

special **Toolkit**



IN PARTNERSHIP WITH

PEARSON



Why Institutions require Educational Consultants / Agents?

Pearson Centres use different methods of promoting their courses to potential learners eg Direct marketing and forming business relationships with Schools and other education providers. However an Agent plays a very important role for Institutions who wants to recruit international students. For students and their parents, agents are important local advisors who provide support for the complex decisions and processes associated with study abroad. For institutions, agents represent a cost-effective way to recruit international students, as the agents' services include performance based compensation, and most universities and colleges cannot afford to set up their own offices across the globe so using agents is very cost-effective for them.

The main services offer by agent include:

- Career Counselling and Educational Planning
- Helping students to select Institutions, Courses and the Country of their interest
- Visa/Immigration Guidance and preparing Visa Application
- Educational Loan and Scholarships Assistance
- Pre-departure, Accommodation and Airport pickup Assistance

Why should any Pearson Centre use Uniagents.com (Part of Centre Toolkit by Pearsons) ?

Appointing a Qualified and Reliable Agent

A professional and qualified education agent can enhance the awareness of the institution in the local region of representation. To select the right education agent an effective screening process is needed, before a representation agreement with him can be considered. This can be done by preparing an Agency Questionnaire requiring relevant information about the agency and conducting reference checks by asking 2 or 3 valid academic references with whom the agent currently works.

The Process of Appointing an Agent:

Step 1: Click on Find New Agents for a UniAgents account and View their personal contact details of 50 Agents a month.

OR

Click on Agencies under Manage Interests who wish to represent the institution.

Step 2: Accept or Decline their representation request.

Step 3: If accepted, send them an Agency Questionnaire.

Step 4: Ask for academic reference letters.

Step 5: Sign a Representation Agreement

General Compensation Models

1.) Per Learner Commission Model

Most of the leading institutions across the globe use a per-student/ learner commission model usually starting from 10-15% and goes up to 25-30% of the annual first year tuition fee depending upon the type, duration and fee structure of the course.

2.) Regional Exclusivity / Regional Office Model

Some consultants feel comfortable to work only if they have the exclusive representation in a specific region. It's a big decision to give exclusive rights to any consultant. It must not be given to any agent until a thorough due diligence is done. It is recommended to receive a few applications from an agent and take a positive decision on the basis of the quality of the applicants provided, conversion rate and feedback from students. In such a case the exclusive agent gets authorised to find local agents to source applications. Minimum student targets must be set for such an agent. It must be kept in mind that such an agent may well ask for marketing budgets and retainerships in certain cases.



Overview

Content	Page no.
What is UniAgents ?.....	3
Who are the main users ?.....	3
What are the main benefits for Pearson Centres ?.....	3
How to register as a Centre ?.....	4
What benefits do I get once registered ?.....	4
Why do I need to verify my email ?.....	4
What is the user registration fee ?.....	4
How can I know whether my user registration is successful ?.....	4
I've forgotten my password/username ?.....	4
How to Login ?.....	6
How can I change/update my profile ?.....	6
How can I Change my Login Password ?.....	6
Where can I see how many agents want to represent me ?.....	7
How do I know if a student has sent an Enquiry ?.....	7
How can I search for New Agents ?.....	8
How can I view/manage the Agents who are Representing my Centre ?.....	9
How to Add a new Application ?.....	9
How to View/Search the Applications ?.....	10
How to take a Decision on Applications ?.....	11
How to Add Courses ?.....	12
How to View Courses ?.....	12
How to Add/View Intakes ?.....	13
What is CSV Function ?.....	13
How to Download Agents Report ?.....	14
CSV Report.....	14
How to Forward the application for Review ?.....	15
How to Add a New User ?.....	16
How to Increase the visibility of your Centre using the UniAgents Toolkit?.....	16
How to Add/View Marketing Material ?.....	17
How to read an Application Profile ?.....	17



What is UniAgents?

- Uniagents provides a Global Application and Mobility Ecosystem, Powered by Pearson providing you access to diversified International Students and Consultants
- Uniagents is the World's largest Global Application Management Ecosystem
- Total solution to Streamline and Automate International student recruitment process
- Access to 9000+ Agents from over 108 Countries
- Receive interests from Students and Agents globally

Being a part of UniAgents family makes Student International recruitment and mobility as easy and efficient as it has never been before.

Who are the main users?



who wish to validate the digital documents generated using this system.

What are the main benefits for Pearson Centres?

- Free access worth annual subscription of 2000 USD
- Find new learners who are looking for overseas study opportunities and wish to learn about pathway options offered by Pearson
- Develop relationship with educational consultants in different parts of the world and recruit diversified students

Please follow "Uniagents - Pearson Toolkit " Channel on YouTube for FAQ videos.

How to register as a Centre?



What benefits do I get once registered?

After you login into your account you will be able to:



Why do I need to verify my email?

The validation process shows that the email address you have provided is genuine, and that you did not make a mistake when entering it. It is important to have your correct email ID, because you will receive your login details and any further communication on the registered email ID.

What is the user registration fee?

Pearson gives access to this service FREE of charge to their Centres. The access provided to Pearson centres is worth an annual subscription of 2000 USD for each centre.

How can I know whether my user registration is successful?

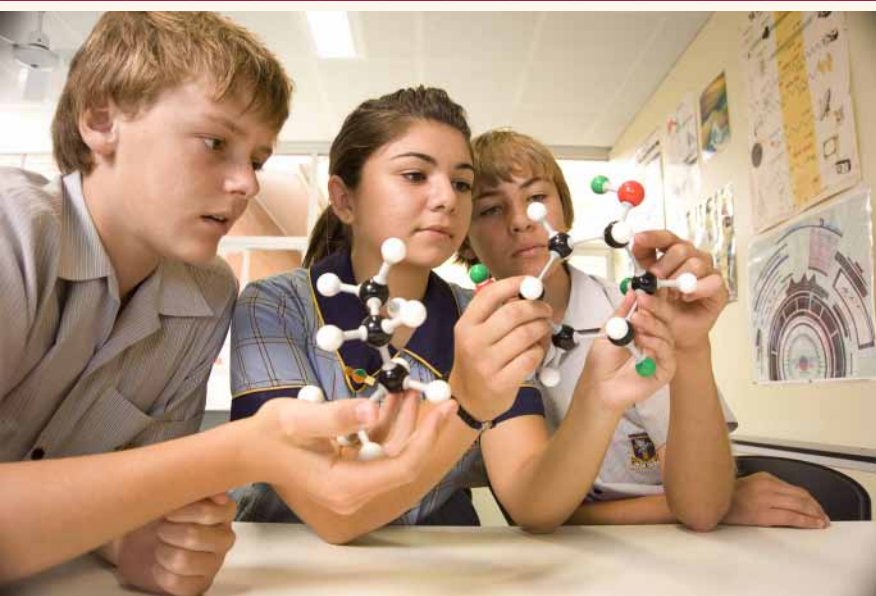
Shortly after registration you will receive a verification email to verify the registered email id.

I've forgotten my password/username?

If you have forgotten your username/password, please write to centre.support@uniagents.com to verify your details and to reset your login details or go to 'forgot password' in login screen and follow the instructions.

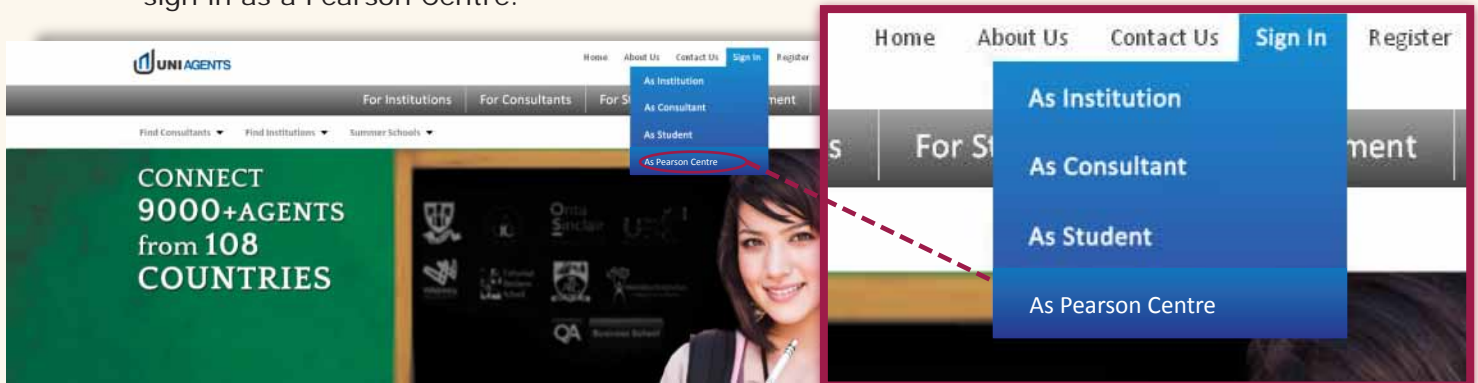


MY CENTRE ACCOUNT



How to Login?

