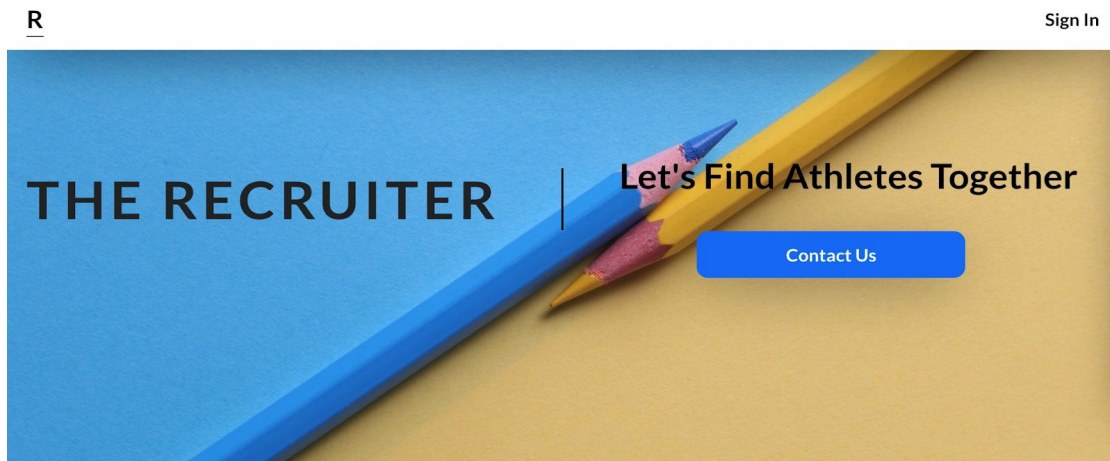


INSTRUCTIONS

1. Home Page



Record

High customizable templates for athlete related information.



Share

Share data of candidates to assistants or the whole recruiting team.



Trace

Trace progress of individual athlete and recruiting funnel.

- a. Click **Sign In**.
 - b. Sign in using these credentials:
 - i. Username: user1
 - ii. Password: Password1!
 - c. Alternatively, create your own account by clicking **Sign up** and use that account to sign in. This requires a valid email address because it will send you a verification code to complete sign up.
2. [Dashboard](#)
- a. Recruiting Funnel section displays the number of athletes in different recruiting funnel statuses graphically.

3. [Recruits](#)

R

Dashboard Recruits Coaches Teams

Log Out

Recruits

Add New +

First Name

Last Name

Age

Position

From To

Filter by Position ▼

Search

Reset

First Name ▼	Last Name ▼	Status ▼	DOB ▼	Height ▼	Position ▼	School ▼	Phone ▼	Email ▼		
Michael	Jordan	Warm	2/17/1963		Shooting Guard	Corvallis High School	222-212-3569	michael.jordan@gmail.com	<div>View</div>	<div>Edit</div>
John	Smith	Cold	3/19/2001	6'9"	Center	Crescent Valley High School	503-888-5555	jsmith@gmail.com	<div>View</div>	<div>Edit</div>
Dwieht	Shrute	Warm	6/9/2004	6'2"	Point Guard	Corvallis High School	541-737-...	dwieht@aol.com	<div>View</div>	<div>Edit</div>

- Search for a recruit.
 - Try First Name John. Click **Search**.
 - Try Last Name Knowles. Click **Search**.
 - Try Age From 14 To 17. Click **Search**.
 - Filter by position. Try Point Guard. Click **Search**.
- Reset search filter.
 - Click **Reset**.
- View recruit.
 - Click on **View** for any recruit.
 - Try Michael Jordan
 - View recruit's information in the following tabs:
 - Personal Information**
 - Phone number
 - Email
 - Birthday
 - Address
 - Financial aid application status
 - Parent/Guardian
 - Click on **Quick Add** to add a parent/guardian
 - Select an existing name or select Other to enter a new name then click **Add**
 - Click on the **red X** next to a name to remove the parent/guardian
 - Schools and Clubs**
 - Current school and coaches

- b. Current club(s) and coaches
- c. Click on the coach's name to view more information about them
- d. Click **Quick Add** to add this recruit to another club
 - i. Choose a club from the list and click **Add**
 - ii. If club is not present
 - 1. Scroll to bottom of dropdown list and select **Other...**
 - 2. Fill out the form to create a new club team.
 - 3. Alert will show up to confirm new addition. The new club will be now present on the recruit's profile
- e. Click the red circular **x** to quickly remove a club from the recruit's profile.
 - i. A popup alert will ask you to confirm.

