

How to Update the Lifecycle Role/Stage on a Contact Record

Follow these instructions to update the lifecycle Role/Stage from LEAD-ACTIVE to INQUIRY-ACTIVE.

You can find this field on the CONTACT MODULE – under Key Recruitment Info 1

Key Recruitment Info 1

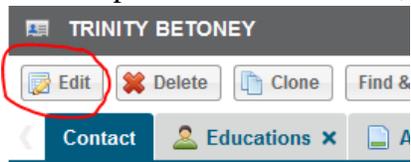
My intended start term: M

Lifecycle Role/Stage: Inquiry-Active

I am inquiring to the campus in: Olympia Pre

Radius Contact Type:

- 1) At the top of the contact record, select EDIT to open the record for editing.



- 2) Once in EDIT MODE, look for the GREEN CIRCLE with the white plus in the middle.

Key Recruitment Info 1

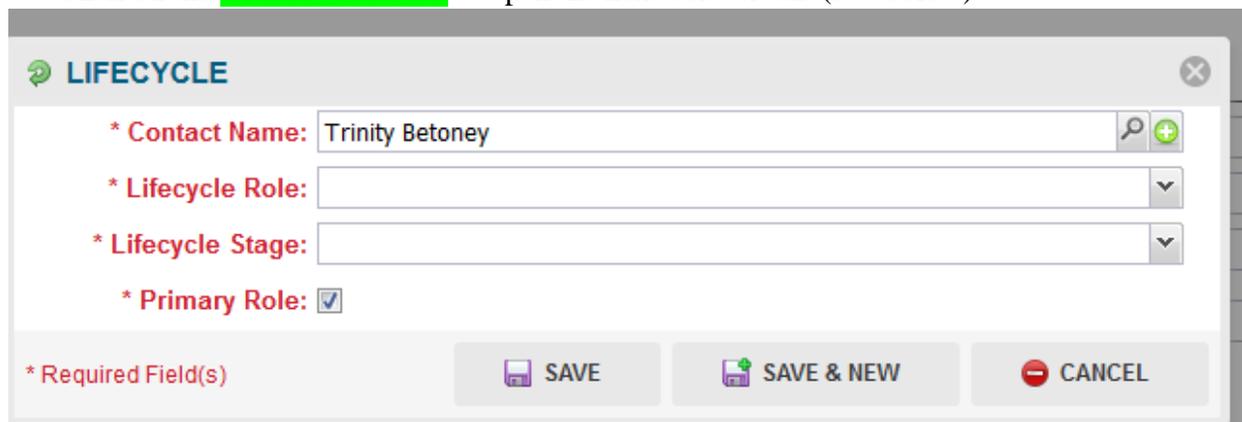
My intended start term: M

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I am inquiring to the campus in: Olympia Pre

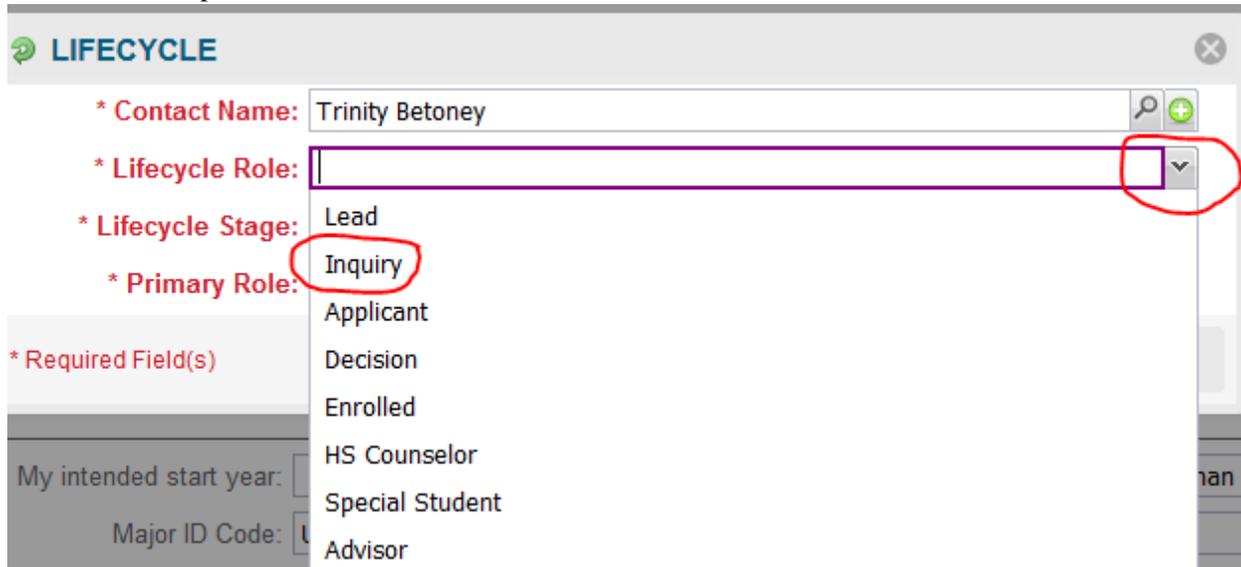
Radius Contact Type: Type to search Radius Contact Type

