

## Quote tool guide

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Dear partner,

Welcome to our Quote tool guide! This onboarding guide will quickly get you up to speed with our real-time information hub. We use [Edvisor software solution](#).

If you do not have an account yet, please, start from the step 1.

**Let's dive in!**

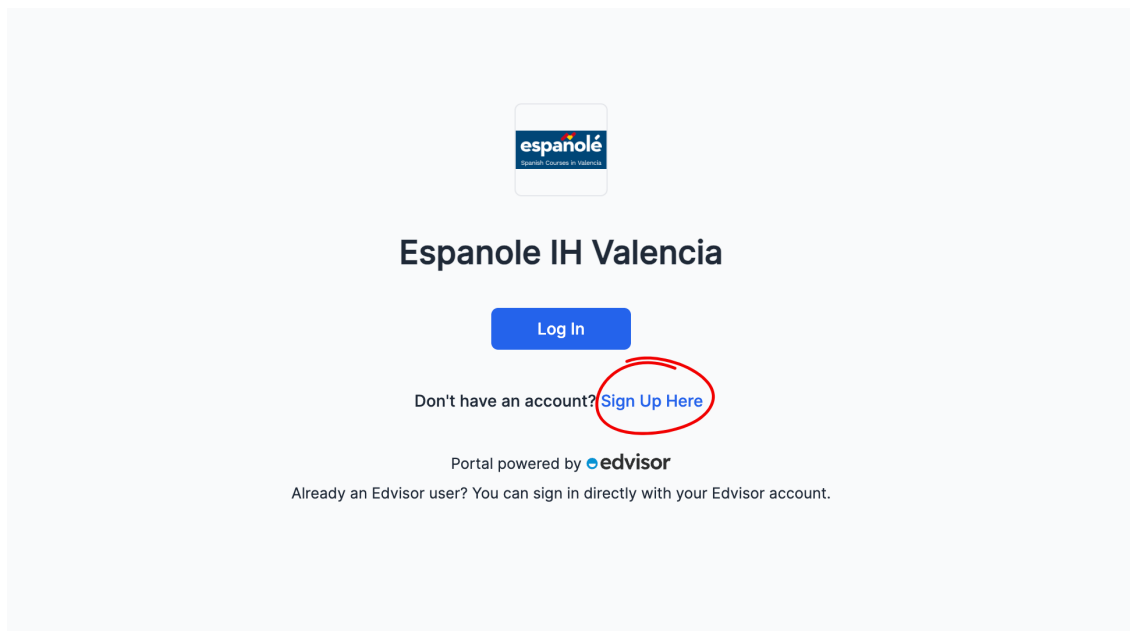
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## 1) Create your account


1. To get started, visit our Portal:

 <https://espanole.portal.edvisor.io/en>

2. Click on 'Sign Up Here' to open the registration form.



3. Complete the signup form—it's quick and easy, and won't take more than 5 minutes of your time.

 Once you've submitted the form, you'll receive a verification email. Please check your inbox and click the verification link to activate your account.

4. After verifying your email, you'll be directed back to our login page. Simply enter the email and password you used to sign up, and voilà, you're in!

