


Create a New NVTI Student Contact Record

Purpose: Search for and, if needed, complete a new Student Contact record.

Assumptions: You have a complete, approved NVTI application open and CRM open.

Step-by-Step:

1. On the CRM top bar, click .



Result: A search box opens.

2. In the search box, enter the student name in the NVTI application, using the **firstname*lastname** format.
3. Under the **General** column, click the **Contacts** button.

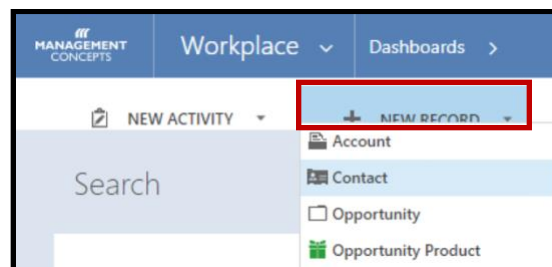
Result: The **Active Contacts: Modified within last 12 months** window opens.

If an existing student record is returned: Continue to Enroll a Student in a Course.

If no results were found: Continue with the process steps below.

4. Click the **+ New Record**.

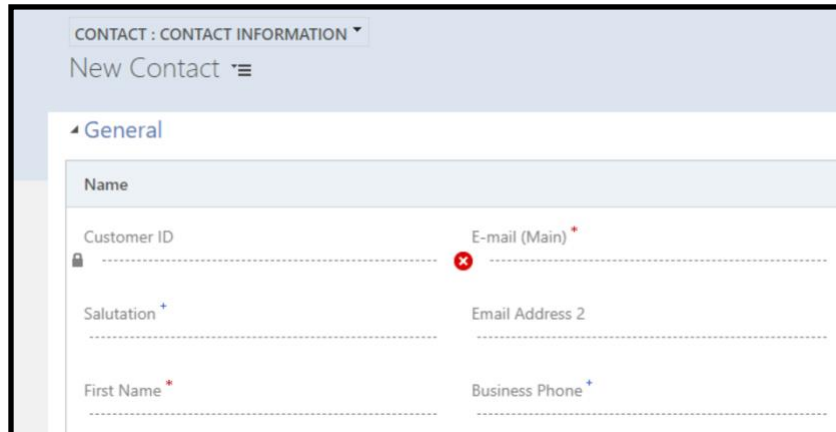
Result: A drop-down menu of application options displays.



5. Select **Contact**.

Result: A new **Contact** record opens.

6. Scroll to the **General** pane.



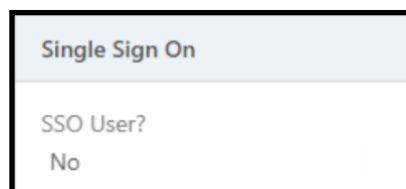
The screenshot shows a web interface for creating a new contact. At the top, there's a header bar with 'CONTACT : CONTACT INFORMATION' and a dropdown arrow, followed by 'New Contact' and a menu icon. Below this is a sidebar with a 'General' tab selected. The main content area is titled 'Name' and contains several input fields: 'Customer ID' (with a lock icon), 'E-mail (Main)' (with a red 'x' icon), 'Salutation' (with a plus icon), 'Email Address 2', 'First Name' (with a red asterisk), and 'Business Phone' (with a plus icon). Each field has a dashed line indicating where to enter text.

7. Populate the following fields with details from the Student Application form:

- a. **First Name**
- b. **Last Name**
- c. **Job Title**
- d. **Account**—Enter the Agency/Organization Name
- e. **E-Mail (Main)**
- f. **Business Phone**
- g. **Mobile Phone**
- h. **Street /PO Box**
- i. **City**
- j. **State/Province**
- k. **Zip/Postal Code**
- l. **Country/Region**—Auto populates as United States
- m. **Originating Source**—Enter **Onsite**

8. Scroll right to the **Single Sign On** panel.

9. At **SSO User?**, change the default **No** entry to **Yes**.



The screenshot shows a panel titled 'Single Sign On'. Below the title is a section labeled 'SSO User?'. Under this label, there is a radio button next to the word 'No'.

10. Scroll down to the **Contact Types*** panel and click in the panel.

A screenshot of a web form panel titled "Contact Types" with a red asterisk indicating a required field. Below the title is a dashed line representing a text input field.

Result: A field displays with a ▼.

11. Click the ▼.

Result: A drop-down menu appears.

12. Choose from these options depending on student registration type from the application:

- ND: NVTI-DVOP
- NG-NVTI-DOL Grantee
- NL: LVER
- NM: NVTI-Manager/Supervisor
- NT: NVTI-Other, such as USERRA

13. Scroll down to the **NVTI User Specifics** pane.

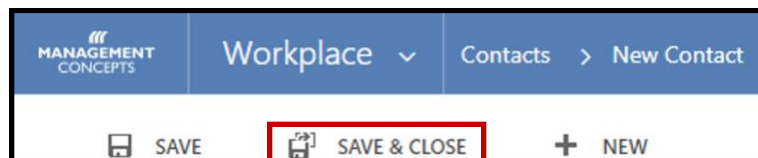
14. At the **NVTI News Letter User** field, change **No** to **Yes**.

15. In the **Date of Position** field, type the date the student will begin their training program.

A screenshot of the "NVTI User Specifics" pane. It contains two fields: "NVTI News Letter User" with the value "No" and "Date of Position" which is currently empty. The "Date of Position" field is highlighted with a red border.

Result: The date will display.

16. Scroll up and click the **Save & Close** button.

A screenshot of the bottom navigation bar of the application. It includes the "MANAGEMENT CONCEPTS" logo, a "Workplace" dropdown menu, and a breadcrumb trail "Contacts > New Contact". At the bottom, there are three buttons: "SAVE", "SAVE & CLOSE" (highlighted with a red border), and "NEW".

Result: The Student Contact Record saves and closes.

Continue with: Enroll a Student in an NVTI Class