts

In Agentcis, communication can be done efficiently through multiple sections and pages.

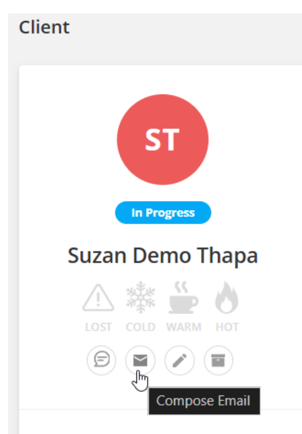
From the contacts listing page

By simple clicking on the **action icon** (three-dot icon) or, by clicking on the **email address** of the contact



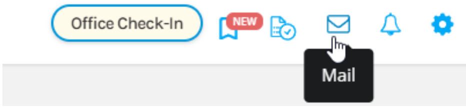
From the contacts profile page

Click on the email icon on the contacts profile

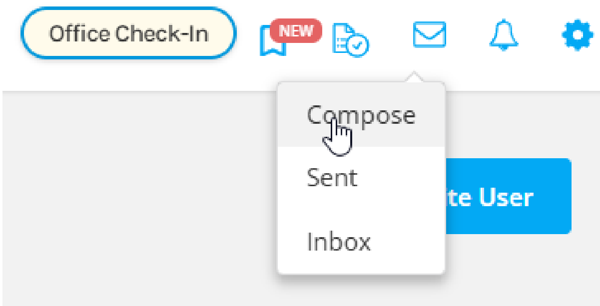


From the top bar

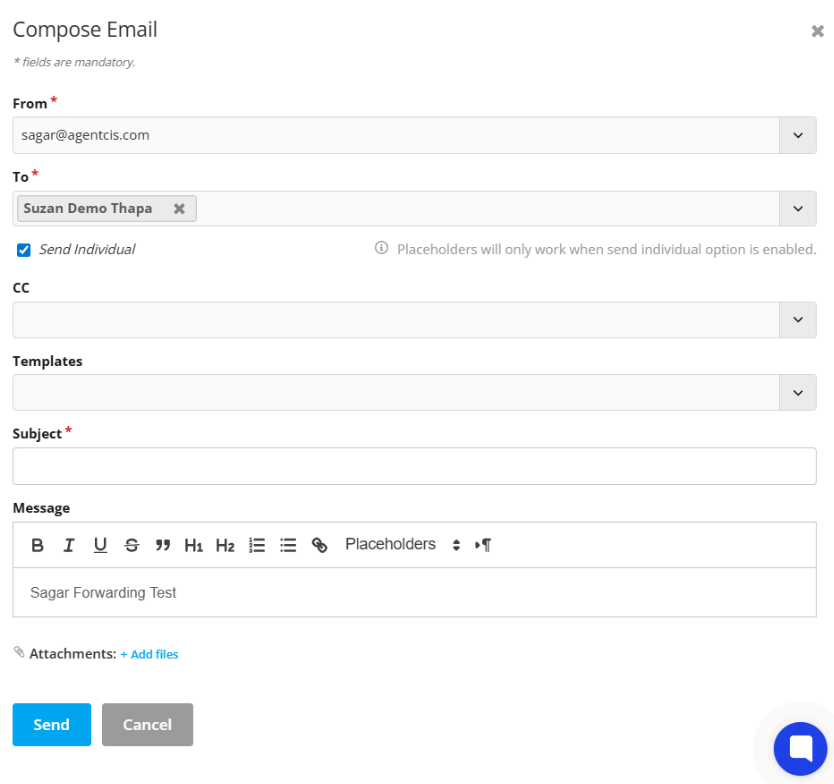
Click on the email icon situated at the top right side of the top bar



You can **compose** a new email, **view inbox** and **outbox** from this section.



While sending the emails, the Compose email page is the same for all types.



Choose the required Sender (From), Receiver (To)

You can also choose whether to send emails to multiple recipients as a same email or each email to each recipient should go individually by simply checking the box for **Send Individual**

CC
Select other receivers whom the email should be carbon copied to.

Templates
You can choose templates that are already created and saved in the system and avoid manual typing of the email content.

Subject
Choose the subject of this email that provides a grasp of the knowledge of the email abouts.

Message
With message formatting options in the message section, you can easily customize your content like a ms word.

Placeholders
Placeholders are sample texts or fields that show where specific information should be entered when writing an email. They act as guides to help you fill in the correct details before sending your message.

Example:

- **[Recipient Name] – Replace with the name of the person you are emailing.**

If you are sending emails to multiple clients at once, you would not need to change the client's name. Adding such placeholders will automatically fill the details and send.

Attachments

In case you need to add any necessary documents, files or images.