



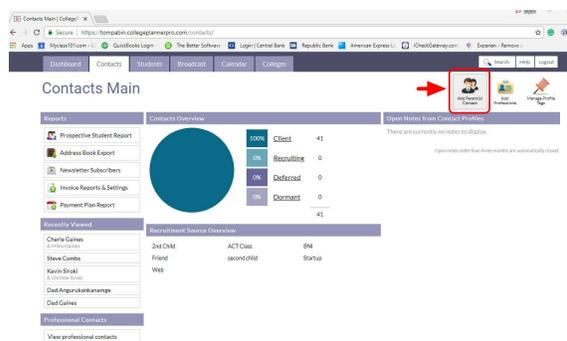
## Create Contact (Parents) in College Planner Pro

Login to the Class 101 Platform by going to:

<https://class101.collegeplannerpro.com>

Once there, enter your credentials. You will be taken to the Dashboard tab of the platform. Select Contacts to move on to the 'Contacts Main' area of the system and the next steps.

Select the 'Add Parent Contact' icon.



Complete the fields in the 'Add New Contact' form.

1. Capture as much information as you can so we can use it in future analysis. A five-digit zip code is sufficient. If you have it, do not record the Zip+4, just the five-digit code.
2. Be sure to place your assigned Franchise No. in the second Phone No. field.
3. Enter the Recruitment Source. See Page 2 for Valid Selections. Be sure to enter these exactly, same spelling, spacing and capitalization.
4. Select Parent or Professional Contact (Professional Contacts are non-parents, BNI Members, High-School Counselors, etc.). You cannot add a student profile to a Professional Contact.
5. Additional or alternate addresses, guardian situations or notes about split homes would be entered in 'Private notes.'
6. Select 'Save Contact'

**Add New Contact**

First Name: Edward  
Last Name: Stark  
Phone: 111-222-3333  
Email: estark@kinginthenorth.com  
Recruitment Source: Other  
Private notes: All Address: 1 Castle Road Kings Landing, Westeros 00001  
Save Contact



## Duplicate Profiles

Because all locations use the same platform, it is possible that multiple contacts with the same name could exist under separate locations. If this occurs, you will be given a warning as you try to add the Contact. You will be able to save the contact even with the warning message. I would suggest, however, that you add the Contact's middle initial to the First Name field to distinguish your Contact before you save it.

The screenshot shows the 'Add New Contact' form with a warning message: 'Oops, looks like this profile might already exist.' Below the warning, it states: 'Bryan Smith was added: Oct 17, 2018' and 'Profile status: Recruiting' with a 'Go to profile' link. The form fields include: First Name (Bryan), Last Name (Smith), Parent (dropdown), Phone (with ext. and Home/Mobile dropdowns), Email, Newsletter (checkbox), Recruitment Source, and Type (Parent Contact).

**Profile Status** – When created, all Contacts begin in the Status of 'Recruiting'. We use this status to distinguish contacts who are 'on the fence' from actual sales. Do not manually change this value until the Contact has submitted their down-payment.

Adding a student to the Contact page and marking it as Client will automatically change the Parent Contact from Recruiting to Client.

The screenshot shows the 'Profile Status' dropdown menu with the following options: Dormant, Deferred, Recruiting (highlighted), and Client.



## CollegePlannerPro - Recruitment Sources

Use these recruitment sources spelled out and typed in this **EXACT** manner

<b>ACT Class</b>	<b>High School</b>
<b>ACT Event</b>	<b>Instagram</b>
<b>Additional Child</b>	<b>Networking Team</b>
<b>BNI</b>	<b>Other</b>
<b>Chamber</b>	<b>Print AD</b>
<b>Client Referral</b>	<b>Sports</b>
<b>College Fair</b>	<b>SAT Class</b>
<b>Event/Seminar</b>	<b>SAT Event</b>
<b>Facebook</b>	<b>Special Market</b>
<b>Friend</b>	<b>Web Site</b>
	<b>Walk-In</b>