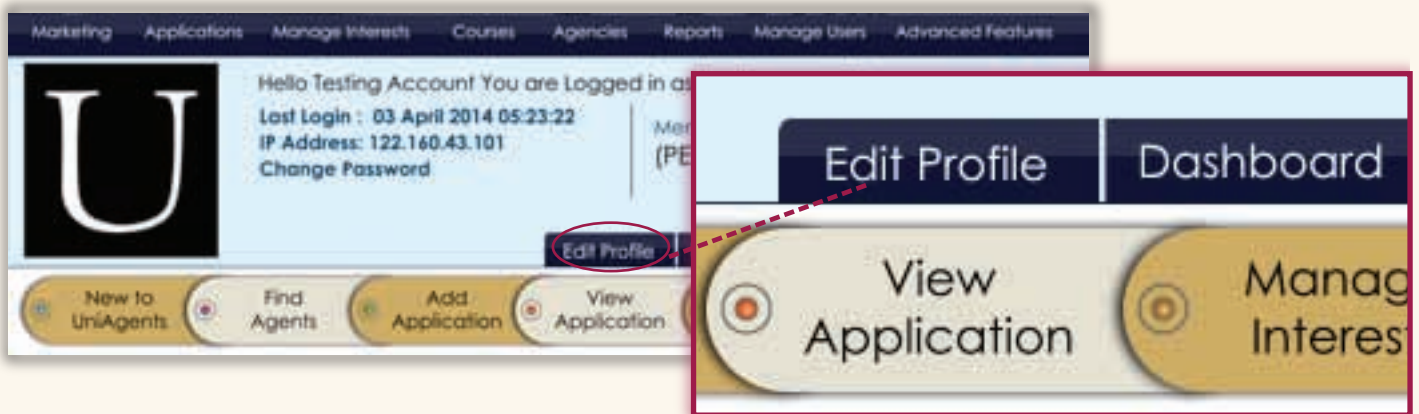
Step: To Login, go to www.uniagents.com and sign in as a Pearson Centre.



- Enter your login and password, which will take you to your CRM account.

How can I change/update my profile?

Step: Click on **Edit Profile** on the **Dashboard Screen** to edit your Centre's profile.



How can I Change my Login Password?

Step: Click on **Change Password** on the Dashboard screen to change your Password.

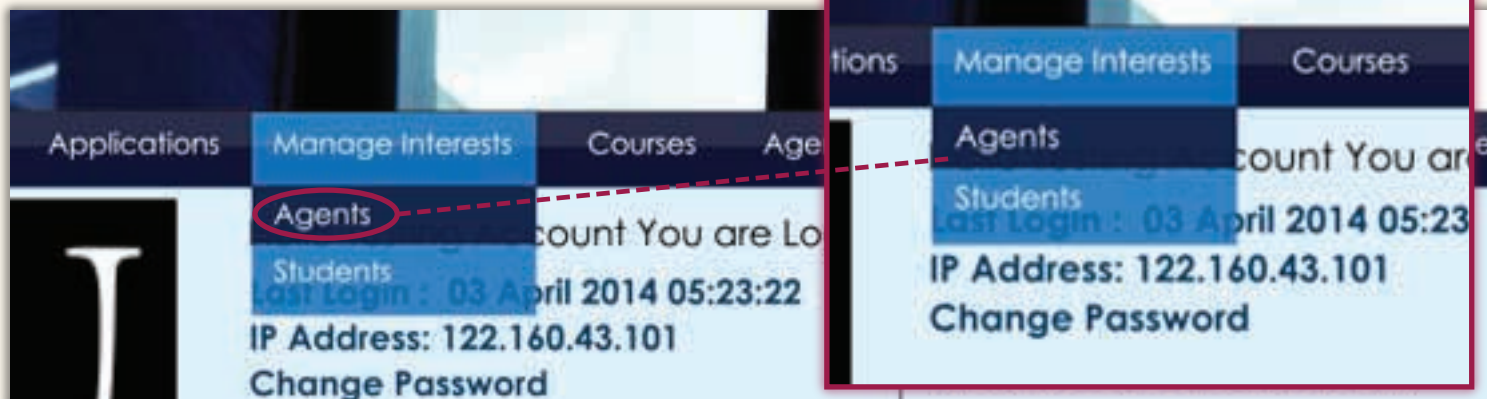


- If you forget your old password, please write to centre.support@uniagents.com or go to forgot password in login screen and follow the instructions.

Where can I see how many agents want to represent me?

To View the Interest from Agents who wish to represent your Centre:

Step 1: Click on **Agents** under **Manage Interests** menu



Step 2:

View the Interest from the Agents who wish to represent your Centre

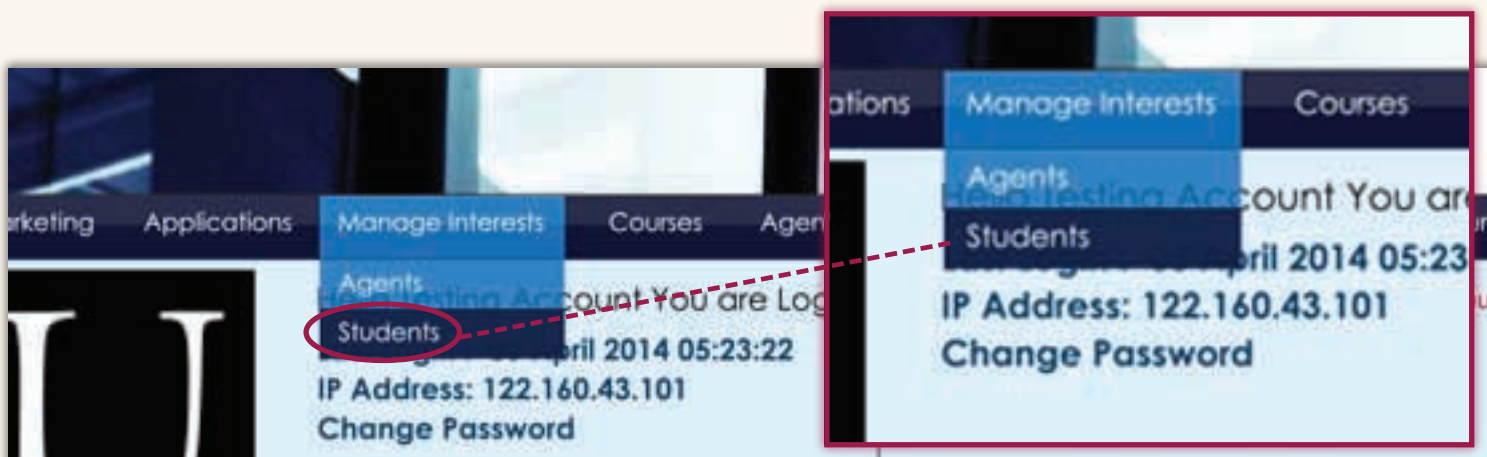
- In the Interest you have received you can view the profile of the Agents and the Enquiry, which after viewing the agent's profile, you can either Accept or Decline



How do I know if a student has sent an Enquiry?

