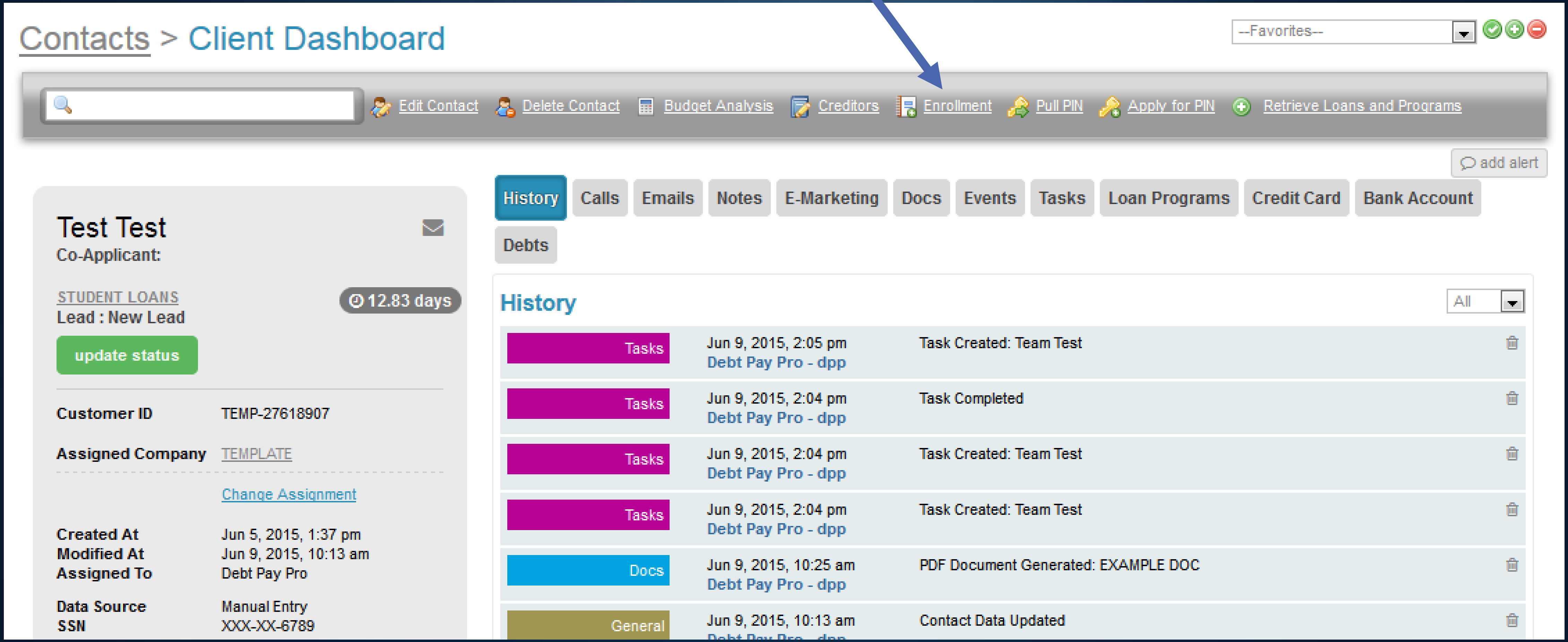
Enrolling a Contact

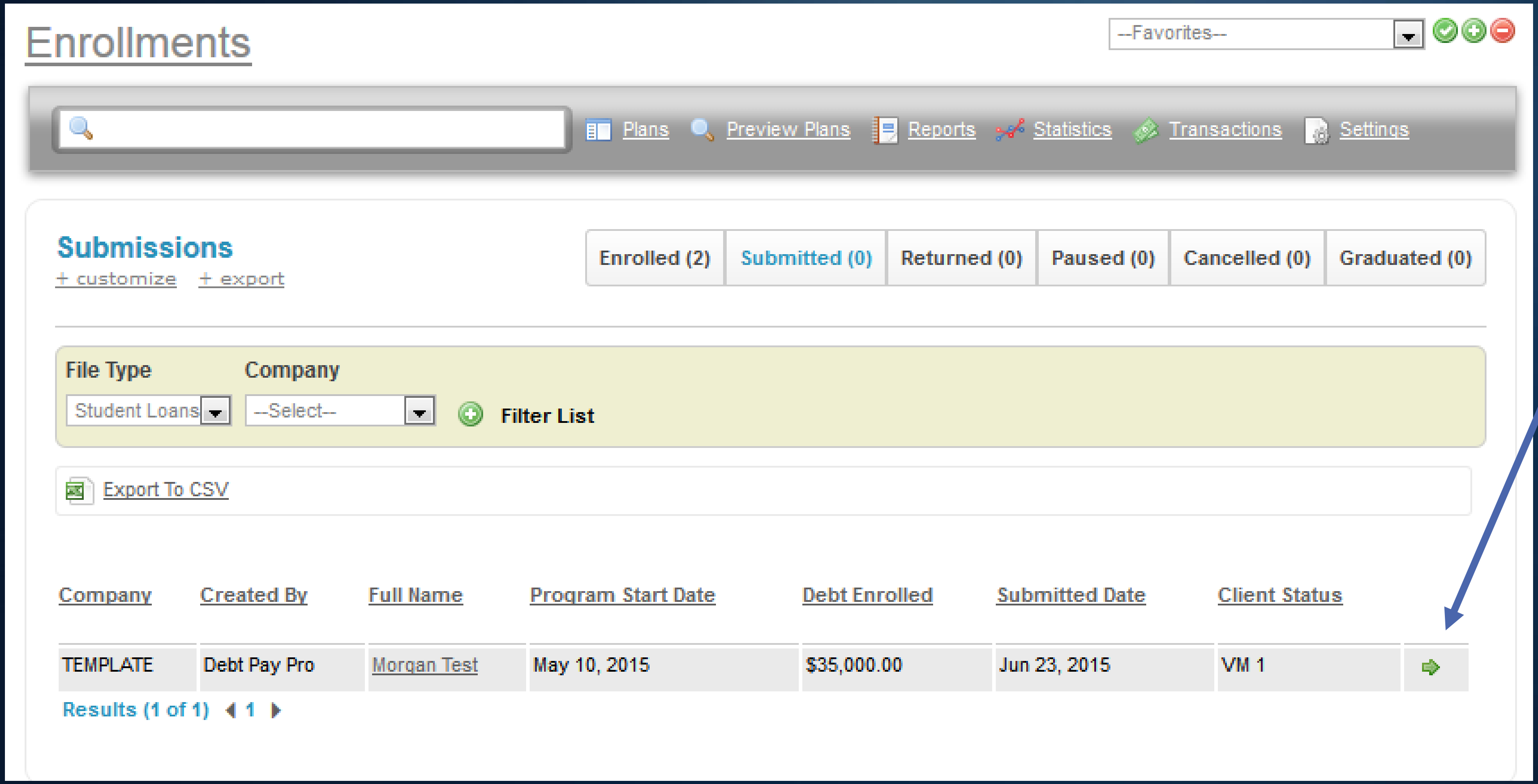
Enrollment should be done at the end of your sales process when you are ready to activate the clients scheduled payments and possibly