Denbigh Administration
Enrolment Enquiries Manual
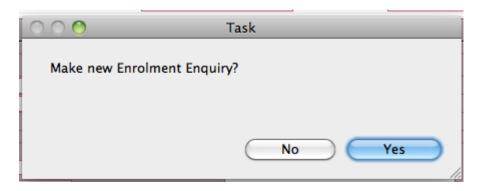
Enrolment Enquiries

From the Main Menu - Click on Enrolment Enquiries

Make new Enrolment Enquiry

Click Yes to enter a new Enrolment Enquiry

Enter the Enquirer's details
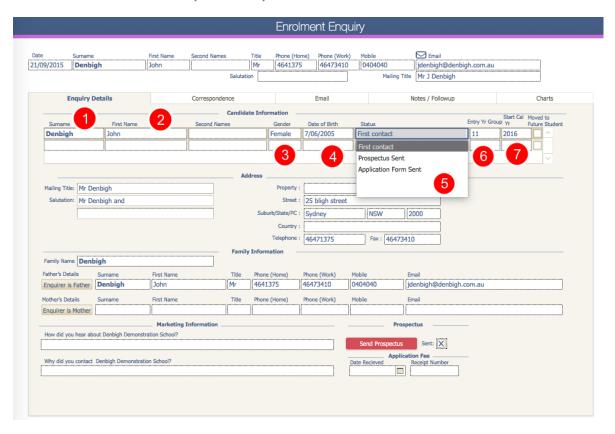

Enter the details of the person making the enquiry. Defaults to today's date.
1. Surname
2. First Name
3. Second Name (if applicable)
4. Title
5. Home Phone
6. Work Phone
7. Mobile Number
8. Email address.
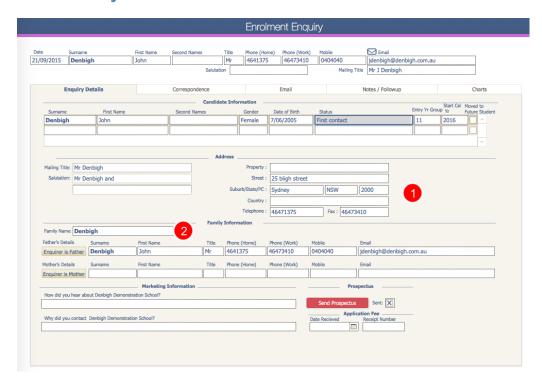The Salutation and Mailing Title Fields are created automatically.

Enter the Candidates (Student) Details

1. Surname
2. First Name
3. Gender (drop down list)
4. Date of Birth
5. Choose from First contact, Prospectus Sent or Application Form Sent
6. Enter the year group the student will commence
7. Enter the Calendar year of commencement

Enter the Family Address

Enter the Family address and Family name.

Enter the Mother and Father's Details

If the person making the enquiry is the Mother or Father, just click "Enquirer is …" and it will copy the details to the appropriate Fields.

Send Prospectus

Click the "Send Prospectus" button to create the correspondences to send the Prospectus.

Correspondence to the Enquirer

Correspondence can be sent to the family either as a letter or via eMail. Click the "New Letter to Enquirer" button.

Correspondence - Template type

The Enquirer's details will be added to the letter. Choose the type of letter to be created.

Correspondence - Letter Template

Choose the letter template to be used.

Correspondence - Sign off and Signatory

Click the drop down lists to choose the Sign off, Signatory and the Position.

Correspondence - Choose Signature

Signatures can be stored in the Staff file and used in Correspondence.

Correspondence Print

Click the Print Button to Print the letter, save as a PDF or Email.

Prospectus Sent

The Prospectus Check box with fill after the letter has been created.

Correspondence Stored

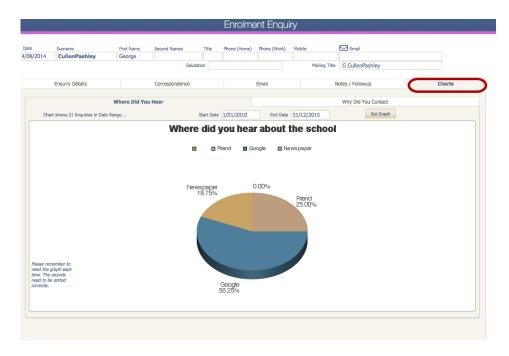The letter is stored under the Correspondence tab, or Email tab if the correspondence was emailed.