To View the Enquiries from Students:

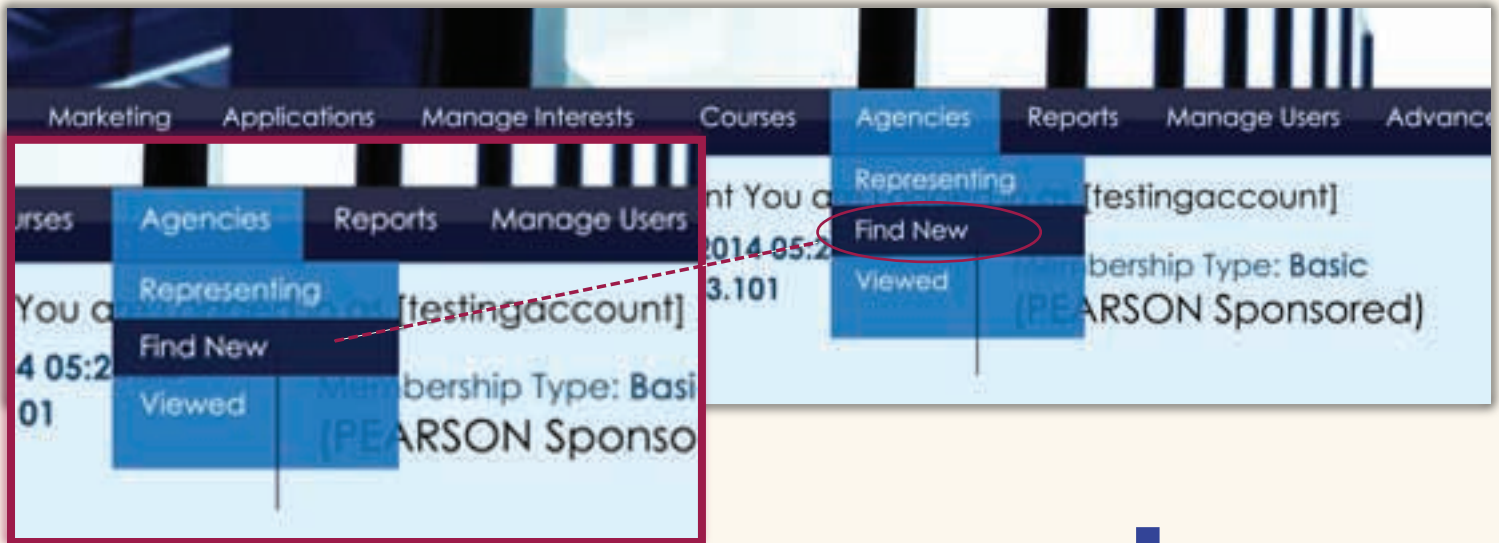
Step: Click on **Students** under **Manage Interests** menu



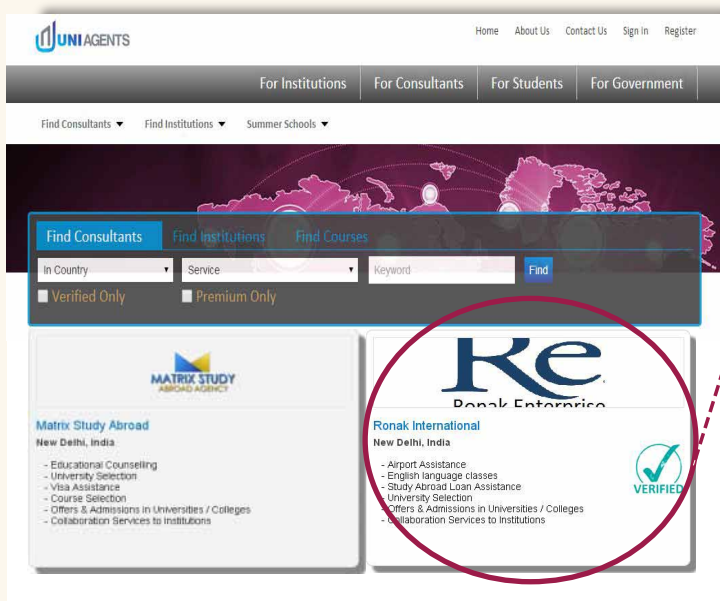
- View the Enquiries from the Students who want to know more about your Centre
- You can also Manage your Agents/Students Interests by clicking on Manage Interests in Quick Menu bar

How can I search for New Agents?

Step: Click on **Find New** under the **Agencies** menu



- You can Search new agents from a database of 9000 agents from over 108 countries
- Being a Pearson member you can view a full profile of 50 Agents a month which includes their personal contact details and other relevant information
- You can also Search for New Agents by clicking on Find Agents in Quick Menu bar





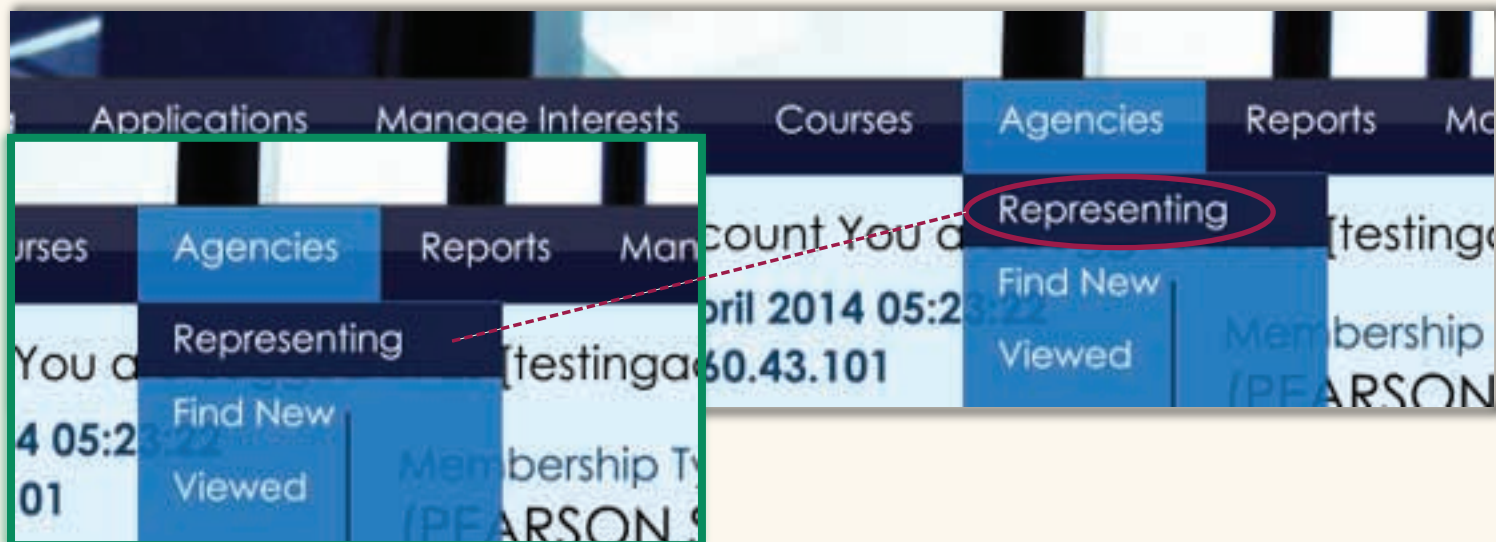
Ronak International
New Delhi, India

- Airport Assistance
- English language classes
- Study Abroad Loan Assistance
- University Selection
- Offers & Admissions in Universities / Colleges
- Collaboration Services to Institutions



How can I view/manage the Agents who are Representing my Centre?

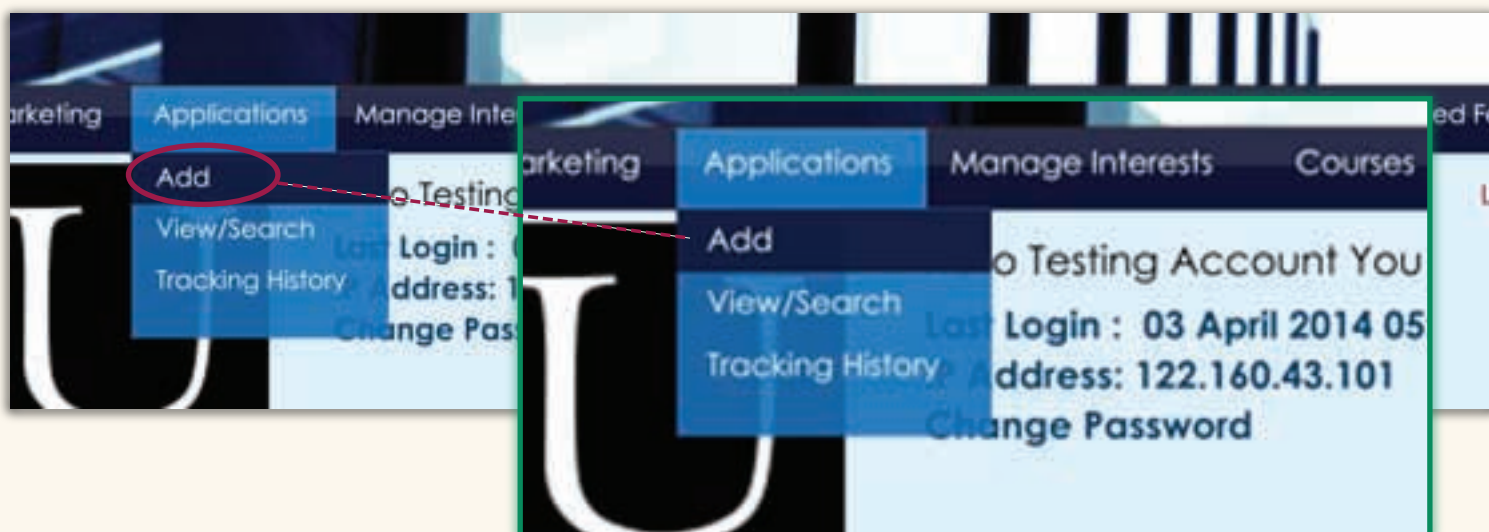
Step: Click on **Representing** under the **Agencies** menu



- You can view the list of agents with whom you have made an agreement

How to Add a new Application?

