

Enterests CRM

for Visa & Immigration Firms

Digitizing Visa Consultancy Operations in Pakistan



Operational Challenges Faced by Visa Consultants



Manual Excel
Based Case Tracking



Missed Follow-ups
without Proper Record



Scattered Client
Documents



WhatsApp Chat
& Disorganized Emails



Difficulty
Coordinating Team Tasks



Installment Payment
Confusion

A Centralized System for Modern Visa Firms

Enterests is an all-in-one CRM and Project Management system designed to help Pakistani visa consultants streamline lead management, case processing, documentation, billing, HR, and client communication – all within a single secure cloud platform.



Lead
Management



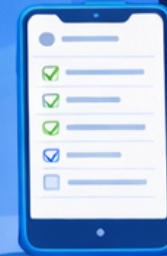
Case
Processing



Document
Control




Billing &
Payments





Smart Lead & Client Pipeline

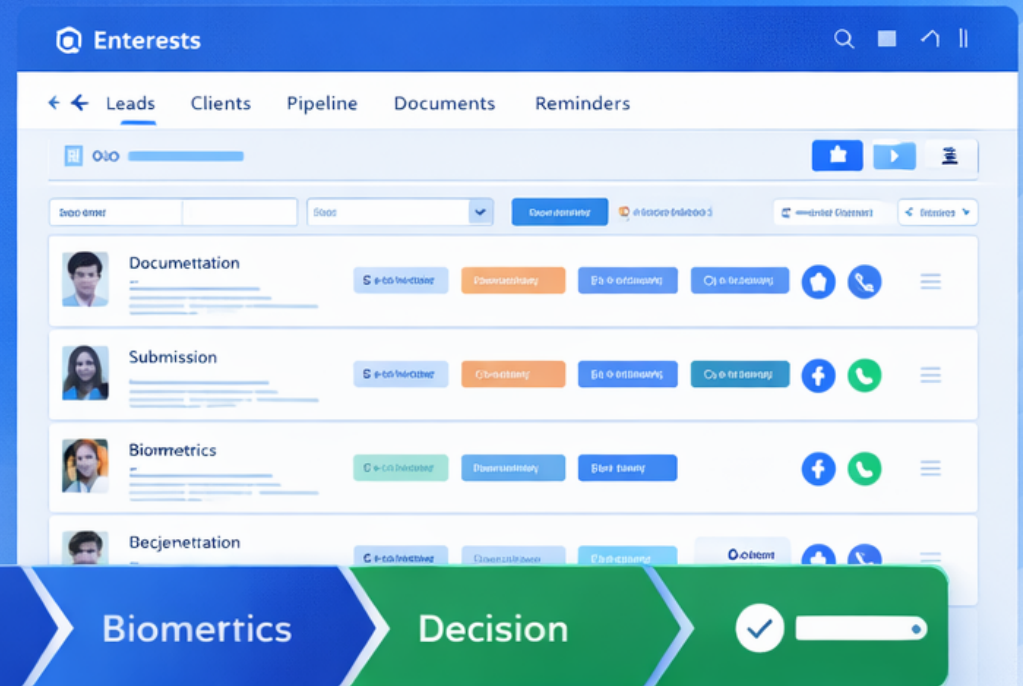
 Direct Meta & Website Lead Integration

 Centralized Client Database

 Automated Follow-up Reminders

 Visa Case Pipeline with Custom Stages

 Communication History Tracking



The screenshot displays the Enterests software interface. At the top, there's a navigation bar with 'Leads', 'Clients', 'Pipeline', 'Documents', and 'Reminders'. Below this, a search bar and a 'Documentation' button are visible. The main content area shows a list of client entries, each with a profile picture, name, and a set of action buttons. The entries are: 'Documentation', 'Submission', 'Biometrics', and 'Bejenettation'. The 'Decision' stage is highlighted in green, indicating the current or final step in the pipeline.

