



Share Platform with Students

From the primary Contact page, you should have a student listed in the Student Information section. Select the +Client button to create their student profile.

The screenshot shows the primary Contact page for Bryan Smith. The page includes a profile status section with buttons for Dormant, Deferred, Recruiting, and Client. Below this is a section for Parent's Contact Information and a section for Student Information. In the Student Information section, there is a list of students, including Jacob Smith, Class of 2021. A red arrow points to the '+ Client' button next to Jacob Smith's name.

Click on the Student name to go directly to the profile. From the Student Profile, hover over the name and click the pencil to enter an email address.

The screenshot shows the Student Profile page for Jacob Smith. The page includes a navigation bar with Dashboard, Contacts, Students, and Broadcast. Below the navigation bar is a profile card for Jacob Smith [2021]. A red arrow points to a pencil icon next to the name, with a tooltip that says 'Click to edit student details'. Below the profile card are buttons for 'Add to Quick List' and 'Open Student's Keychain'. There is also a 'View Parer Profile' button and a 'Meetings w' button.



Once this is done, a button becomes available under the Student Access area. Click the button beside 'Login account status' to activate sharing.

Jacob Smith [2021]

+ Add some tags to this profile

Add to Quick List Open Student's Keychain

CustomCollegePlan.com Student Access

Login account status:

Jacob currently can not login. Enabling the account will NOT send an email.

My Checklist

Once 'on' you can send an email to the student with login info.

+ Add some tags to this profile

Add to Quick List Open Student's Keychain

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Login account status: PIN: 8049

Send email to Jacob with login info

Account settings Login as student

My Checklist