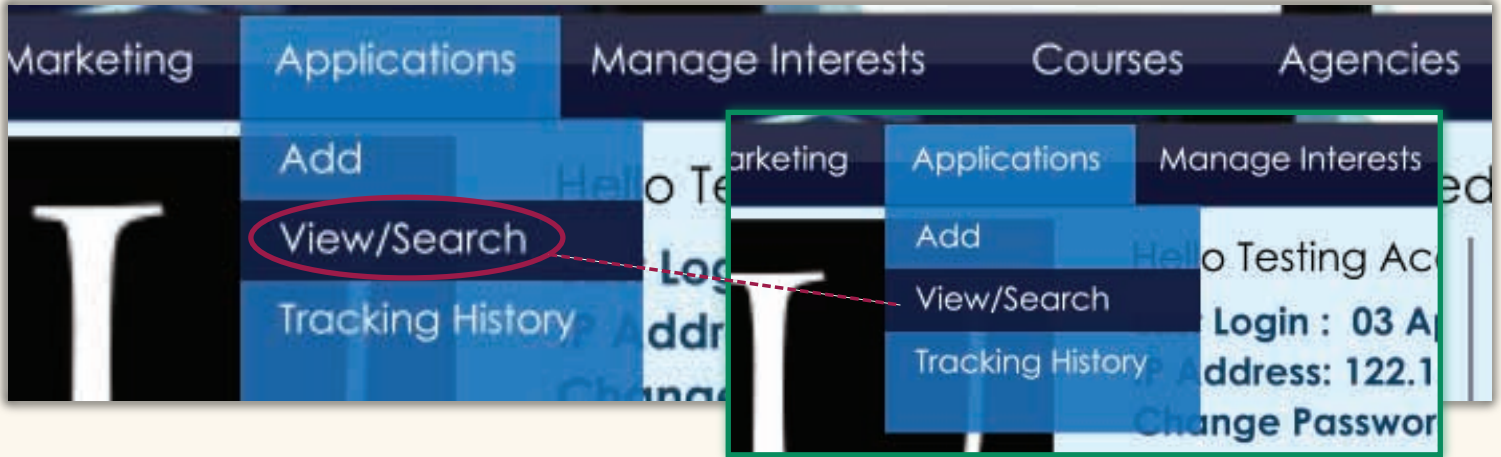
Step: Click on **Add** under the **Applications** menu



- Select the campus or the Agent, (if the student has been referred by one) and fill up the form
- Upload the duly filled Centres application form and supporting documents
- Applications can also be added by your agents from their control panel or by students directly through an embedded form within the centre's website
- You can also add applications by clicking on Add Application in Quick Menu bar

How to View/Search the Applications?

Step 1: Click on **View/Search** under the **Applications** menu



Step 2:

Click on **View** to view all the applications

A screenshot of the 'View / Search Applications' search interface. It features various filters such as 'Added On', 'Intake', 'Keyword', 'Agency', 'Course', 'Assessment Status', 'Application Status', 'Country', 'Application Administrator', 'Last Updated', 'Reference Number', 'Completed Between', and 'Order By'. A 'View' button is circled in red in the bottom right corner.

- Use single or multiple filters of the search box to find an individual application or set of applications
- The application status is stated in the upper right corner of the student profile
- All the filtered applications can be downloaded in the CSV format (as one Excel sheet)

A thumbnail screenshot of the application list. The 'New[Update]' button is circled in red. The table below shows the application details for U0585001.

Application	Documents	Added On	Last Updated
John Smith Oxford, United Kingdom Ronak International Change Agency View History View Notes Forward	Download [Edit]	14 February 2014	

A detailed screenshot of the application details for U0585001. The 'New[Update]' button is circled in red. The table below shows the application details for U0585001.

Application	Documents	Added On	Last Updated
John Smith Oxford, United Kingdom Ronak International Change Agency View History View Notes Forward	Download [Edit]	14 February 2014	

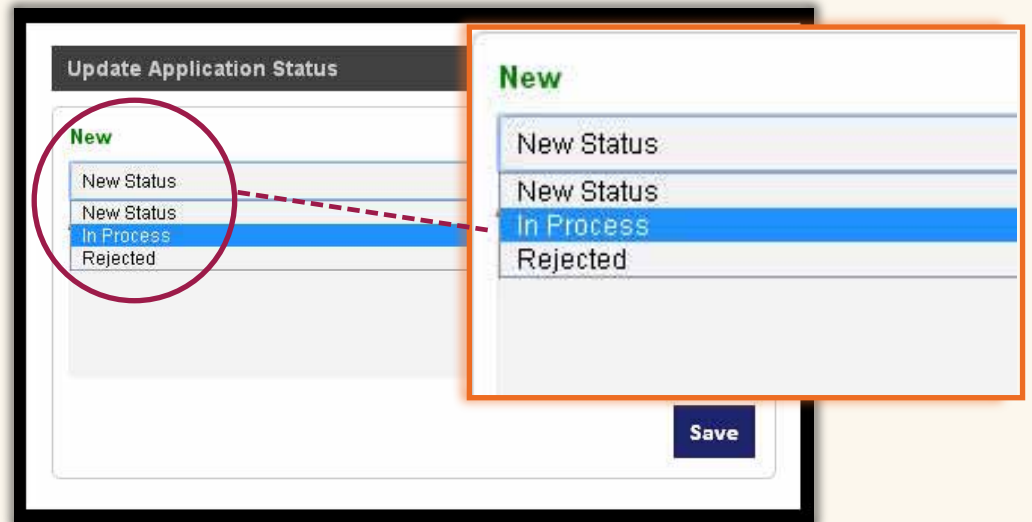
How to take a Decision on Applications?

Step 1: To take a decision on the application click on Update (in the top right corner of the application profile)

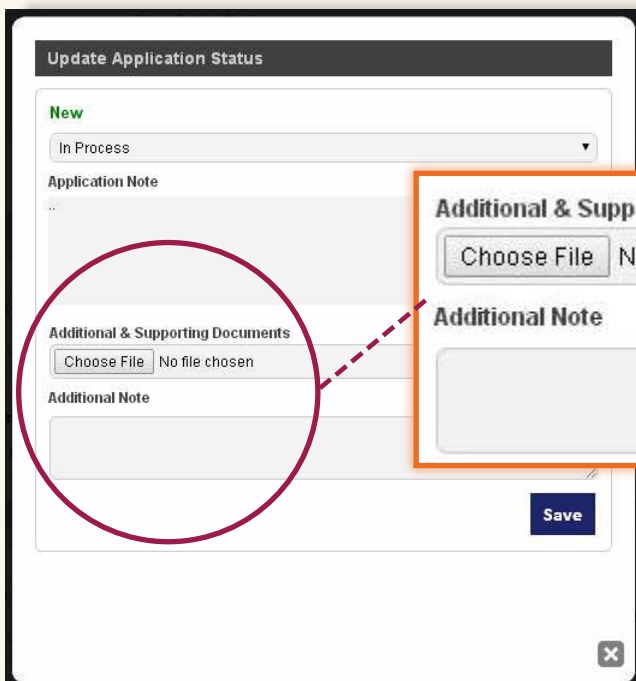


Step 2:

Choose the Appropriate Decision from the drop down box, and fill in the required fields where Applicable