New

Documentation






Submission

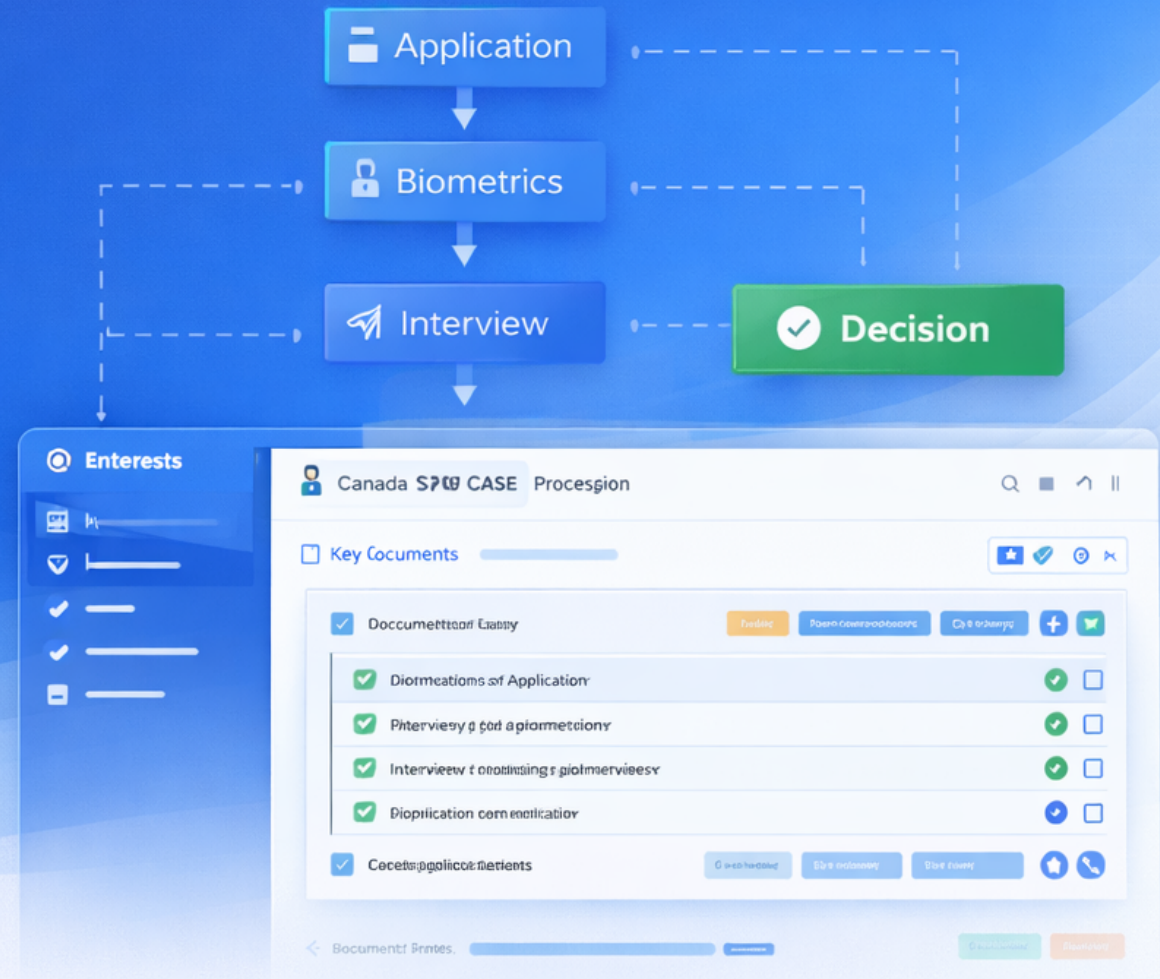
Biometrics

Decision



Structured Visa Case Processing

-  Convert client into visa cases (Projects)
-  Assign case managers
-  Securely upload & manage documents
-  Checklist-based workflow
-  Track milestones
(Application, Interview, Decision)



