Enquiry Types in the BackOffice

Concept: Enquiry Type (ET)

Enquiry Types (ETs) are a **core** structural element of the Advocate Abroad ecosystem that define what kind of legal or professional service a client is seeking, in which jurisdiction, and under which commercial rules. Unlike simple “categories” or cosmetic labels on a record, an ET carries business meaning that drives routing, pricing, recurring behaviour, statistics, and eligibility of professionals. ETs sit alongside Statuses as two of the most impactful levers in the BackOffice platform: Status describes where the case is in its lifecycle, ET describes what the case actually is. For a UI walkthrough of how ETs are configured and used, see the Enquiry Types UI page.

Nature of Enquiry Types

Each ET is a configuration object maintained in the BackOffice “Enquiry Types” area, with fields for name, category, service type, visibility, country rules, user restrictions, billable actions, additional services, and recurrence behaviour. In BackOffice, a client record always has exactly one primary ET, which determines how that record behaves in terms of assignment options, available strategies, and downstream automation. Some ETs also imply that linked records will be created (for example, Additional Services like Translation), or that a principal/delegatee recurring model must be used (for example, Income Tax Declaration, Accounting/Bookkeeping).

Purpose and Role in the Ecosystem

The primary purpose of ETs is to encode business logic about a service into a single, reusable unit that can be referenced consistently across Website and BackOffice. By standardising ETs, the system can reliably perform tasks such as selecting appropriate professionals, building the correct quotation structure, enforcing country/profession constraints, and calculating commissions, without bespoke logic per form or per user. ETs are also the backbone for reporting, because many dashboards and statistics group cases by ET category (for example, Immigration, Property, Tax) or by specific ET (for example, a named tax or visa service) to show performance and volume.

Difference from Statuses and “Regular Enquiries”

Statuses describe the lifecycle stage of a record (New Enquiry, Created Lead, In Progress, Waiting for Response, Eliminated, Hibernated, Closed), and many automations are status-driven; ETs, in contrast, describe the substantive nature of the work and the applicable business rules. A “Regular Enquiry” in business language is simply a case that follows the standard enquiry-to-lead workflow, but in implementation terms it is always one concrete ET such as Property Purchase, Digital Nomad Visa, or Income Tax Declaration. Changing Status moves a case forward or backward in time; changing ET potentially changes the entire process that should apply to that case, including who can handle it, how it should be priced, and whether it should recur.

Role of Categories within ETs

Categories act as the top-level taxonomy for Enquiry Types and provide a bridge between business domains, website content, and BackOffice organisation. Each ET belongs to exactly one Category, which places it within a domain such as Accounting Services, Administrative Law & Processes, Architectural Services, Business Services, Criminal Law, Family Law, Property Law, Tax Returns & Fiscal Services, Visas & Immigration, Translation Services, Insurance Services, Financial Advisor Services, and many others. In the UI, Categories appear in dropdowns when configuring an ET and are used as filters on the Enquiry Types list and in reporting views.

Operationally, Categories help Admins and Users quickly locate related ETs, enforce consistent naming conventions within a domain, and understand at a glance which broad area a given ET belongs to. Categories also support strategic decisions: they define which areas have many ETs and therefore detailed offerings, and they make it easier to design Category-level statistics or dashboards (for example, all ETs under “Visas & Immigration” versus all ETs under “Tax Returns & Fiscal Services”).

ETs and User Capabilities

User Capabilities represent the list of ETs that a professional is allowed to handle, filtered by their profession (lawyer, accountant, translator, ASP) and countries. In practice, ETs configured in BackOffice are made available to Users through their capabilities configuration (managed in the admin tools), and only ETs enabled in a User’s capabilities can be associated with that User’s work. ET configuration and User Capabilities therefore work together: the ET defines the required profession and country profile, and the User record declares “I can take this ET”, so allocation and workload management can be managed confidently.

ETs in Website Form Intake

Every website form is mapped, via configuration, to one primary ET, and this mapping is one of the most sensitive parts of the system. When a client submits a form, the submission URL, form ID and endpoint are matched to a routing table so that BackOffice receives a new client record with the correct ET, country, and initial Status. Additional Services checkboxes on forms (for example, translation, mortgage, accounting) can create extra client records with other ETs that are linked to the main record, ensuring that all required services are represented as distinct ET-based cases.

