



**SYNERGETIC**  
Management Systems

## Synergetic User Guide

# Community

Version 65

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## Community

The Community module allows you to enter and maintain information about the members of your organisation's community, including:

- students
- teachers
- parents or guardians
- suppliers.

Every member of the Synergetic community database is represented:

- As an individual community member with all of their information. See *Maintaining community members* (on page 8).
- As a member of various constituencies. See *Constituencies* (on page 3).
- In terms of their relationships with other individuals. See *Relations* (on page 4).

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**Note:** **Relationships** represent how one member of the community relates to another. **Constituencies** define how community members relate to your organisation. For example, the community member can be a student, staff member or debtor.

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Most people associated with your organisation are created as community members with a Synergetic ID number. The Synergetic ID number stays with the community member throughout their involvement with your organisation.

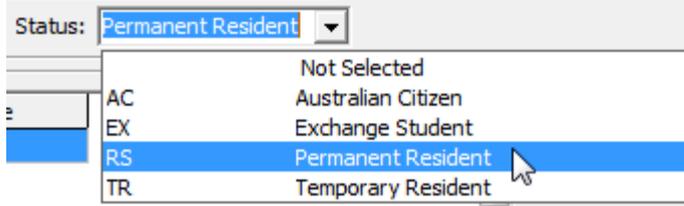
Name and address information is always held with the community member. Other Synergetic applications refer to the contact details held in the community record. If you update a community member's record, the changes made in the community database are applied throughout the Synergetic application.

## What's new to Community

### Version 65

This section outlines changes to the Community manual arising from changes made to Synergetic (versions 64.13-65.19).

**Note:** The look and feel of Synergetic depends on the PC it is running on. The screenshots in this manual use both the version 65 and pre-65 look and feel. You may notice a slight difference in appearance between this manual and Synergetic running at your organisation but the functionality is exactly the same.

Change	More information	See...
New field on the <b>International</b> tab.	<p>You can set a person's citizenship using the <b>Status</b> field on the <b>International</b> tab of Community Maintenance.</p> 	<i>Community Maintenance - International tab</i> (on page 131)
Changes to setting up relationships.	<p>Your organisation may have a policy where certain relations are always contacted by SMS and others always by email.</p> <p>You can set this default behaviour in the <b>luRelationship</b> lookup table, and when new relations or contacts are created their <b>Use SMS</b> and <b>Use Email</b> settings reflect this default.</p>	<i>Community Maintenance - Relations tab</i> (on page 72) <i>Adding new relations - Community</i> (on page 76) <i>luRelationship lookup table</i>
New search ability.	<p>You can search for community members by:</p> <ul style="list-style-type: none"> <li>• surname</li> <li>• maiden name</li> <li>• previous surname</li> <li>• overridden legal surname</li> </ul> <p>in the <b>Surname</b> field of the <b>Set Community Search Criteria</b> window.</p>	<i>Searching for community members</i> (on page 12)

## Constituencies

Constituencies are groups of individuals and companies. Constituencies define how an individual or company relates to your organisation. Because an individual might relate in several ways, they are generally members of many constituencies. For example, they may be a parent, staff member and a debtor.

Two types of constituencies are used in Synergetic:

- Synergetic functions automatically create **Synergetic** constituencies. These are also referred to as **system** constituencies and are generally prefixed with @.
- Users create and maintain **client** constituencies to record parent support groups, auxiliaries, VIP guest lists and similar groups. These are also referred to as **user-defined** constituencies.

Some examples of **Synergetic** constituencies (with their code in brackets) are shown below.

Creditor (@CRD)	Current Parent (@PC)
Debtor (@DEB)	Current Student (@SC)
Enrolment Deposit Contact (@EDC)	Current Staff (@STF)
Enrolment Deposit Student (@EDS)	Donor (@ZDN)

Some examples of **client** constituencies (with their code in brackets) are shown below.

Friends of School (FOS)	Philanthropic Trusts and Foundations (PTF)
Governing Board Members (GOVB)	

**Note:** Do not duplicate Synergetic constituencies when creating and maintaining client constituencies.

**Tip:** Some people are not automatically placed in a constituency. We recommend that you add them to a constituency, for example **Friends of School**.

Use constituencies to maintain and select lists of people you are regularly dealing with. See *Searching for community members* (on page 12).

Constituencies are maintained in the lookup table **luConstituency**, listed in alphabetical code order. See *Maintaining lookup tables* in the System maintenance manual.

## Relations

Use relations to maintain the way in which individuals relate to each other.

Within Synergetic, relationships are represented from the perspective of each individual. For example a father-son relationship is represented as:

- father-son on the father's record
- son-father on the son's record.

Relationships are maintained in the **luRelationships** lookup table, listed in alphabetical order. See *Maintaining lookup tables* in the System maintenance manual.

### Relationship tree



The relationship tree is:

- a graphical representation of relationships:
  - with the selected community member
  - between community members linked to the selected community member.
- available from screens used to maintain aspects of community members, such as debtors.

Use the relationship tree to:

- overview relationships
- select another individual in the community
- add new relationships to selected individuals in the tree
- navigate quickly to individuals in the tree and update their details if required
- delete relationships if required.

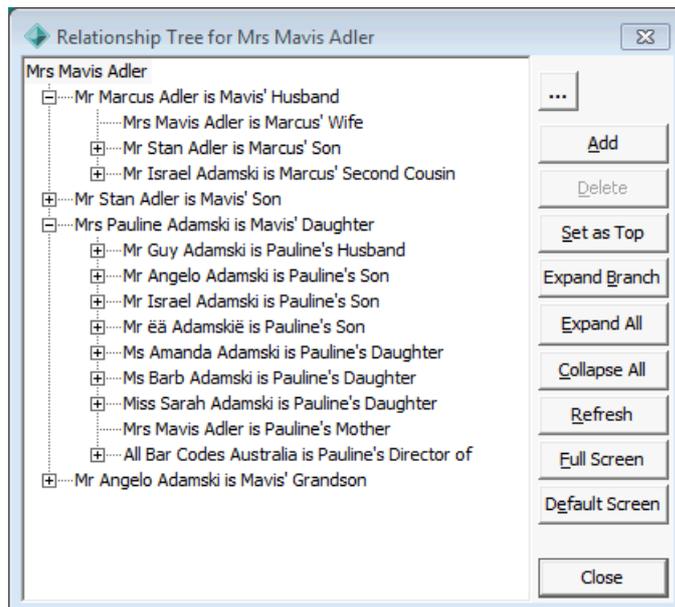
## Opening the Relationship Tree window

To open the **Relationship Tree** window:

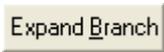
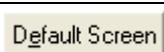
1. Either:

- Click  on the **Community Maintenance** toolbar.
- Select **Action > Generate Relationship Tree** from the main menu when the **Community Maintenance** window is open.
- Press **Ctrl** and **T** when the **Community Maintenance** window is open.

The **Relationship Tree** window is displayed, with the current community member at the top of the tree.



## Relationship Tree buttons

Button	Description
	<p>Launches the <b>Community Maintenance</b> window for the selected community member.</p> <p><b>Tip:</b> You can also double click on the selected record to launch <b>Community Maintenance</b>. See <i>Maintaining community members</i> (on page 8).</p>
	Add a new relationship. See <i>Adding new relations</i> (on page 76).
	Delete the relationships between the selected record and the current community member.
	<p>Move the selected record to the top of the relationship tree.</p> <p><b>Tip:</b> This is useful for quickly looking at the relationships of the selected record.</p>
	<p>Expand the entire branch for the selected record.</p> <p><b>Tip:</b> You can also click on the icon on the tree nodes to expand branches to the next level only.</p>
	<p>Display all relationships by expanding all branches.</p> <p><b>Note:</b> For extensive relationships it is better to expand individual branches, as expanding all can take some time to process.</p>
	Collapse the relationships to display only the key relationships of the person at the top of the tree.
	<p>Refresh the relationship tree from the database.</p> <p><b>Note:</b> This can be necessary to display recently added relationships.</p>
	<p>Display the relationship tree at full screen size, if the relationships are extensive.</p> <p>For example, if grandparents and great grandparents are displayed the tree extends over to the right.</p>
	Return to the default screen size.

## Flipping spouses

Use the **Flip Spouses** icon  to swap the order a couple is listed in.

You might want to flip spouses:

- When a prospective student becomes a future student. The person who initially makes an enquiry is entered as the contact for the prospective student. This is often the mother, and when you enter full details of the student, you may need to make the father the primary person and the mother the spouse. This ensures that mail is addressed to Mr and Mrs, instead of Mrs and Mr.
- To change the primary contact person for a student to the other spouse.
- When the parents separate. You may want to make the mother the primary contact person by flipping the spouses and then splitting them.
- To change the way mail is addressed.
- For past students and their spouses.

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**Note:** You can only flip spouses if you have the correct permissions. See [Group/User Security Maintenance - Groups view](#) in the System maintenance manual.

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For more information about maintaining spouse relationships after a divorce or separation, see:

- *Current Student Maintenance - Contacts tab* in the Current students manual
- *Current Student Maintenance - Legal tab* in the Current students manual.

## Maintaining community members

### How to:

- Search for a community member. See *Searching for community members* (on page 12).
- Create a new community member. See *Creating new community records* (on page 19).
- Create a spouse record. See *Creating a spouse* (on page 29).
- Add a community member to a client constituency. See *Adding a community member to a user-defined constituency* (on page 46).
- Add qualifications. See *Adding qualifications* (on page 61).
- Add relations. See *Adding new relations* (on page 76).
- Delete a community member, including removing links, relationships and user-defined constituencies. See *Deleting community members* (on page 32).

### What you can do:

What you can do...	See...
You can: <ul style="list-style-type: none"> <li>• List all constituencies that the community member is associated with.</li> <li>• Add to a user-defined constituency. Modify and delete from user-defined constituencies.</li> </ul>	<i>Community Maintenance - Constats tab</i> (on page 42)
Maintain personal details.	<i>Community Maintenance - Name tab</i> (on page 54)
Maintain home address details.	<i>Community Maintenance - Home Address tab</i> (on page 140)
Specify postal address details for mailing purposes.	<i>Community Maintenance - Postal Address tab</i> (on page 48)
Maintain home phone and email details.	<i>Community Maintenance - Phone tab</i> (on page 49)
Maintain phone and email details used during business hours.	<i>Community Maintenance - Occupation tab</i> (on page 37)
Specify occupation (work) address details.	<i>Community Maintenance - Occupation Address tab</i> (on page 40)
Maintain summary information about education received and qualifications achieved.	<i>Community Maintenance - Education tab</i> (on page 57)
You can: <ul style="list-style-type: none"> <li>• list qualifications attained from training providers</li> <li>• maintain qualifications.</li> </ul>	<i>Community Maintenance - Qualifications tab</i> (on page 59)
Keep a record of any skills of community members that can be of use to your organisation.	<i>Community Maintenance - Skills tab</i> (on page 62)

What you can do...	See...
Maintain information about: <ul style="list-style-type: none"> <li>• date and country of birth, nationality and language used in birth country</li> <li>• religion and parish</li> <li>• maiden name or suffix</li> <li>• overriding default mail addressing and salutation formats</li> <li>• barcoding and login details used on campus.</li> </ul>	<i>Community Maintenance - Other tab</i> (on page 64)
View and update attributes for the community member.	<i>Community Maintenance - Attributes tab</i> (on page 69)
You can: <ul style="list-style-type: none"> <li>• list close relationships</li> <li>• add new relations</li> <li>• perform functions for the selected relation, including maintaining relationships and details, and communicating with them.</li> </ul>	<i>Community Maintenance - Relations tab</i> (on page 72)
You can: <ul style="list-style-type: none"> <li>• specify whether the community member receives particular types of correspondence</li> <li>• record the death of a community member.</li> </ul>	<i>Community Maintenance - Flags tab</i> (on page 78)
Maintain the methods you use to communicate with the community member.	<i>Community Maintenance - Notify Methods tab</i> (on page 81)
You can: <ul style="list-style-type: none"> <li>• review the events that community members are currently attending</li> <li>• add community members to an existing event and maintain their details.</li> </ul>	<i>Community Maintenance - Current Events tab</i> (on page 90)
Review and update details about past events that the community member has attended.	<i>Community Maintenance - Events tab</i> (on page 101)
Maintain: <ul style="list-style-type: none"> <li>• communications with community members that have yet to be sent</li> <li>• notification methods for the donor or prospect.</li> </ul> Also see <i>Maintaining communications</i> in the Development manual.	<i>Community Maintenance - Current Comms tab</i> (on page 83)
Maintain communications that have been sent to community members. Also see <i>Maintaining communications</i> in the Development manual.	<i>Community Maintenance - Comms tab</i> (on page 88)

What you can do...	See...
Record general and biographical comments.	<i>Community Maintenance - Notes/Bio tab</i> (on page 104)
You can: <ul style="list-style-type: none"> <li>• view the most recent photo</li> <li>• flag what permissions have been received to utilise the photo in your organisation's external communications.</li> </ul>	<i>Community Maintenance - Photo tab</i> (on page 105)
You can: <ul style="list-style-type: none"> <li>• view the community members living at the same household address identifier</li> <li>• create a new address record</li> <li>• move selected community members to another address.</li> </ul>	<i>Community Maintenance - Household tab</i> (on page 107)
You can: <ul style="list-style-type: none"> <li>• list vehicles and add a new vehicle</li> <li>• allocate parking spaces for vehicles used by your organisation.</li> </ul>	<i>Community Maintenance - Vehicles tab</i> (on page 110)
You can: <ul style="list-style-type: none"> <li>• maintain existing loans</li> <li>• create new loans</li> <li>• maintain bookings for planned lending of objects</li> <li>• create new bookings.</li> </ul>	<i>Community Maintenance - Objects tab</i> (on page 114)
You can: <ul style="list-style-type: none"> <li>• view sales made to a community member</li> <li>• reprint the sales docket for a previous sale.</li> </ul>	<i>Community Maintenance - Sales tab</i> (on page 120)
Maintain keys allocated to community members.	<i>Community Maintenance - Keys tab</i> (on page 112)
View the audit trail of community information, including name and address details.	<i>Community Maintenance - Maint tab</i> (on page 130)
Define your own tabs or programs within Synergetic.	<i>Community Maintenance - User Forms tab</i> (on page 128)
Maintain documents, pictures and spreadsheets.	<i>Community Maintenance - DocMan tab</i> (on page 123)
Maintain visa and passport information.	<i>Community Maintenance - International tab</i> (on page 131)

What you can do...	See...
You can: <ul style="list-style-type: none"><li>• view communications sent to the community member by email, post and SMS</li><li>• view attachments of emails sent to the community member</li><li>• view documents uploaded to the community member's <b>DocMan</b> tab</li><li>• import emails from Microsoft Outlook by dragging and dropping.</li></ul>	<i>Community Maintenance - Correspondence tab</i> (on page 146)
Maintain company contact details for a company record type.	<i>Community Maintenance - Company tab</i> (on page 138)
Maintain company addresses for a company record type.	<i>Community Maintenance - Company Address tab</i> (on page 143)

## Searching for community members

Use the **Set Community Search Criteria** window to search for existing community members.

