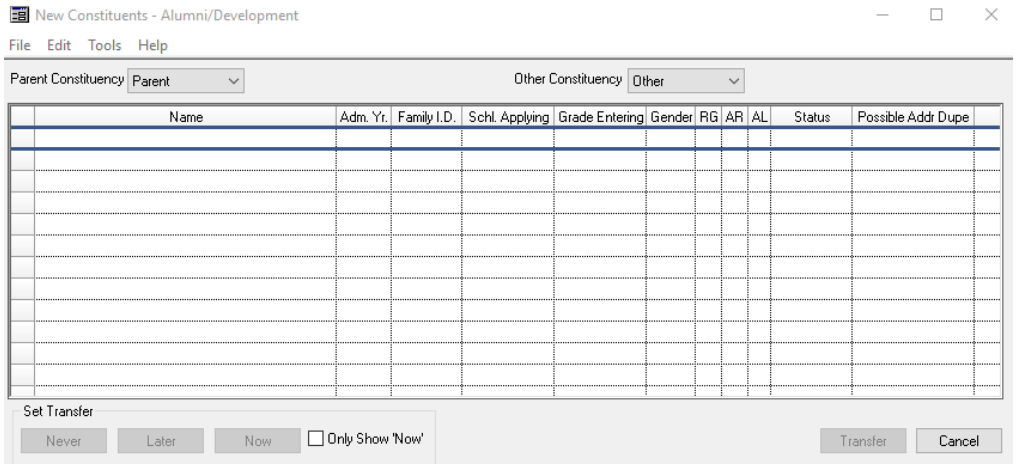
How do I bring in new families?

Go to Maintenance. New Families. New Families window will open.

At top left choose the parent constituency. If you see Student or Other with a drop down menu that means your school brings students in as constituents and other means Grandparents come in upon the child entry to school If a child is never coming or needs to be held for later you can highlight them and click on the Later or Never button.



Click Transfer.

NOTE: You may get notification windows about salutations. Click OK through all of them. It will not have an affect on the new records generating.

Relationship Mapping Section (2nd section).

You will set up the relations to constituents.

First section – leave as is unless you are a girls school

Second Section – Parent relations- use child relationships

Third Section – Other relations (grandparents) -- use grandchild relationships

Once done click ok. All the families will transfer in as constituents. If you get an error on a student, call Senior Systems immediately or set the child to LATER and continue tranferring. You can then call us and we'll assist.