3. Evaluations

- a. View the evaluations for the recruit
- b. Click on any of the dates to expand the evaluation information
- c. Click on **Edit** to make changes to the evaluation
- d. Click on **Delete** to remove the evaluation
- e. Click on **Add New** to add a new evaluation
 - i. Fill out the fields and click **Add**

4. Call Log

- a. View records of past calls
- b. Click **Add New** to add a new call for this recruit.
 - i. Fill out the field and click **Add**.

d. Edit recruit.

- i. If viewing from the Recruits listing page, click on the gray **Edit** button next to the View button. If already viewing the individual recruit's information, click on the blue **Edit** button next to the recruit's name at the top.
- ii. Modify any of the fields and click **Update** at the bottom of the page. Choose some fields that were displayed on the information page (Phone, Email, Address, etc.) to see the updated information.
- iii. Click on **BASIC INFO**, **SCHOOL**, **SOCIAL**, or **RECRUITING** to jump to that section of the form.
- iv. Click **Delete Recruit** to remove this recruit.

- e. Add recruit.
 - i. On the Recruits listing page, click **Add New** at the top next to the Recruits title.
 - ii. Fill out the form and click **Add Recruit**.
 - iii. You will be directed to the recruit's new profile page. Click through the tabs to find buttons to add various other data such as call logs, evaluations, guardians, etc.

4. [Coaches](#)

- a. Search for a coach.
 - i. Try First Name Carter. Click **Search**.
 - ii. Try Last Name Pip. Click **Search**.
 - iii. Try Clubs Anchorage Club. Click **Search**.
 - iv. Try Schools Lincoln High School. Click **Search**.
- b. Reset search filter.
 - i. Click **Reset**.
- c. View coach.
 - i. Click on **View** for any coach.
 - 1. Try Carter Pip
 - ii. View coach's information in the following sections:
 - 1. Schools**
 - a. Current school name
 - b. School address
 - c. Click **Quick Add** to add this coach to another school
 - i. Choose a school from the list and click **Add**
 - ii. If school is not present (See images below)
 - 1. Scroll to bottom of dropdown list and select **Other...**
 - 2. Fill out the form to create a new school team.
 - 3. Alert will show up to confirm new addition. The new school will be now present on the coach's profile

c.ii.1

c.ii.2

c.iii.3

Schools Cancel

School: Select a School

Add

Corvallis High School

Crescent Valley High School

Lincoln High School

Linn Benton Community College

Oregon State University

University of Michigan

Corvallis High School

Strawberry Mansion High School

MLK High School

Other...

Coach Carter Clarence Pip, III Edit

School has been added!

Schools Quick Add + OK

School: Other...

Team Name: Timberwolves

School Name: MLK High School

Address Line 1: 321 Green Street

Address Line 2:

City: Corvallis

State: Oregon

Zip Code: 83129

Add

Coach Carter Clarence Pip, III Edit

Schools Quick Add +

Knights

Strawberry Mansion High School

1200 Girard Avenue

Philadelphia, PA, 19122

Timberwolves

MLK High School

321 Green Street

Corvallis, OR, 83129

- d. Click the red circular **x** to quickly remove a school from the coach's profile.
 - i. A popup alert will ask you to confirm.

2. Clubs

- a. Current club name
- b. Club address
- c. Click **Quick Add** to add this coach to another club
 - i. If club is not present:
 1. Scroll to bottom of dropdown list and select **Other...**
 2. Fill out the form to create a new club team.
 3. Alert will show up to confirm new addition. The new club will be now present on the coach's profile.
- d. Click the red circular **x** to quickly remove a club from the coach's profile.
 - i. A popup alert will ask you to confirm.
- d. Edit coach.
 - i. If viewing from the coach listing page, click on the gray **Edit** button next to the View button. If already viewing the individual coach's information, click on the blue **Edit** button next to the coach's name at the top.
 - ii. If viewing the individual coach's information, click on the red X button next to the club/school information to delete related school / club. Click on the blue **Quick Add** button to add school/club