Click on the GREEN CIRCLE to open the next edit screen. (See below)

A screenshot of a 'LIFECYCLE' edit window. The window title is 'LIFECYCLE'. It contains several fields: '* Contact Name:' with the value 'Trinity Betoney'; '* Lifecycle Role:' with an empty dropdown; '* Lifecycle Stage:' with an empty dropdown; and '* Primary Role:' with a checked checkbox. At the bottom, there are three buttons: 'SAVE', 'SAVE & NEW', and 'CANCEL'. A legend indicates that fields with an asterisk are required.

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- 3) DO NOT change the CONTACT NAME FIELD.
CLICK on the DOWN ARROW for the LIFECYCLE ROLE to reveal the choices. Click or Select INQUIRY from the drop down.

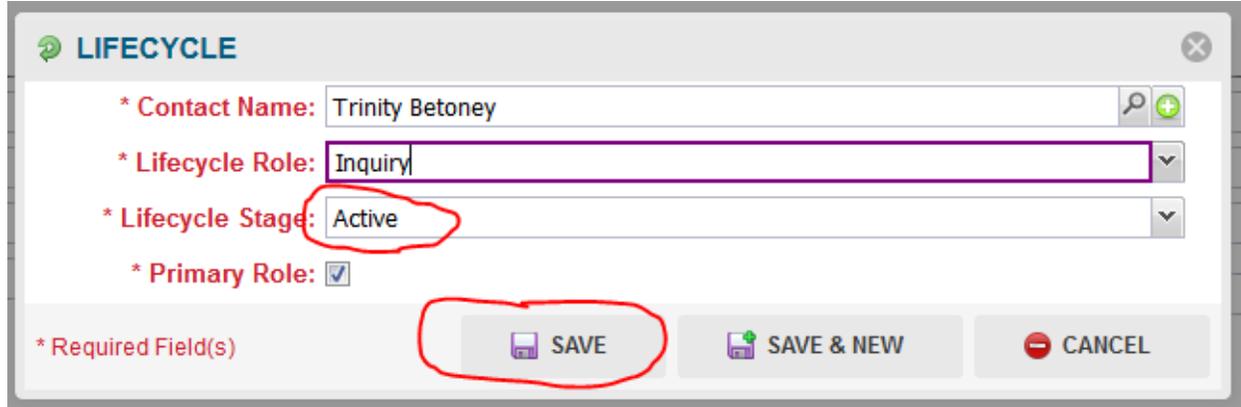


The screenshot shows the 'LIFECYCLE' form with the following fields and values:

- * Contact Name: Trinity Betoney
- * Lifecycle Role: (dropdown menu open, showing options: Lead, Inquiry, Applicant, Decision, Enrolled, HS Counselor, Special Student, Advisor)
- * Lifecycle Stage: Lead
- * Primary Role: Inquiry

The dropdown menu for Lifecycle Role is open, and the 'Inquiry' option is highlighted. The 'Primary Role' field is also checked.

- 4) Look for the LIFECYCLE STAGE field. The field should be ACTIVE. If ACTIVE is not there, CLICK on the DOWN ARROW to reveal the choices. Click or Select ACTIVE from the drop down.
CLICK on SAVE before exiting the field.



The screenshot shows the 'LIFECYCLE' form with the following fields and values:

- * Contact Name: Trinity Betoney
- * Lifecycle Role: Inquiry
- * Lifecycle Stage: Active
- * Primary Role:

The 'Active' option is selected in the Lifecycle Stage dropdown. The 'SAVE' button is highlighted.

- 5) Go back to the TOP and CLICK on SAVE to exit edit mode.



The screenshot shows the top of the 'LIFECYCLE' form with the following fields and values:

- TRINITY BETONEY
- Save
- Cancel

The 'Save' button is highlighted.