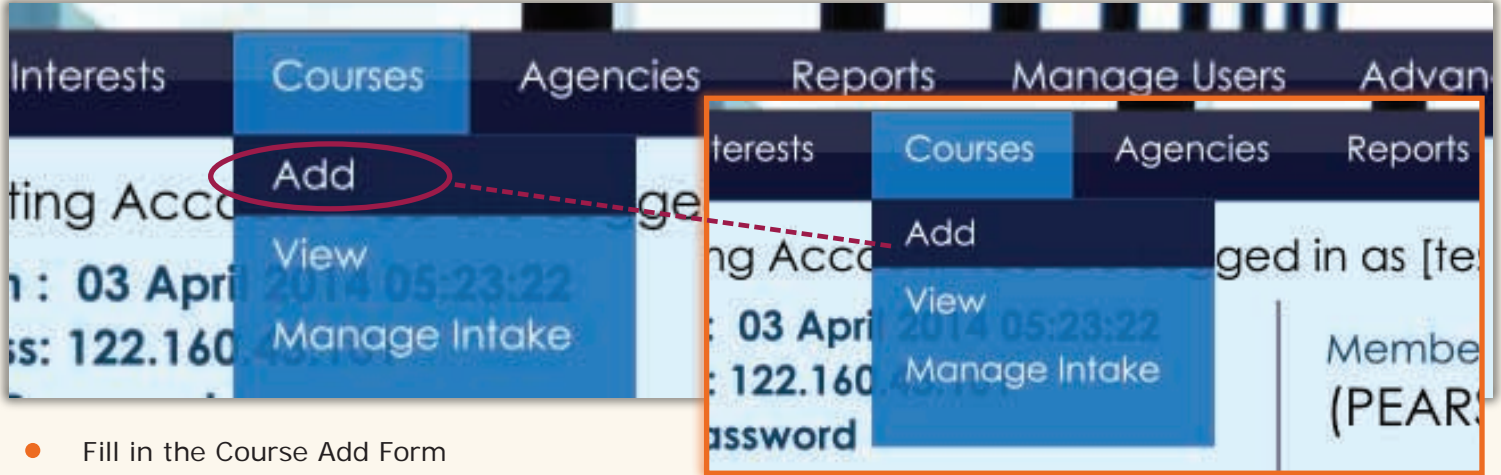
Step 3: You can upload the offer letters and other documents and maintain your notes in the fields available



- View all your application history in View History section in the application profile

How to Add Courses?

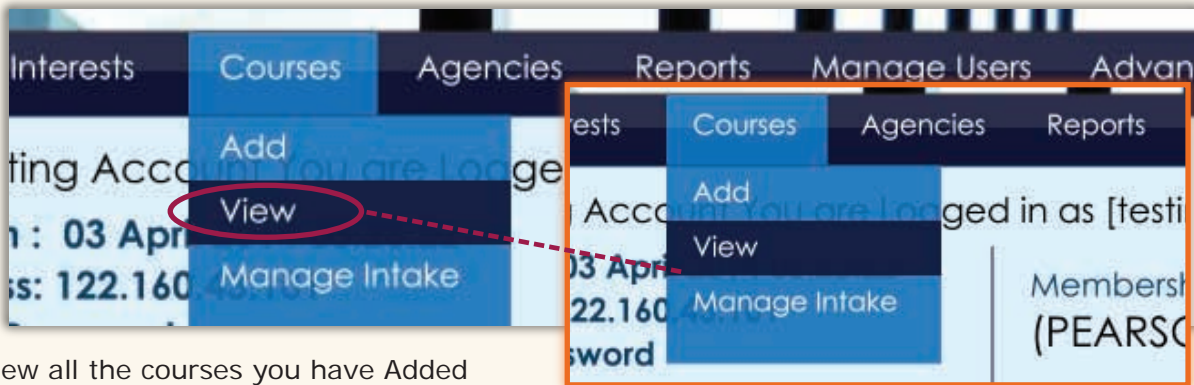
Step: Click on **Add** under the **Courses** menu



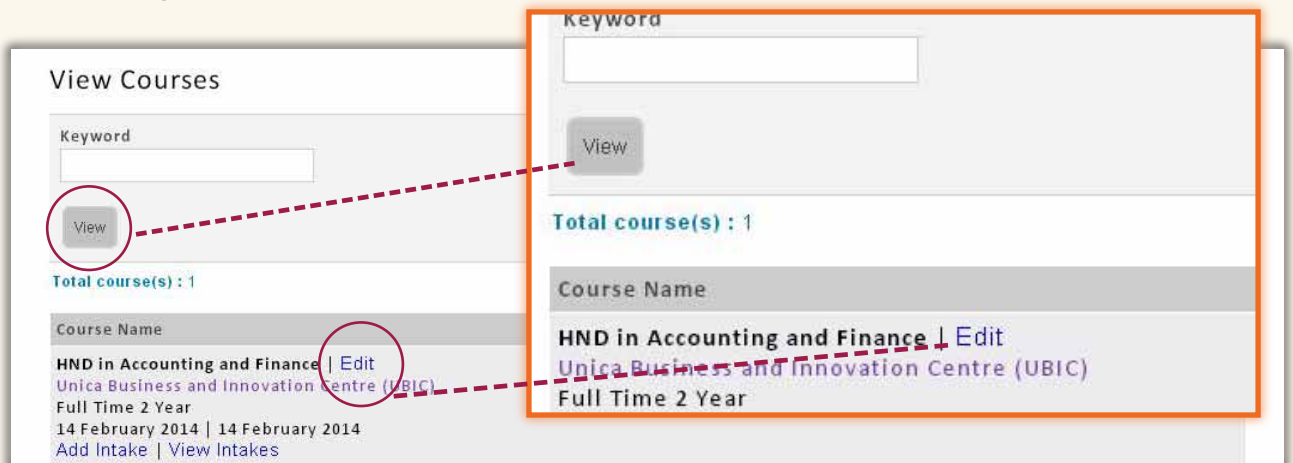
- Fill in the Course Add Form
- Mention all the information including Duration, Fees, Entry Criteria, Scholarships, and other relevant Course Information

How to View Courses?

Step 1: Click on **View** under the **Courses** menu

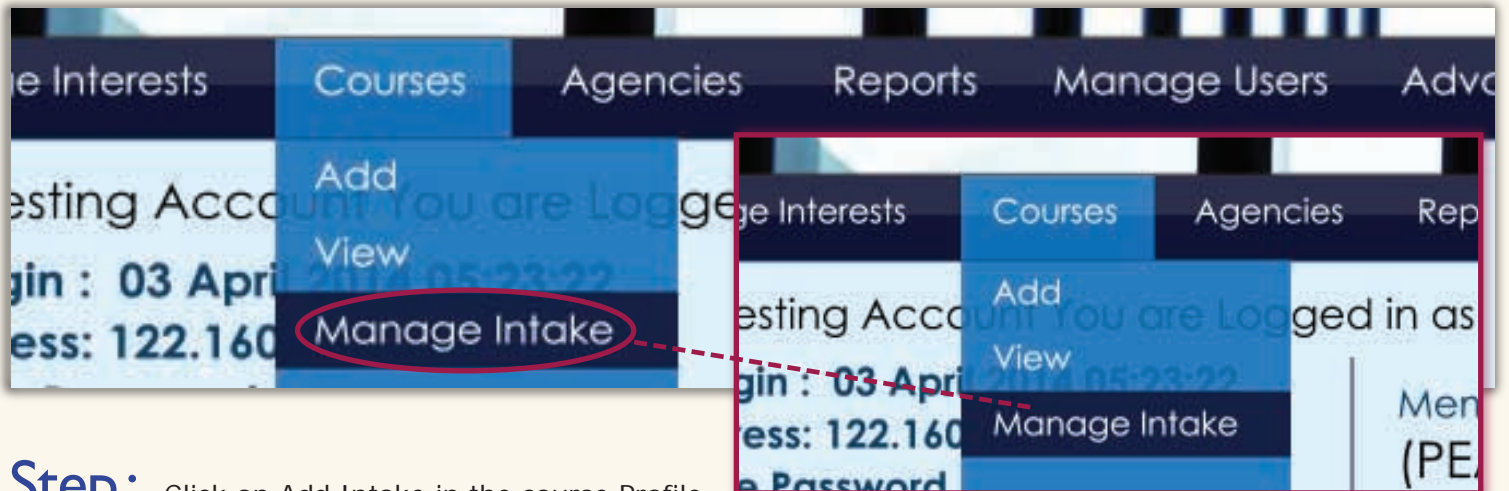


- View all the courses you have Added
- If you want to Edit any Course information, click on Edit to change it



How to Add/View Intakes?

