

Pipeline — the enrollment board

Every open inquiry as a card, in the column for its stage. Move cards with the arrows or by dragging; click a card for the full profile.

1 What this page is for

WHAT THIS PAGE IS FOR

This is where admissions work happens. Each card is one real person from the website or Transition Enroll — nobody is typed in. Columns run left to right from **New Lead** to **Active Student**; inside each column the cards are grouped by how long ago the person arrived (Today, Last 7 days, Last 14 days, Last 30 days, Older).

GETTING AROUND THE BOARD

- The board is a box about 70% of the screen tall; scroll **up and down** inside it for more cards.
- Use the big <> arrows at either side, or the purple scroll bar at the bottom, to see more columns. A greyed arrow means you are at the end.
- **Show** filters to website-only or Transition-Enroll-only people. **Sort by** reorders the cards in every column.

WHAT A CARD SHOWS

Name, program, a source chip (Website form / Website application / Transition Enroll registration / Transition Enroll inquiry), how they were contacted (once recorded), days in the pipeline, and the two small move arrows.

THE KEY LINE ABOVE THE BOARD

Says how many cards came from the website and how many from Transition Enroll, and which time window is showing.

2 Parked & closed out

WHAT IT SHOWS

Five side lanes for people who are not moving forward right now. They are not a second status system: each lane is simply a group of the close-out reasons already recorded on the person.

LANE	CLOSE-OUT REASON(S) BEHIND IT
Follow-Up Needed	Cost / funding
Not Ready	Not eligible yet
Future Class	Schedule conflict
Unable to Contact	Never responded
No Longer Interested	Went elsewhere, Just researching

REACTIVATE

Returns the person to the stage they were at when they were parked, clears the reason, and puts the card back on the board.

Parking from the dashboard (choosing a reason with a button) is not built yet; reasons currently come from the database. Reactivating *is* available.

3 Step by step

Move someone forward after a call

1. Find the card (use **Sort by > Name A-Z** if the column is long).
2. Click the card's > arrow, or drag the card to the next column.
3. If the card is leaving **New Lead**, the in-site box asks when and how you contacted them. Check the time, pick how, press **Save**.
4. The card moves and the change is saved to the record and the audit log.

Park someone who is not going ahead

1. There is no park button on the board yet. A close-out reason (Cost / funding, Not eligible yet, Schedule conflict, Never responded, Went elsewhere, Just researching) is written to the record by Mission Metrics on request, or arrives with imported data.
2. Once a reason is on the record the card leaves the board and appears in the matching lane under **Parked & closed out**.
3. Until a button exists, ask Mission Metrics to close out a lead, or simply leave it in its column.

Bring a parked person back

1. Scroll to **Parked & closed out**.
2. Press **Reactivate** on the card. They return to the column they were in.

See only website leads

1. Set **Show** to *Website only*.
2. Set it back to *Everyone* when done — the choice is not remembered after a refresh.

4 If something looks wrong

The back arrow on a card is grey.

The card is already in the first column (New Lead); there is nowhere further back. Hover the arrow for the hint.

I moved a card and it jumped back.

The save failed and a message said why. The most common cause used to be a database rule that has since been fixed; if it happens again, screenshot the message.

A person is on the board twice.

They inquired on the website (AIW- record) and later registered in Transition Enroll (TE-S- record). Move or park the website one by hand; the records are not joined automatically yet.

Days in pipeline seems wrong.

It counts from when the inquiry arrived, not from when they entered the current column, because stage-entry times are not recorded yet.