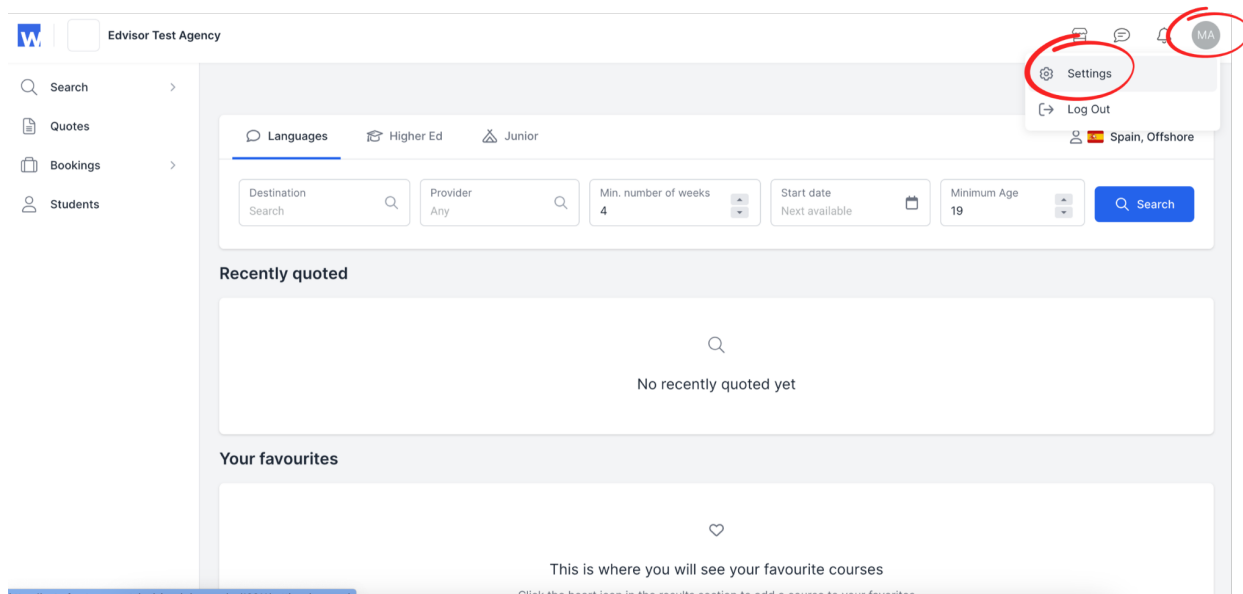
We're thrilled to have you on board and can't wait for you to explore all the features and benefits of our Agency Portal.

## 2) Account Setup: Personalize your experience

First thing, let's adjust your settings to make everything work better for you and your team.

Here's what to do:

- Click on your user icon at the top right corner.
- Choose Settings.



This will take you to the settings page, divided into 4 sections:

- **Personal:** Change your name, password, or language here.
- **Offices:** If you have more than one office, you can add or change their info here.
- **Teams:** Here, you can add, remove and manage people from your team.
- **Company:** Update your company's info like address, logo, which currency you use, and where you work.

Please fill in all these details. It's important and will help with the next steps we'll show you in this guide.

### 3) Searching for our courses

From the main dashboard, you'll see a menu on the left with a few options. To start exploring our offering, click on 'Search' > 'Courses'.

This will take you to the search page from where you can find all our programs!

#### Searching for courses

- Begin by entering the student's nationality. This is a crucial step to ensure you see the correct prices and promotions.
- Choose our only campuses by using the 'Provider' dropdown menu.
- Specify the duration (number of weeks), the start date or click "next available" if it's an urgent request. Choose the country and your student's age to further refine your search.

## Understanding your search results

The search results page will display all the programs that match your search criteria.

The screenshot shows a search results page for 'españolé'. On the left is a sidebar with navigation links: Search, Quotes, Bookings, Students, and Enrolment conditions. The main search bar at the top has 'Languages' selected, with filters for Destination (Valencia, Valencia), Provider (Espanole IH Valencia), Duration (4 weeks - Next available), and Student information (19 and older). Below the search bar, it shows '13 results' and 'Clear all filters'. The results are sorted by 'Top school first'. Two results are visible: 'Intensive Spanish 20 (20 L/W)' and 'Intensive Spanish 25 (25 L/W)'. Each result includes a thumbnail image, the school name 'Espanole IH Valencia', the course details, and the price in EUR and USD. The first result is priced at €940.00 EUR (\$1,094.38 USD) and the second at €1,160.00 EUR (\$1,350.52 USD). Both results have an 'Add to quote' button.

To narrow down your options, use the filter sidebar on the left. You can filter by price, hours per week, course type, and more.


💡 The search bar stays at the top, will stay at the top, allowing you to modify your search without going back.

## Exploring our programs

Click on any title in the search results to get detailed information about that program and our campus.

A pop-up box will appear providing:

- Course details
- Entry requirements
- Timetable
- Highlights and description of our campus
- Nationality mix of students
- Our awards and accreditations
- Campus facilities

 **TIP:** To check other available dates for a program, click on the listed date. This will show you all the start dates available for that course.

## Promotions and Special Offers

If there are promotions specific to your market, they will be automatically applied and reflected in the price on the search results page.

