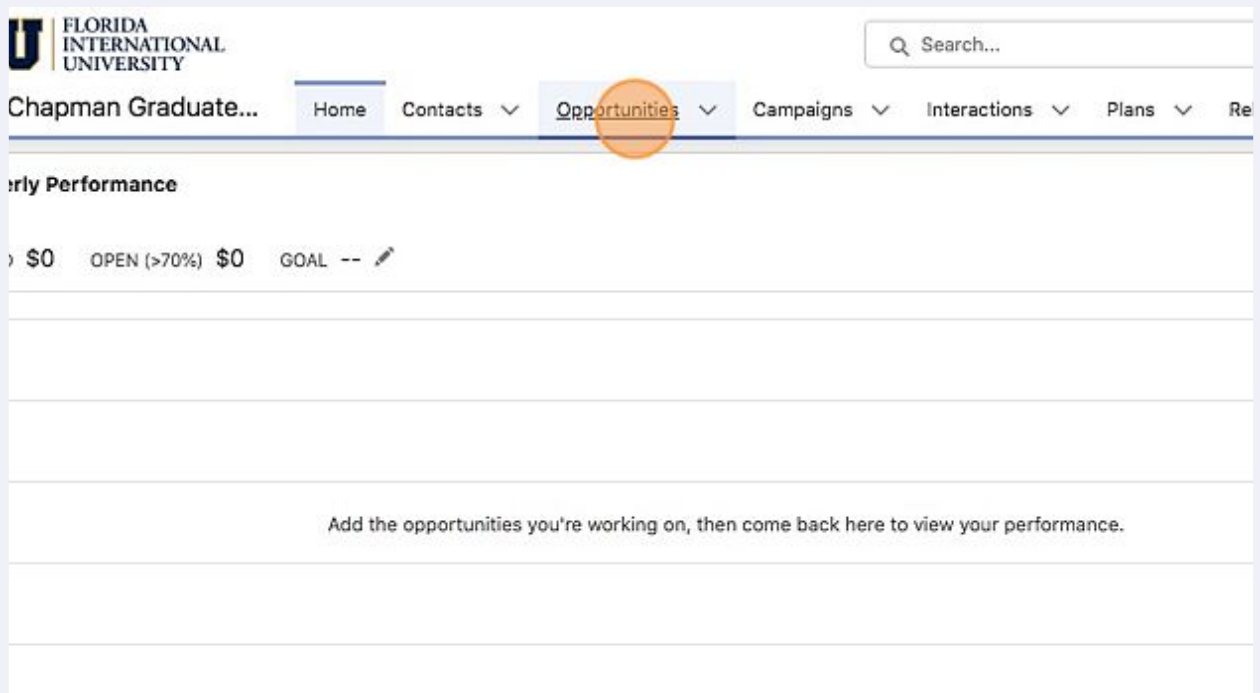


Applicant Opportunity Updates

1 Navigate to fiucrm.lightning.force.com/lightning/page/home

2 Click "Opportunities"



The screenshot displays the Florida International University CRM interface. At the top left is the university logo and name. A search bar is located at the top right. The navigation menu includes 'Home', 'Contacts', 'Opportunities', 'Campaigns', 'Interactions', 'Plans', and 'Reports'. The 'Opportunities' menu item is highlighted with an orange circle. Below the navigation bar, the 'Opportunity Performance' section is visible, showing a table with columns for 'Amount', 'Status', and 'Goal'. The current values are '\$0', 'OPEN (>70%)', and '\$0' respectively. A message at the bottom of the table reads: 'Add the opportunities you're working on, then come back here to view your performance.'

3 Click "Select a List View"

FIU FLORIDA INTERNATIONAL UNIVERSITY

Chapman Graduate... Home Contacts Opportunities Campaigns Interactions Plans

Opportunities
MSF Fall 2023 - Applicants

50+ items • Sorted by Opportunity Name • Filtered by All opportunities - Academic Interest, Term • Updated a few seconds ago

Contact	Opportunity Name	Stage	Notes
1 Mohammed Bello Bello Adam	Adam - Fall Term 2023	Incomplete	Missing: Transcripts, POD, Resu Essay, DCF/FIN, POR
2 Munawir Alanazi	Alanazi - Fall Term 2023	Admitted	Missing: DCF/FIN new sponsors - READY TO RECOMMEND - wa admitted Spring did not pay hac
3 Tahani Alatawi	Alatawi - Fall Term 2023	Admitted	Missing: Official Transcripts, PC (graduates May 23), Essay, DCF (F1 transfer), POR
4 Alaa Albhrani	Albhrani - Fall Term 2023	Admitted	Missing: Transcripts (Undergrad and Masters), Essay, DCF/FIN(F Transfer??), POR
5 Reem Albuaiamy	Albuaiamy - Fall Term 2023	Incomplete	Missing: Native lang. transcripts/degree. official

4 Click the list view for your application pipeline.

Chapman Graduate... Home Contacts Opportunities Campaigns Interactions Plans

Opportunities
MSF Fall 2023 - Applicants

50+ iter

Search lists...

