



Protocol for Storing Enrollment Forms

1. Be sure to use your Enrollment Forms to record the details for your sales.



Enrollment Form

Parent/Guardian Name: _____ Relationship to Student: _____

Full Address: _____

Mobile Phone: _____ Email Address: _____

Other Parent/Guardian: _____ Relationship to Student: _____

Full Address: same as above

Mobile Phone: _____ Email address: _____

Student Name: _____ Birthdate: _____

School: _____ Graduation Year: _____

Student email: _____

2. Take a picture or scan the Enrollment Form into a file.
3. Login to the Platform (CPP).



Good morning

Email

Password

[Forgot my password](#)

[Login](#)



4. Go to your Contact Page.

5. Select Add Files and Folders from the top menu.

6. Insert the files.

- a. Choose 'Select Files' to find the files you want to upload.
- b. In the Upload into contact's field, select 'General folder'.
- c. Choose Done/Close.



7. Link a Google Doc. – it is possible to link a Google Doc
 - a. Name the link for your reference from CPP
 - b. Select the Folder you want to place the document
 - c. Copy and paste the link to the Google Doc from Google Drive

Link a Google Doc in Folder

Link a Google Doc

File name

Folder

Document link

Cancel Save Google Doc

8. To Access the document once uploaded.
 - a. For all documents uploaded into the platform, you must Download in order to review the document. To do so, just click on the item and you will be given a window with some options: Delete; Download; Replace.
 - i. Delete if you want to get rid of it.
 - ii. Download if you want to review it.
 - iii. Replace if you have a new one.

Attached File Options

Class 101 Enrollment Form.pdf

File label

Folder

Delete Download Replace

Cancel Save Changes



- b. For Google Docs, just select the link and you will be given a window with options:
Delete; View File
- i. Delete if you want to get rid of it.
 - ii. View File if you want to review the document.

The screenshot shows a dialog box titled "Attached File Options" with a close button (X) in the top right corner. Inside the dialog, there is a blue icon representing a Google Doc with the text "Google Doc" next to it. Below this, there is a text input field labeled "File label" containing the word "Test". Underneath that is a dropdown menu labeled "Folder" with "General folder" selected. At the bottom of the dialog, there are two buttons: "Delete" (with a trash can icon) and "View File" (with a magnifying glass icon). At the very bottom of the dialog, outside the main content area, are two buttons: "Cancel" and "Save Changes".