See *Searching* in the Introduction manual for details on how to use the search tools.

You can access **Community Maintenance**:

- From every main menu (except **General Ledger** and **Sales**). For example, by selecting **Module > Students > Community Maintenance**.



- Using the **Community** icon  on the main menu.
- Launching into it from within another application.

## Setting search criteria - Set Community Search Criteria

In the **Set Community Search Criteria** window:

- select the tab you require
- type in the information you know about the community member.

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**Note:** The tabs displayed depend on your user security privileges.

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Selections are filtered using AND criteria, so the more selections you use, the more specific the search. For example, if you enter **Smith** and **Williamstown**, Synergetic will only return records for community members who are named Smith AND who live in Williamstown. Enter less information to return a group of people, or use specific information to search for individuals.

## Opening the Set Community Search Criteria window

To open the **Set Community Search Criteria** window:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



X
Set Community Search Criteria

General
Giving
Prospect Tracking
Communications/Events
Past Students
Skills & Qualifications
Other

**Personal**

ID: <input type="text"/>	<input type="checkbox"/> Tagged IDs	ID Type: <input type="text"/>
Surname: <input type="text"/>		Surname Sounds Like: <input type="text"/>
Preferred: <input type="text"/>		Given 1: <input type="text"/>
Other Given: <input type="text"/>		Gender: <input type="text"/>
Suburb: <input type="text"/>		Postcode: <input type="text"/>
State: <input type="text"/>		Country: <input type="text"/>
Nationality: <input type="text"/>		
Company: <input type="text"/>		Company Sounds Like: <input type="text"/>
Prev Surname: <input type="text"/>		Prev Surname Sounds Like: <input type="text"/>
Vehicle Reg: <input type="text"/>		Parking Space: <input type="text"/>
Phone Number Contains: <input type="text"/>		Email Address: <input type="text"/>
Deceased: <input type="text"/>		

**Occupation**

Occupation: <input type="text"/>	Occupation Desc: <input type="text"/>
Position: <input type="text"/>	Position Desc: <input type="text"/>
Industry: <input type="text"/>	Industry Desc: <input type="text"/>

**In Constituency**

1: <input type="text"/>	2: <input type="text"/>	
<input type="radio"/> And <input checked="" type="radio"/> Or		
3: <input type="text"/>		

**Not in Constituency**

1: <input type="text"/>	2: <input type="text"/>	
<input type="radio"/> And <input checked="" type="radio"/> Or		
3: <input type="text"/>		

New...
Exclude all Students
OK
Clear
Cancel

## Set Community Search Criteria fields and buttons

### General tab

Area	Description
<b>Personal</b>	<p>Search by community member personal details, including name, address, vehicle, nationality and company details.</p> <p><b>Note:</b> When searching for community records using the <b>Postcode</b> field, Synergetic searches for like records instead of exact matches. For example, if you enter <b>3</b> in the postcode field, Synergetic returns records that have postcodes starting with <b>3</b>.</p>
<b>Occupation</b>	Search by community member occupation.
<b>In Constituency</b> <b>Not In Constituency</b>	<p>Search for community members who do or do not belong to a particular constituency. For example search for all community members who are not debtors.</p> <p>See <i>Community Maintenance - Constits tab</i> (on page 42).</p> <p><b>Note:</b> You can search more than one constituency by selecting <b>And</b> or <b>Or</b>.</p>

### Giving tab

Area	Description
<b>Donations</b>	<p>Search for community members who have:</p> <ul style="list-style-type: none"> <li>supported an appeal or made a donation</li> <li>donated a specified amount</li> <li>donated during a specified period.</li> </ul>
<b>Pledges</b>	<p>Search for community members who have:</p> <ul style="list-style-type: none"> <li>made a pledge</li> <li>pledged a specified amount.</li> </ul>
<b>Foundation Basis</b>	<p>Search for community members who have a foundation basis in the selected range, if your organisation has a foundation.</p> <p><b>Note:</b> A foundation basis is the sum of receipts and pledges from the donor. Different types of giving and different funds can contribute to the foundation basis in different proportions. For example, gifts could be 100% and pledges 50%. In kind gifts can lead to the foundation basis being adjusted manually.</p>

**Prospect Tracking tab**

Area	Description
<b>Prospect Tracking</b>	Search for community members who have offered to support your organisation's appeal.
<b>Activity</b>	Search for community members by the activity types on their record.

**Communications/Events tab**

Area	Description
<b>Current Communications</b>	Specialised lists associated with the community member.
<b>Past Communications</b>	Specialised lists associated with the community member.
<b>Current Events</b>	Events the community member is currently attending.
<b>Past Events</b>	Events the community member has attended.

## Past Students tab

Area	Description
<b>Peer Year</b>	Year the student: <ul style="list-style-type: none"> <li>• completed or would have completed their final year of schooling</li> <li>• commenced their studies, if your organisation is a tertiary institution.</li> </ul>
<b>Last Campus</b>	Campus the student attended during their last year.
<b>Last House</b>	House the student belonged to during their last year.
<b>Name at School</b>	Name of the student used at your organisation. <hr/> <p style="text-align: center;"><b>Note:</b> Format should be <b>Surname, Given 1 (Preferred)</b>.</p> <hr/> For example, a past student may have married and changed their name.
<b>Entry Year Level</b>	Year level the student started in at your organisation.
<b>Year Left</b>	Year the student left your organisation.
<b>Last Year Level</b>	Year level the student was in when they left your organisation.
<b>Branch</b>	Branch of the association that the past student is a member of. For example, Life Member Association - UK Branch.
<b>Sub School</b>	Search for students by the sub-school they are grouped into, if applicable. <p>This is used mostly by multi-campus organisations that provide schooling for all year levels at each campus. For example, year levels can be grouped into:</p> <ul style="list-style-type: none"> <li>• junior school</li> <li>• middle school</li> <li>• senior school.</li> </ul> <hr/> <p><b>Warning:</b> Do not add sub-schools by selecting from the right click menu because entries are required in both the <b>luSubSchool</b> and the <b>luYearLevel</b> lookup tables.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;"> <p>Refresh Lookup Table (for active control)</p> <p><span style="color: red;">✘</span> Add New Lookup Table Entry (luSubSchool)...</p> <p>Modify Lookup Table Entry (luSubSchool)...</p> <p>Find Lookup Table Entry (luSubSchool)...</p> </div> <p><a href="#">See luSubSchool and luYearLevel lookup tables in the System maintenance manual.</a></p> <hr/>

**Skills & Qualifications tab**

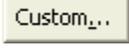
Area	Description
<b>Skill Code</b>	Unique identifier for the skill.  <u>Note: The list of skills is maintained in the <b>luSkill</b> lookup table.</u>
<b>Skill Level</b>	Level of skill attained by the community member.
<b>Attained Date</b>	Date the skill was attained.
<b>Expiry Date</b>	Date the skill expires. For example, a plumber's skill expires by a particular date unless they continue to be recertified.
<b>Qualification Code</b>	Unique code for the qualification.
<b>Qualification Level</b>	Level of the qualification. For example secondary, tertiary.
<b>Training Provider</b>	Organisation providing the training and conferring the qualification.
<b>Major 1-2</b>	Major fields of specialisation.
<b>Minor 1-2</b>	Minor fields of specialisation.
<b>Attained Date</b>	Date the qualification was conferred.
<b>Expected Attainment Year</b>	Year when a partially completed qualification should be completed.

**Other tab**

Area	Description
<b>Notes Contains</b>	Search for community members who have notes containing the word or words in this field.
<b>Any Notes</b>	Select to search for all community members who have notes attached.
<b>Biography Contains</b>	Search for community members who have a biography containing the word or words in this field.
<b>Any Biography</b>	Select to search for all community members who have a biography.
<b>Confidential Contains</b>	Search for community members who have confidential notes containing the word or words in this field.
<b>Any Confidential Notes</b>	Select to search for all community members who have confidential notes attached.
<b>Relationships</b>	Search for community members who have the selected relationship with another community member. You can select up to three relationship types to search by.

## Buttons

The buttons are available from all tabs.

Button	Description
	Create a new community member. See <i>Creating new community records</i> (on page 19).
	Exclude all current and future students from the search.
	Use a custom search form to search for a community member. See <i>Using custom search forms</i> in the Introduction manual.  <a href="#"><u><b>Note:</b> This button is only visible if custom search has been enabled for this module at your organisation.</u></a>

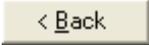
## Creating new community records

To create a new community member:

1. Either:

- click  on the **Set Community Search Criteria** window
- click  on the **Community Maintenance** toolbar
- select **File > New...** from the main menu when **Community Maintenance** is open
- right click on the **Community Selector** grid and select **New...**
- press **Ctrl + N** when **Community Maintenance** is open.

The **Contact Name** data input window is displayed.

2. Use the  and  buttons to move through the data input windows.

Different windows are displayed, depending on your selections on the first window.

---

**Note:** See [Community creation windows \(on page 20\)](#) if you need more information about what to enter when you are creating a new community member.

---

## Community creation windows

To enter information in the community creation windows:

1. Select **File > New**, as part of *Creating new community records* (on page 19).

The **Name** window is displayed first.

**Create New Community Member**

**Name**

Record Type:  Personal  Company  Personal Company

ID:   Use existing ID

Title:

Surname:

Given 1:

Preferred:

Other Given:

Gender:

Date of Birth:

Mail Format:

After pressing [Next >] the computer will search for a match in the community using Surname, First Initial and Gender.

< Back   Next >   Cancel

---

**Note:** The fields on the Personal and Personal Company **Name** windows are identical.

---

2. Select the **Record Type**, if required.

**Create New Community Member**

**Name**

Record Type:  Personal  Company  Personal Company

ID:   Use existing ID

Occupation Description: (Optional)

Company:

Attention: (Optional)

After pressing [Next >] the computer will search for a match in the community using Company.

< Back   Next >   Cancel

---

**Note:** If you selected **Company**, the **Contact Name** window is displayed with different fields.

---

3. Enter the community member's name. The name can be either:

- an individual's
- a company name
- an individual at a company address (personal company).

If the information you enter matches one or more members of the community database, Synergetic displays a window showing possible matches. See *Possible Name Match Found window* (on page 31). Select the matching name, if applicable.

4. Enter other fields, as described in the table below.

5. Click .

The following windows are displayed after the **Name Details** window, depending on the selections made:

- Spouse details, if applicable. See *Spouse Name window* (on page 23).
- Home address details. See *Home Address window* (on page 24).
- Company address details. See *Company Address window* (on page 26).
- Couple relationship. See *Select Couple Relationship window* (on page 27).
- Community member's phone and occupation details. See *Phone/Occupation window* (on page 28).
- Spouse's phone and occupation details, if applicable. See *Phone/Occupation window* (on page 28).

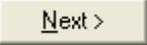
## Create New Community Member - Name window key fields

Field	Description								
<b>Record Type</b>	New community members can be <b>Personal, Company</b> or <b>Personal Company</b> .								
	<table border="1"> <thead> <tr> <th>Selection</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><b>Personal</b></td> <td>An individual person or couple.</td> </tr> <tr> <td><b>Company</b></td> <td>The company is the primary contact. For example: Jackson Holdings Attn: Mr John Roberts</td> </tr> <tr> <td><b>Personal Company</b></td> <td>A company where a person is the primary contact. For example: Mrs Anne Johnson Salbut Enterprises</td> </tr> </tbody> </table>	Selection	Description	<b>Personal</b>	An individual person or couple.	<b>Company</b>	The company is the primary contact. For example: Jackson Holdings Attn: Mr John Roberts	<b>Personal Company</b>	A company where a person is the primary contact. For example: Mrs Anne Johnson Salbut Enterprises
	Selection	Description							
	<b>Personal</b>	An individual person or couple.							
<b>Company</b>	The company is the primary contact. For example: Jackson Holdings Attn: Mr John Roberts								
<b>Personal Company</b>	A company where a person is the primary contact. For example: Mrs Anne Johnson Salbut Enterprises								
<b>ID</b>	Community member's Synergetic ID number.								
<b>Use Existing ID</b>	If the community member already exists, select the <b>Use Existing ID</b> field and enter the community member's Synergetic ID.								
<b>Preferred</b>	Community member's preferred name.  This field is automatically completed with the primary contact's given name. You can type another name if required. For example, if the primary contact's given name is Stephen, you could type Steve.								
<b>Other Given</b>	Community member's other given names.								
<b>Gender</b>	Community member's gender.  In most cases, this field is automatically completed when you select the person's title. In some cases, you need to select their gender. For example, <b>Dr</b> (doctor).								
<b>Date of Birth</b>	Community member's date of birth.								
<b>Mail format</b>	Address format for the community member. For example, whether their initials should be used, or an ampersand (&) instead of 'and'.								

## Create New Community Member - Spouse Name window

The **Spouse Name** window is the same in all modules. The example below shows a typical **Spouse Name** window.

On the **Spouse Name** window:

1. If there is no spouse, leave all fields blanks and click .
 

The **Address Details** window is displayed. See *Home Address window (on page 24)*.
2. If the spouse is an existing community member, either:
  - Type in details you know about them, click  and select the spouse. See *Possible Name Match Found window (on page 31)*.
  - If you know their Synergetic ID, select **Use Existing ID** and type it into the **ID** field.

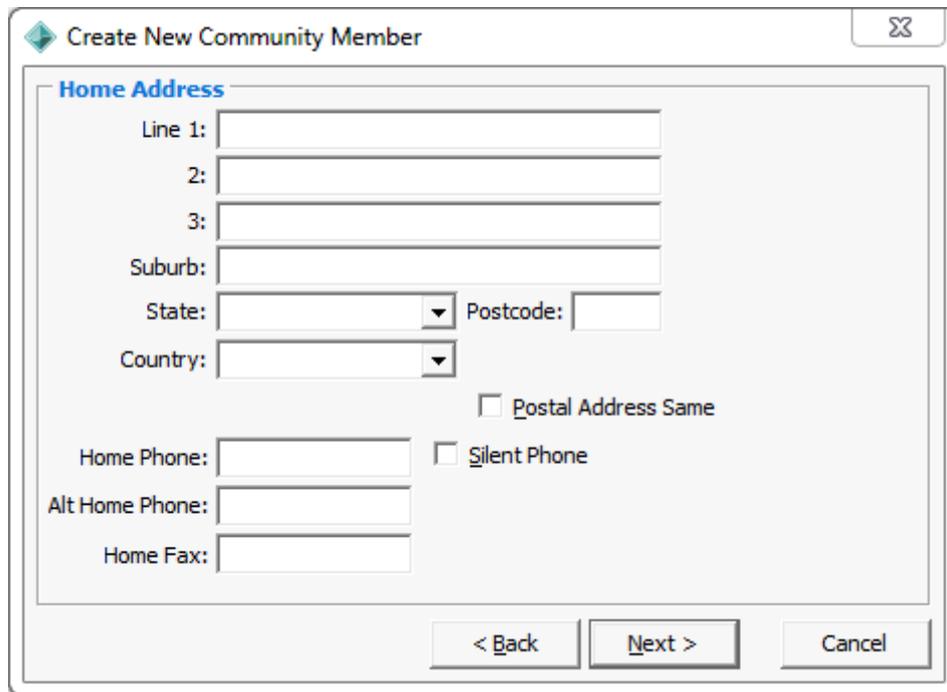
The details of the person are retrieved from the community database.
3. Click .

