TUXAID

EXOGRAD

CRM for education consultancy

The CRM built for study-abroad consultancies.

Manage every student from first enquiry to visa approval — in one secure, role-aware workspace for your telecallers, counsellors, admission and visa teams.

Lead → Opportunity → Application → Admission → Visa

5 stages

One student record, end to end

Role-based

Granular, record-level access

AI

Ask your data in plain English

Real-time

Live alerts & auto-refresh

One student, one profile

A single profile follows the student through every stage — notes, documents, payments and history stay together.

Right work, right person

Every team sees only what its role allows. Restricted actions are hidden, not just blocked.

Nothing slips through

Aging escalations, tasks, reminders and overdue reports keep every enquiry moving.

Capture every enquiry. Convert more.

From bulk imports to campaign tracking, Exograd gives your front-line team a fast, clean lead pipeline.

1 Lead Management

- **Manual entry** and bulk creation of leads
- **Call status tracking** — New, Not Connected, Callback, Follow-up, Not Interested, Do Not Contact and more
- **Classification** — Hot, Warm, Cold, Dead (bulk update supported)
- **Stages** — Intake, Qualified, Converted, Lost, Stalled
- **Source & channel** tracking per lead
- **One-click conversion** to Opportunity
- Primary, secondary & WhatsApp numbers

2 Smart Bulk Import

- Upload **Excel (.xlsx) or CSV** files
- **Column mapping** to CRM fields
- **Background processing** with live progress bar
- Import queue monitor & per-job status
- **Summary** — created, updated, reopened, skipped
- **Import log** — who imported what, and when

3 Duplicate Protection

- **Phone-number normalisation** as the unique key
- Existing leads **enriched** — blank fields filled, data never overwritten
- **Auto-merge** of repeated rows in the same file
- **Smart reopen** of old/archived leads after a configurable interval
- Invalid numbers skipped automatically

4 Campaigns & Lead Forms

- Campaigns with start/end dates and owner
- Platforms: **Google, Meta, LinkedIn, Email, WhatsApp**
- Multiple **lead forms** per campaign
- Leads tagged to campaign & form for ROI tracking

5 Fast Search & Lists

- **Fuzzy search** — finds students even with typos
- Rich filters: status, assignee, campaign, course, date
- Quick views: Assigned to me, Unassigned, Today, This month
- Configurable records per page & auto-refreshing lists

From counselling to visa — one connected flow.

Each stage has its own team, its own status and a full hand-off trail, while the student profile stays intact.

6 Opportunities

- Auto-created on lead conversion
- Counsellor ownership & assignment
- **Course choices** & finalised course tracking
- Convert to Application when the student is ready

7 Applications

- Application status tracking
- **Approval-controlled** move to Admission or Visa
- **Close** — completes all related tasks automatically
- **Recall** — return to Opportunity stage safely

8 Admission Desk

- Dedicated admission team workspace
- Status: New → In Process → Completed
- Work on assigned files; counsellor keeps ownership

9 Visa Desk

- Dedicated visa team workspace
- Status: New → In Process → Completed
- Visa-approved tracking on dashboards

10 Student Profiles & Documents

- Single profile shared across all stages
- **Document vault** — qualifications, certificates, ID proof, receipts
- PDF, Word, Excel & image uploads
- **Activity timeline** & previous notes

11 Fees & Payments

- Fee requests per student & course with due dates
- **Instalments** — record multiple part-payments
- Cash, cheque, bank transfer, card, UPI
- Status: Requested, Pending, Completed, Returned

12 Course & Institution Catalogue

- **Institutions** with multiple campuses / centres
- **Courses** by program type, category & format
- **Course offerings** by country, institution & campus
- Tuition fee with currency, calendar plan, on/off-campus
- **Intakes** by season with upcoming/open status
- Eligibility tests (IELTS, TOEFL, etc.) & syllabus uploads

Keep the team moving. See everything.

Automated follow-ups, live alerts and dashboards that show exactly where every student — and every team member — stands.

13 Tasks & Reminders

- Tasks with priority, due date & assignee
- Reminders linked to any student record
- Task reassignment across the team
- Pending-task & overdue-reminder reports

14 Aging Escalations

- Auto-escalate stale **leads, opportunities, applications, admissions & visas**
- Separate aging periods for Hot / Warm / Cold / Dead
- Group escalations into bulk tasks
- Fully configurable — on/off per stage

15 Real-time Notifications

- **Live in-app alerts** — no page reload
- Assignment, task & escalation notifications
- **Student birthday** notifications
- Auto-refreshing lists and badges

16 Dashboards

- **Home** — totals, conversion rate, leads by source, classifications
- **Leads** — contacted, converted, dead, performance by assignee
- **Opportunity & Application** — journeys, universities, fees paid, visa approved, counsellor performance
- Quick period filters (1–45 days) or custom range

17 ReportIQ — AI Reporting Assistant

Ask questions about your data in plain English and get instant answers — no report builder, no SQL.

"Show hot leads" · "How many pending tasks are there?" · "Opportunities converted this month per user" · "Users inactive for the last hour"

- Follow-up questions keep context
- Tolerant of typos & name variations
- Saved, recent & suggested queries
- Answers respect the user's permissions

18 Reports & Export

- Leads report with advanced filters
- Pending tasks & overdue reminders
- Login history — IP, device & browser
- **Export to Excel / CSV** in the background, download when ready

Enterprise-grade control, out of the box.

Built-in roles for every team in a consultancy, with fine-grained permissions you can tailor.

ROLE	TYPICAL ACCESS
Telecaller	Own leads, call updates, convert to opportunity
Co-ordinator	All records, assign / reassign, bulk import, reports
Counsellor	Own opportunities & applications, documents, tasks
Admission / Visa team	Applications assigned to them, stage status updates
Admin	Everything — users, roles, settings, audit, approvals

19 Access Control

- **Custom roles**; multiple roles per user
- Read / Update / Delete — **own vs. others**
- Create, Approve & Manage permissions
- UI adapts — users only see what they may use

20 Security & Audit

- **Full audit trail** of every change
- Login history & active session tracking
- Idle session timeout & secure token login
- Google / Facebook sign-in support
- Soft delete & archive — data is recoverable

21 Admin Settings

- Session & token lifetimes
- Aging periods & escalation rules
- Search sensitivity, page size, refresh rate
- Dashboard periods & notification toggles

22 Platform

- Cloud-ready, containerised deployment
- Partitioned database built for high volume
- Background job queue for heavy work
- REST API for integrations
- Built-in system health monitoring

Ready to run your consultancy on Tuxaid Exograd?

Book a personalised demo and see your own student pipeline in action.

Quick onboarding
Import your existing leads in minutes.

Your workflow
Roles, stages and rules configured for you.

Ongoing support
Training and help for every team.