All LSI schools receive a number of direct enquiries, such as e-mail enquiries, brochure requests and in some cases Skype, live chat and call-backs. The Direct Enquiry System helps us to see what is happening with these enquiries and hopefully prevents us from forgetting to reply to enquiries from potential students.

**Latest updates to the DES manual – 2013/02/22**

- **Updated filter info**
- **Shortcut to “Customer details”**
- **General info about filling in enquiry report**
- **Customer enquiry window – updated view**
- **How to deal with enquiries (a, b and c)**
**Introduction - get to know the DES**

**Logging in**

1. Log in to the system. To access the system open: [http://www.lsi.edu/admin/](http://www.lsi.edu/admin/)

In a separate small pop-up, you'll be asked for a user name and password. *Note that you are not allowed to change this password so it is a good idea to save the password.* Here's an example of what it might look like (depends on your browser, this is Mozilla Firefox):

![Authentication Required](image1)

After that you should be able to see the light blue authentication window prompting you another authentication for which you'll have to use your personal account (NOTE: you can change this password later):

![Login](image2)

2. Congratulations! You are now logged in. Now, you will see the following screen (note that your “role” might be something else than “supervisor enquiries”):

![Personal Account](image3)

**“Customers” view**

3. First, let's have a look at “Customers”. Click on the word to open a drop down menu. You will now see this:
4. You now have two options on the left-hand side: “Customers” or “Enquiry Report”.

5. Clicking “Customers” will open up a menu with the customers’ names, location and e-mail address:

   ![Customers menu]

   - Adelaide Cutiar, Malta, elaiella@hotmail.com
   - adna kezi souza martins, BELO HORIZONTE, Brazil, kealinhasta@hotmail.com
   - Adrian Gheorghiu, Bucharest, Romania, adrian.gheorghiu@mara-study.ro

6. Clicking the customer’s name will display the student’s info like shown here:

   ![Customer details]

   - Full Name: adna kezi souza martins
   - Address: BELO HORIZONTE, Brazil
   - Email: kealinhasta@hotmail.com
   - Date Of Birth: 1901/2013
7. Here, if you click on the initial enquiry, in this case “Enquiry from LSI Website”, you will see the initial enquiry (NOTE: only the initial enquiry will be shown, so any replies will not be documented automatically). Here is an example of an enquiry:

<table>
<thead>
<tr>
<th>Order</th>
<th>Start Date</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Subject</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enquiry from LSI Website</td>
<td>19/01/2013</td>
</tr>
</tbody>
</table>

“Enquiry Report” view

8. For some customers, you will find an “order”. Note that only bookings, that is, “orders”, that have been made on the website go here and they do that automatically. Basically, this means that the orders have not necessarily really turned into an actual booking, so this will not in any way replace CLASS.

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9. Let’s now go back to the screen where you can choose “Customers” or “Enquiry Report”. Now, click on “Enquiry Report” to get access to the most useful area of the DES.
10. After clicking “Enquiry report”, you will now see something like this:

![Enquiry Report Window](image)

11. The enquiry report window shows a lot of information. You can also filter what information is seen, so if you only want to see enquiries of a certain type (in “Media”), you can do that. For instance, you can choose to only see the brochure requests (“Brochure”) on the page. To select several media, keep CTRL pressed when clicking on the wanted media. Conveniently, you will see how many options you have selected.

![Filter Options](image)

You can also filter the view based on dates or even status. If you want to only see the bookings made in January, then you just adjust the date filters (“Enquiry from” and “Enquiry to”) and then choose “Booking” as status and hit the “Search” button.
NOTE: The info in the search fields will be saved if not reset manually. The “reset” button can be found next to the “Search” button. This means that you can easily do small changes in your searches without choosing every search field again.

12. You can also use the search function in the upper right corner. The search function looks through all info, including name, surname, e-mail, country etc.
13. If you want to go to a certain person's Customer file, you can now click on the name and be redirected there:
Filling in the enquiry report

When you receive an e-mail to your school e-mail address via the website (“Enquiry from LSI Website”, not e-mails sent directly to the e-mail address) the DES will create a file for the enquiry. This file can then be used to easily access some vital information about that potential customer. When you have dealt with a customer enquiry, usually via e-mail, you should fill in the enquiry report as soon as possible (ie. before forgetting). The most important field to change is the status.