The following windows are displayed after the **Spouse Name** window, depending on the selections made:

- Address details. See *Home Address window (on page 24)*.
- Couple relationship. See *Select Couple Relationship window (on page 27)*.
- Community member's phone and occupation details. See *Phone/Occupation window (on page 28)*.
- Spouse's phone and occupation details, if applicable. See *Phone/Occupation window (on page 28)*.

## Create New Community Member - Home Address window

The **Home Address** window is the same in all modules. The example below shows a typical **Home Address** window.

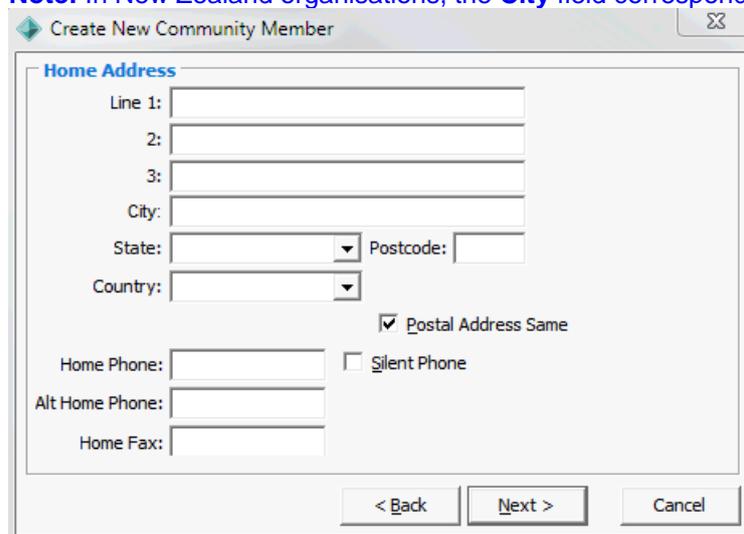


The screenshot shows a window titled "Create New Community Member" with a close button in the top right. The "Home Address" section contains the following fields and options:

- Line 1: [Text Box]
- 2: [Text Box]
- 3: [Text Box]
- Suburb: [Text Box]
- State: [Dropdown Menu] Postcode: [Text Box]
- Country: [Dropdown Menu]
- Postal Address Same
- Home Phone: [Text Box]  Silent Phone
- Alt Home Phone: [Text Box]
- Home Fax: [Text Box]

At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

**Note:** In New Zealand organisations, the **City** field corresponds to the **Suburb** field.



This screenshot is similar to the one above but shows a different configuration for New Zealand organisations. The "Home Address" section contains the following fields and options:

- Line 1: [Text Box]
- 2: [Text Box]
- 3: [Text Box]
- City: [Text Box]
- State: [Dropdown Menu] Postcode: [Text Box]
- Country: [Dropdown Menu]
- Postal Address Same
- Home Phone: [Text Box]  Silent Phone
- Alt Home Phone: [Text Box]
- Home Fax: [Text Box]

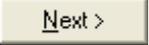
At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

See *SuburbUpperCaseFlag* configuration setting in the System maintenance manual.

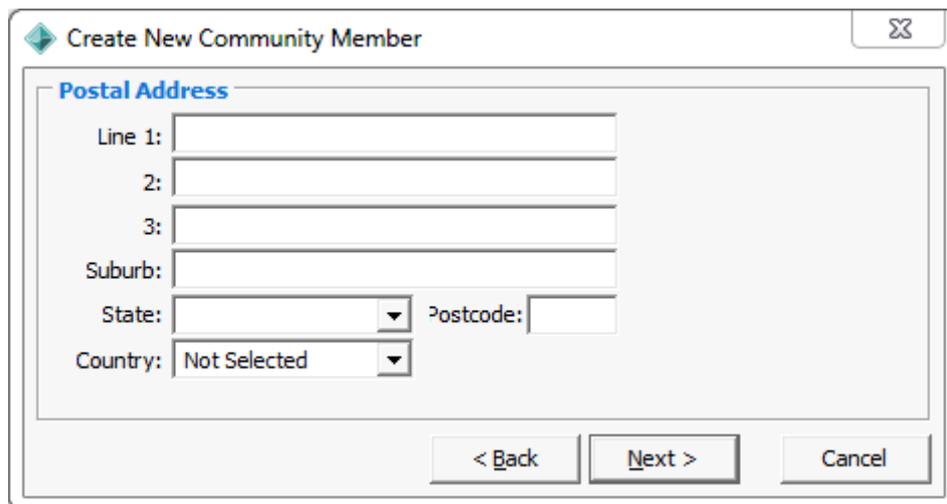
On the **Postal Address** window:

1. Enter the address for the person or company.

**Note:** If you leave this window blank, the address will show as **\*Address Unknown\***.

2. If the person's postal address is different from their home address, clear the **Postal Address Same** field and click .

The **Postal Address** window is displayed.

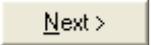


The screenshot shows a window titled "Create New Community Member" with a "Postal Address" section. The section contains the following fields:

- Line 1:
- 2:
- 3:
- Suburb:
- State:  (dropdown menu)
- Postcode:
- Country:  (dropdown menu)

At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel".

3. Enter the postal address of the person.

4. Click .

The following windows are displayed after the **Address Details** or **Postal Address** windows, depending on the selections made:

- Couple relationship. See *Couple Relationship window (on page 27)*.
- Community member's phone and occupation details. See *Phone/Occupation window (on page 28)*.
- Spouse's phone and occupation details, if applicable. See *Phone/Occupation window (on page 28)*.

## Create New Community Member - Company Address window

The **Company Address** window is displayed when adding a new company or personal company. This window is also displayed when you create a Synergetic constituency member, such as a debtor.

### Create New Community Member - Company Address window key fields

Field	Description
<b>Postal Address Same</b>	Clear if the postal address is not the street address. When you click  , the <b>Postal Address</b> window is displayed.
<b>Silent Phone</b>	Select if the phone number is not generally available to staff.

## Create New Community Member - Select Couple Relationship window

The **Select Couple Relationship** window is the same in all modules. The example below shows a typical **Select Couple Relationship** window.



The screenshot shows a window titled "Create New Community Member" with a sub-section "Select Couple Relationship". The instruction "Select the relationship for the couple below:" is followed by a text field containing "Mr Fred Masters" and a dropdown menu with "Wife" selected. Below the dropdown, it says "IS: Sue Masters". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

On the **Select Couple Relationship** window:

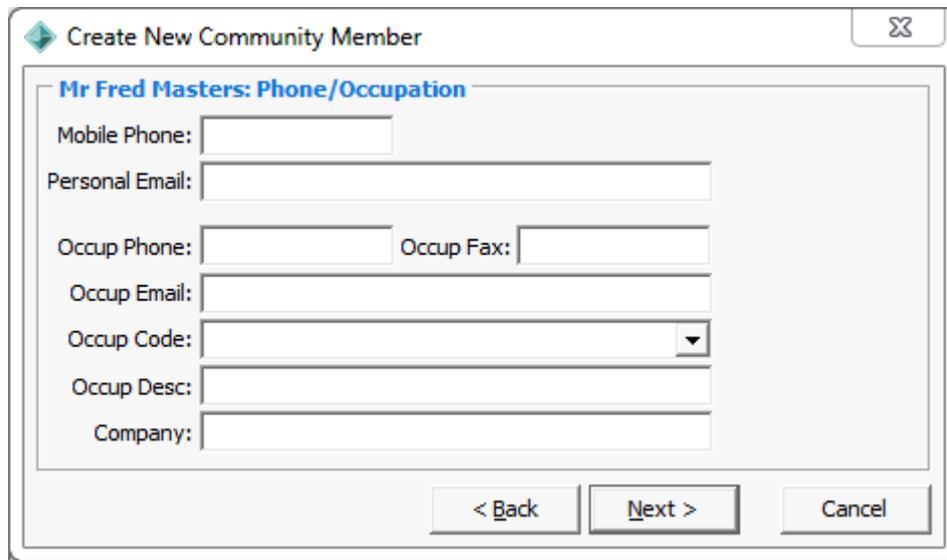
1. If you create a spouse for a community member, you need to define the relationship between the community member and their spouse.
2. Click **Next >**.

The following windows are displayed after the **Select Couple Relationship** window, depending on the selections made:

- Community member's phone and occupation details. See *Phone/Occupation window* (on page 28).
- Spouse's phone and occupation details, if applicable. See *Phone/Occupation window* (on page 28).

## Create New Community Member - Phone/Occupation window

The **Phone/Occupation** window is the same in all modules. The example below shows a typical **Phone/Occupation** window.



The screenshot shows a window titled "Create New Community Member" with a close button in the top right corner. The window content is titled "Mr Fred Masters: Phone/Occupation" and contains the following fields:

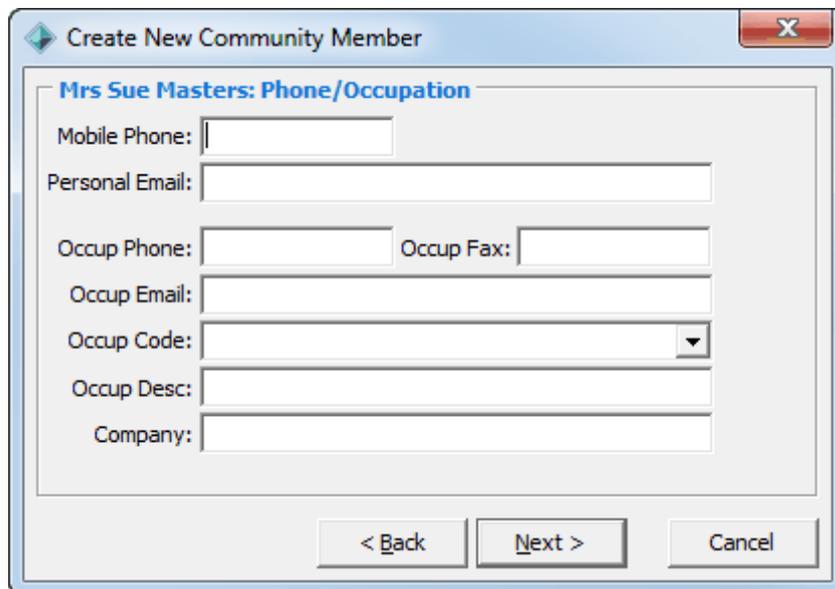
- Mobile Phone:
- Personal Email:
- Occup Phone:  Occup Fax:
- Occup Email:
- Occup Code:
- Occup Desc:
- Company:

At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

On the **Phone/Occupation** window:

1. Enter the details of the person's phone and occupation.
2. Click .

If you entered spouse details earlier, the **Phone/Occupation** window is displayed for the spouse.



The screenshot shows a window titled "Create New Community Member" with a close button in the top right corner. The window content is titled "Mrs Sue Masters: Phone/Occupation" and contains the following fields:

- Mobile Phone:
- Personal Email:
- Occup Phone:  Occup Fax:
- Occup Email:
- Occup Code:
- Occup Desc:
- Company:

At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

3. Enter the details of the spouse's phone and occupation.
  4. Click .
- The community member is created.
5. Update other details about the community member on the **Community Maintenance** window. See *Maintaining community members* (on page 8).

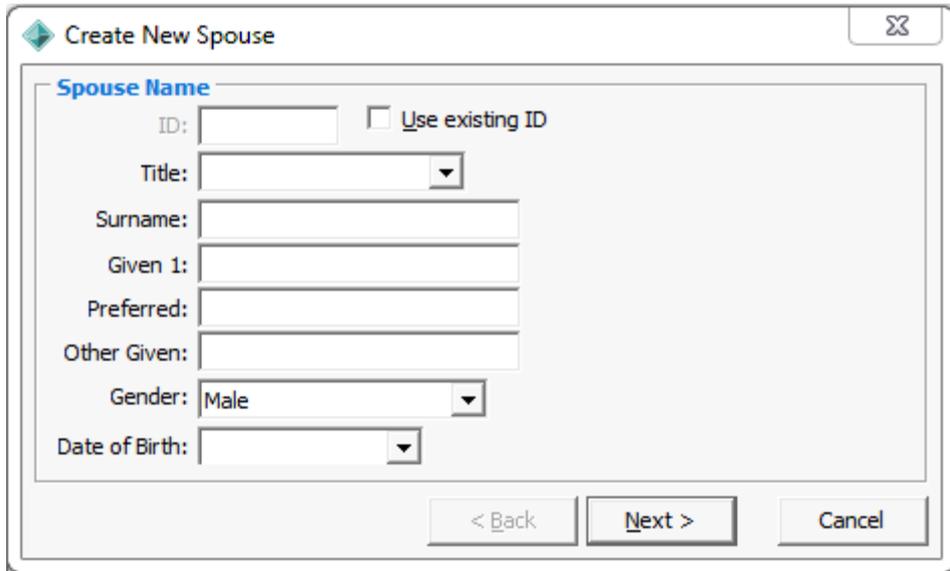
## Creating a spouse

To add a spouse to an existing community member's record:

1. Open the existing community member's record. See *Searching for community members* (on page 12).

2. Click .

The **Spouse Name** window is displayed. See *Spouse Name window* (on page 23).



3. Enter the spouse's name, gender and date of birth.

4. Click .

The **Select Couple Relationship** window is displayed. See *Select Couple Relationship window* (on page 27).

---

**Note:** If the information you enter matches one or more members of the community database, Synergetic displays a window showing possible matches. If the spouse is already a community member, open the existing record.

The **Address Couple Will Live At** window is displayed. See *Address Couple will live at window* (on page 30). Select the correct address, then click .

---

5. Select the couple's relationship.

6. Click .

If the spouse is:

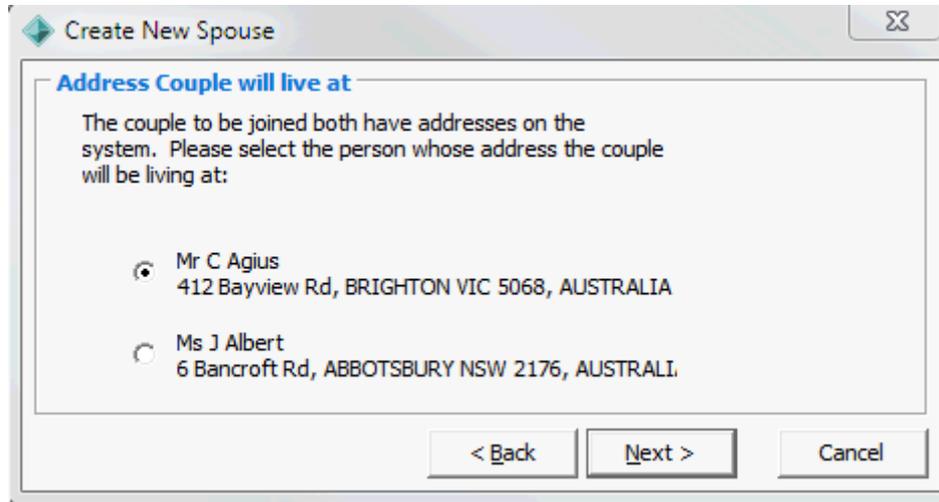
- a new community member, the **Phone/Occupation** window is displayed
- an existing community member, the spouse is added to the community member's record.