ETs in BackOffice Client Records

In BackOffice, ET is visible and editable (with constraints) on the Overview and Enquiry Details tabs, usually via an “Optional Change Enquiry Type” function for certain statuses. The current ET determines the available Strategy Guides, Direct Service templates, and some status transitions, because different ETs may support different flows (for example, Translation or a country-specific tax service may have distinct edge cases). ET changes are heavily audited: any change creates an Updates Record entry, can alter which Users are suitable for the case, and may reset Strategy Guides and other ET-dependent artefacts. To see where the ET appears in the client header, view the ETs in Client Records section of the UI page.

Strategies and Templates Grouped by ET

Strategy Guides (quotation frameworks) and Direct Service templates are always defined against specific ETs and countries. When a user selects a Strategy Guide in BackOffice, the selector is filtered to show only guides whose ET and country match the client record’s ET and jurisdiction, ensuring that the questions, proposals and quotation ranges are appropriate. Direct Service Offers likewise use strategy- and ET-specific templates; changing the ET can remove or add available templates, and some logic (for example, Direct Service vs Paid Consultation) depends on combinations of Status and ET. For example screens of the Strategy Guide and quotation behaviour, see the ETs and Strategy Guide – Quotation Stage section on the UI page.

Recurring and Special ET Behaviours

Certain ETs are flagged as recurring, which triggers the principal/delegatee recurring service model and recurring payment tracking flows in BackOffice. When a recurring ET is present, BackOffice can place the client into Hibernated status between cycles and then reactivate it to Ongoing on the appropriate date, allowing recurring services such as annual tax declarations or ongoing accounting to be managed without recreating records each year. Other ETs carry special rules, such as Translation-type services (which must route to translator-capable professionals) and specific country-restricted ETs which only appear for particular jurisdictions.

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Agency Referrals (Referring Client) is a special ET used as a container for organisations or individuals who regularly refer multiple end clients, rather than as a specific billable service in itself. Its purpose is to hold and maintain the contact details and relationship context for the referring party, so that linked client records (created for the mutual clients they send) can be tracked against that referrer over time. This ET therefore behaves more like a persistent account or umbrella record than a standard case: it supports ongoing collaboration and visibility of referred work, but does not itself generate commission obligations to the referring client, and it is not treated as a normal service ET for quotation or payment flows.

Country, User and Category Constraints

ET configuration includes a “Restrict To Countries” setting, which limits the ET to specific jurisdictions where that service exists, preventing it from being attached to clients in incompatible countries. A “Restrict To User” dropdown can bind the ET to a specific User when needed, which is useful for pilot services, specialist offerings, or transitional configurations. Combined with Categories, these constraints ensure that ETs are only available in relevant country contexts and that internal lists and filters remain meaningful and manageable.

Changing ET Mid-Lifecycle

Changing the ET on an existing client record is a high-impact action and is therefore limited to certain statuses for Users, while Admins have broader override powers. A confirmed ET change can require re-evaluation of which professional should handle the case, as the new ET may demand a different profession or capability set. The system also resets or archives ET-dependent artefacts (such as Strategy Guides and ET-specific statistics) and logs the change in the Updates Record for audit and reporting quality.

ETs in Reporting and Analytics

Reporting layers (dashboards, statistics, provider statements) rely heavily on ET to group and filter data, because ETs define both service type and, indirectly, revenue model. Some ETs can be explicitly excluded from certain reports (for example, rare or experimental ETs, or internal ones), and recurring ETs are sometimes treated differently in success-rate calculations to avoid distorting metrics with long-lived cases. Country-specific ETs must be clearly tagged so that analytics by jurisdiction remain accurate and cross-country comparisons are meaningful.

ET Setup Location (BackOffice)

ETs are typically created and maintained via the **Enquiry Types** screen in the BackOffice Admin Dashboard. From the Admin Dashboard, the “Enquiry Types” button under Lookups opens the Enquiry Type list, where Admins can review existing ETs and add new ones using the “Add Type” button. This BackOffice UI is the normal entry point for day-to-day ET maintenance; once an ET is defined here, it is consumed throughout the system for client records, strategies, emails and reporting.

