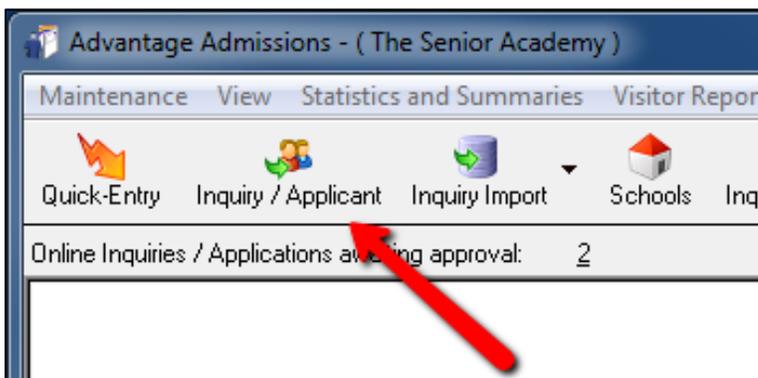


## Quick Reference: Linking an Inquiry/Applicant record to a Constituent record

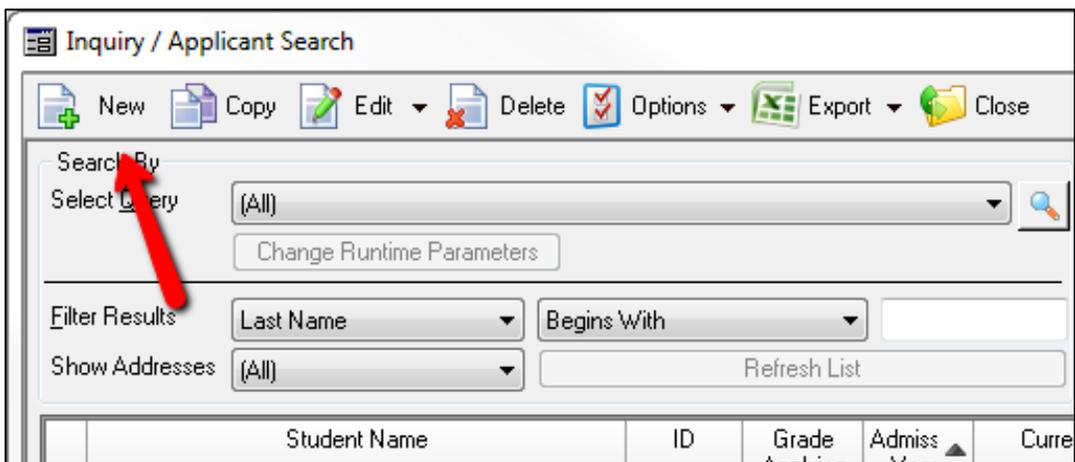
If you are creating a new Inquiry/Applicant record in the Admissions application, and the Inquiry/Applicant record has a relationship to an existing Constituent record, you will want to link the two records during the Inquiry/Applicant setup process.

### To link an Inquiry/Applicant record to a Constituent record:

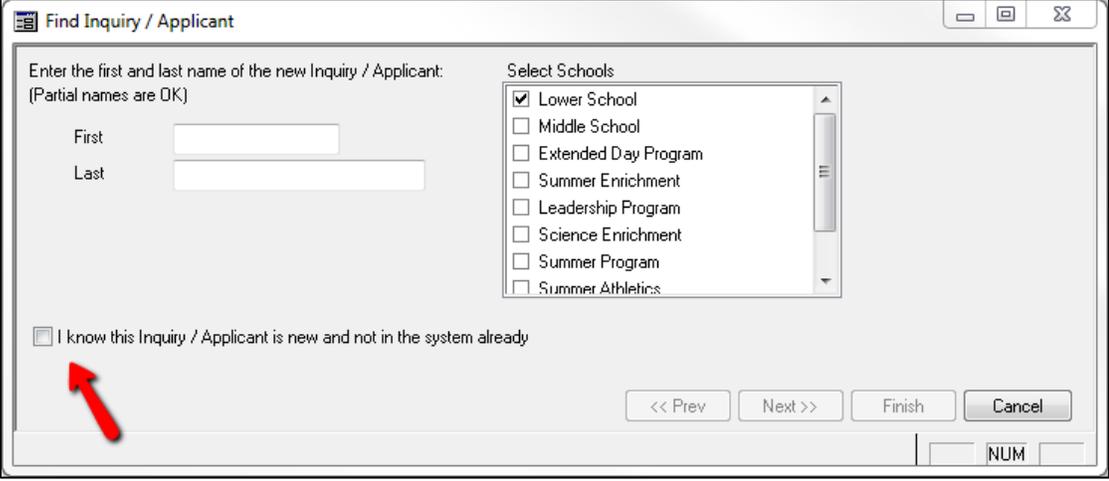
1. In the Admissions application, click the **Inquiry/Applicant** icon.