7. Enter the spouse's telephone and occupation details. See *Phone/Occupation window* (on page 28).

## Address Couple will live at window

If you are creating a new spouse record and the information you enter matches one or more members of the community database, Synergetic displays a window showing possible matches. If the spouse is already a community member, open the existing record.

The **Address Couple will live at** window is displayed.

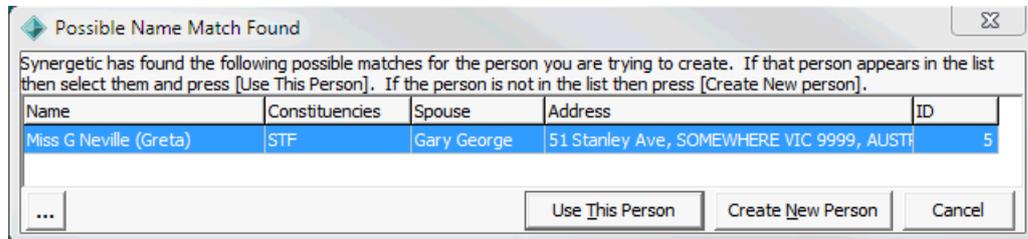


Select the correct address, then click .

## Possible Name Match Found window

If you are creating a new record and the information you enter matches one or more members of the community database, the **Possible Name Match Found** window is displayed.

- Click **Use This Person** to use the selected community member record.
- Click **Create New Person** to create a new community member record.



## Deleting community members

To delete a community member:

1. Check maintenance functions for actions needed before deleting the community member. For example:

Function	Make sure that:
<b>Current Student Maintenance</b>	You remove all courses and classes that the student is enrolled in.
<b>Debtor Maintenance</b>	The balance of the community member's account is zero. All debts must be received before deletion can occur.
<b>Creditor Maintenance</b>	The balance of the community member's account is zero. All outstanding payments must be made before deleting a creditor.
<b>Staff Maintenance</b>	You remove any classes that the staff member is teaching.

2. Search for the community member. See *Searching for community members* (on page 12).
3. Open the relevant modules and delete the community member from each. For example, if the community member is a:
  - debtor, open **Debtor Maintenance** windows
  - supplier, open **Creditor Maintenance** windows.

**Tip:** Click  on the **Constits** tab to open the relevant module.

4. Remove links with a spouse and other relations. See *Removing spouse links and relationships* (on page 33).
5. Delete links to user-defined constituencies. See *Deleting links to user-defined constituencies* (on page 35).
6. Delete the community member. See *Deleting community members from Synergetic* (on page 36).

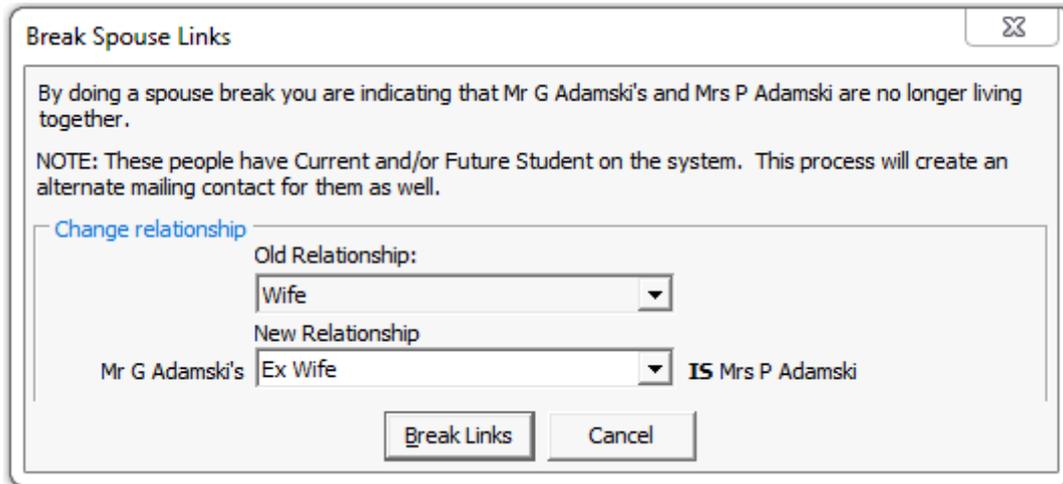
## Removing spouse links and relationships

To remove spouse links and relationships:

1. Search for the community member. See *Searching for community members* (on page 12).

2. Click  on the **Community Maintenance** toolbar.

The following warning is displayed.



**Break Spouse Links** ✕

By doing a spouse break you are indicating that Mr G Adamski's and Mrs P Adamski are no longer living together.

NOTE: These people have Current and/or Future Student on the system. This process will create an alternate mailing contact for them as well.

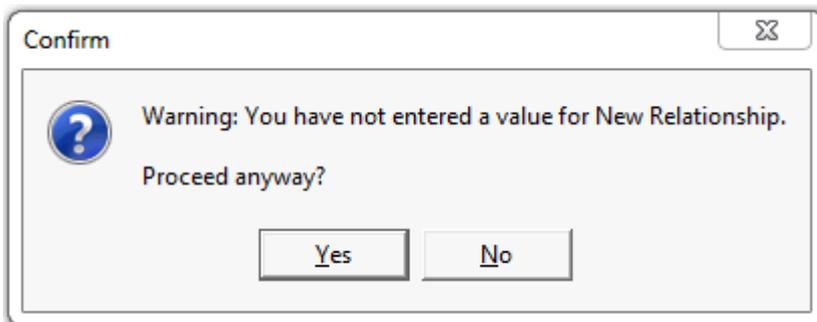
[Change relationship](#)

Old Relationship:

New Relationship  
 Mr G Adamski's  **IS** Mrs P Adamski

3. Click **Break Links**.

The following warning is displayed.



**Confirm** ✕

 **Warning: You have not entered a value for New Relationship.**

Proceed anyway?

4. Click .

The link is broken. Synergetic creates:

- an alternative mailing contact for any linked students
- separate address records for each of the spouses, although both will have the same details initially.

5. Click the **Relations** tab.

The **Relations** tab of the **Community Maintenance** window is displayed.

Relation	Constituencies	Use SMS	Use Email	ID
Mr Simon Beresford is James' Son	SC (S8/NOR)			205

**Details**

Name:   

Address:  

Phone BH:

Email:  

Use SMS:   Use Email:

6. Select one of the relations and click **Delete**.
7. Click .  
The links with the relation are deleted.
8. Repeat steps **6** and **7**, if the community member has any other relationships.

### Deleting links to user-defined constituencies

**Note:** Constituencies created by Synergetic (prefixed by @) need to be deleted using the function that created them. For example, the @DEB (Debtor) constituency is deleted from within the **Debtors Maintenance** function.

To delete all user-defined constituencies of a community member:

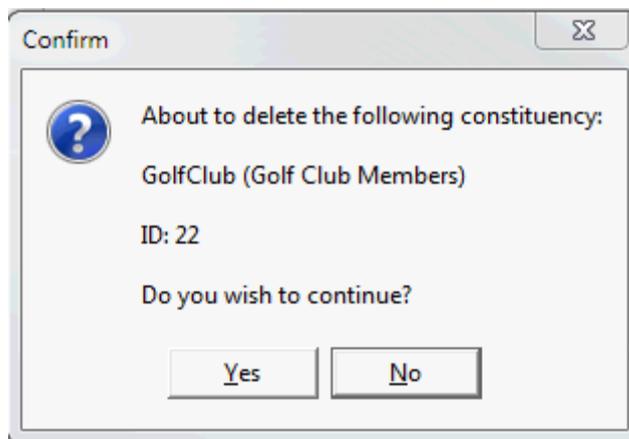
1. Search for the community member. See *Searching for community members* (on page 12).
2. Click the **Constits** tab. See *Community Maintenance - Constits tab* (on page 42).

The **Constits** tab of the **Community Maintenance** window is displayed.

Constits							Name	Home Address	Postal Address	Phone	Occupation	Occupation Address
Code	Description	Date Joined	Campus	From	To							
@PC	Current Parent	3/3/2011 12:53: S										
CANTVOL	Canteen Volunteer	1/7/2010		1/7/2010								
COUNC	School Council	3/3/2010		3/3/2010								

3. Select a user-defined constituency and click **Delete**.

The following warning is displayed.



4. Click .

The link to the user-defined constituency is deleted.

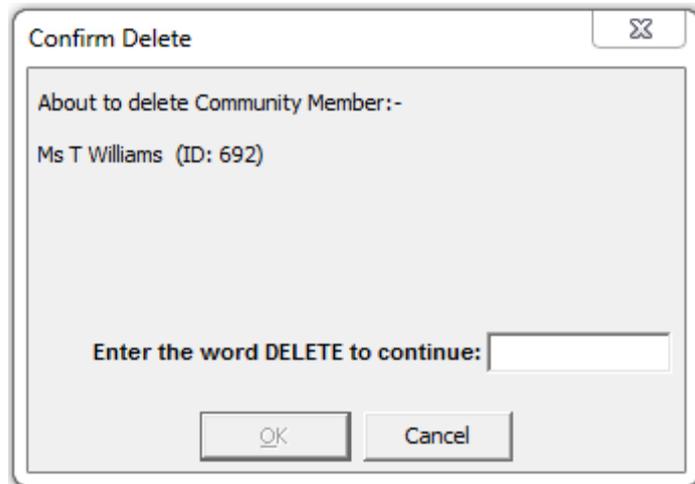
5. Repeat steps 3 and 4 for each user-defined constituency.

## Deleting community members from Synergetic

To delete a community member:

1. Search for the community member. See *Searching for community members* (on page 12).
2. Select **File > Delete** from the main menu.

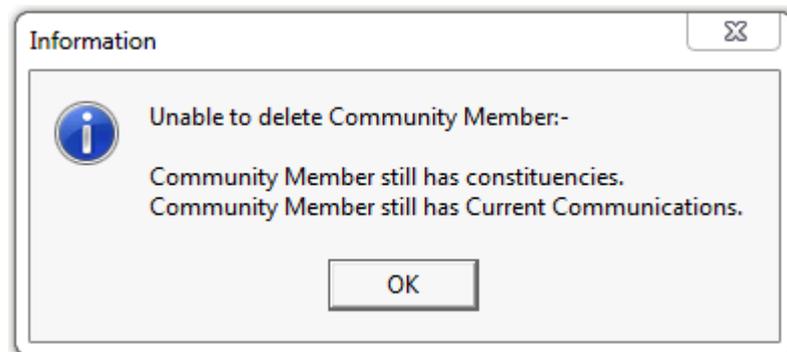
The following warning is displayed.

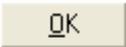


---

**Note:** If the community member has links, the following message is displayed. You must delete the links before you can delete the community member.

---



3. Type **delete**.
4. Click .

The community member is deleted.

## Community Maintenance - Occupation tab

Use the **Occupation** tab to enter and maintain the community member's business hours' phone and email contacts.

### Opening the Occupation tab

To open the **Occupation** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Occupation** tab.

The **Occupation** tab of the **Community Maintenance** window is displayed.

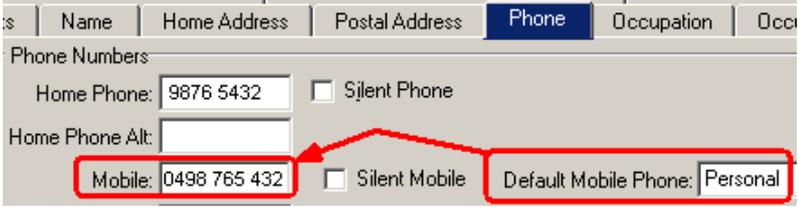
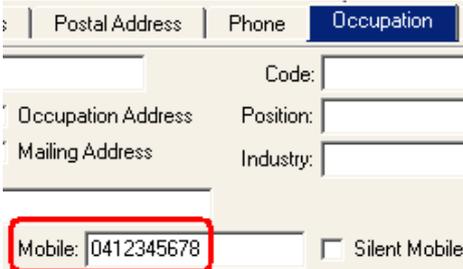
The screenshot shows the 'Community Maintenance' window for 'Mr G & Mrs P Adamski' at '9 Towers St, CABRAMATTA NSW 2166, AUSTRALIA'. The 'Occupation' tab is selected. The 'Occupation Details' section includes the following fields:

- Description: Senior Lecturer
- Code: Academic
- Include Description in:  Occupation Address,  Mailing Address
- Position: Senior management in large busine
- Industry: [Empty]
- Company: [Empty]
- Phone: [Empty], Mobile: [Empty],  Silent Mobile, Default Mobile Phone: Personal
- Fax: [Empty]
- Email: ddillon@synergetic.net.au
- Default Email: Home Email

Buttons at the bottom include: Show Spouse, Keep, Criteria..., < Back, Next >, OK, Exit.

## Community Maintenance - Occupation tab fields and buttons

### Fields

Field	Description
<b>Description</b>	Description of the community member's occupation. For example, information about their job.
<b>Include Description in Occupation Address</b>	Select to include the <b>Description</b> in the occupation address.
<b>Include Description in Mailing Address</b>	Select to include the <b>Description</b> in the mailing address.
<b>Code</b>	Occupation code.
<b>Position</b>	Position code.
<b>Industry</b>	Classify by industry.
<b>Company</b>	Company name, if applicable.
<b>Phone</b>	Contact telephone number.
<b>Mobile</b>	Contact mobile telephone number.
<b>Silent Mobile</b>	Select if the mobile number is not to be listed.
<b>Default Mobile Phone</b>	<p>Community member's preferred mobile phone. Available values are:</p> <ul style="list-style-type: none"> <li><b>Personal.</b></li> <li><b>Occupation.</b></li> </ul> <p>Synergetic uses the community member's default mobile phone when sending SMS text messages from Synergetic to the person.</p> <p>When:</p> <ul style="list-style-type: none"> <li><b>Personal</b> is selected, the <b>Mobile</b> phone number recorded on this tab is used.</li> </ul>  <ul style="list-style-type: none"> <li><b>Occupation</b> is selected, the <b>Mobile</b> phone number recorded on the <b>Occupation</b> tab is used.</li> </ul> 
<b>Fax</b>	Fax number, if applicable.

Field	Description
Email	Default email address.
Default Email	Select the default email address. Values include: <ul style="list-style-type: none"><li>• Home Email</li><li>• Occupation Email</li><li>• Home and Occupation Email.</li></ul> See <i>Community Maintenance - Phone tab</i> (on page 49).

### Buttons

Button	Description
	Send an email to the default email account.

## Community Maintenance - Occupation Address tab

Use the **Occupation Address** tab to specify the occupation address details.

