



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. **Be sure to obscure any banking or credit card information before uploading.**
3. Take a picture or scan the Enrollment Form into a file.
4. Login to the Platform (CPP).



Good morning

Email

Password

[Forgot my password](#)

5. Go to your Contact Page.

Dashboard Contacts Students Broadcast Calendar Colleges Thomas Pabin Search Help Logout

Bryan Smith
Friend
Add to Quick List

+ Add some tags to this profile

Profile Status: Dormant, Deferred, **Recruiting**, Client

Parent's Contact Information: 8599137513 (Home), 000 (Mobile), bsmith@class101.com, Email (Contact preference), 245 Regency Circle, Lexington, KY 40503, Lexington, KY 40503, United States

Calendar Items: There are currently no meetings to display

Student Information: Sarah Smith (Class of 2023), Jacob Smith (Class of 2021 - Active profile), Add a student to this profile

Files and Folders: General Folder

Notes & Emails: There are currently no notes to display

Payment Plans: There are currently no payment plans to display

Invoices: There are currently no invoices to display

Broadcast Messages Sent: There are no messages to display

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

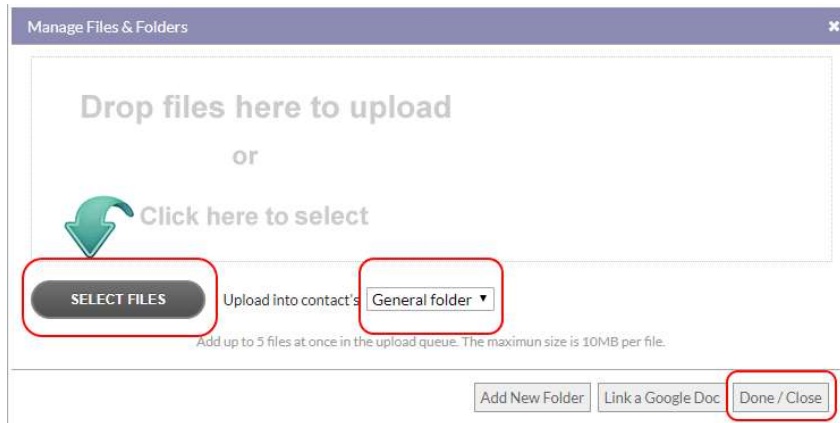
Edit Parent's Details Edit Student List Create New Payment Plan Create New Invoice Add New Note Add New Meeting **Add Files & Folders** Return to Contacts Main

7. Insert the files.

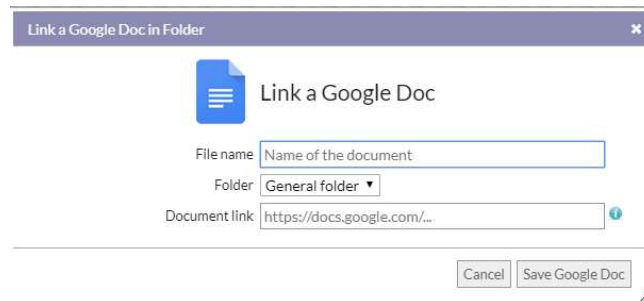
- a. Choose 'Select Files' to find the files you want to upload.
- b. In the Upload into contact's field, select 'General folder'.



c. Choose Done/Close.



8. 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



9. 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
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- 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.