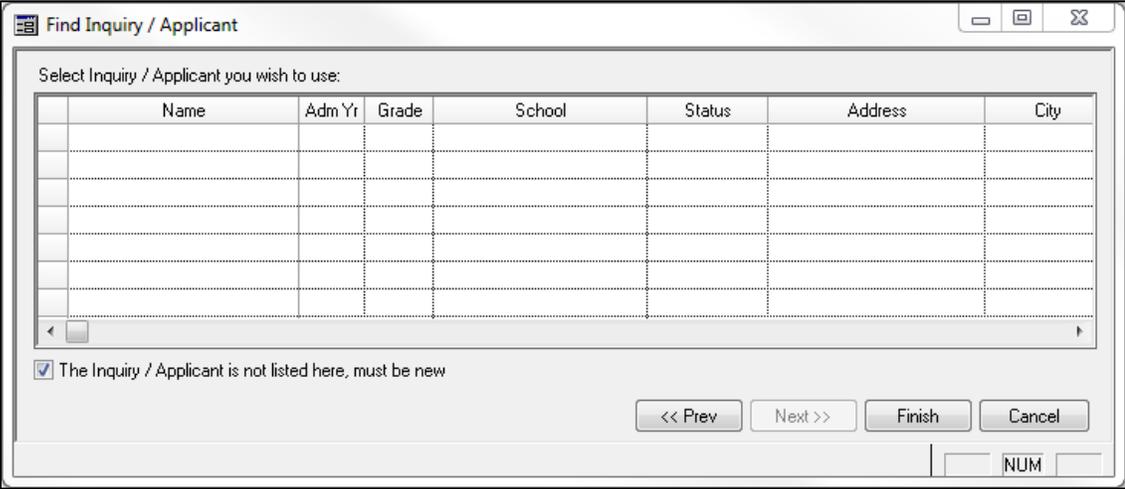
2. On the Inquiry/Applicant Search screen, click **New**.



- On the Find Inquiry/Application screen, uncheck the **I know this Inquiry / Application is new and is not in the systems already** checkbox. Then click **Next>>**.

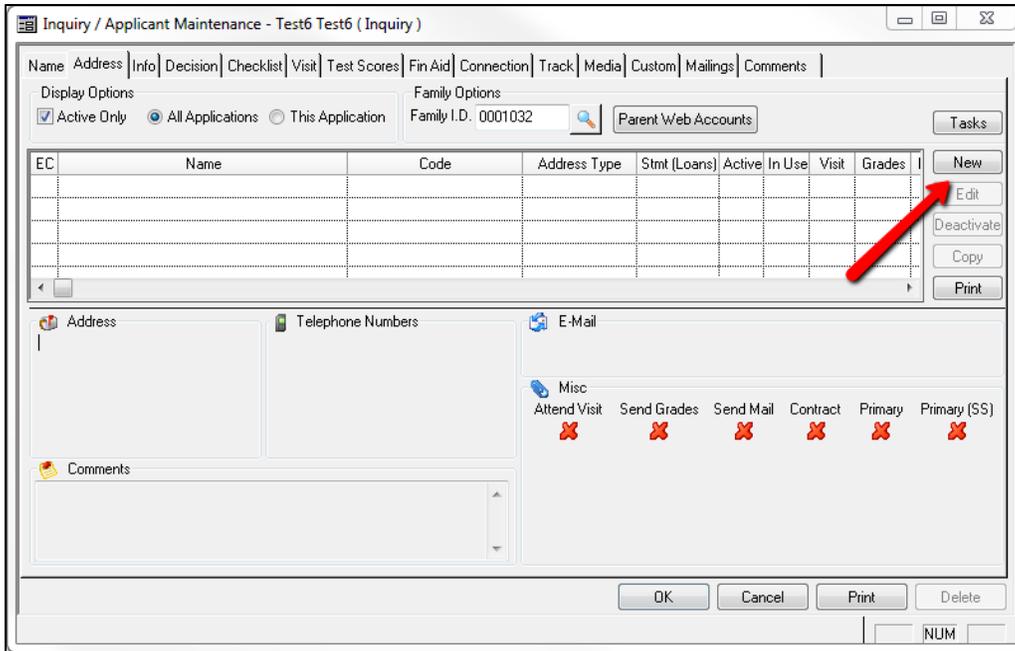


- On the next screen, ensure that the **The Inquiry/Application is not listed here, must be new** checkbox is selected and click **Finish**. The Inquiry/Applicant Maintenance screen appears.