- iii. Modify any of the fields and click **Update** at the bottom of the page. Choose some fields that were displayed on the information page (First Name, Middle Name, Last Name, etc.) to see the updated information.
 - iv. Click **Delete Coach** to remove this coach.
 - e. Add coach.
 - i. On the Coach listing page, click **Add New** at the top next to the Coaches title.
 - ii. Fill out the form and click **Submit**.
 - iii. You will be directed to the coach's new profile. Use the **Quick Add** buttons to add club and school teams to the coach.

5. [Teams](#)

R
Dashboard
Recruits
Coaches
Teams
Log Out

Teams
Add New Team +

Type

Select a Team Type ▼

Team Name

Organization

Search
Reset

Type ▼	Team Name ▼	Organization ▼	City ▼	State ▼	Zipcode ▼	
Club	Anchorage Huskies	Anchorage Club	San Diego	CA	92101	<div style="background-color: #007bff; color: white; padding: 2px 10px; border-radius: 4px;">View</div> <div style="background-color: #6c757d; color: white; padding: 2px 10px; border-radius: 4px; margin-left: 5px;">Edit</div>
Club	San Diego Suns	San Diego Club	San Diego	CA	92101	<div style="background-color: #007bff; color: white; padding: 2px 10px; border-radius: 4px;">View</div> <div style="background-color: #6c757d; color: white; padding: 2px 10px; border-radius: 4px; margin-left: 5px;">Edit</div>
School	Spartans	Corvallis High School	Corvallis	OR	97330	<div style="background-color: #007bff; color: white; padding: 2px 10px; border-radius: 4px;">View</div> <div style="background-color: #6c757d; color: white; padding: 2px 10px; border-radius: 4px; margin-left: 5px;">Edit</div>

- a. Search for a team.
 - i. Choose Type Club. Click **Search**.
 - ii. Try Team Name Anchorage Huskies. Click **Search**.
 - iii. Try Organization Anchorage Club. Click **Search**.
- b. Reset search filter.
 - i. Click **Reset**.
- c. View team.
 - i. Click on **View** for any team.
 - 1. Try Anchorage Huskies
 - ii. View team's information in the following sections:
 - 1. **Team**
 - a. Team type
 - b. Team name
 - c. Team address
 - d. Click **Edit** button to edit this team information.

2. Coaches

- a. Current coaches names
 - i. Click a coach to go to their profile
- b. Click **Quick Add** to add another coach to this team
 - i. If coach is not present, scroll to bottom of dropdown list and select **Other...**, then fill out the form to create a coach.
- c. Click the red circular **x** to quickly remove a coach from the team.
 - i. A popup alert will ask you to confirm.

3. Recruits

- a. Current recruits names
 - i. Click a recruit to go to their profile
- b. Click **Quick Add** to add an existing recruit to this team
- c. Remove a recruit from the team
 - i. If the team is a club: click the red circular **x** next to the recruit's name
 - ii. If the team is a school: click the **Edit** button next to the recruit's name and update the school in the recruit's profile
- d. Edit Teams.
 - i. If viewing from the team listing page, click on the gray **Edit** button next to the View button. If already viewing the individual team's information, click on the blue **Edit** button next to the team's name at the top.
 - ii. If viewing the individual team's information, click on the red X button next to the coach/recruit information to delete related coach/recruit. Click on the blue **Quick Add** button to add coach/recruit.
 - iii. Modify any of the fields and click **Update** at the bottom of the page. Choose some fields that were displayed on the information page (Name, Type, Address, etc.) to see the updated information.
 - iv. Click **Delete Team** to remove this team.
- e. Add team.
 - i. On the Team listing page, click **Add New** at the top next to the Teams title.
 - ii. Fill out the form and click **Add**.

- iii. You will be directed to the team's new profile page. Use the **Quick Add** buttons to add recruits and coaches to the team.

6. Logout

- a. Click on **Log Out** at the top right corner of the page.
- b. This logs the user out and redirects them to the home page.
- c. Click Sign In again (or navigate to any of the links above in steps 3-6) and it should prompt the user to sign in again.