### Opening the Occupation Address tab

To open the **Occupation Address** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

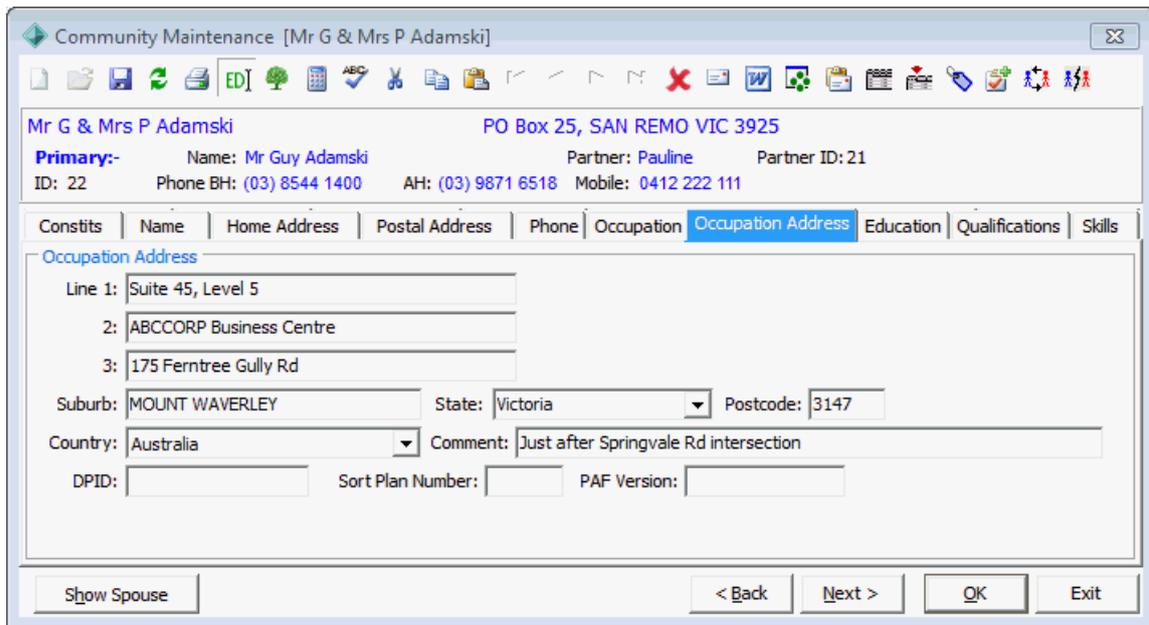
**Tip:** You can also access the **Set Community Search Criteria** window by clicking  Community.

2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Occupation Address** tab.

The **Occupation Address** tab of the **Community Maintenance** window is displayed.



The screenshot shows the 'Community Maintenance' window for 'Mr G & Mrs P Adamski'. The 'Occupation Address' tab is selected. The window displays the following information:

**Mr G & Mrs P Adamski** PO Box 25, SAN REMO VIC 3925

**Primary:-** Name: Mr Guy Adamski Partner: Pauline Partner ID: 21  
 ID: 22 Phone BH: (03) 8544 1400 AH: (03) 9871 6518 Mobile: 0412 222 111

Navigation tabs: Constits | Name | Home Address | Postal Address | Phone | Occupation | **Occupation Address** | Education | Qualifications | Skills

**Occupation Address**

Line 1: Suite 45, Level 5  
 Line 2: ABCCORP Business Centre  
 Line 3: 175 Ferntree Gully Rd

Suburb: MOUNT WAVERLEY State: Victoria Postcode: 3147  
 Country: Australia Comment: Just after Springvale Rd intersection  
 DPID: Sort Plan Number: PAF Version:

Buttons: Show Spouse < Back Next > OK Exit

## Community Maintenance - Occupation Address tab fields

Field	Description
<b>Line 1</b>	First line of the address.
<b>Line 2</b>	Second line of the address, if required.
<b>Line 3</b>	Third line of the address, if required.
<b>Suburb</b>	Suburb.
<b>State</b>	State.  <u>Note: Only Australian states are available for selection. If the community member lives overseas, do not enter state details.</u>
<b>Postcode</b>	Community member's postcode.  <u>Note: Only Australian postcodes can be entered. If the community member lives overseas, do not enter a postcode.</u>
<b>Country</b>	Country of residence if applicable.  <u>Note: Only use for overseas community members.</u>
<b>Comment</b>	Additional addressing information, such as the nearest cross road.
<b>DPID</b>	Delivery postal identifier used to format postal addressing information on envelopes. Used to: <ul style="list-style-type: none"> <li>• increase mailing accuracy</li> <li>• reduce postal charges.</li> </ul> <u>Note: DPID, Sort Plan Number and PAF Version are automatically populated if RAT is used at your organisation. These fields are cleared to avoid them being made invalid by any manual address changes.</u>
<b>Sort Plan Number</b>	Barcode sort plan number used for large mailing runs using Australia Post.
<b>PAF Version</b>	Version of the postal address file from Australia Post.

## Community Maintenance - Constits tab

Use the **Constits** tab to:

- List all constituencies that the community member is associated with. This includes Synergetic constituencies. System constituencies are generally prefixed with @. For example, the **Staff** constituency code is **@STF**.
- Add a community member to a user-defined constituency. For example, the school council. User-defined groups do not have a prefix. See *Adding a community member to a user-defined constituency* (on page 46).
- Modify and delete community members from user-defined constituencies.
- Select a Synergetic constituency and launch the related maintenance window. Either double click on the record or click .

This only applies to Synergetic constituencies. For example, double click on **@STF** to open the **Staff Maintenance** window.

---

**Note:** Synergetic constituencies cannot be maintained using the **Constits** tab. Perform maintenance in the related function. For example, update staff details in **Staff Maintenance**.

---

Constituency membership is listed by:

- code
- description
- date joined
- campus
- the date range of the association.

## Opening the Constits tab

To open the **Constits** tab:

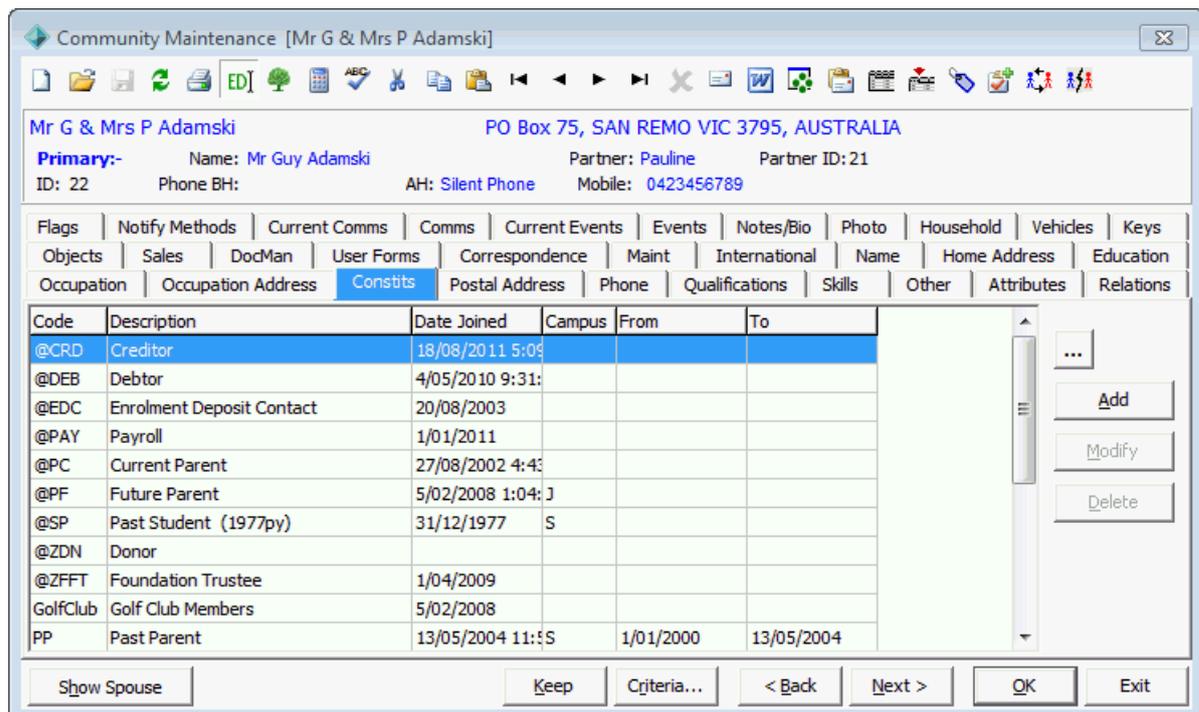
1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

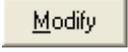
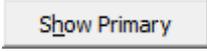


## Community Maintenance - Constits tab key fields and buttons

### Fields

Field	Description
<b>Code</b>	Constituency code: <ul style="list-style-type: none"> <li>• Synergetic constituencies are prefixed with @</li> <li>• user-defined constituencies generally do not have a prefix.</li> </ul>
<b>Description</b>	Description of the constituency.
<b>Date Joined</b>	Date the community member(s) is added to the constituency.
<b>Campus</b>	Campus the community member(s) is a constituent of, if applicable.  For example, use this field when a new staff member is appointed and assigned to a campus.
<b>From</b>	Date the community member(s) started their involvement relating to the constituency. For example: <ul style="list-style-type: none"> <li>• a member of the <b>School Council</b> constituency has the date they started at the school in any capacity as the <b>From</b> date.</li> <li>• a member of the <b>Past School Council</b> constituency has the date they started at the school council as the <b>From</b> date.</li> </ul>
<b>To</b>	Date the community member(s) was removed from the constituency.  <u><b>Note:</b> Do not complete the field when adding community member(s) to a constituency. Some organisations may use this field when entering historical information or when they know the date that the community member's constituency membership ends.</u>

## Buttons

Button	Description
	Click to open the maintenance window associated with the selected constituency. For example, if <b>@SC Current Student</b> is selected, click to open the <b>Current Student Maintenance</b> window.
	Click to add the community member to a constituency. See <i>Adding a community member to a user-defined constituency</i> (on page 46).
	Click to modify constituency details, for example by adding an end date.  <u>Note: You can only modify constituency details for user-defined constituencies.</u>
	Click to delete the community member from a constituency.  <u>Note: You can only delete community members from user-defined constituencies.</u>
 / 	Click to display the spouse's details.

## Adding a community member to a user-defined constituency

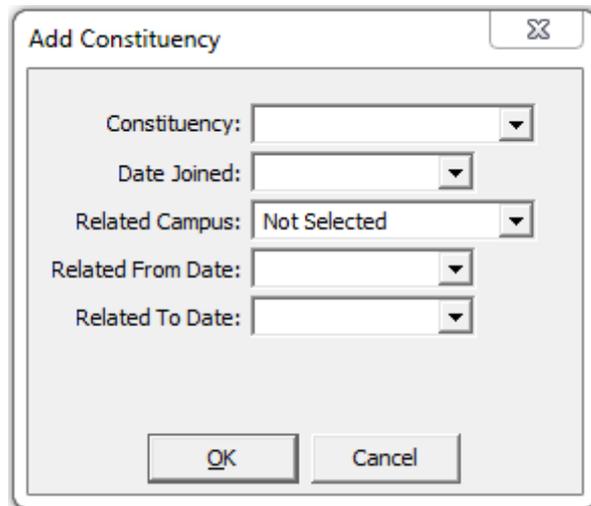
**Note:** You can only add a community member to a Synergetic constituency by adding them in the appropriate function. For example, to add a community member to the Debtor constituency, you must create a new debtor in **Debtor Maintenance**. You cannot add a community member to the Debtor constituency from the **Community Maintenance** windows.

To add a community member to a user-defined constituency:

1. Search for the community member. See *Searching for community members* (on page 12).  
The **Constits** tab of the **Community Maintenance** window is displayed.

2. Click **Add**.

The **Add Constituency** window is displayed.



3. Select the constituency and the date the community member joined the constituency.
4. If required, select other information, for example related campus, start and end dates.
5. Click **OK**.

The community member is added to the user-defined constituency.

**Note:** You can add user-defined constituencies using the lookup table **luConstituency**. See *Maintaining lookup tables* in the *System maintenance manual*.

## Add Constituency key fields

Field	Description
<b>Constituency</b>	<p>Constituency code:</p> <ul style="list-style-type: none"> <li>• Synergetic constituencies are prefixed with @</li> <li>• user-defined constituencies generally do not have a prefix.</li> </ul> <p><b>Note:</b> You cannot assign a community member to a Synergetic constituency using the <b>Add Constituency</b> window.</p>
<b>Date Joined</b>	<p>Date the community member(s) is added to the constituency.</p> <p><b>Note:</b> Defaults to today's date.</p>
<b>Related Campus</b>	<p>Campus the community member(s) is a constituent of, if applicable.</p> <p>For example, use this field when a new staff member is appointed and assigned to a campus.</p>
<b>Related From Date</b>	<p>Date the community member(s) started their involvement relating to the constituency. For example:</p> <ul style="list-style-type: none"> <li>• a member of the <b>School Council</b> constituency has the date they started at the school in any capacity as the <b>From</b> date.</li> <li>• a member of the <b>Past School Council</b> constituency has the date they started at the school council as the <b>From</b> date.</li> </ul>
<b>Related To Date</b>	<p>Date the community member(s) was removed from the constituency.</p> <p><b>Note:</b> Do not complete the field when adding community member(s) to a constituency. Some organisations may use this field when entering historical information or when they know the date that the community member's constituency membership ends.</p>

## Community Maintenance - Postal Address tab

Use the **Postal Address** tab to enter and maintain the community member's postal address details for mailing purposes.

**Note:** Only use this tab if the postal address is different to the home or business address, for example if a community member prefers mail to be sent to their post box.

### Opening the Postal Address tab

To open the **Postal Address** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Postal Address** tab.

The **Postal Address** tab of the **Community Maintenance** window is displayed.

The screenshot shows the 'Community Maintenance' window for 'Ms A Adamski'. The address is '9 Towers St, CABRAMATTA NSW 2166, AUSTRALIA'. The 'Postal Address' tab is selected, showing fields for Line 1 (PO Box 75), Line 2, Line 3, Suburb (SAN REMO), State (Victoria), Postcode (3795), Country (Australia), DPID (36562150), Sort Plan Number (009), and PAF Version (2011.2). There is a checkbox for 'Same as Home Address'.

### Community Maintenance - Postal Address tab key fields

Most of the fields on the **Postal Address** tab are almost identical to the fields on the **Home Address** tab. See *Community Maintenance - Home Address tab* (on page 140).

Field	Description
<b>Same as Home Address</b>	Select to use the home address as the postal address, if appropriate.

## Community Maintenance - Phone tab

Use the **Phone** tab to maintain the community member's phone and email details.

### Opening the Phone tab

To open the **Phone** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

**Tip:** You can also access the **Set Community Search Criteria** window by clicking  Community.

2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

- Click the **Phone** tab.

The **Phone** tab of the **Community Maintenance** window is displayed.

**Note:** The fields on the company **Phone** tab are slightly different to the fields on the individual **Phone** tab. Refer to the examples below.