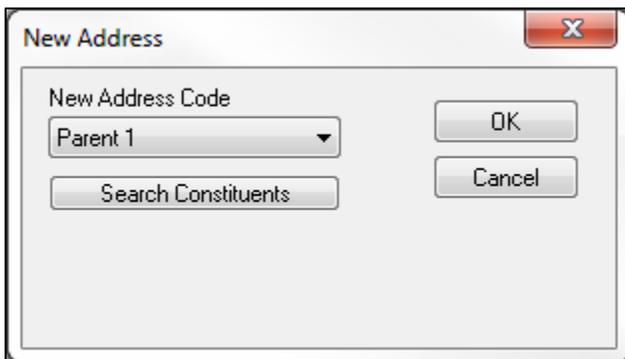


Name	Adm Yr	Grade	School	Status	Address	City

- On the Inquiry/Applicant Maintenance screen, click the **Address** tab and click the **New** button.



- On the New Address screen, select **Parent 1** and then click **Search Constituents**.



- The Constituent Address Search screen appears. Search for the Constituent that is related to the Inquiry/Applicant and click **OK**.

**Constituent Address Search**

Search For:  
 Last Name (Sort Key) TESTE Begins With 

Sort By:  Last Name  I.D.  
 Sort Order:  Ascending  Descending

Name	Code	Active	Address Type	I.D.	Primary	AP	SL	RG	AL	AD
Mr. and Mrs. Art	Z	Y	Home	007762	N	N	N	N	Y	N
Mr. Donnell	CM	Y	Home	007915	Y	N	N	N	Y	N
Mr. and Mrs. Kirby	Z	Y	Home	007761	N	N	N	N	Y	N
Mr. and Mrs. Kirby	CM	Y	Home	007761	Y	N	N	N	Y	N
Mr. and Mrs. Peyton	CM	Y	Home	000552	Y	N	N	N	Y	N
Mr. and Mrs. Peyton	Z	Y	Home	000552	N	N	N	N	Y	N
Dr. Leonel	CM	Y	Home	004002	Y	N	N	N	Y	N
Mr. and Mrs. Dandre	CM	Y	Home	007872	Y	N	N	N	Y	N
Mr. and Mrs. Dandre	Z	Y	Home	007872	N	N	N	N	Y	N

4925 Ridgeside Dr.  
 Kent, MA 02158

Tel No: 617-555-2166  
 Fax No:  
 E-Mail: acker@senior-systems.com  
 Billing: A/R: Loans:  
 Send Grades: No  
 Send Mail: Yes

- Once you select the Constituent record, the Constituent information that you have selected appears on the New Address screen. Click **OK**.

**New Address**

New Address Code  
Parent 1

Constituent I.D. 007761 - Constituent Main  
 Mr. and Mrs. Kirby

9. Review the information in the Constituent record and click **OK**.

Address Maintenance - ( Test6 Test6 )

Parent/Guardian | Address | General | Comments

Father / Name 1

Title: Mr. (dropdown)  
 First: Kirby  
 Middle:   
 Last:   
 Suffix: (dropdown)  
 Preferred: Kirby  
 Relation: (dropdown)  
 SSN:   
 Full Name: Mr. & Mrs. Kirby (dropdown)  Custody

Mother / Name 2

Title: Mrs. (dropdown)  
 First: Tyler  
 Middle:   
 Last:   
 Suffix: (dropdown)  
 Preferred:   
 Relation: (dropdown)  
 SSN:   
 Parent 1

OK Cancel Delete

10. The Constituent information selected appears in the Inquiry/Applicant's Address tab.

Inquiry / Applicant Maintenance - Test6 Test6 ( Inquiry )

Name | Address | Info | Decision | Checklist | Visit | Test Scores | Fin Aid | Connection | Track | Media | Custom | Mailings | Comments

Display Options:  Active Only  All Applications  This Application  
 Family Options: Family I.D. 0001032

EC	Name	Code	Address Type	Stmnt (Loans)	Active	In Use	Visit	Grades
	<b>Mr. &amp; Mrs. Kirby</b>	<b>Parent 1</b>	<b>Home</b>	<b>Original</b>	✓	✓	✓	✓

Address: 6338 Park Lane, Kent, MA 02158, Kirby

Telephone Numbers: Tel No: 617-555-9391, Fax No: 617-555-3377, Dad's Cell: 617-555-4906

E-Mail: Father: acker@senior-systems.com, Mother:   
 Misc: Attend Visit (✓), Send Grades (✓), Send Mail (✓), Contract (✗), Primary (✓), Primary (SS) (✗)

Linked to: 2 new unlinked. Mr. Kirby (007761), Mrs. Tyler (011530)

OK Cancel Print Delete NUM