The default status is Unreplied. In most cases, “Still considering” will be the correct status. In some cases, the student is basically ready to book but hasn’t yet filled in the form or something similar. In these cases, go for “Wants to book”. “No answer” is meant for callbacks only – it is not to be used in the meaning “I am waiting for the customer to reply my e-mail”.

After, say, exchanging e-mails, the status should be updated when needed. Most importantly, when the enquiry leads to a booking, this has to be updated in the enquiry report by changing the status to “Booking”.

1. **Introduction.** A lot of the information can be found directly on the Enquiry report page, namely “Enquiry date”, “Customer”, “E-mail”, “Media”, “Country”, “School” and “Status”.

2. To edit the customer file or in order to get more information, click on the magnifying glass / enlarger symbol:
3. Clicking the magnifying glass/enlarger symbol opens the following page:

### View or Update customer enquiry

| Enquiry date: | 15-Feb-2013 13:20:28 |
| Media:        | Direct contact |
| Firstname:    | sadfasdf |
| Email:        | sadfasdf@fasdfs.com |
| Country:      | Afghanistan |
| Callback time:| |
| Step name:    | |
| Notes:        | |

**Log:**
- [15/02/2013 13:20 Viktor]
  - Office changed from London Hampstead to London Central
- [15/02/2013 13:20 Viktor]
  - Wants to go to London Central

4. When you have dealt with a customer enquiry, you should first fill in the needed fields.
   
   a. In the case of an enquiry from the website, fill in “First response date” with the correct time and possibly notes as well, if helpful in the future.

   ![Enquiry form with date and notes]

   **BEFORE**
   ```
   Notes:
   Wants residential accommodation next to the school with 46 inch TV and free drinks.
   ```

   **AFTER**
   ```
   Log:
   [15/02/2013 07:58 Phil Scherb]
   Office changed from London Hampstead to London Central
   ```

   b. Sometimes it can be useful to add some notes. After having been saved, the note goes in the log.

   ![Notes and Log]

   c. Sometimes it happens that the student actually is interested in another school than the one receiving the initial enquiry. In such cases the operators can transfer the enquiry to
another office/school by changing the LSI office in charge. You can find a drop-down menu with the title “LSI office in charge” in the top right corner:

From the drop-down menu (see above), you can re-assign the customer from one school to another school (Cambridge to London Central), or from your school to for instance the “LSI Young Learner Dept.” or “Online media enquiries”. However, more commonly, the online dept (managing the live chat and Skype), will forward the enquiry to the school.

When you try to save, the DES will prompt you to confirm that you want to make the change. Like this:
5. Remember to also tick in the boxes of the topics that have been discussed:

6. In the “View or Update customer enquiry” window you can also see a field called “Promotion”. This field is used when a promotion has been promised to the student over e-mail/Skype/livechat/e-mail etc. The promotions are usually time-limited (7 days). This information should all be in the promotion field. When getting a booking from a direct student, the Registrar should always have a look at the promotion field in order to be able to give the correct price in the invoice.

Example of a promotion:

School: Brighton

Promotion: 3 weeks + 1 week for free. No enrolment fee. Valid until 7th February.

Topics:  
- Accommodation types
- Accommodation prices
- Host family details
- Course types
- Course prices
- How to book
- Booking - payment issues
- Visa issues
- Nationality statistics

If the Registrar is uncertain about what promotion to apply, you can see who has been the latest operator (and probably the one promising the discount) and be in touch with him/her:
7. If you get an enquiry directly to your school e-mail (for instance, info-lon1@lsi.edu), then you will have to add it manually. You will be able to do this by clicking “New Enquiry” in the Enquiry report view and selecting “Direct contact” as type of media. Try to write as much info as possible (first name, surname, e-mail address etc.). Note: the “media” field is there to show where the initial enquiry came from, so it should not be changed even if the discussion would go from, say, Skype to e-mail.