begin the back-end processing for your service.

Starting on the Client Dashboard, Click on “Enrollment” located on the navigation bar



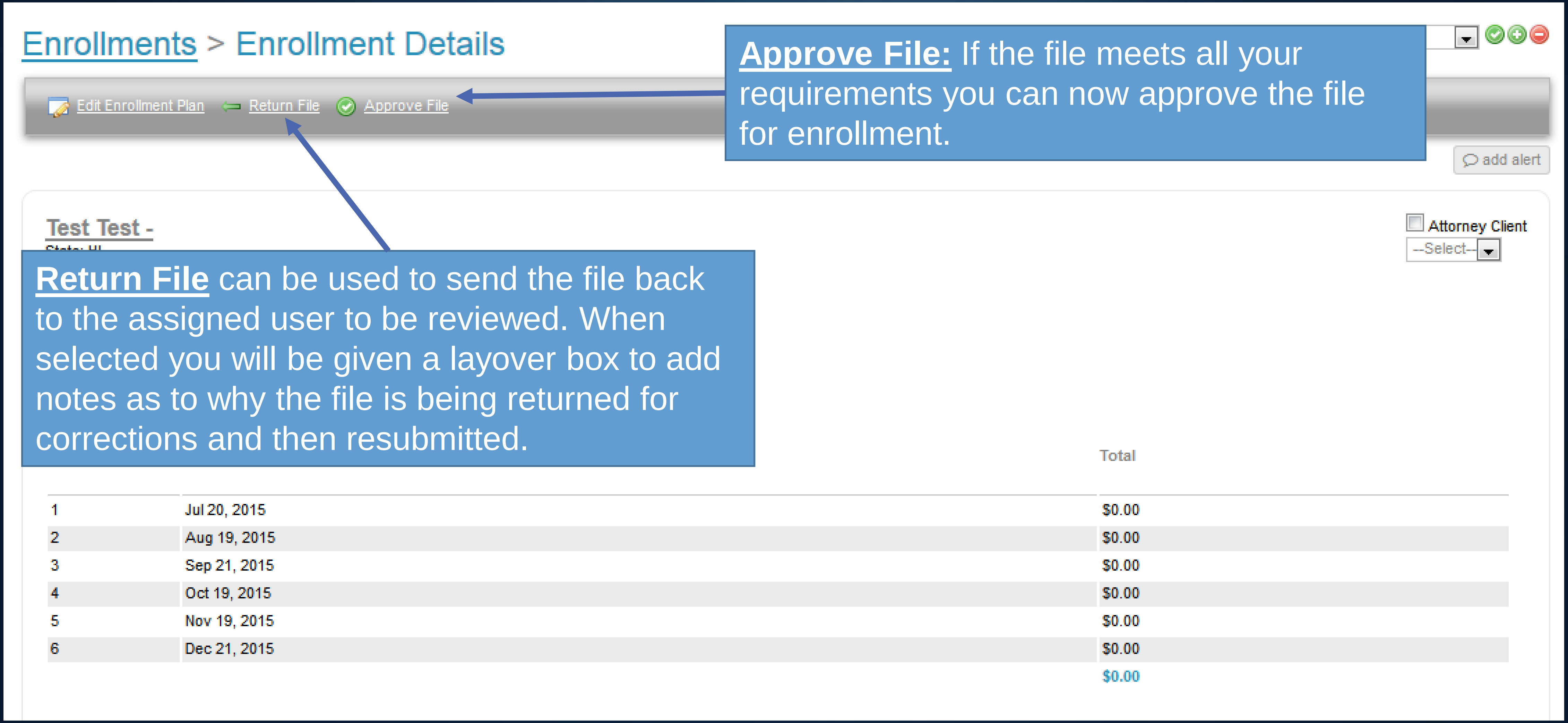
Next click “Submit File” from the navigation bar