Step: Click on **Manage Intakes** under the **Courses** menu



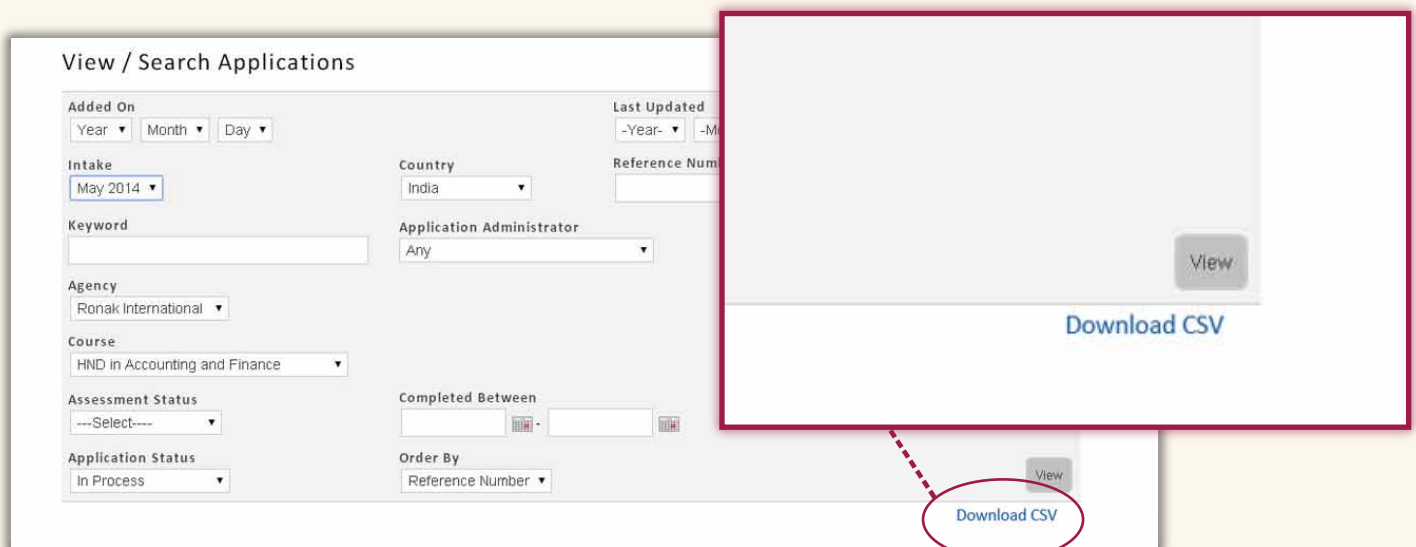
Step: Click on Add Intake in the course Profile



- Fill in the Add Intake Form with Start Date/Last Date, Duration, Tuition Fees and other fields
- If you want to Edit any Intake information, click on View Intake and then click on Edit Intake to change the information

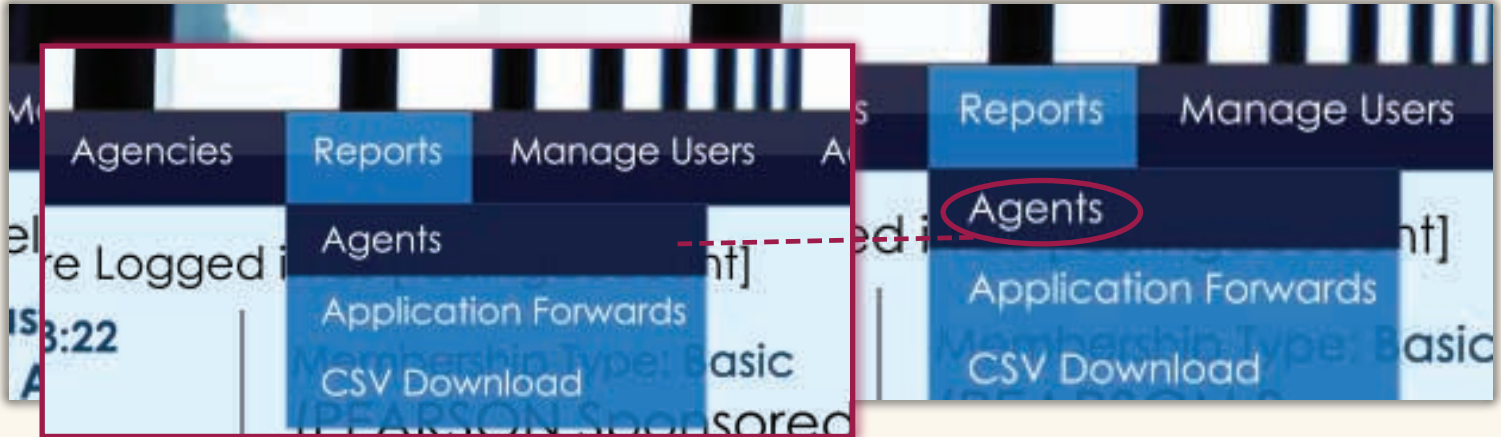
What is CSV Function?

“**Download as CSV**” function anywhere on this system will allow you to download the selected/filtered applications or information, in an **Excel sheet format**. It is a very useful feature as you can create your own customized reports and use it for internal reporting purposes.



How to Download Agents Report?

Step: Click on **Agents** under the **Reports** menu

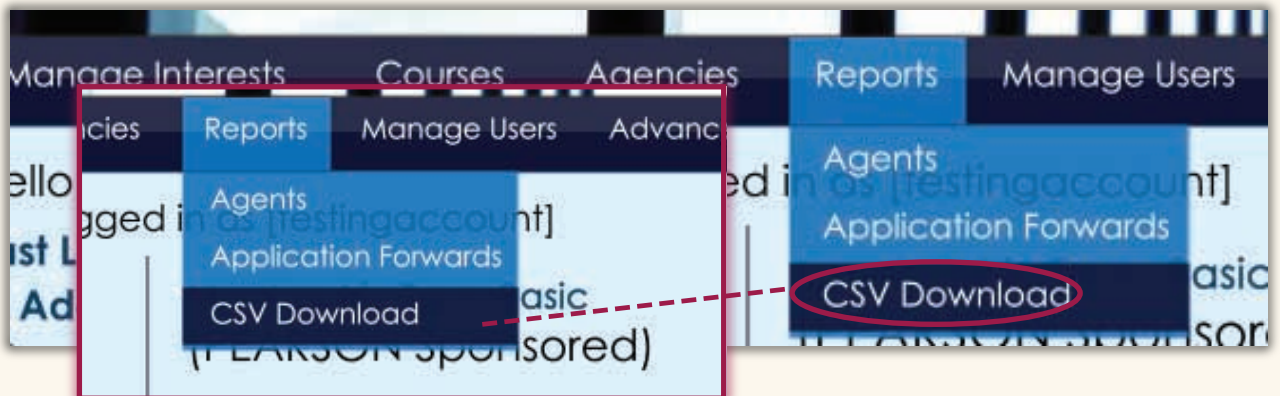


- You will be able to see the performance report of all your existing agents
- By clicking on various hyperlinks within the report you can find out more detailed information about every agent and the agreed conditions

CSV Report

CSV Report is an important security feature which allows you to track the export of any data stored on the system sent to external sources.

Step: To see the summary of CSV downloads, click on **CSV Downloads** under **Reports** Menu

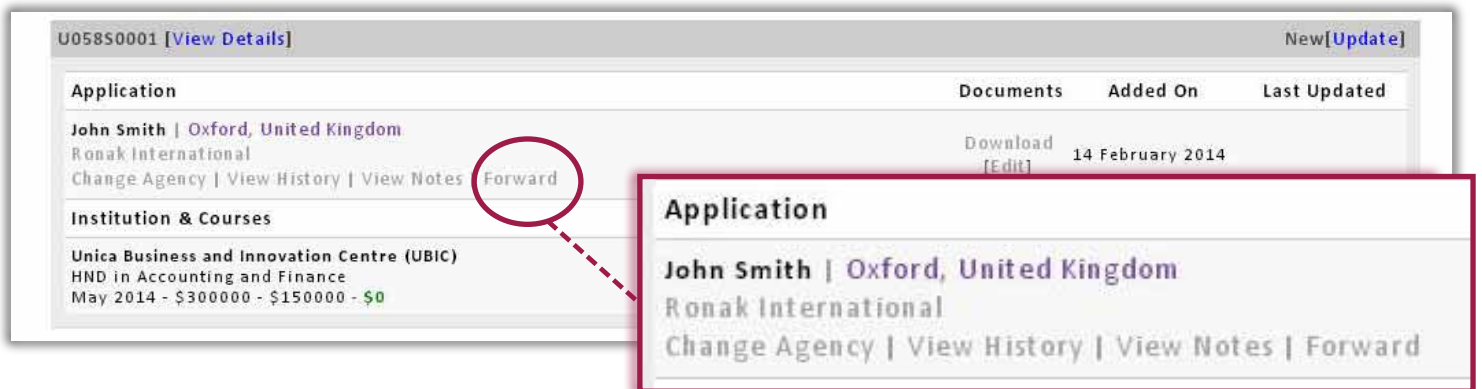


- Use filters to create the most relevant report

Application
TheUbic 05 February 2014 203.196.143.211 Agencies Download
TheUbic 04 February 2014 203.196.143.211 Agencies Download
TheUbic 14 December 2013 203.196.143.211 Applications Download

How to Forward the application for Review?

