

# Leads & Admissions — every inquiry

The full list of everyone who asked about a program in the window, newest first, grouped by how long ago they came in. Search, filter, sort, mark contacted, export.

## 1 What this page is for

### WHAT THIS PAGE IS FOR

The admissions desk's master list. Where **Today** shows only the people waiting on you, this page shows *everyone* who arrived in the time window — contacted or not, enrolled or not — so nothing is lost.

### CONTROLS AT THE TOP

- **Search** — name, phone or program; the list narrows as you type.
- **All stages** — show one stage only.
- **All sources** — website form, website application, Transition Enroll registration or Transition Enroll inquiry.
- **Export CSV** — downloads the rows on screen as a spreadsheet file (ID, name, phone, program, source, received, response minutes, stage, tuition, owner).

### THE AGE BUTTONS

Above the table: **All**, **Last 7 days**, **8 to 14 days ago**, **15 to 30 days ago**, **Older**, each with a count. The table is also grouped by these bands with a purple header row.

## 2 The number cards

The cards across the top of the page, left to right.

| CARD      | WHAT IT COUNTS                |
|-----------|-------------------------------|
| New today | Arrived in the last 24 hours. |

**Awaiting first contact**

Open inquiries with no first contact recorded. Every one is a paid-for lead.

**In application**

Started an application but not yet enrolled.

**Enrolled**

Reached Enrolled or beyond, with the share of all inquiries.

### 3 Inquiries by day of week

How many inquiries arrived on each weekday in the window. Staff the phones where the bars are tall; if weekends are busy and nobody answers until Monday, Speed to Lead will show the cost.

### 4 Why prospects didn't enroll

Close-out reasons on parked records: Cost / funding, Not eligible yet, Schedule conflict, Never responded, Went elsewhere, Just researching. Reasons are recorded at the moment a lead is closed out. Empty when nobody in the window has been closed out.

### 5 Step by step

#### Find one person

1. Type part of the name, phone or program in **Search**.
2. Click the row's **Call** button to dial, or use the Contacted? dropdown to record a call.

### Work everyone not yet contacted

1. Click the **Response time** heading to sort; "never contacted" rows group together.
2. Or set the stage filter to *Lead*.
3. Record each call with the dropdown as you go.

### Export for a spreadsheet

1. Set the filters you want.
2. Press **Export CSV**. The file downloads to your computer and opens in Excel or Numbers.

## 6 If something looks wrong

### The phone shows as a run of digits.

Website forms accept any format; Transition Enroll formats numbers. Both dial correctly from the Call button.

### Program shows a code like cna-hhsc-cbt.

That is the website's short name for the program the person picked; Transition Enroll students show the full title.

### Value says TBD\_PRICE.

The program has no published price on the storefront, so no tuition is attached rather than guessed.