

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.

🗐 Inquiry / Appli	cant Search				
🔒 New 🗎	Copy 📝 Edit 👻 📄 Delete 🔰	Options 👻	Export	- 🌮	Close
Search By					
Select 🔔 ery	(All)				- 🔍
	Change Runtime Parameters				
<u>Filter</u> Results	Last Name 💌 Begins V	With	•		
Show Addresses	(All) •		Refresh List		
	Student Name	ID	Grade /	Admiss 🔺	Curre



3. 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>>.

Find Inquiry / Applicant		
Enter the first and last name of the new Inquiry / Applicant: (Partial names are DK) First Last	Select Schools Image: Constraint of the school Middle School Extended Day Program Summer Enrichment Leadership Program Science Enrichment Summer Program Summer Program Summer Athletics	
I know this Inquiry / Applicant is new and not in the system a	siready << Prev Next >>	Finish Cancel

4. 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.

== F	Find Inquiry / Applicant						
S	elect Inquiry / Applicant you wish	to use:					
	Name	Adm Yr	Grade	School	Status	Address	City
	•						4
	The Inquiry / Applicant is not list	ed here, m	ust he ne	w			
	,			 C			
					<< Prev	Next >> Finish	Cancel
							NUM



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

ame Address In Display Options Z Active Only	 Decision Checklist Visit Te All Applications	st Scores Fin Aid Connecti Family Options lication Family I.D. 0001(on Track Media 132 <u></u> Pa	Custom Mailings arent Web Accour	Comments	Tasl
	Name	Code	Address Type	Stmt (Loans) Ac	tive In Use Visit	Grades I New Edi Deacti Cop
Address	Telepho	ne Numbers	🗐 E-Mail Nisc Attend Visit Se	end Grades Sen	d Mail Contract	Primary Primary (S

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

New Address	×
New Address Code	OK
Parent 1	Cancel



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

Constituent Address Search												23
Search For: Last Name (Sort Key) Begins With TESTE					Sort B La: I.D	y st Name			() () ()	iort () A:	Drder scen esce	ding nding
Name	Code	Active	Address Type	I.D.		Primary	AR	SL	RG	AL	AD	*
Mr. and Mrs. Art	Z	Y	Home	007762		N	N	Ν	N	Y	Ν	
Mr. Donnell	CM	Y	Home	007915		Y	N	N	Ν	Y	Ν	
Mr. and Mrs. Kirby	Z	Y	Home	007761		N	Ν	Ν	Ν	Y	Ν	
Mr. and Mrs. Kirby	CM	Y	Home	007761		Y	Ν	Ν	Ν	Y	Ν	
Mr. and Mrs. Peyton	CM	Y	Home	000552		Y	Ν	Ν	Ν	Y	Ν	
Mr. and Mrs. Peyton	Z	Y	Home	000552		N	Ν	Ν	Ν	Y	Ν	
Dr. Leonel	CM	Y	Home	004002		Y	Ν	N	Ν	Y	Ν	
Mr. and Mrs. Dandre	CM	Y	Home	007872		Y	Ν	Ν	Ν	Y	Ν	
Mr. and Mrs. Dandre	Z	Y	Home	007872		N	Ν	Ν	Ν	Y	N	*
4925 Ridgeside Dr. Kent, MA 02158			Te Fa E- Se Se	el No: ix No: Mail: Billing: end Grades end Mail:	617-5 A/R: : No Yes	55-2166 acke	er@s	enic Loa	r-sys ins:	tem:	s.con	ı
							0	K			Can	cel

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

New Address	23
New Address Code Parent 1	ОК
Search Constituents	Cancel
Constituent I.D. 007761 - Constituen Mr. and Mrs. Kirby	t Main



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

Father / Name 1	Mothe	er / Name 2	
Title Mr. 👻	Title	Mrs. 👻	
First Kirby	First	Tyler	
Middle	Midd	e	
Last	Last		
Suffix 🗨	Suffix	•	
Preferred Kirby	Prefe	rred	
Relation	▼ Relat	ion	•
SSN	SSN		
Full Name			
Mr. & Mrs. Kirby		•	Custody

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

lame Address Info Decision Display Options V Active Only All Appl	Checklist Visit Technic Visit Visit Visit Visit Technic Visit Visi	est Scores Fin Aid Conne Family Options Dication Family I.D. 000	rction Track Media 3 01032 Ra	Custom Mailir arent Web Acc	ngs Com counts	ments		Tasks
EC Nam	e	Code	Address Type	Stmt (Loans)	Active	n Use Visit	Grades I	New
Mr. & Mrs. Kirby		🎒 Parent 1	Home	Original	v	< <	~	Edit
								Deactiva
								Copy
					+		-	
Address Address Address Address Kant, MA 02158 Kirby Comments	Teleph Tel No: Fax No: Business: Dad's Cell:	one Numbers 617-555-3391 617-555-3377 617-555-4906	S E-Mail Father: Mother: Misc Attend Visit Si Linked to: 2 new unlinked	ac end Grades	<u>sker@ser</u> Send Mai ✔	nior-systems.c Contract X 007761) (011530)	Primary	Primary (SS 🎽
				OK	Cano	cel	Print	Delete