

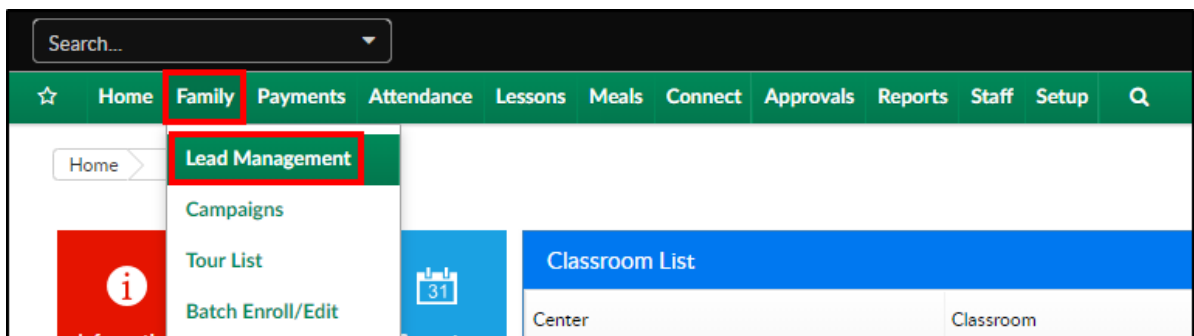
Family > Lead Management

Last Modified on 02/27/2019 8:47 am EST

Lead Management allows centers to track potential family activity within the system before the family record is created.

View Current Leads

1. Click Family, then select Lead Management



2. All Pending families will display under the Lead and Wait List section

Lead and Wait List												
	Center	Parent First Name	Parent Last Name	Child	Age	Start Date	Create Date	Accept Date	Accepted By	Activity Type	Status	Ac
<input checked="" type="checkbox"/>	DCW Transactional-CENTER 1	Marilla	Cuthbert	Anne	7	10/30/2017	10/24/2017 10:13 AM				Closed	
<input checked="" type="checkbox"/>	DCW Transactional-CENTER 1	Kristina	Gass	Child1	0	03/29/2018	03/15/2018 9:06 AM			Phone Call	Active	03
<input checked="" type="checkbox"/>	DCW - Transactional	Jane	Winters	Henry	0	12/24/2018	12/20/2018 10:49 AM				Closed	
<input checked="" type="checkbox"/>	DCW - Transactional	Jessica	Sanders	Dustin	1	03/04/2019	02/25/2019 1:36 PM			Phone Call	Active	02

- o To change the search criteria, click the Search Criteria drop-down



- o Change the search filter in the Search Criteria window

Search Criteria

Submit Date (>)

Parent Last Name

Parent First Name

Child's First Name

Status

[Activity Search](#)

Find

- Submit Date (>) - enter the date to search as of. For example, if 7/16/2018 is selected in the Submit Date field, results will display for 7/16/2018 until the present day
- Parent First/Last Name - enter the parent's first and/or last name
- Child's First Name - enter the student's first name
- Status - select a status
 - Pending - student is not active and will not display in the family search results
 - Approved - student has been approved to the system and will display in the family search results
 - Rejected - the student's request for admittance has not been approved
- For a more advanced search, click Activity Search

Activity Search

From Date <input type="text"/>	To Date <input type="text"/>
Activity Type <input type="text" value="All"/>	Activity Status <input type="text" value="All"/>
Lead Source <input type="text"/>	Classroom <input type="text"/>
From Age (Months) <input type="text"/>	To Age (Months) <input type="text"/>
Email <input type="text"/>	Phone Number <input type="text"/>

- From/To Date - enter a start date and/or end date for the activities
 - Activity Type - select the activity type from the drop-down. (Setup in [Valid Values](#) under Activity Type)
 - Activity Status - select the status of the activity
 - Lead Source - select the source of the lead. Examples: email, expo, walk-in, etc. (Setup in [Valid Values](#) under Lead Source)
 - Classroom - choose the classroom the student would be placed into, if approved
 - Age From/To - to view all student's within a specific age, enter the to and from age in months
 - Email - search by the parent's email address
 - Phone Number - search by the parent's phone number
- Click Find

Editing Lead Information

To edit a family's lead record, follow the steps below

1. Locate the family's name in the Lead and Wait List section
2. Click the edit icon to the left of the Center/Parent First name

Lead and Wait List												
Center	Parent First Name	Parent Last Name	Child	Age	Start Date	Create Date	Accept Date	Accepted By	Activity Type	Status	Ac	
<input checked="" type="checkbox"/> DCW Transactional-CENTER 1	Marilla	Cuthbert	Anne	7	10/30/2017	10/24/2017 10:13 AM				Closed		
<input checked="" type="checkbox"/> DCW Transactional-CENTER 1	Kristina	Gass	Child1	0	03/29/2018	03/15/2018 9:06 AM			Phone Call	Active	03	
<input checked="" type="checkbox"/> DCW - Transactional	Jane	Winters	Henry	0	12/24/2018	12/20/2018 10:49 AM				Closed		
<input checked="" type="checkbox"/> DCW - Transactional	Jessica	Sanders	Dustin	1	03/04/2019	02/25/2019 1:36 PM			Phone Call	Active	02	

3. Edit the necessary information
4. Click Save at the bottom of the screen

Approve/Reject Student's

From the Lead Management screen, students can be approved or rejected into their requested program.

