

New Member Training Guide

1. General Introduction

- 5 Minute Demo
- Account Introduction
- Account Customization
- Add a Parent
- Add a Student
- Student Profile
- Enable CustomCollegePlan

2. College Lists

- Suggested College List
- Custom College List
- College Tags
- College Search
- College Profile Report
- College Comparative Report
- Students "My List" of Colleges

3. Application Tracking

- Import College Deadlines
- Application Requirements
- Application Outline
- Tracking Admissions Decisions

4. Student Management and Communication

- Create Student To-Dos
- Create Checklist Items
- Share Documents
- Track Time
- Student Notes and Emails
- Send Student Text Messages
- Broadcast Email Messages

5. Calendar and Scheduling

- Sync Calendar
- Create Calendar Events
- Set up Availability
- Scheduling Appointments
- Students Scheduling Appointments

6. Billing and Invoicing

- Create Invoices
- Create Payment Plans
- Invoice Defaults