

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

Contacts > Client Dashboard

--Favorites--

Search bar | [Edit Contact](#) | [Delete Contact](#) | [Budget Analysis](#) | [Creditors](#) | [Enrollment](#) | [Pull PIN](#) | [Apply for PIN](#) | [Retrieve Loans and Programs](#)

add alert

- History
- Calls
- Emails
- Notes
- E-Marketing
- Docs
- Events
- Tasks
- Loan Programs
- Credit Card
- Bank Account

Debts

Test Test

Co-Applicant:

[STUDENT LOANS](#) 12.83 days

Lead : New Lead

[update status](#)

Customer ID: TEMP-27618907

Assigned Company: [TEMPLATE](#)

[Change Assignment](#)

Created At: Jun 5, 2015, 1:37 pm
Modified At: Jun 9, 2015, 10:13 am
Assigned To: Debt Pay Pro

Data Source: Manual Entry
SSN: XXX-XX-6789

History All

Tasks	Jun 9, 2015, 2:05 pm Debt Pay Pro - dpp	Task Created: Team Test	
Tasks	Jun 9, 2015, 2:04 pm Debt Pay Pro - dpp	Task Completed	
Tasks	Jun 9, 2015, 2:04 pm Debt Pay Pro - dpp	Task Created: Team Test	
Tasks	Jun 9, 2015, 2:04 pm Debt Pay Pro - dpp	Task Created: Team Test	
Docs	Jun 9, 2015, 10:25 am Debt Pay Pro - dpp	PDF Document Generated: EXAMPLE DOC	
General	Jun 9, 2015, 10:13 am Debt Pay Pro - dpp	Contact Data Updated	

Next click "Submit File" from the navigation bar

Enrollments > Enrollment Details --Favorites--

[Edit Enrollment Plan](#) [Submit File](#) add alert

Test Test - Attorney Client
State: HI --Select--

Choose Compensation Template
Standard

All In One

#	Date	Total
1	Jul 20, 2015	\$0.00
2	Aug 19, 2015	\$0.00
3

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

The screenshot shows the 'Enrollments' dashboard. At the top, there is a search bar and a navigation menu with options: Plans, Preview Plans, Reports, Statistics, Transactions, and Settings. Below the navigation, there is a 'Submissions' section with a status filter bar showing: Enrolled (2), Submitted (0), Returned (0), Paused (0), Cancelled (0), and Graduated (0). Underneath, there are filters for 'File Type' (set to Student Loans) and 'Company' (set to --Select--), along with a 'Filter List' button and an 'Export To CSV' button. A table displays the following data:




Company	Created By	Full Name	Program Start Date	Debt Enrolled	Submitted Date	Client Status	
TEMPLATE	Debt Pay Pro	Morgan Test	May 10, 2015	\$35,000.00	Jun 23, 2015	VM 1	➔

At the bottom of the table, it says 'Results (1 of 1)' with navigation arrows.

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.

Enrollments > Enrollment Details

 Edit Enrollment Plan  Return File  Approve File

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

Test Test -
State: IL

Attorney Client
--Select--

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.

		Total
1	Jul 20, 2015	\$0.00
2	Aug 19, 2015	\$0.00
3	Sep 21, 2015	\$0.00
4	Oct 19, 2015	\$0.00
5	Nov 19, 2015	\$0.00
6	Dec 21, 2015	\$0.00
		\$0.00

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).

Enrollments > Enrollment Details --Favorites--

[Edit Enrollment Plan](#) [Complete Enrollment](#) add alert

Test Test -
State: HI Attorney Client
--Select--

Choose Compensation Template
Standard

All In One

#	Date	Total
1	Jul 20, 2015	\$0.00
2	Aug 19, 2015	\$0.00
3	Sep 21, 2015	\$0.00

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.

Enrollments

--Favorites--

Plans Preview Plans Reports Statistics Transactions Settings

All Enrolled Customers

[+ customize](#) [+ export](#)

Enrolled (2) Submitted (0) Returned (0) Paused (0) Cancelled (0) Graduated (0)

File Type: Student Loans Company: --Select-- [+ Filter List](#)

[Export To CSV](#) [Analyze This Report](#)

<u>Full Name</u>	<u>State</u>	<u>Next Payment</u>	<u>Payments Made</u>	<u>Balance</u>	<u>Enrolled Date</u>	
Test Test	HI	Jul 20, 2015	0	\$0.00	Jun 18, 2015	➔
Morgan Test	CA	Jul 10, 2015	0	\$0.00	May 04, 2015	➔

Results (2 of 2) ◀ 1 ▶

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.