RECENT LIST VIEWS

- Healthcare MBA
- ✓ MSF Fall 2023 - Applicants (Pinned list)
- MSIRE Fall 2023 - Applicants
- OMSF Fall 2022 - Applicants
- OMSF Fall 2023 - Applicants
- OMSF Prospects Open/Follow Up
- OMSIRE Fall 2023 - Applicants
- OMSIRE Prospects Open/Follow Up

seconds ago

otes

issing: Transcripts, POD, Resu ssay, DCF/FIN, POR

issing: DCF/FIN new sponsors READY TO RECOMMEND - wa admitted Spring did not pay hac

issing: Official Transcripts, PC graduates May 23), Essay, DCF (F1 transfer), POR

issing: Transcripts (Undergrad and Masters), Essay, DCF/FIN(F transfer??), POR

issing: Native lang. transcripts/degree, official transcripts, resume (how long d

issing: Essay, POR, DCF/FIN (F transfer)



Tip! Click the pin next to the opportunity list view name of your current pipeline to ensure that when you click the "opportunities" tab in the future it will take you there directly.

6

Stages of an applicant are as defined below:

- Initiated = Brand new applicant not reviewed by recruiter (Auto)
- Incomplete = Reviewed/contacted by recruiter, pending documentation (Manual)
- In Review = Recommended for admissions (Manual)
- Admitted = App admitted (Auto)
- Confirmed = App paid invoice (Manual)
- Closed = App is enrolled, denied, or not coming

7

Click the Opportunity Name of the application you are working on.

Contact	Opportunity Name	Stage	Notes
1 Natalie Gonzalez	Gonzalez - Fall Term 2023	Initiated	
2 Ayesha Waqar	Waqar - Fall Term 2023	Initiated	
3 Md Sohel Rana	Rana - Fall Term 2023	Initiated	
4 Alejandro Jose Matus	Matus - Fall Term 2023	Initiated	
5 Ramatu Abubakar Binyamin	Binyamin - Fall Term 2023	Incomplete	Missing: Transcripts, POD, Resu Essay, DCF/FIN, POR - Deferal f Spring 2022
6 Sofia Colman	Colman - Fall Term 2023	Incomplete	Missing: Essay, Up to Date Resu We were going to Hardin waiver for Fall 2022 but she never got. Missing: Transcripts, Diploma



Tip! Note, if you click the contact name, this will take to you the contact information of the application NOT the application opportunity to update.



Tip! Open windows in a new tab. This will allow you to go back to your pipeline, or any view, with more efficiency.

8

Click the pencil (any) to edit the applicant opportunity.

The screenshot displays a CRM interface with a list of opportunities on the left and a sidebar on the right. The list has a header 'Initiated' and several rows, each with a pencil icon for editing. The sidebar contains 'Related List Quick Links' and 'Opportunities for Parent Contact (3+)'. The quick links include Cases (5), Interactions (3), Stage History (4), Invoices (0), Contact Roles (1), Opportunity Field History (5), and Notes & Attachments (0). The 'Opportunities for Parent Contact' section lists two entries for 'Gonzalez' with details for 'Spring Term 2022' and 'Spring Term 2023', including 'Opportunity Record T...', 'Applicant Opportunity', and 'Recruitment Interest: Finance - MSF:Finance Online'.

9

Items that **MUST** be updated within application opportunities are as follows:

- Stage
- Sub-Stage
- Status Detail
- Notes (should be utilized to mark any major notes about app file)
- Date recommended (once/if recommended)
- Years of Work Experience
- Major
- Joint degree/Dual degree, if applicable
- Official Test Scores section, if applicable
- Documents Received (Off. transcripts, Resume, Recommendations, Personal Statement/Essay, Unofficial Transcript, Proof of Degree, FL Proof of Residency)
- International Students Section, if applicable

Any other additional fields as related to your program can/should be updated as well. The more information housed in the opportunity, the better.

10

Click "Save" to save changes to the file. Note, when documents are received and uploaded to ImageNow, you must update the applicant opportunity record.

The screenshot shows a web application interface for managing application opportunities. At the top, there is a header with the ID '3324932' and a note 'This field is calculated upon save'. Below this, there are several input fields. One field contains 'APPL', another is empty, and a third contains '1231483'. To the right of these fields is a dropdown menu for 'Status Detail' with the following options: 'Incomplete', 'Pending documents', and '--None--'. Each option has a 'View all dependencies' link below it. At the bottom of the form, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a blue border and a circular orange icon.