

How to Make a Note in an Account

For both Student and Prospect accounts

We leave notes in both Student and Prospect accounts whenever there is an action taken on the account. We always err on the side of making too many notes rather than too few. When in doubt leave a note.

Always put the most recent note at the top of the notes section.

Format: Date Initials Notes

Example: 5/14/2022 jer changed the participation fee on the CC on file

Common Shorthand:

CC: Credit Card

DNS: Did not Show

ERR: Email Renewal Reminder

LM: Left Message

LPP: Late Payment Pipeline

NSK: New Season Kickoff

OH: Open House

REG: Registered

VM: Voice mail

WD: Withdraw