Remember, you can change the displayed currency to your preference at any time by selecting from the 'Currency' dropdown menu at the top of the page.

## 4) Generating quotations for your students

Our portal offers more than just consultation; it provides dynamic pricing that you can use to instantly create a quote for your prospective students.

Within the search results, you have the option to select one or multiple courses to include in a quote.

When you locate the desired course, simply click the **'Add to quote'** button found next to the course's details.

Feel free to choose as many course options as you need. After your selection, click on **'New quote'** or **'Add to existing quote'** located at the bottom of the page.

The screenshot shows a search results page for 'Espanole IH Valencia'. It lists two courses:

- Intensive Spanish 25 (25 L/W)**: €1,160.00 EUR (\$1,350.88 USD). Button: **Add to quote**.
- Intensive Spanish 30 (30 L/W)**: €1,380.00 EUR (\$1,607.08 USD). Button: **Selected** (circled in red).

At the bottom right, there are two buttons: **Add to existing quote** and **New quote** (circled in red).

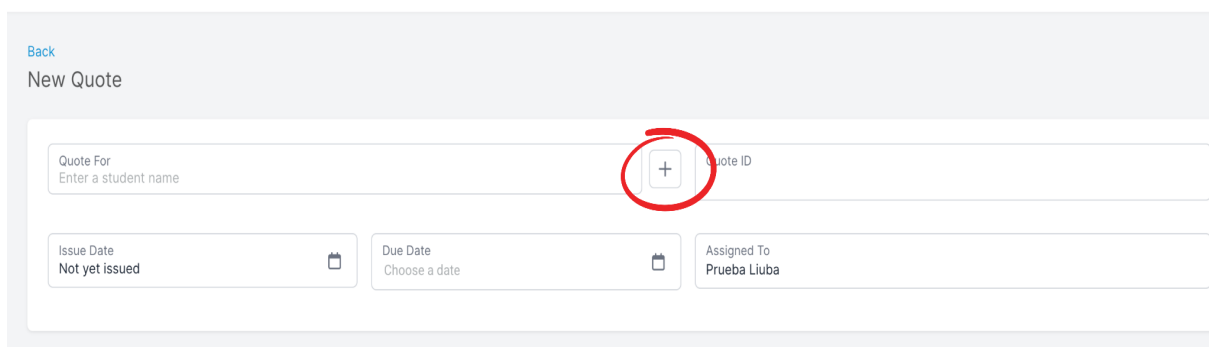
When you've selected courses to quote, you'll be directed to a page like this, where you can craft a customized quote for your student.

You'll see different options listed as Option 1, Option 2, and so on. Each one represents the different courses you're considering for the student, and include the following information:

- **Course name and details:** The name of the course, the location, the duration, and start and end dates.
- **Cost breakdown:** A detailed list of all the fees involved, including tuition, registration, materials, and any additional mandatory fees.
- **Total:** The full price for the option, shown in both the local currency (CAD in this case) and the chosen currency for the quote (USD).

Once you are happy with the result, assign the quote to one student by looking for the student in the student field or clicking on the + icon to create a new student.

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Then, click 'Save' in the right-hand corner of the page.

💡 You'll be able to access your quote at any time from the 'Quotes' section of the portal, or find it linked to the selected student's profile.



## 5) Managing student sales

With your quote already created, it's time to share it with the student.

Returning to the main dashboard, you'll find a menu on the left with various options.

### Quotes

Click on 'Quotes' to manage all the quotations you've created.

To share a quote with a student, simply open the quote and click on **'Email to student'** if you wish to send the quote via email, or click on **'Preview quote'** if you prefer to share a link via WhatsApp or another method.

With this dynamic quote, the student will be able to browse through all the quote options you've included, compare them, and view all the information about the programs, our school

**TIP!** You can track if the student has viewed the quote or not from the quotes dashboard.

and our campus.

### Students

In the 'Students' section, you'll see a list of all the students you've created profiles for. Here, you can store the students' basic information and view all the quotes that are linked to them.

## 6) Sending applications

The student can select their preferred option directly through the dynamic quote.

Once accepted, you'll receive an email and see the update reflected in the quote within your portal. Simply open the quote and click on **'Start Application'**.