### Personal record type

The screenshot shows the 'Community Maintenance' window for 'Mr G & Mrs P Adamski' at '9 Towers St, CABRAMATTA NSW 2166, AUSTRALIA'. The 'Phone' tab is selected in the navigation menu. The 'Phone Numbers' section contains the following fields:

- Home Phone: 03 98765432 (with a checked 'Silent Phone' checkbox)
- Home Phone Alt: (empty)
- Mobile: 0423456789 (with an unchecked 'Silent Mobile' checkbox and a 'Default Mobile Phone' dropdown set to 'Personal')
- Home Fax: (empty)
- Home Email: gadamski@example.com
- Default Email: Home Email (dropdown)
- Web Site: (empty)

At the bottom of the window, there are buttons for 'Show Spouse', 'Keep', 'Criteria...', '< Back', 'Next >', 'OK', and 'Exit'.

### Company record type

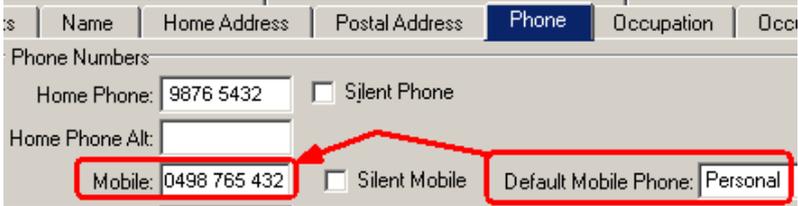
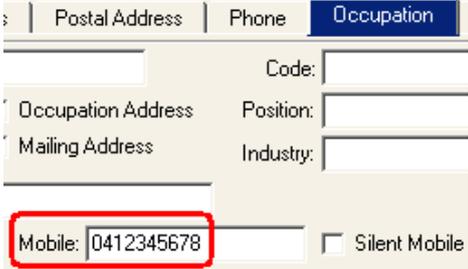
The screenshot shows a software window titled 'Community Maintenance [ABC books]'. At the top, it displays the company name 'ABC books' and its address '132-136 Link Rd, MELBOURNE VIC 3000, AUSTRALIA'. Below this, there are fields for 'Primary:- ID: 393', 'Name: ABC books', 'Phone BH:', 'AH: 90001234', 'Partner:', and 'Partner ID:'. A navigation bar contains various tabs: 'Notify Methods', 'Current Comms', 'Comms', 'Current Events', 'Events', 'Notes/Bio', 'Photo', 'Household', 'Vehicles', 'Keys', 'Objects', 'Sales', 'DocMan', 'User Forms', 'Correspondence', 'Maint', 'International', 'Company', 'Company Address', 'Occupation', 'Occupation Address', 'Constits', 'Postal Address', 'Phone' (which is selected), 'Qualifications', 'Skills', 'Other', 'Attributes', 'Relations', and 'Flags'. The 'Phone Numbers' section includes input fields for 'Phone' (containing '90001234'), 'Phone Alt', 'Mobile', and 'Fax'. There are checkboxes for 'Silent Phone' and 'Silent Mobile'. A dropdown menu for 'Default Mobile Phone' is set to 'Occupation'. There is also an 'Email' field and a 'Web Site' field. At the bottom, there are buttons for 'Create Spouse...', 'Keep', 'Criteria...', '< Back', 'Next >', 'OK', and 'Exit'.

### Community Maintenance - Phone tab key fields and buttons

#### Personal record type fields

This screenshot shows the 'Phone' tab for a personal record. The tabs at the top are 'Constits', 'Name', 'Home Address', 'Postal Address', 'Phone' (selected), and 'Occupation'. The 'Phone Numbers' section contains fields for 'Home Phone' (03 9845 6554), 'Home Phone Alt', 'Mobile' (0412589523), and 'Home Fax'. There are checkboxes for 'Silent Phone' (checked) and 'Silent Mobile'. A dropdown menu for 'Default Mobile Phone' is set to 'Personal'. There are also fields for 'Home Email', 'Default Email' (set to 'Home Email'), and 'Web Site'.

Field	Description
<b>Home Phone</b>	Home telephone number.
<b>Silent Phone</b>	Select if the phone number is not to be listed or made available to staff members without appropriate permissions.  <u>Note: Make suitable arrangements for contacting the student's guardian in the event of an emergency.</u>
<b>Home Phone Alt</b>	Second home phone number if applicable.
<b>Mobile</b>	Mobile telephone number.

Field	Description
<b>Silent Mobile</b>	<p>Select if the mobile phone number is not to be listed or made available to staff members without appropriate permissions.</p> <p><u>Note: Make suitable arrangements for contacting the student's guardian in the event of an emergency.</u></p>
<b>Default Mobile Phone</b>	<p>Community member's preferred mobile phone. Available values are:</p> <ul style="list-style-type: none"> <li>• <b>Personal</b></li> <li>• <b>Occupation.</b></li> </ul> <p>Synergetic uses the community member's default mobile phone when sending SMS text messages from Synergetic to the person.</p> <p>When:</p> <ul style="list-style-type: none"> <li>• <b>Personal</b> is selected, the <b>Mobile</b> phone number recorded on this tab is used.</li> </ul>  <ul style="list-style-type: none"> <li>• <b>Occupation</b> is selected, the <b>Mobile</b> phone number recorded on the <b>Occupation</b> tab is used.</li> </ul> 
<b>Home Fax</b>	Home fax number, if applicable.
<b>Home Email</b>	Home email address, if applicable.
<b>Default Email</b>	<p>Select the default email address. Values include:</p> <ul style="list-style-type: none"> <li>• <b>Home Email</b></li> <li>• <b>Occupation Email</b></li> <li>• <b>Home and Occupation Email.</b></li> </ul> <p><u>Note: If you choose <b>Home and Occupation Email</b>, emails sent to the community member are by default sent to both the email address on the <b>Phone</b> tab and on the <b>Occupation</b> tab.</u></p>
<b>Web Site</b>	<p>Individual's personal or company's web site.</p> <p>Specify the URL (Universal Resource Locator) for the web site. For example, the following URL is for the personal web site of a staff member at the University of Hawaii: <b>www2.hawaii.edu/~gorman/</b>.</p> <p>Synergetic does not need the <b>http://</b> prefix to be specified but it can be included.</p>

### Company record type fields

Field	Description
<b>Phone</b>	Main business contact telephone number.
<b>Silent Phone</b>	Select if the phone number is not to be listed.
<b>Phone Alt</b>	Second business phone number if applicable.
<b>Mobile</b>	Business mobile telephone number.
<b>Silent Mobile</b>	Select if the mobile phone number is not to be listed.
<b>Default Mobile Phone</b>	Select the default mobile phone number for the company.
<b>Fax</b>	Business fax number.
<b>Email</b>	Business email address.
<b>Web Site</b>	The company's web site. Specify the URL for the web site, such as <b>www.synergetic.net.au</b> . Synergetic does not need the <b>http://</b> prefix to be specified but it can be included.

### Buttons

Button	Description
	Send an email to the default email account.
	Browse the web site listed in the <b>Web Site</b> field. The web site is displayed using your default web browser.

## Community Maintenance - Name tab

Use the **Name** tab to maintain the community member's name details.

**Note:** The **Name** tab is not displayed for **Company** record types. See *Community Maintenance - Company tab* (on page 138) in the Community manual.

### Opening the Name tab

To open the **Name** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Name** tab.

The **Name** tab of the **Community Maintenance** window is displayed.

The screenshot shows the 'Community Maintenance [Mr G & Mrs P Adamski]' window. The 'Name' tab is selected. The window displays the following information:

- Mr G & Mrs P Adamski** PO Box 75, SAN REMO VIC 3795, AUSTRALIA
- Primary:-** Name: Mr Guy Adamski Partner: Pauline Partner ID: 21
- ID: 22 Phone BH: AH: Silent Phone Mobile: 0423456789

The 'Name' tab contains the following fields and options:

- Community Record Type:**  Personal  Company  Personal Company
- Title:** Mr (dropdown) This record will be sorted using the surname field.
- Surname:** Adamski
- Given:** Guy
- Preferred:** Guy **Preferred Formal:** Guy **Initials:** G  Override Initials
- Internal Name:** Adamski, Guy  Override Internal Name **Display Names...** (button)
- Gender:** Male (dropdown)

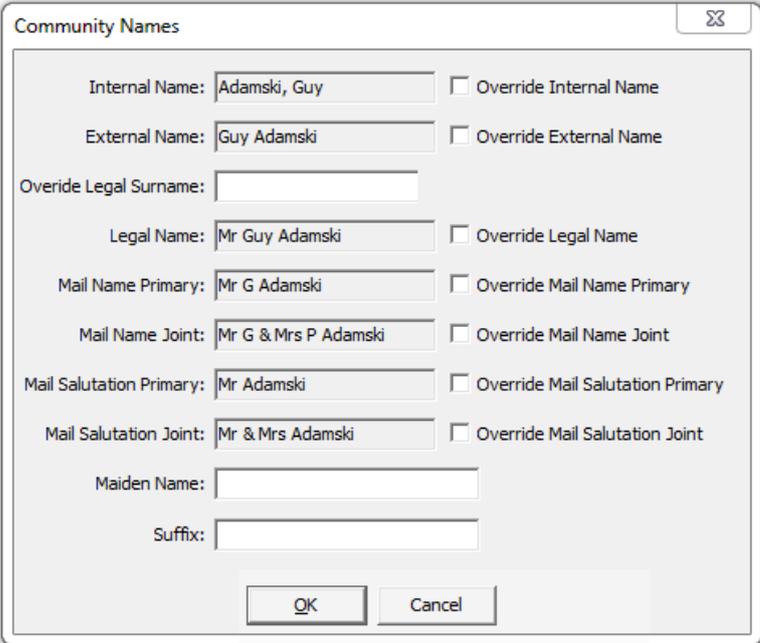
At the bottom of the window, there are buttons for: Show Spouse, Keep, Criteria..., < Back, Next >, OK, and Exit.

## Community Maintenance - Name tab key fields and buttons

### Fields

Field	Description
<b>Community Record Type</b>	Type of record.  <u>Note: The <b>Name</b> tab is only displayed for <b>Personal</b> and <b>Personal Company</b> records.</u>
<b>Title</b>	Community member's title.
<b>Surname</b>	Community member's last name.
<b>Given</b>	Community member's given name.
<b>Preferred</b>	Community member's preferred name. For example, their given name might be Melinda, but they prefer to be called Mel.
<b>Preferred Formal</b>	Community member's preferred formal name. For example, some cultures may use the family name before the given name in formal situations.
<b>Initials</b>	Community member's initials, automatically derived from the given names entered.
<b>Override Initials</b>	Select <b>Override Initials</b> to enter different initials.
<b>Internal Name</b>	Community member's name as used by the Synergetic database.
<b>Override Internal Name</b>	Select <b>Override Internal Name</b> to enter a different internal name.
<b>Gender</b>	Community member's gender.

**Buttons**

Button	Description
	<p>Opens the <b>Community Names</b> window. Override community names if required.</p> 
	<p>Click to display the spouse's details.</p>

## Community Maintenance - Education tab

Use the **Education** tab to maintain summary information about education received and qualifications achieved.

### Opening the Education tab

To open the **Education** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

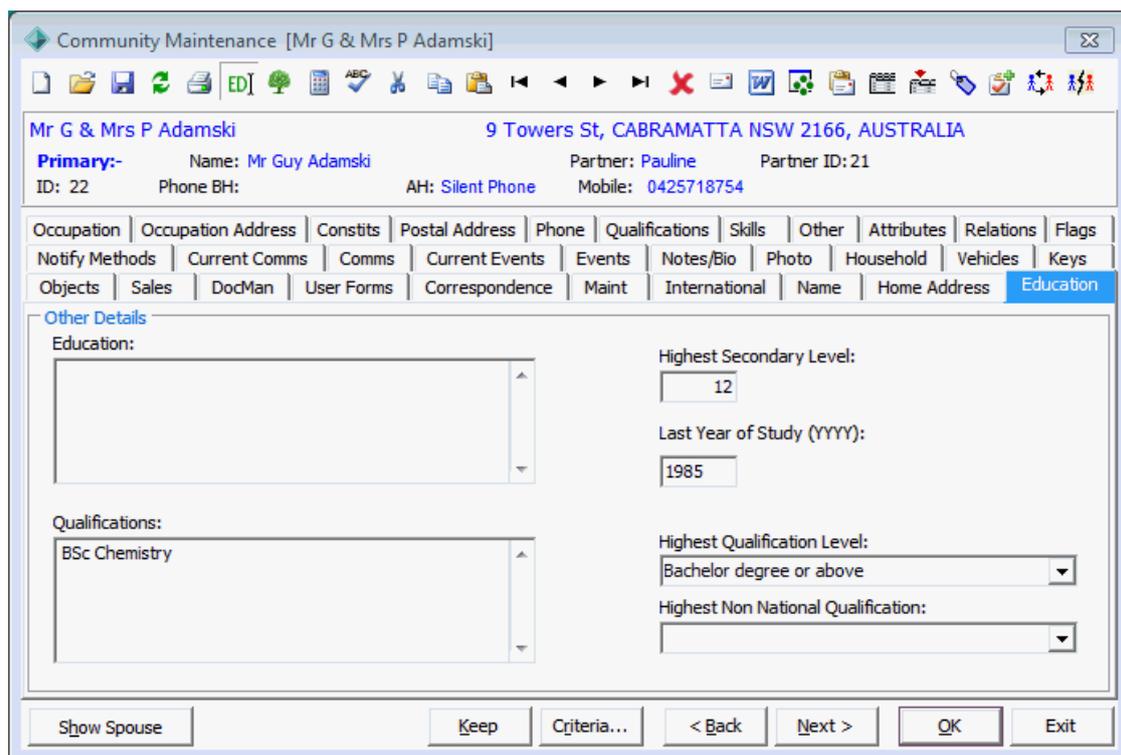
**Tip:** You can also access the **Set Community Search Criteria** window by clicking  Community.

2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Education** tab.

The **Education** tab of the **Community Maintenance** window is displayed.



The screenshot shows a software window titled "Community Maintenance [Mr G & Mrs P Adamski]". The window has a menu bar with various icons and a toolbar. Below the toolbar, the user's name "Mr G & Mrs P Adamski" and address "9 Towers St, CABRAMATTA NSW 2166, AUSTRALIA" are displayed. A "Primary:-" section lists details: Name: Mr Guy Adamski, Partner: Pauline, Partner ID: 21, ID: 22, Phone BH, AH: Silent Phone, and Mobile: 0425718754. A tabbed interface is visible with tabs for Occupation, Occupation Address, Constits, Postal Address, Phone, Qualifications, Skills, Other, Attributes, Relations, Flags, Notify Methods, Current Comms, Comms, Current Events, Events, Notes/Bio, Photo, Household, Vehicles, Keys, Objects, Sales, DocMan, User Forms, Correspondence, Maint, International, Name, Home Address, and Education. The "Education" tab is selected and active. Under "Other Details", there are sections for "Education:" and "Qualifications:". The "Education:" section includes a text area, "Highest Secondary Level:" (input: 12), and "Last Year of Study (YYYY):" (input: 1985). The "Qualifications:" section includes a text area with "BSc Chemistry", "Highest Qualification Level:" (dropdown: Bachelor degree or above), and "Highest Non National Qualification:" (dropdown). At the bottom, there are buttons for "Show Spouse", "Keep", "Criteria...", "< Back", "Next >", "OK", and "Exit".