After “Submitting” the client will now appear under the Enrollments tab. The contact has now been placed under the Submitted section awaiting approval.



At this point in the enrollment process we recommend a manager or processor take over reviewing the file making sure all need documents have been collected, and the payment schedule has been setup properly or any other item(s) that need to be checked before fully enrolling your client. Once finished you can click the green arrow to be taken back to the clients enrollment details page.

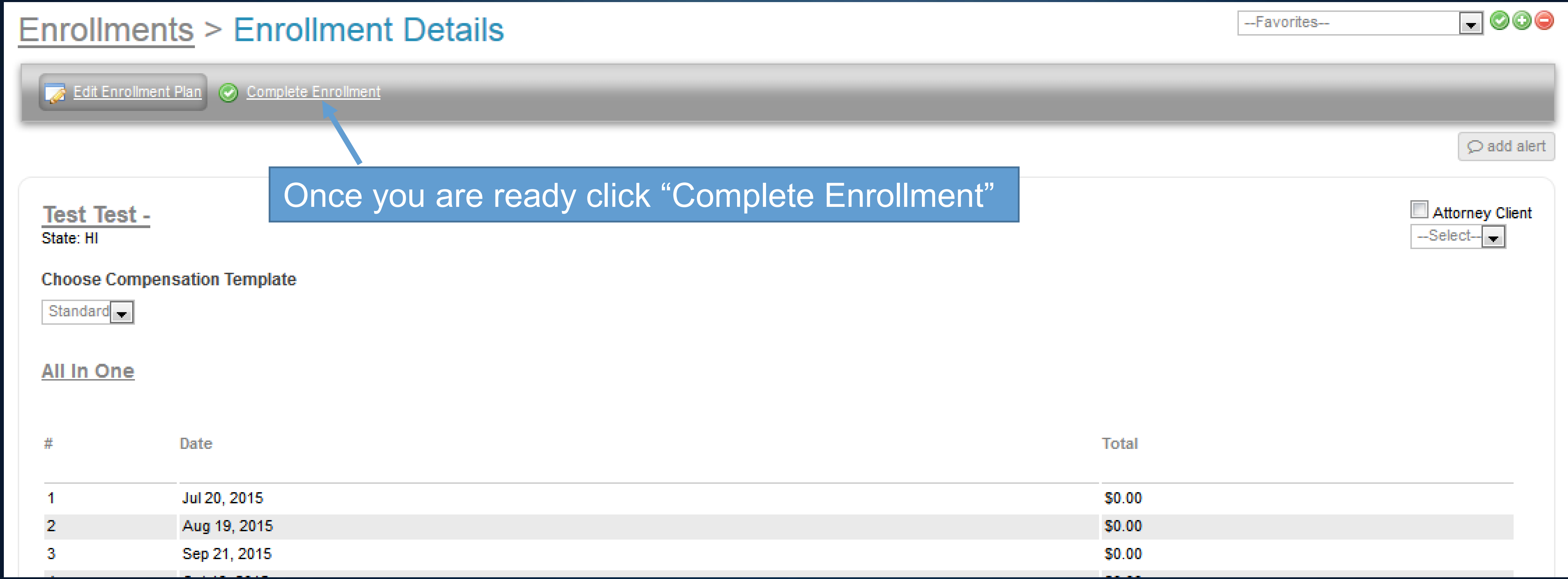
Once back at the Enrollment Details page you will see 2 options available on the navigation Bar.



