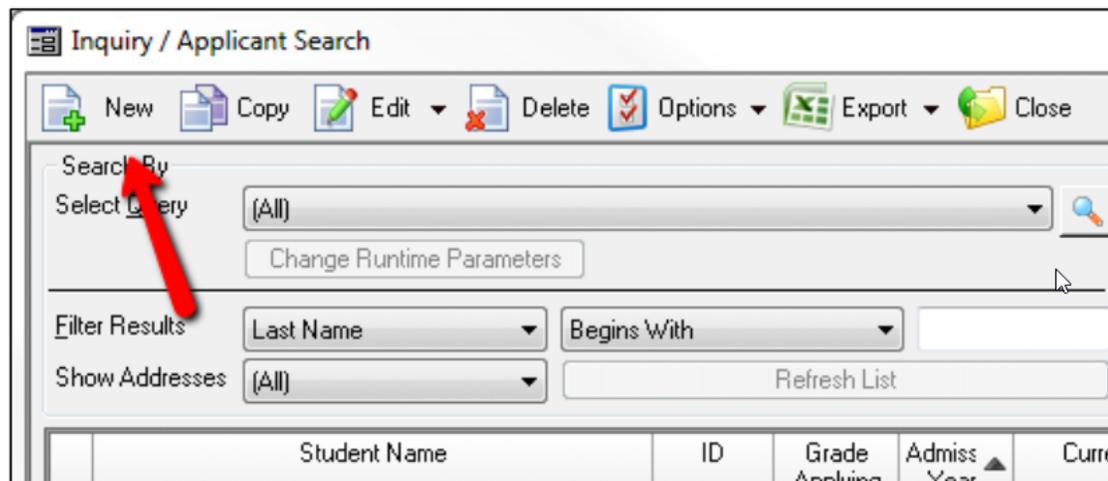
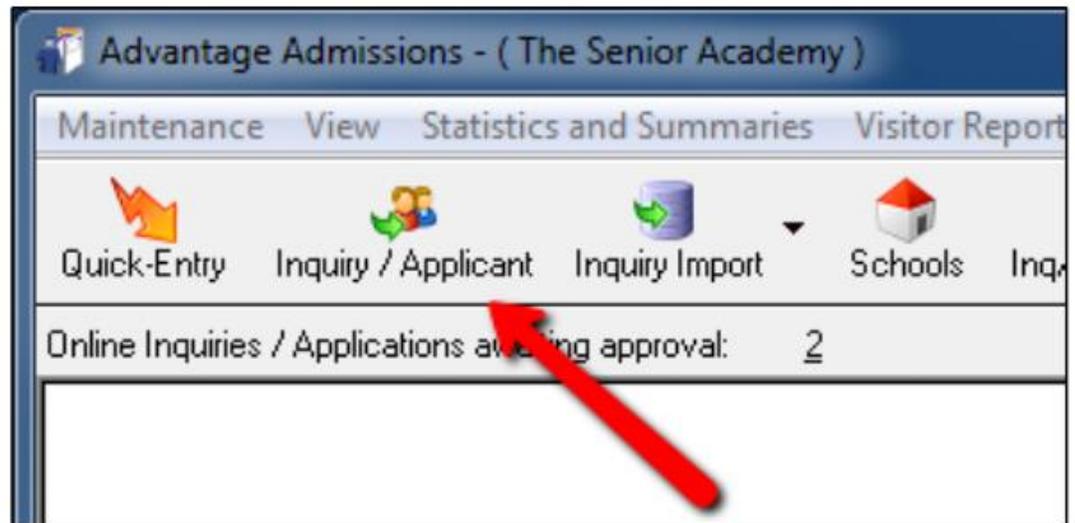


# How do I Link an Inquiry/Applicant record to a Constituent Record

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.

3. On the Find Inquiry/Application screen, uncheck the I know this Inquiry / Application is new and is not in the systems already

Find Inquiry / Applicant

Enter the first and last name of the new Inquiry / Applicant:  
(Partial names are OK)

First

Last

Select Schools

- Lower School
- Middle School
- Extended Day Program
- Summer Enrichment
- Leadership Program
- Science Enrichment
- Summer Program
- Summer Athletics

I know this Inquiry / Applicant is new and not in the system already

<< Prev   Next >>   Finish   Cancel

NUM

Find Inquiry / Applicant

Select Inquiry / Applicant you wish to use:

