PARTNER PORTAL
QUICK REFERENCE GUIDE

ACCESSING THE PORTAL

Setting up your account

- Go to: **https://partner.studylink.com/accounts/reset-password**
- Enter your email address and check your inbox for an activation link
- Follow the instructions to set up your account (It's important you choose a new username and password and enter a unique email address)
- Finally, select **"default branch"** to proceed.

Managing your password

It's important to reset your password every 180 days so your access to the portal isn't interrupted.

To reset your password:

- While logged in, go to **'Manage Account'** under your username
- Click **'Change password'**
- Enter your current password then a new, unique password and **'Save'.**

DASHBOARD

When you log in you'll always find this useful information on your dashboard:

- All applications grouped by status
- The latest materials provided by your institution partner in **'Recently updated resources'**
- From time to time your institution partners will share important updates...and you won't miss them in **'Latest News'!**

APPLICANT RECORDS

Create a new applicant

- Select the **'Applicants'** menu item, then select **'+Add new applicant'**
- Enter the personal and contact details in the **'Applicant details'** form and **'Save'**.

Search for an applicant

- Select the **'Applicants'** menu item
- Type the first name and/or last name into the 'Search' bar and press enter.

View an applicant's record

- Click **'View'** to the right of the applicant's details.

Update an applicant's details

- With the applicant's record open, select **'Edit Applicant'**.

Add an applicant's address

- With the applicant record open, select **'Add Address'**.

WORKING WITH APPLICANT RECORDS

Add documents to an applicant's record

- With the applicant record open, select the **'Attachments'** tab
- Drag and drop files to the drop area, or click to select files from a specific location
- Select a category for the file, eg Passport, Academic Transcript
- Click **'Upload All'**.

Add notes to an applicant's record

- With the applicant record open, select the **'Notes'** tab
- Click **'Add Note',** enter the note content and **'Save'**.

Export an applicant's details

- Select the **'Applicants'** menu item
- Select the **checkbox** next to each of the applicants' names you'd like to include
- Click **'Export'** and details will be generated in .CSV format.

APPLICATION RECORDS

Create a new application

- With the applicant record open, click **'Create Application'**

- Click inside the **'Filter'** area
- Select the filters in order to display the course the applicant is applying for
- Select the course from the available list using the **'+Apply'** button.

Complete an application form

- Select **'Application form**' and complete the application details
- Once all mandatory fields are completed click **'Next'**
- Upload any required documents in the '**Required documentation'** screen
- Remember to save your progress so you can return to complete at any time.

Search for an application

- Select the **'Applications'** menu item
- Type the Application ID into the **'Search'** bar and press enter.

Export application details

- Select the **'Applications'** menu item
- Select the checkbox next to each application you'd like to include
- Click **'Export'** and details will be generated in .CSV format.

MANAGING APPLICATIONS

View status history

- Select the **'Applications'** menu item
- Click **'View'** to the right of the application
- Select the '**Status History'** tab.

Send a message to your institution partner

- Locate the application you wish to reference in your message
- Select the '**Messages'** tab – the message form opens
- Write the Subject and your message and click **'Send Message'**.

View an application's attachments

- Locate the application
- Select the '**Attachments'** tab
- Attachments include a PDF of the application, Offer Letters and attachments received through email communications.

Attempt to reapply for the same course

- Locate the applicant record from the **'Applicants'** menu option select '**View'**
- Click '**Create Application'**.

Note: *If you select a course for which there is already an application a validation message will display informing you that the applicant has already applied.*

Please note: *You can't amend or withdraw applications once they have been submitted unless your institution partner requests more information.*

RESPOND TO OFFERS SENT BY AN INSTITUTION

Accept an offer

- Locate the conditional offer from the **'Dashboard'**
- Click **'View'** then 'Respond to Offer' and you'll be presented with three options
- Select **'Accept Offer'**
- You'll be given the option to either be directed to the WIP gateway to make payment or to receive a link you can provide to the applicant for payment
- Click '**Accept Offer'**.

Offer Details

Date of Offer	15-Mar-19
Duration	52 Credits (1Year)
Acceptance Fee	$7020
Offer PDF	View Offer Letter

Accept Offer
Reject Offer
Defer Offer

After accepting this offer, you will be take to the Wester Union Payment gateway to make payment

Transfer me to the Western Union GlobalPay for Students gateway to pay the deposit

Give me a link that I can provide to the Applicant to make payment

Accept Offer

Reject an offer

- Locate the conditional offer and **'View'** as per the previous step
- Select **'Reject Offer'** from the options provided
- Enter any comments and click **'Reject Offer'**.

Defer an offer

- Locate the conditional offer and '**View'** as per the previous step
- Select **'Defer Offer'** from the options provided
- Select the intended intake from the drop down list and click **'Defer Offer'**.

INBOX AND COMMUNICATIONS

Sending messages

- You can email an applicant via the message tab in the Applicant record
- You can email your institution partner via the message tab the Application record.

Referencing messages

- A full message history between you and your institution partner, or you and your applicant, can be found in the inbox
- Search for the email you're looking for using either an applicant's name or the Application ID.

RESOURCES

Your institution partner will provide up to date marketing materials and administrative documentation in the Resources section.

If you can't find what you're looking for, please contact your institution partner.

PROVIDERS

The institutions you work with, who currently accept applications via the StudyLink Connect platform, are included in this section under **'My Providers'**.

SUPPORT DESK

We're always here if you need assistance. Simply submit a support request (ticket) in the **'Support'** section.

You can raise and manage tickets and also view a full message history of all the tickets you raise.

You'll also find useful **'how to'** articles, tips and videos to help you get the most out of StudyLink Connect.