Approve File: If the file meets all your requirements you can now approve the file for enrollment.

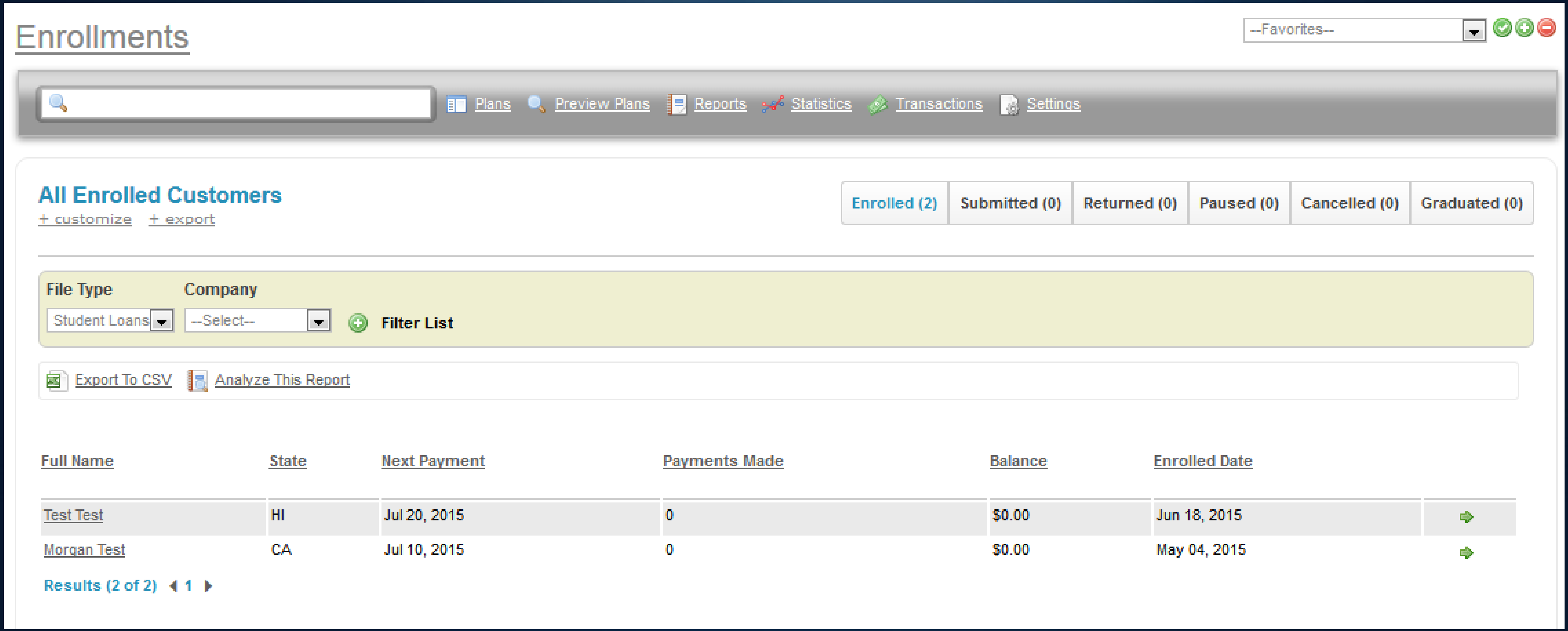
Return File can be used to send the file back to the assigned user to be reviewed. When selected you will be given a layover box to add notes as to why the file is being returned for corrections and then resubmitted.

Once approved you will need to complete enrollment. At this point it is good policy to make one final check of the payment information as after completing the enrollment the clients scheduled payment will be live and process automatically (as long as a processor has been integrated with your account).



Once you are ready click “Complete Enrollment”

Now that you have completed enrollment the client will appear under the “Enrolled” section on the Enrollments tab. All clients here should be enrolled with your services and making payments, unless payments have been paused temporarily.



Things to know about enrolled contacts…

- Once a contact has been "Enrolled" their payments will be live and will process automatically (provided a processor has been linked with your account). Please contact support@debtpaypro.com for more information regarding setting up a processor.
- It is best practice to have a manager review contacts file before enrolling clients.
- Enrolled Contacts cannot be deleted, the option will no longer be available on the Client Dashboard.
- Depending on your "Enrollment Settings" contacts may have their stage/status automatically updated through the enrollment process. Please see articles regarding the enrollment tab or enrollment settings specifically for questions regarding this.