Invoicing & Installment Tracking



Generate branded invoices



Partial & full payment tracking



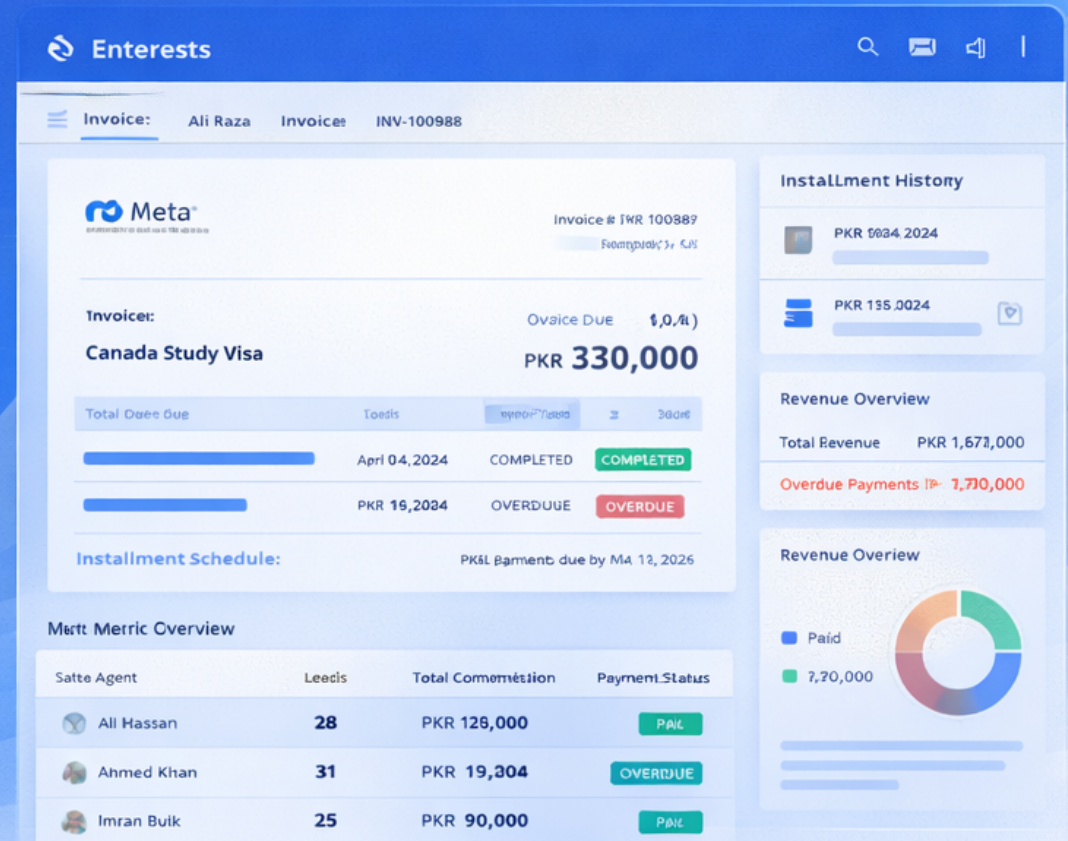
Installment plans



Payment history per client



Revenue reporting



Enterests

Invoice: Ali Raza Invoice INV-100988

Meta Invoice # INR 100887

Invoice: Canada Study Visa Invoice Due (₹,0,00) **PKR 330,000**

Total Due Due	Terms	Payment Status	30 Days
PKR 15,2034	April 04, 2024	COMPLETED	COMPLETED
PKR 15,2034		OVERDUE	OVERDUE

Installment Schedule: PKR Payment due by MA 13, 2026

Merit Merit Overview

Satte Agent	Leads	Total Commission	Payment Status
Alli Hassan	28	PKR 125,000	PAID
Ahmed Khan	31	PKR 19,304	OVERDUE
Imran Bulk	25	PKR 90,000	PAID

Installment History

- PKR 5034.2024
- PKR 155.0024

Revenue Overview






Total Revenue PKR 1,671,000

Overdue Payments (PKR) 1,710,000

Revenue Overview

Legend: Paid (7,20,000)

HR & Internal Operations

-  Role based access control
-  Attendance & leave tracking
-  Task assignment
-  Internal chat & announcements
-  Productivity reports



The dashboard provides a comprehensive overview of HR and internal operations. It features a navigation menu with options for Dashboard, Leads, Pipeline, Agents, Invoices, and Tasks. The main content area is divided into several sections:

- Greeting:** "Good Morning, Admin"
- Key Metrics:**
 - Emploees: 26
 - Open Tasks: 18
 - Today's Attendance: 85%
- Analytics:**
 - Task Analytics:** A bar chart showing tasks completed per day. Total: 145 Tasks Completed Last Week.
- Staff Overview:** A table listing staff members, their roles, and availability.

Staff Agent	Role	Availability
 Ayesha Khan	Admin	On Leave
 Ahmed Ali	Sales Manager	Present
 Saira Malik	Case Officer	Present
 Bilal Ahmed	Sales Agent	Late
- Internal Chat:** A notification for an onboarding retroom with an Onboarding progress bar at 49%.
- Announcements:** A list of recent announcements, including one from Saira Malik and another from Ali Hassan.

Features Highlights



Smart Lead & Case Tracking



Custom Stages



Automated Reminders



Commission & Payment Tracking



Checklists & Workflow



Internal Chat & HR Tools



Empowering Visa & Immigration Consultants with Digital Efficiency

Thank You!

Any Questions?



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