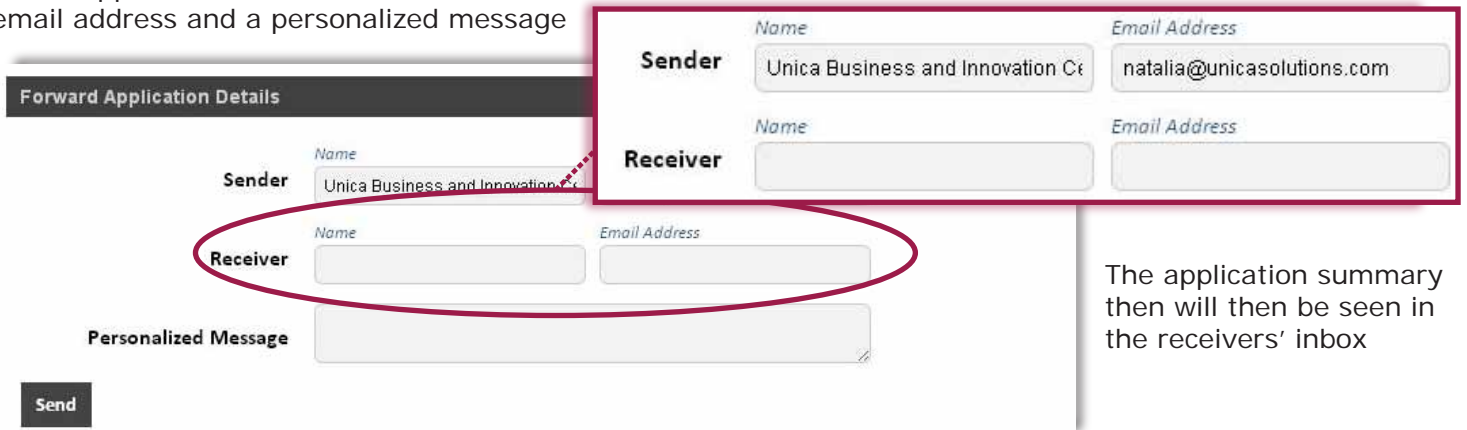
Step 1: Click on Forward Application within the relevant student profile, where the application has to be forwarded for review to a faculty member or another concerned department



The screenshot shows an application details page for 'U05850001'. The application is for 'John Smith | Oxford, United Kingdom' at 'Ronak International'. The 'Forward' button is circled in red. A callout box highlights the application details: 'Application: John Smith | Oxford, United Kingdom, Ronak International, Change Agency | View History | View Notes | Forward'. The application was added on '14 February 2014'.

Step 2:

In the appeared box enter the destination email address and a personalized message

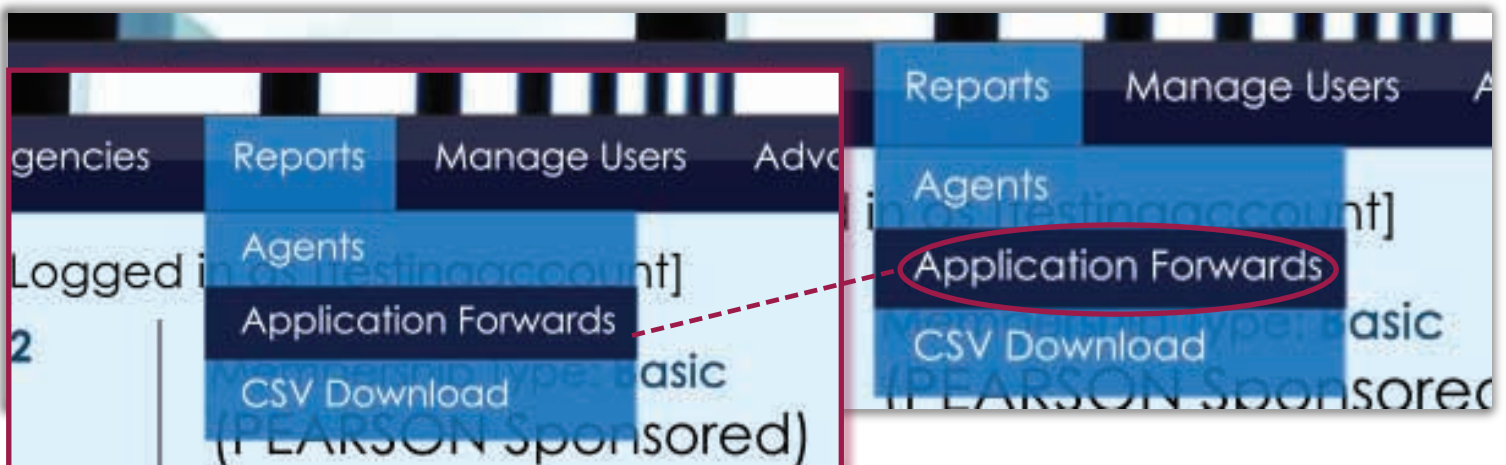


The screenshot shows the 'Forward Application Details' form. The 'Sender' field is pre-filled with 'Unica Business and Innovation Centre' and 'natalia@unicasolutions.com'. The 'Receiver' fields for 'Name' and 'Email Address' are circled in red. A 'Personalized Message' field and a 'Send' button are also visible.

The application summary then will then be seen in the receivers' inbox

Step 3:

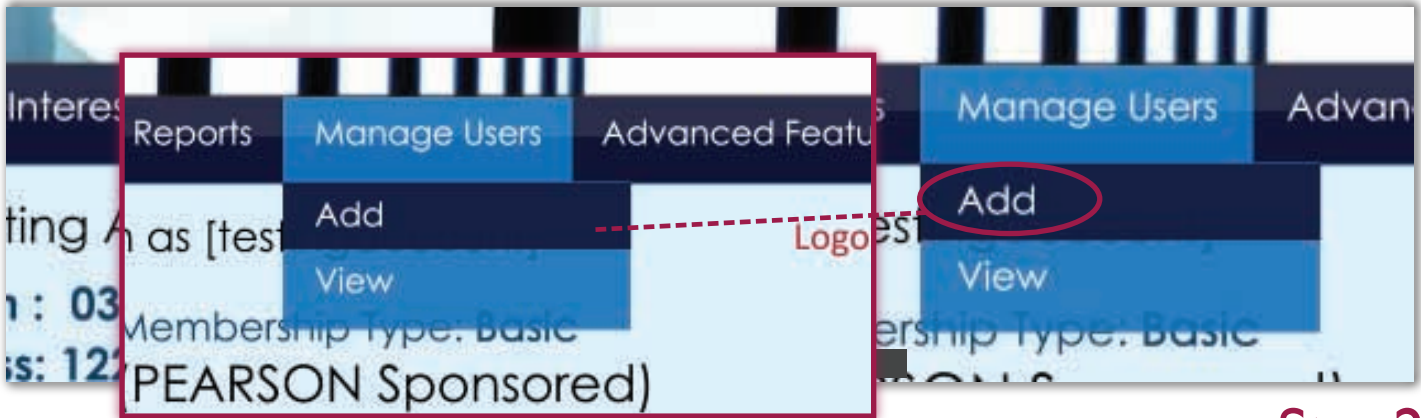
All the forwarding activities are recorded into a relevant report for security reasons and can be downloaded from Application Forwards under Reports section



The screenshot shows a navigation menu with options like 'Reports', 'Manage Users', 'Agents', and 'Application Forwards'. The 'Application Forwards' option is circled in red, indicating it is the location where forwarding activities are recorded.

How to Add a New User?

Step 1: Click on **Add** under **Manage Users** menu



Step 2:

Select the type of user as Application Administrator and fill in the required fields

NOTE that the CSV security level for the new user should be selected carefully, to avoid the unauthorized downloading of the centre data base.

The user licence provided by Pearson is unlimited, therefore there is no restriction on the number of applications/ interests or number of users on this Account.

A screenshot of a web form titled 'Add Super User'. The form contains several input fields: 'Full Name', 'Username', 'Password', 'Email Address', and 'Download CSV'. The 'Type' dropdown menu is set to 'Application Administrator', which is circled in red. A blue 'Submit' button is located at the bottom left of the form. A close button (X) is in the bottom right corner.

How to Increase the visibility of your Centre using the UniAgents Toolkit?