1. Slide the scroll bar to the right

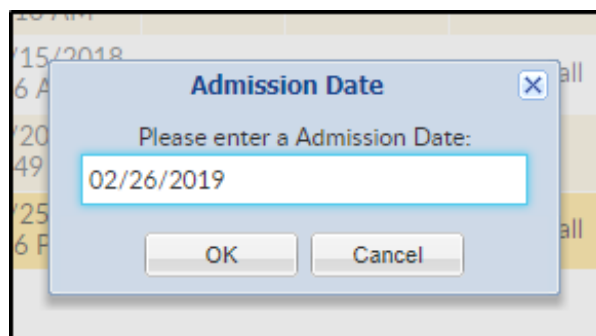
Lead and Wait List												
Center	Parent First Name	Parent Last Name	Child	Age	Start Date	Create Date	Accept Date	Accepted By	Activity Type	Status	Ac	
<input checked="" type="checkbox"/> DCW Transactional-CENTER 1	Marilla	Cuthbert	Anne	7	10/30/2017	10/24/2017 10:13 AM				Closed		
<input checked="" type="checkbox"/> DCW Transactional-CENTER 1	Kristina	Gass	Child1	0	03/29/2018	03/15/2018 9:06 AM			Phone Call	Active	03	
<input checked="" type="checkbox"/> DCW - Transactional	Jane	Winters	Henry	0	12/24/2018	12/20/2018 10:49 AM				Closed		
<input checked="" type="checkbox"/> DCW - Transactional	Jessica	Sanders	Dustin	1	03/04/2019	02/25/2019 1:36 PM			Phone Call	Active	02	

Records from 1 to 4 Page 1 100 rows per page

2. Click Approve or Reject

Lead and Wait List												
Parent Last Name	Child	Age	Start Date	Create Date	Accept Date	Accepted By	Activity Type	Status	Activity Date	Accept	Re-Approve	Reject
Cuthbert	Anne	7	10/30/2017	10/24/2017 10:13 AM				Closed		Approve		Reject
Gass	Child1	0	03/29/2018	03/15/2018 9:06 AM			Phone Call	Active	03/15/2018	Approve		Reject
Vinters	Henry	0	12/24/2018	12/20/2018 10:49 AM				Closed		Approve		Reject
Anders	Dustin	1	03/04/2019	02/25/2019 1:36 PM			Phone Call	Active	02/25/2019	Approve		Reject

- o Approve - a student/family record will be created
 - Once approved, enter the Admission Date in the popup and click OK. A student/family record has now been created



- o Reject - the lead will be denied and a student record will not be created

Actions Menu

There are several options in the Actions drop-down menu:

- View Denied Children Information - displays two sections; Denied Students List and Denied Students List - Discharged
- [Add New Lead](#) - allows an admin to manually add a lead
- Export - exports the information displayed in the Lead and Wait List section into a 37 column Excel spreadsheet

Waiting List February 26, 2019				
Center	Created	Parent First Name	Parent Last Name	Address 1
DCW Transactional- CENTER 1	10/24/2017	Marilla	Cuthbert	123 Greengables Way
DCW Transactional- CENTER 1	03/15/2018	Kristina	Gass	445 S. Livernois Rd Suite 224
DCW Transactional- CENTER 1	03/15/2018	Kristina	Gass	445 S. Livernois Rd Suite 224
DCW Transactional- CENTER 1	03/15/2018	Kristina	Gass	445 S. Livernois Rd Suite 224

- Blank Lead Information Form - opens a blank Lead Information Form as a PDF



DayCare
WORKS

DCW Transactional- CENTER
1
445 S. Livernois
Rochester MI 48307

Lead Information Form

Lead Information	
Lead Date: _____	Do Not Solicitate? <input type="checkbox"/> Yes <input type="checkbox"/> No
Initial Phone Call Date: _____	Follow-up Call Name: _____
Parent Information	
Parent First Name: _____	
Parent Last Name: _____	
	<input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Other
Address 1: _____	
Address 2: _____	
City: _____	State: _____
Zip: _____	
Email: _____	
Phone Number: _____	Cell Phone: _____
Child 1	Child 2
Child Name: _____	Child Name: _____
Birthday: _____	Birthday: _____
Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female	Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female
Request Hours: _____	Request Hours: _____
Request Days: _____	Request Days: _____
Request Start: _____	Request Start: _____
Child 3	Child 4

- Lead Activity Summary - exports lead activities to Excel. This export includes the following tabs: Activity Summary, Activity Chart, Totals Chart, Hear About Us, Hear About Us Chart
- View Calendar - displays a calendar view of all events. View by day, week, month and filter by activity type. A Calendar Event can also be added from this page