Name	Adm Yr	Grade	School	Status	Address	City

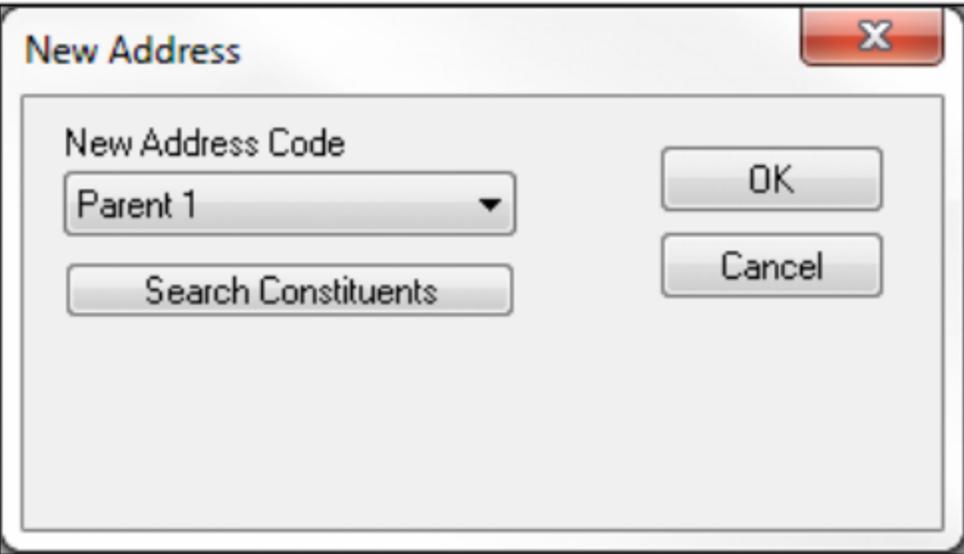
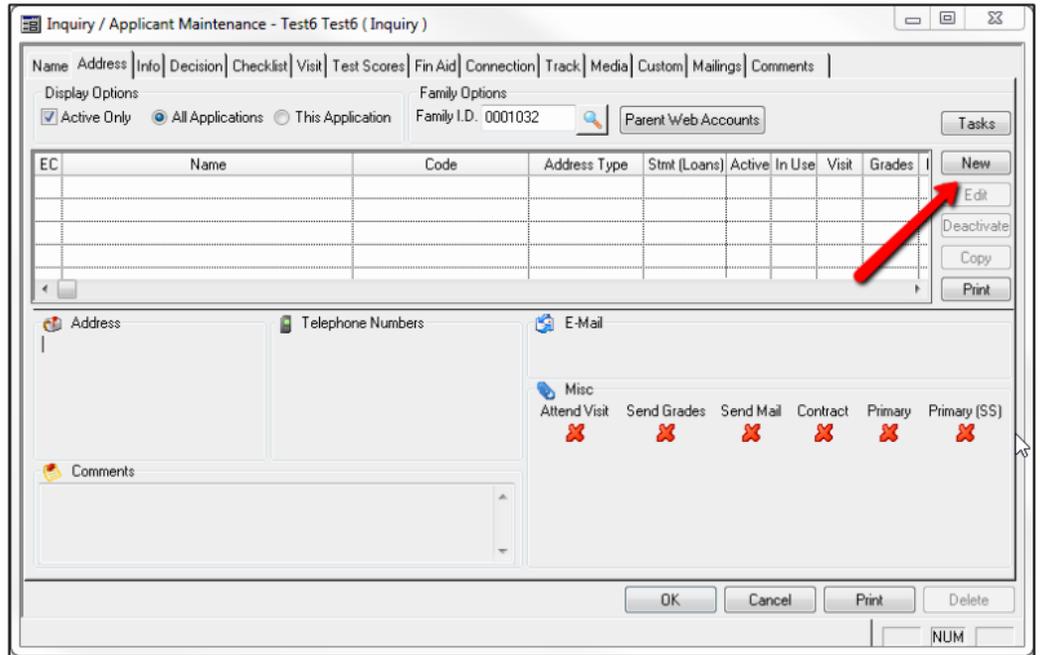
The Inquiry / Applicant is not listed here, must be new

<< Prev   Next >>   Finish   Cancel

NUM

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.

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



6. 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)  Begins With

Sort By:  
 Last Name  
 I.D.

Sort Order:  
 Ascending  
 Descending

Name	Code	Active	Address Type	I.D.	Primary	AR	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

OK Cancel

- 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

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

- Review the information in the Constituent record and click OK.

Address Maintenance - ( Test6 Test6 )

Parent/Guardian | Address | General | Comments

Father / Name 1

Title:

First:

Middle:

Last:

Suffix:

Preferred:

Relation:

SSN:

Mother / Name 2

Title:

First:

Middle:

Last:

Suffix:

Preferred:

Relation:

SSN:

Full Name:   Custody

Parent 1

OK Cancel Delete

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  Tasks

EC	Name	Code	Address Type	Stmt (Loans)	Active	In Use	Visit	Grades
	Mr. & Mrs. Kirby	Parent 1	Home	Original	✓	✓	✓	✓

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

Telephone Numbers: Tel No: 617-555-9391, Fax No: , Business: 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: Mr. Kirby (007761), Mrs. Tyler (011530), 2 new unlinked

OK Cancel Print Delete

NUM

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