### Community Maintenance - Education tab fields

Field	Description
<b>Education</b>	Community member's places of study. This is a free form text field.
<b>Highest Secondary Level</b>	Highest secondary level. This can be expressed as a year level or a form, as required.
<b>Last Year of Study</b>	Year the community member finished their education.
<b>Qualifications</b>	Specify the qualifications based on the education levels achieved, using a free form text field. See <i>Community Maintenance - Qualifications tab</i> (on page 59).
<b>Highest Qualification Level</b>	Highest qualification completed by the community member. Values include: <ul style="list-style-type: none"> <li>• Certificate I to IV (including trade certificate)</li> <li>• Advanced diploma/diploma</li> <li>• Bachelor degree or above</li> <li>• no non-school qualification.</li> </ul>
<b>Highest Non National Qualification</b>	Highest qualification completed by the community member in a country other than Australia.

## Community Maintenance - Qualifications tab

Use the **Qualifications** tab to:

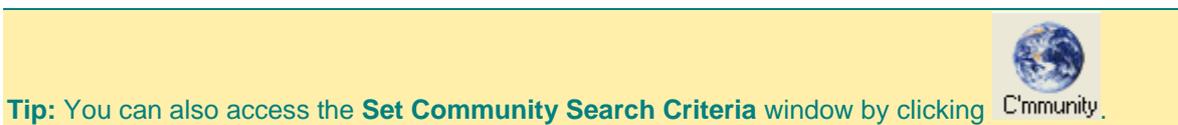
- List qualifications attained from training providers.
- Add qualifications. See *Adding qualifications* (on page 61).
- Modify and delete qualifications.

### Opening the Qualifications tab

To open the **Qualifications** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

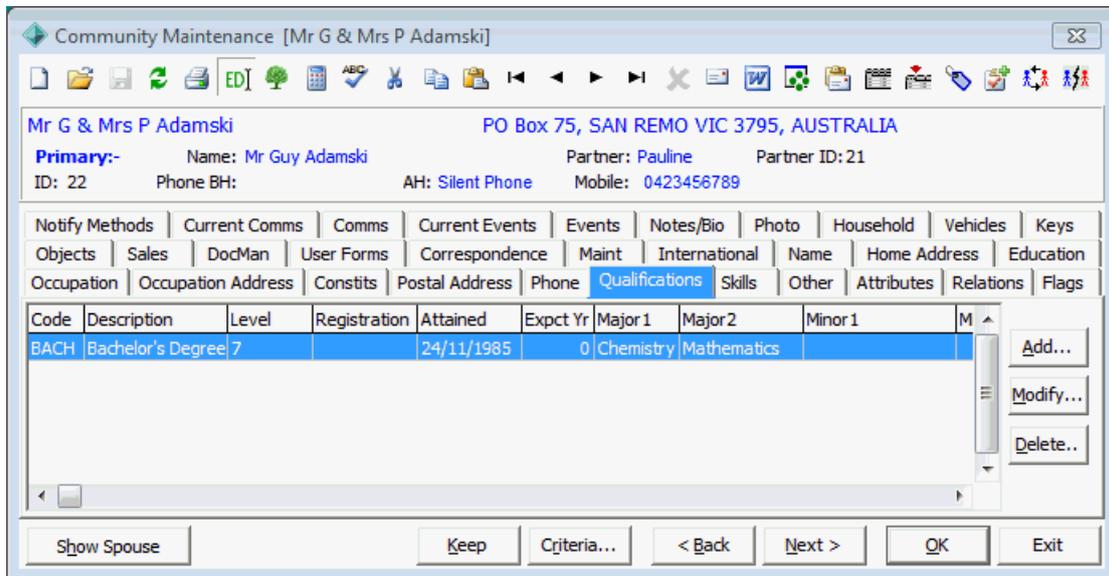


2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Qualifications** tab.

The **Qualifications** tab of the **Community Maintenance** window is displayed.



## Qualifications tab fields and buttons

### Fields

Field	Description
<b>Code</b>	Qualification code.
<b>Description</b>	Description of the qualification.
<b>Level</b>	Level of the qualification, for example secondary, tertiary.
<b>Registration</b>	Registration code from the training provider verifying the qualification.
<b>Attained</b>	Date the qualification was conferred.
<b>ExpctYr</b>	Year when a partially completed qualification should be completed.
<b>Major 1</b>	Major field of specialisation.
<b>Major 2</b>	Major field of specialisation.
<b>Minor 1</b>	Minor field of specialisation.
<b>Minor 2</b>	Minor field of specialisation.
<b>Seq</b>	Unique number identifying the qualification.
<b>Training Provider</b>	Organisation providing the training and conferring the qualification.
<b>Additional Description</b>	Description of the qualification.

### Buttons

Button	Description
	Add a qualification. See <i>Adding qualifications</i> (on page 61).
	Modify a qualification.
	Delete a qualification.

## Adding qualifications

You can add details of qualifications attained from training providers.

To add a qualification to a community member:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).  
The **Constits** tab of the **Community Maintenance** window is displayed.
3. Click the **Qualifications** tab. See *Community Maintenance - Qualifications tab* (on page 59).  
The **Qualifications** tab of the **Community Maintenance** window is displayed.

4. Click .

The **Add Qualification** window is displayed.

**Add Qualification - Mr G George (Gary)**

**Qualifications**

Qualification:

Additional Description:

Training Provider:

Qualification Level:

Registration Code:

Major 1:

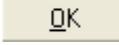
Major 2:

Minor 1:

Minor 2:

Attained Date:  Expected Attainment Year:

Comment:

5. Select the qualification.
6. If required, enter other information, for example the training provider or qualification level.
7. Click .

The qualification is added to the community member's record.

## Community Maintenance - Skills tab

Use the **Skills** tab to keep a record of any community member's skills that can be of use to your organisation. For example, tradespeople.

### Opening the Skills tab

To open the **Skills** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Skills** tab.

The **Skills** tab of the **Community Maintenance** window is displayed.

The screenshot shows the 'Community Maintenance' window for 'Mr G & Mrs P Adamski'. The 'Skills' tab is active, displaying a table of skills and a form for editing a skill.

Code	Description	Level	Attained	Expiry	Comment
BUS25	Bus Driver up to 25 passengers	H	24/02/2005		

Below the table, the 'Skills' form is visible with the following fields:

- Skill Code: Bus Driver up to 25 p
- Skill Level: High
- Attained Date: 24/02/2005
- Expiry Date: (empty)
- Current Skills Only
- Comment: Mr Adamski is happy to help out with camps and fundraising days.

Buttons at the bottom include: Show Spouse, Keep, Criteria..., < Back, Next >, OK, and Exit.

## Community Maintenance - Skills tab key fields and buttons

**Note:** Fields in the skills area correspond to the selected row in the grid area.

### Fields

Field	Description
<b>Skill Code</b>	Code for the skill. For example, <b>Plumber</b> .
<b>Skill Level</b>	Level achieved. For example, <b>A Grade</b> .
<b>Attained Date</b>	Date that the skill was acquired.
<b>Expiry Date</b>	Enter the expiry date if the skill will expire on a given date.  <u><b>Note:</b> Some skills have a limited lifetime. For example, plumbers have ongoing certification requirements for their skills to stay current.</u>
<b>Current Skills Only</b>	Select to display only skills that have passed their <b>Attained Date</b> but not reached their <b>Expiry Date</b> .
<b>Comment</b>	Any comment about the skill.

### Buttons

Button	Description
	A new row is added in the grid area. Edit the details in the skills area.
	Delete the selected skill from the community member's record.

### Editing existing skills

To edit an existing skill:

1. Open the **Skills** tab.
2. Select the skill in the grid area.
3. Change the information in the **Skills** area.

The changes in the **Skills** area are reflected in the grid area.

## Community Maintenance - Other tab

Use the **Other** tab to maintain information about a community member, including:

- date and country of birth, nationality and language used in birth country
- religion and parish
- maiden name
- suffix such as **Junior** or **Senior**
- overriding default mail addressing and salutation formats
- barcoding and login details used on campus.

## Opening the Other tab

To open the **Other** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Other** tab.

The **Other** tab of the **Community Maintenance** window is displayed.

Community Maintenance [Mr G & Mrs P Adamski]

Mr G & Mrs P Adamski 9 Towers St, CABRAMATTA NSW 2166, AUSTRALIA

**Primary:-** Name: Mr Guy Adamski Partner: Pauline Partner ID: 21  
 ID: 22 Phone BH: AH: Silent Phone Mobile: 0425718754

Flags | Notify Methods | Current Comms | Comms | Current Events | Events | Notes/Bio | Photo | Household | Vehicles | Keys | Objects  
 Sales | DocMan | User Forms | Correspondence | Maint | International | Name | Home Address | Education  
 Occupation | Occupation Address | Constits | Postal Address | Phone | Qualifications | Skills | **Other** | Attributes | Relations

**Other Details**

Date of Birth: 20/02/1931 Pre 1900 Date...  
 Religion: Anglican Parish: Not Selected  
 Nationality: Australian Nationality 2:  
 Country of Birth: Australia Home Language: English  
 Suffix: Prev Surname:  
 Override Mail Format: Override Salutation Format:  
 Barcode: Network Login: tdawson  
 External Registration Number: Community Portal Account: Manage... Batch... Delete

**Dietary Requirements** Vegetarian  
 Cannot eat meat

**Physical Requirements**

**Work With Children Checks**  
 Status: Passed - Paid Work Approved  
 Expiry Date:  
 Registration Number:

Show Spouse Keep Criteria... < Back Next > OK Exit

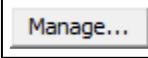
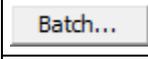
## Community Maintenance - Other tab fields and buttons

### Fields

Field	Description
<b>Date of Birth</b>	Community member's date of birth.
<b>Religion</b>	Community member's religion. Examples include: <ul style="list-style-type: none"> <li>• Agnostic</li> <li>• Anglican</li> <li>• Buddhist</li> <li>• Catholic</li> <li>• Christian</li> <li>• Church of England</li> <li>• Greek Orthodox</li> <li>• Hindu</li> <li>• Jewish</li> <li>• Lutheran</li> <li>• Muslim</li> <li>• Protestant</li> <li>• Scientologist</li> <li>• Uniting Church.</li> </ul>
<b>Parish</b>	Community member's parish, if applicable.
<b>Nationality</b>	Nationality of the community member, if different from your country.
Field	Description
<b>Nationality 2</b>	Second nationality for citizens with dual nationality.
<b>Country of Birth</b>	Community member's country of birth, if different from your country.
<b>Home Language</b>	Language spoken in the community member's home, if different from the majority language in your country.
<b>Suffix</b>	Suffix attached to a person's name. For example, Eddie James <b>Jr</b> or Joe Smith <b>III</b> .
<b>Prev Surname</b>	Use when a person has changed their surname. For example, the maiden name of a past student who has married and taken the name of her husband.
<b>Override Mail Format</b>	Preferred style for addressing mail, if the default style is not suitable. Several styles of addressing couples are available, or the primary community member only can be addressed.

Field	Description								
<b>Override Salutation Format</b>	Preferred style of salutation, if the default style is not suitable. For example, greetings used at the start of a letter. Styles include:								
	<table border="1"> <thead> <tr> <th>Style</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><b>Formal</b></td> <td>As mailing name, no initials. For example, if the mailing name is Mr J. Smith, this becomes Mr Smith.</td> </tr> <tr> <td><b>Pref</b></td> <td>As mailing name, '&amp;' and 'and'. For example, Mr and Mrs Smith.</td> </tr> <tr> <td><b>Honorary</b></td> <td>Title and initials.</td> </tr> </tbody> </table>	Style	Description	<b>Formal</b>	As mailing name, no initials. For example, if the mailing name is Mr J. Smith, this becomes Mr Smith.	<b>Pref</b>	As mailing name, '&' and 'and'. For example, Mr and Mrs Smith.	<b>Honorary</b>	Title and initials.
	Style	Description							
	<b>Formal</b>	As mailing name, no initials. For example, if the mailing name is Mr J. Smith, this becomes Mr Smith.							
<b>Pref</b>	As mailing name, '&' and 'and'. For example, Mr and Mrs Smith.								
<b>Honorary</b>	Title and initials.								
<b>Barcode</b>	Used for barcoding applications within your organisation. For example, book shop sales.								
<b>External Registration Number</b>	Registration number sourced from an external system.								
<b>Network login</b>	Login name assigned to the community member to log in to your organisation's computer network.								
<b>Dietary Requirements</b>	Community member's dietary requirements. For example, allergies and religious prohibitions.  <u><a href="#">Note: You can type the requirements manually in the memo area or select a requirement from the drop-down list. See <i>luDietaryRequirement lookup table</i> in the System maintenance manual.</a></u>								
<b>Physical Requirements</b>	Community member's physical requirements if the community member requires some form of assistance. For example, wheelchair access.								
<b>Status</b>	Status of the community member's WWC (working with children) check. The status that is used at your organisation depends on the requirements of your jurisdiction and the person's role. The typical settings are: <ul style="list-style-type: none"> <li>• <b>Not Selected.</b></li> <li>• <b>Applied.</b> An application is pending.</li> <li>• <b>PassPaidWork.</b> The person is registered to work with children.</li> <li>• <b>PassVolunteer.</b> The person is registered to work voluntarily with children.</li> <li>• <b>IntNegNot.</b> The person is not permitted to work with children unsupervised until further notice. For example, when a person is working with adults exclusively and they have not applied for a WWC check.</li> <li>• <b>NegNot.</b> The person is not permitted to work with children unsupervised.</li> </ul>								
<b>Expiry Date</b>	Expiry date of the current WWC check registration.								
<b>Registration Number</b>	WWC check registration number.								

**Buttons**

Button	Description
	Click to use the <b>Enter Pre 1900 Date</b> window to add a date of birth before 1900. Use instead of the <b>Date of Birth</b> field.
	Change the person's community portal account and password.
	Process a batch file for managing a group of community portal login details.
	Delete the person's community portal account.

## Community Maintenance - Attributes tab

Use the **Attributes** tab to view and update attributes for the community member.