ET Setup Screen and Core Attributes

The “Add Enquiry Type” screen exposes the main ET configuration fields required for business behaviour across Website and BackOffice, with the goal of defining the ET once so that routing, visibility, strategies, and recurring logic all follow the same rules wherever the ET is used. For screenshots and field-by-field UI details, refer to the Enquiry Type Creation Form – Layout section.

Primary Identification Fields

The **ET Name** is the human-readable label for the service (for example, “Artist Visa Spain”, “Professional Tax Registration Service”) and appears in BackOffice dropdowns and sometimes on the website. The **Category** field assigns the ET to one of the global service categories (for example, Accounting Services, Property Law, Visas & Immigration, Tax Returns & Fiscal Services), which are used for grouping in UI filters and reporting. The **Service Type** attribute indicates whether the ET is a Primary service, an Additional service, or Both, and controls where the ET can appear (as a main enquiry versus as a linked/secondary service).

Strategy and Visibility Controls

The **Saved Strategy Limit** sets how many private strategy variations an individual User can store for this ET, preventing the Strategy list from becoming cluttered for very common ETs. Two toggles control visibility and operational use: **Public** determines whether the ET is exposed on the public website (and therefore treated as something people actively search for in search engines), while **Enabled** determines whether the ET can be used at all in BackOffice and related flows. ETs that represent important internal routing distinctions but low search demand may be Enabled but not Public, so they exist only for BackOffice assignment and reporting.

Billable Actions and Additional Services

ETs can be linked to a set of **Billable Actions**, which are discrete service items that Users select in the Completed Wizard when closing or completing work. Billable Actions allow a more granular description of exactly what was delivered under the ET (for example, “Drafting contract”, “Court appearance”, “Tax return filing”), which improves reporting and supports consistent billing and commission logic. ETs can also reference one or more **Additional Services**: any Additional Services linked here appear as buttons in the confirmation email sent to new clients for this ET, allowing clients to request associated services (for example, Translation, Mortgage, Insurance) directly from that email.

Recurring Settings and Hibernation Behaviour

The Recurrence section of the ET screen controls whether and how the ET participates in recurring service flows. The **Has Recurring Payments** toggle marks the ET as recurring (for example, annual tax filings, ongoing accounting), enabling additional recurrence fields and connecting the ET to Hibernated/Ongoing status transitions. For accounting-style services, an additional toggle such as **Accounting Service (has Monthly Payments)** can be used to model frequent payment cycles within the same ET.

Recurrence parameters include labels and timing rules. The **Fixed Fee Label** and **Recurring Fee Label** define how one-off and recurring amounts are presented to Users and in templates. The **Recur period** and **Recur from** fields set the recurrence interval and the reference date from which the cycle is calculated. A **Notify Before** setting defines how long before the recurrence date the assigned User receives an email notification, and it also drives the automatic change from Hibernated back to an active status (for example, Ongoing), moving the client record from the All Clients list back into the Current Clients list at the appropriate time.

Agency Referrals (Referring Client) is a special ET used to model organisations or individuals who regularly refer multiple end clients, rather than a specific billable service for the referrer themselves. Its primary role is to act as a persistent container for the referrer’s contact and relationship details while each actual end-client enquiry is created under a separate, service-specific ET. Once a referrer record is set to this ET, Users no longer treat it as a normal case to advance through statuses; instead, they leave it in place and, whenever the referrer sends someone new, they create or share a new client record for the end client and link it back to this referrer. No Advocate Abroad commission is payable to the referring client under this ET, and it is not used for quotation, payment or survey flows in the same way as standard service ETs.

BackOffice ET Creation Flow

In practice, the ET setup process runs as follows. An Admin opens BackOffice, navigates to the Admin Dashboard, and clicks the **Enquiry Types** button under Lookups to access the ET list. From there, clicking **Add Type** opens the ET creation screen, where the Admin completes Name, Category, Service Type, Saved Strategy Limit, Public/Enabled toggles, country restrictions, any user restriction, Billable Actions, Additional Services, and Recurrence options.

After saving the ET, Admins ensure that relevant Users have the corresponding ET in their capabilities and that any website forms, confirmation emails, and Strategies are aligned with this ET. For ETs that are Public and tied to web forms, test enquiries should be submitted on Staging or a test environment to confirm that the correct ET is assigned, that country restrictions behave as expected, and that recurring and Billable Action logic works as intended in the subsequent lifecycle.

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