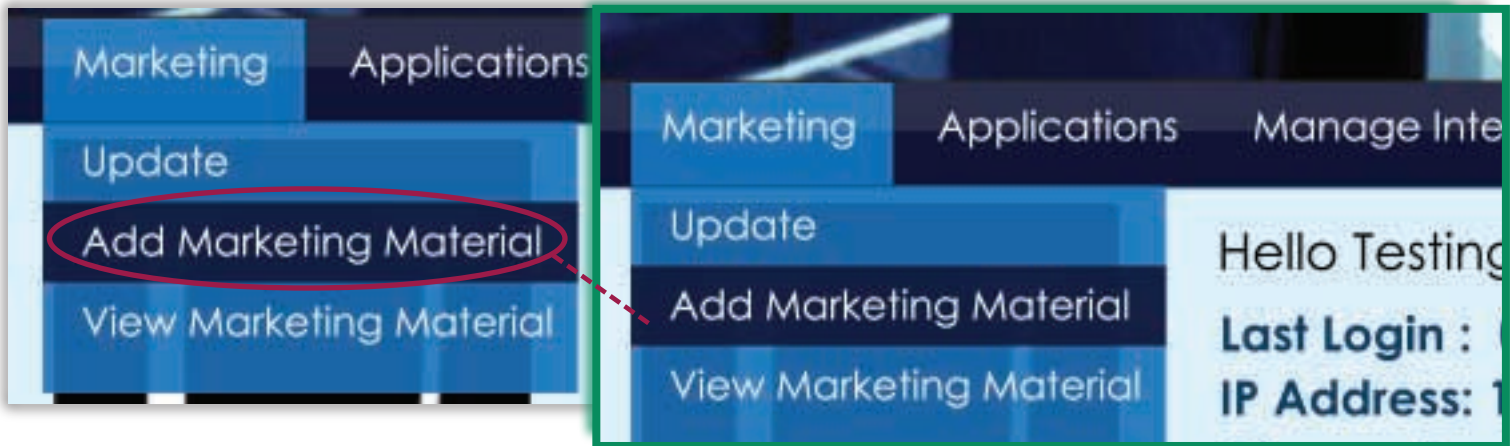
Follow the steps below to increase the visibility of your Institution with millions of users:

- Update your Institute profile with all the relevant information required in the Registration Form
- Add all your courses with specific information which will allow millions of students to search for specific courses
- Add all relevant Marketing material which can be viewed by both Agents and Students
- Provide us with 2-3 Testimonials from your Students which will increase your ratings on the UniAgents Ecosystem which will allow your Institute's profile to be viewed on the higher rankings on this system

How to Add/View Marketing Material?

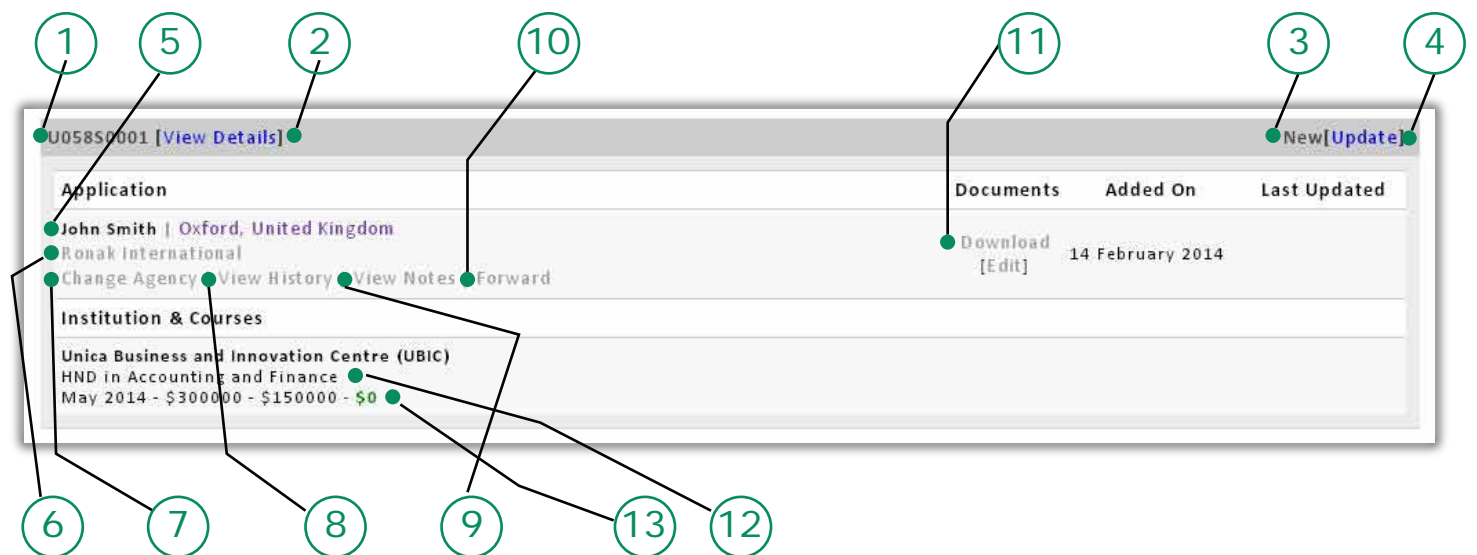
If you want to upload e-copies of your Institute's Brochure, Prospectus or any other marketing/promotional material which could be useful for agents or students to have more information on your Centre, follow the steps below:

Step: Click on **Add Marketing Material** under **Marketing** menu



- Mention the name of the document and upload it (preferred .pdf file)
- You can add multiple documents which are required for agents and students
- All the documents can be Viewed by clicking on View Marketing Material

How to read an Application Profile?

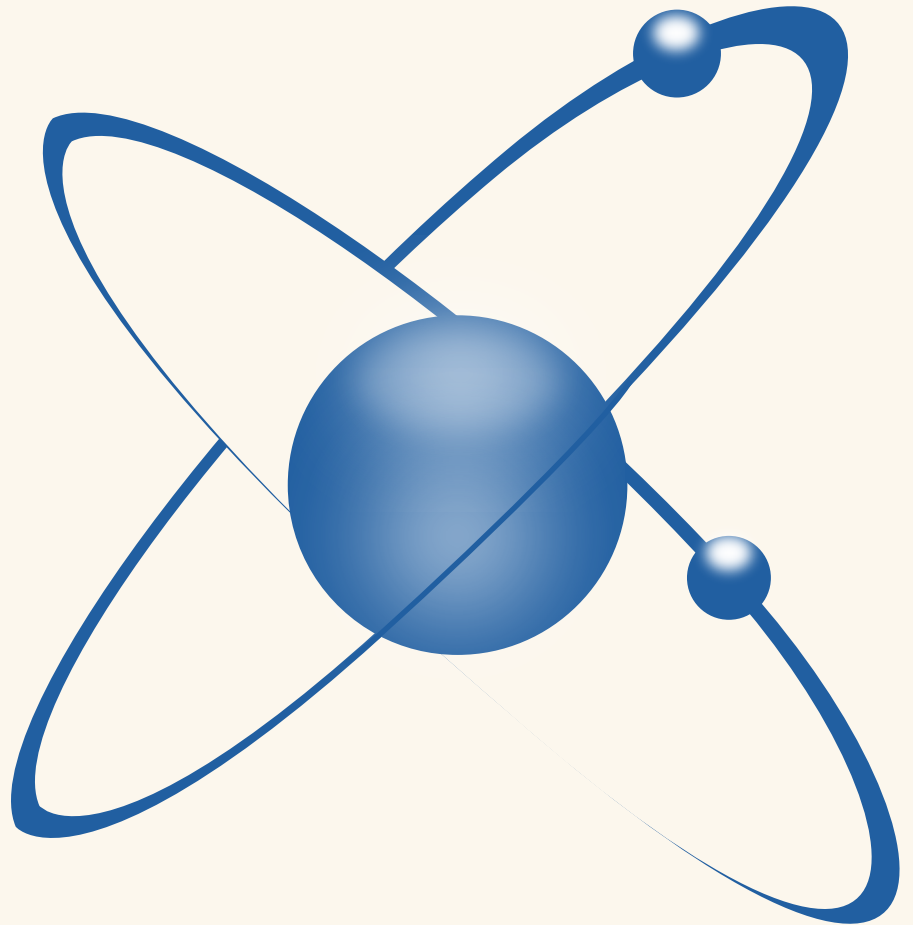


- | | |
|---|--|
| 1. System Application Reference Number | 7. Option to change the agency (if required) |
| 2. Link to View details of the Applicant | 8. Link to View History of the Application |
| 3. Current Status of the Application | 9. Link to View Notes (If any) |
| 4. Link to change the status of the application | 10. Link to Forward the application for review |
| 5. Name of the Applicant | 11. Link to download relevant application documents. |
| 6. Name of the Agency | 12. Name of the Course Applied for |
| | 13. Intake and Fee Details |



UNI AGENTS

AUTOMATE, SIMPLIFY,
CONNECT



IN PARTNERSHIP WITH

PEARSON

For technical support, contact:
centre.support@uniagents.com

ALWAYS LEARNING