Notes/Reminders/Follow-up

To add notes or reminders, click on the "Add Note" or "Add Reminder" buttons respectively. Once the buttons have been pressed the user can then edit the text boxes to have the appropriate texts within it.
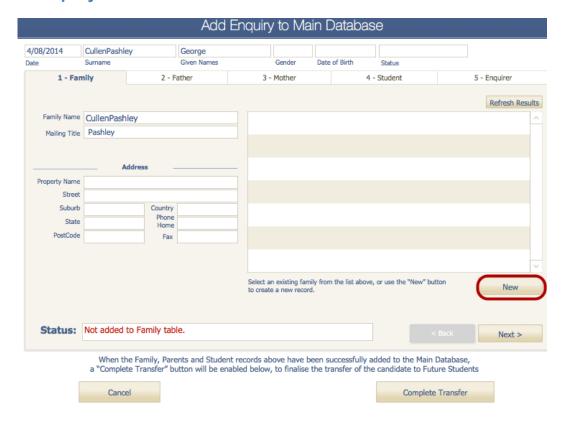
Charts

Enter the date range to check for Marketing details and then click "Set Graph".

Move the Student to Future Students

Find the student to move, then click "Move to Main DB".
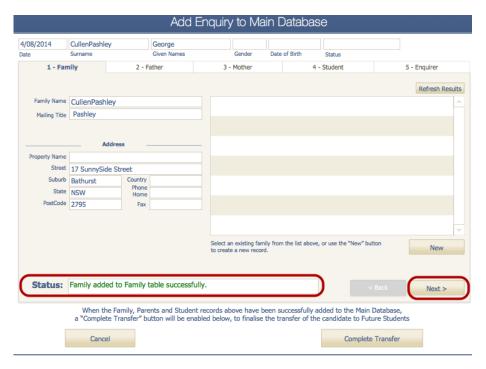
Add Enquiry to Main Database

It will now go through steps to add the family, parents and student to the main database. The system will check for anyone that would already be in the database during this process. If the family exists, click the arrow beside the family, otherwise click the "New" button.
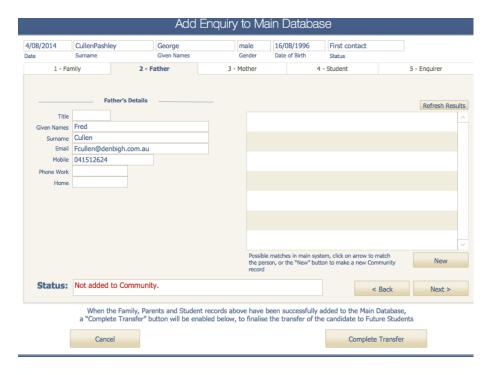
Enrolment Enquiry Family Creation

The family details will be added automatically for the family.

Family Creation

The status will show whether the Family has been added. Press the next button to add the Father and Mother.
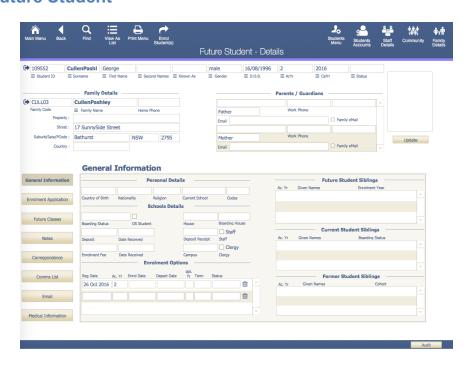
Add Parents to Main Database

Click New to create, or if the person already exists, they will show in the list.

Adding Student

Enter the students name to check if they already exist in the Database. Click New to add the student, or the arrow next to the their name if they already exist.

New Future Student

The student will then be moved to Future Students and the Family created in the Family file. See Adding a Relationship in the Family File (See Creating a Family, adding Students and Parents).