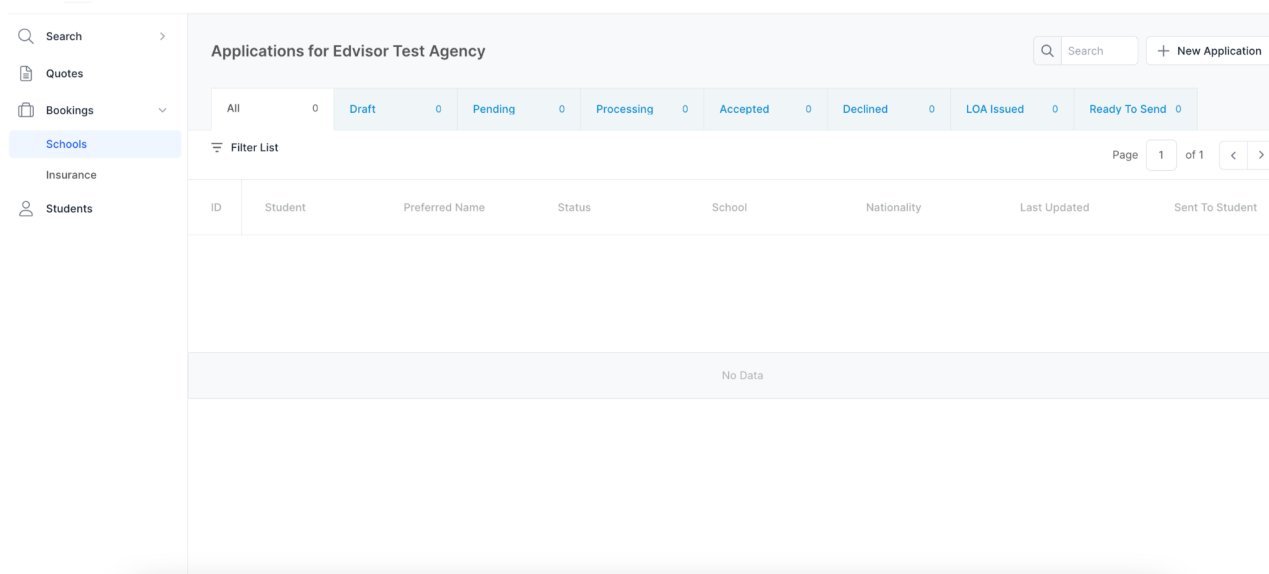
We have integrated our application form into this program to centralize your workflow.

Just start the application, follow the steps, and ensure you fill in all the required details. Our registration team will receive the application and process your applications through this same system.

## Bookings: Track your application


You can track the progress anytime from the '**Bookings**' section, also accessible from the left-hand menu of your portal.

The application will move through various statuses: pending, processing, accepted, declined, LOA issued, etc.



The screenshot shows a web interface for tracking applications. On the left is a sidebar menu with options: Search, Quotes, Bookings (expanded), Schools (selected), Insurance, and Students. The main area is titled 'Applications for Edvisor Test Agency' and includes a search bar and a '+ New Application' button. Below this is a status filter bar with tabs: All (0), Draft (0), Pending (0), Processing (0), Accepted (0), Declined (0), LOA Issued (0), and Ready To Send (0). A 'Filter List' button and pagination (Page 1 of 1) are also present. The main table has columns: ID, Student, Preferred Name, Status, School, Nationality, Last Updated, and Sent To Student. The table is currently empty, displaying 'No Data'.

We will provide all the necessary documents through the portal, ensuring everything is stored in one single place for easy access.

 You can chat with our Admissions team directly through the Portal using the chat box provided.

## 7) Agency support

We have crafted our Agents Hub with care, aiming to ensure you have the quickest access to our information. It's a step towards a more connected and efficient partnership that we believe will benefit us both greatly.

In the Hub, you can download photos, videos, and other marketing materials to promote our Spanish courses and attract more students. You can always access updated course details, prices, and promotions in one place, as well as tools that make enquiries simple.

And remember, if you need help promoting our courses or handling a specific client case, **our friendly team is just a call away.** 😊

You can access our Agent's Hub anytime from our website, or by saving this link with your favorites: <https://resources.espanoleschool.com/welcome>