### Opening the Attributes tab

To open the **Attributes** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

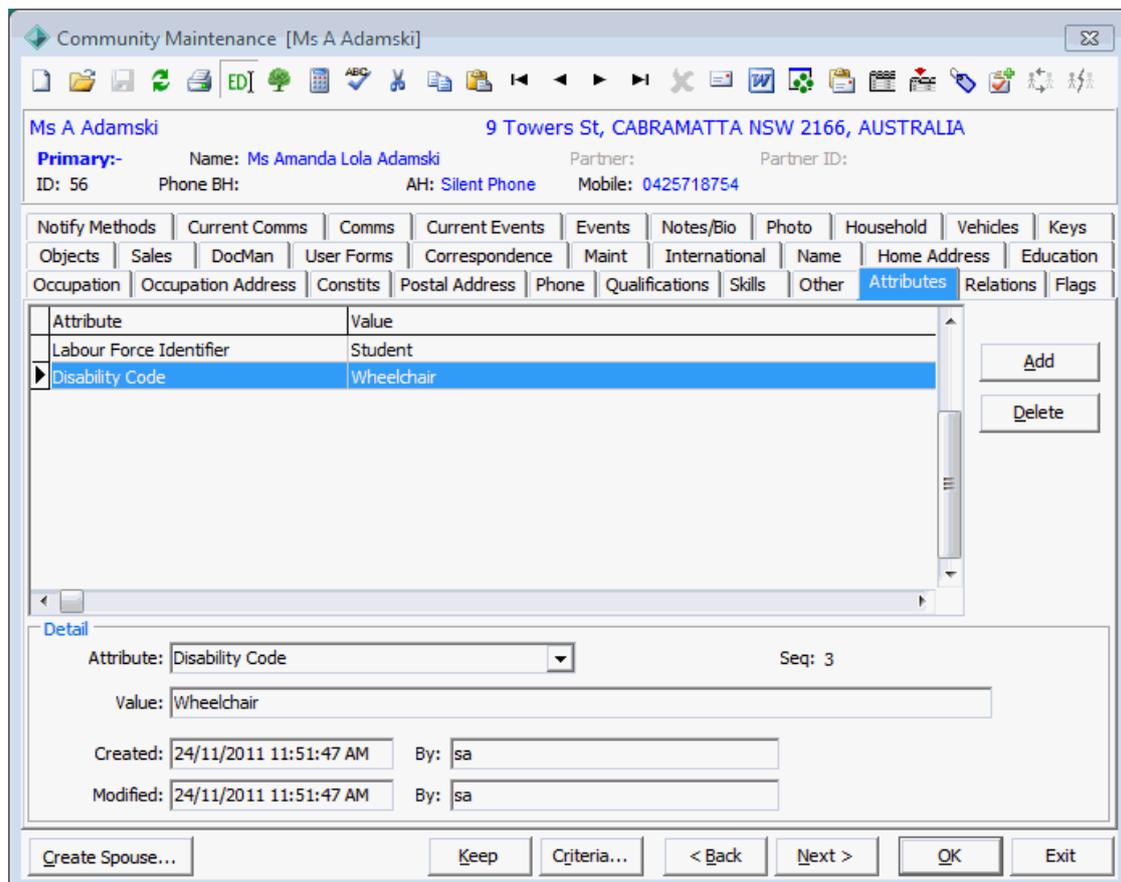


2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Attributes** tab.

The **Attributes** tab of the **Community Maintenance** window is displayed.



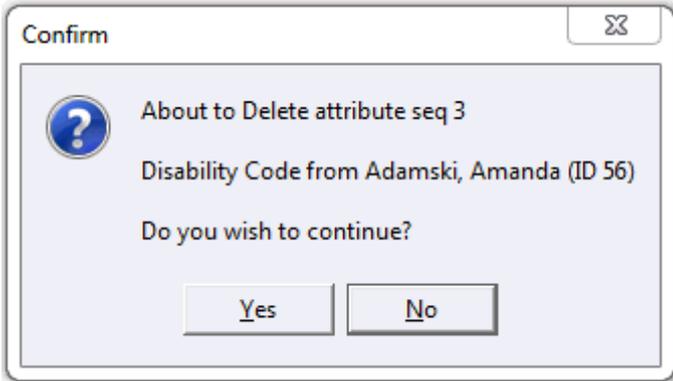
## Community Maintenance - Attributes tab fields and buttons

### Fields

The fields in the grid area correspond with those in the **Detail** area.

Field	Description
<b>Attribute</b>	Attribute that applies to the community member. The list of attributes used at your organisation is set by you depending on your organisation's requirements. <hr/> <b>Note:</b> You can also sort the community attributes by the sort order defined for the attribute in <b>Configuration File Maintenance</b> . See <i>Maintaining configuration files</i> . <hr/>
<b>Value</b>	Value that applies to the attribute for the community member.

**Buttons**

Button	Description						
	<p>To add a new attribute record for the community member:</p> <ol style="list-style-type: none"> <li>Click .                     <p>A new record is added in the grid area (denoted with an asterisk).</p> <table border="1" data-bbox="504 495 1054 600"> <thead> <tr> <th>Attribute</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Disability Code</td> <td>Wheelchair</td> </tr> <tr> <td>*</td> <td></td> </tr> </tbody> </table>  </li> <li>Select an <b>Attribute</b> from the drop-down list.</li> <li>Type a value for the attribute in the <b>Value</b> field.</li> </ol>	Attribute	Value	Disability Code	Wheelchair	*	
Attribute	Value						
Disability Code	Wheelchair						
*							
	<p>To delete an existing attribute from a community member:</p> <ol style="list-style-type: none"> <li>Select the attribute that you want to delete.</li> <li>Click .</li> <li>The following confirmation dialog is displayed.                      </li> <li>Click .</li> </ol>						

## Community Maintenance - Relations tab

Relationships are used to maintain the way in which individuals relate to each other. Within Synergetic, relationships are represented from the perspective of each individual. For example, a father-son relationship is represented as:

- father-son on the father's record
- son-father on the son's record.

Use the **Relations** tab to:

- List close relationships, along with their memberships of constituencies and their identifiers.
- Add new relations. See *Adding new relations (on page 76)*.
- Perform functions for the selected relation, such as:
  - launching the **Community Maintenance** window to maintain their details
  - deleting the selected relationship
  - sending an email
  - composing a letter
  - copying their address details to the Windows clipboard to use elsewhere
  - setting the SMS and email settings for the relation.

---

**Note:** You can configure Synergetic to automatically assign SMS and email settings when the relation is created, depending on the type of relationship. See *luRelationship lookup table* in the System maintenance manual.

---

## Opening the Relations tab

To open the **Relations** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

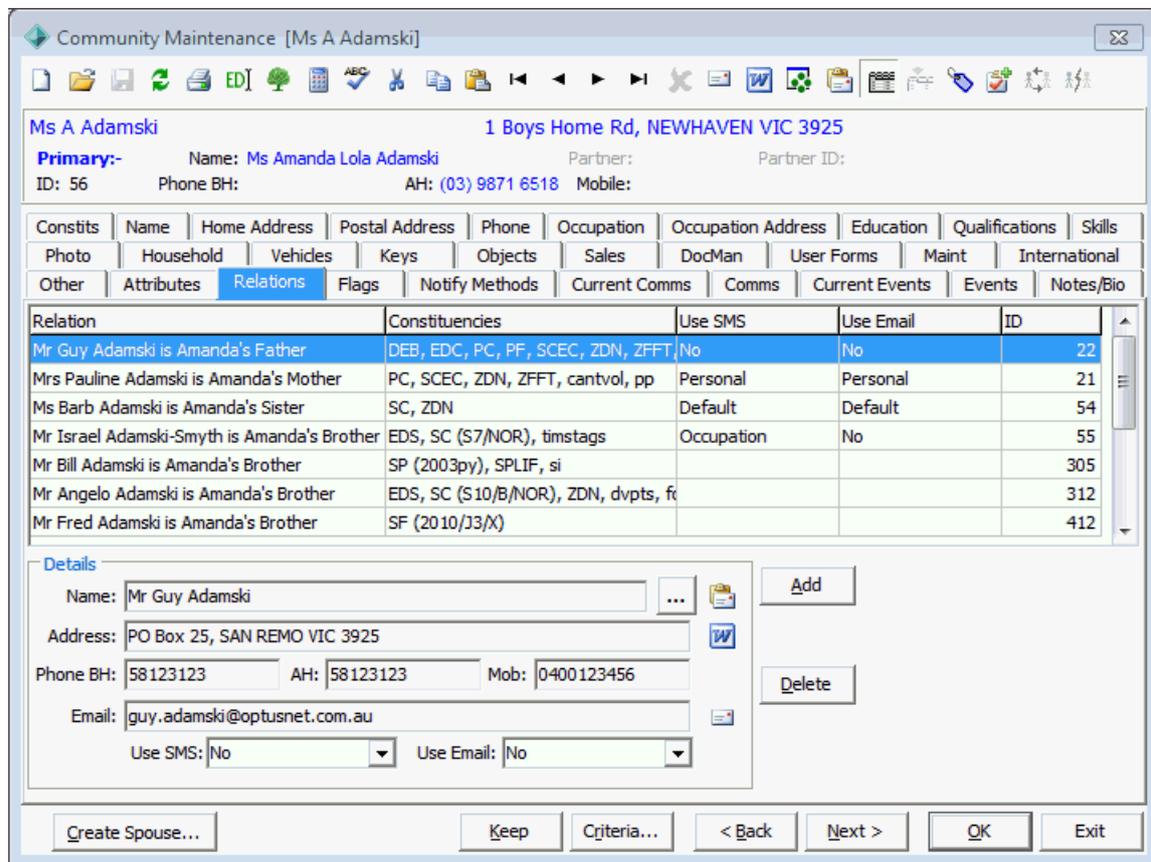
**Tip:** You can also access the **Set Community Search Criteria** window by clicking  Community.

2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Relations** tab.

The **Relations** tab of the **Community Maintenance** window is displayed.



Community Maintenance [Ms A Adamski]

Ms A Adamski 1 Boys Home Rd, NEWHAVEN VIC 3925

**Primary:-** Name: Ms Amanda Lola Adamski Partner: Partner ID:  
 ID: 56 Phone BH: AH: (03) 9871 6518 Mobile:

Relation	Constituencies	Use SMS	Use Email	ID
Mr Guy Adamski is Amanda's Father	DEB, EDC, PC, PF, SCEC, ZDN, ZFFT	No	No	22
Mrs Pauline Adamski is Amanda's Mother	PC, SCEC, ZDN, ZFFT, cantvol, pp	Personal	Personal	21
Ms Barb Adamski is Amanda's Sister	SC, ZDN	Default	Default	54
Mr Israel Adamski-Smyth is Amanda's Brother	EDS, SC (S7/NOR), timstags	Occupation	No	55
Mr Bill Adamski is Amanda's Brother	SP (2003py), SPLIF, si			305
Mr Angelo Adamski is Amanda's Brother	EDS, SC (S10/B/NOR), ZDN, dvpts, f			312
Mr Fred Adamski is Amanda's Brother	SF (2010/J3/X)			412

**Details**

Name: Mr Guy Adamski

Address: PO Box 25, SAN REMO VIC 3925

Phone BH: 58123123 AH: 58123123 Mob: 0400123456

Email: guy.adamski@optusnet.com.au

Use SMS: No Use Email: No

## Community Maintenance - Relations tab fields and buttons

### Grid area fields

Field	Description
<b>Relation</b>	Relationship details. For example, <b>Jay Smith is Ann Smith's daughter.</b>
<b>Constituencies</b>	Relation's constituencies. For example, a student's parent might be a member of the Debtor constituency.
<b>Use SMS</b>	Whether the relation elects to receive SMS text messages from your organisation with regard to this person and if so which mobile phone number to use: <ul style="list-style-type: none"> <li>• <b>Default</b> mobile</li> <li>• <b>Personal</b> mobile</li> <li>• <b>Occupation</b> mobile.</li> </ul>
<b>Use Email</b>	Whether the relation elects to receive email messages from your organisation about this person ( <b>No</b> , if not), and if so which email address to use: <ul style="list-style-type: none"> <li>• <b>Default</b> email</li> <li>• <b>Personal</b> email</li> <li>• <b>Occupation</b> email.</li> </ul> <p><b>Note:</b> Selecting <b>No</b> prevents sending emails from grids but not sending emails using <b>Communications Maintenance</b>.</p>
<b>ID</b>	Relation's Synergetic ID.

### Details area fields

Field	Description
<b>Name</b>	Relation's name.
<b>Address</b>	Relation's address.
<b>Phone BH</b>	Relation's business hours telephone number.
<b>AH</b>	Relation's after hour's telephone number.
<b>Mob</b>	Relation's mobile telephone number.
<b>Email</b>	Relation's email address.
<b>Use SMS</b>	<p>Whether the relation elects to receive SMS text messages from your organisation with regard to this person and if so which mobile phone number to use:</p> <ul style="list-style-type: none"> <li>• <b>Default</b> mobile</li> <li>• <b>Personal</b> mobile</li> <li>• <b>Occupation</b> mobile.</li> </ul>
<b>Use Email</b>	<p>Whether the relation elects to receive email messages from your organisation about this person (<b>No</b>, if not), and if so which email address to use:</p> <ul style="list-style-type: none"> <li>• <b>Default</b> email</li> <li>• <b>Personal</b> email</li> <li>• <b>Occupation</b> email.</li> </ul> <p><b>Note:</b> Selecting <b>No</b> prevents sending emails from grids but not sending emails using <b>Communications Maintenance</b>.</p>

### Buttons

Button	Description
	Launch the <b>Community Maintenance</b> window for the selected record.
	Add a new relation. See <i>Adding new relations</i> (on page 76).
	Delete the selected relationship.
	Send an email. See <i>Sending emails</i> in the Introduction manual.
	Compose a letter. See <i>Composing letters with Microsoft Word</i> in the Introduction manual.
	<p>Copy the address details of the selected record to the Windows clipboard.</p> <p>Go the Microsoft Windows program you are using and paste the address details into the document you are editing.</p>

## Adding new relations

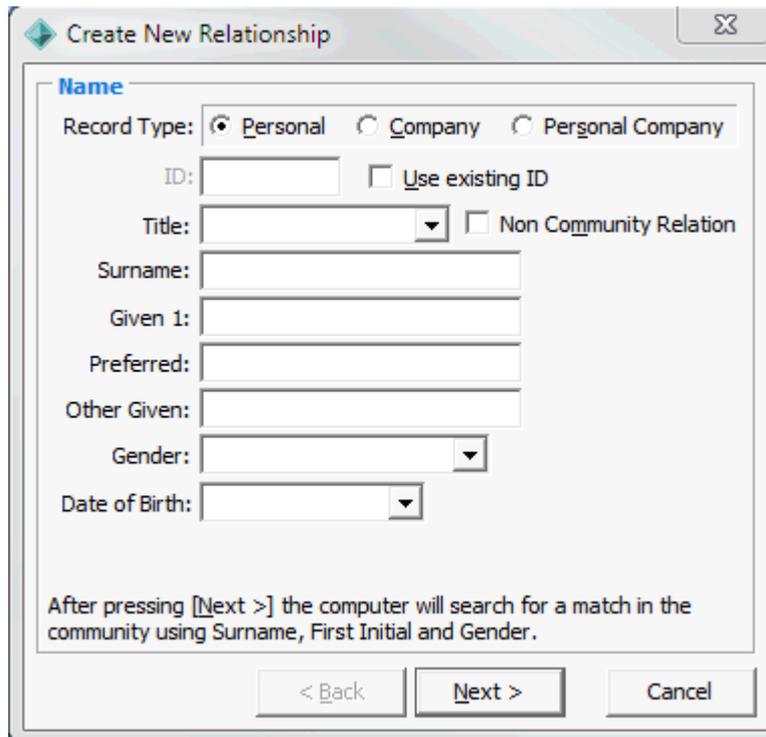
**Note:** When you create a relationship, Synergetic also creates the reverse relationship. For example, if you create a father-son relationship, a son-father relationship is also created at the same time. Reverse relationships are automatically deleted when the relationship is deleted.

To add new relations from the **Relations** tab:

1. Open the **Relations** tab. See *Community Maintenance - Relations tab* (on page 72).

2. Click .

The **Create New Relationship - Name** window is displayed.



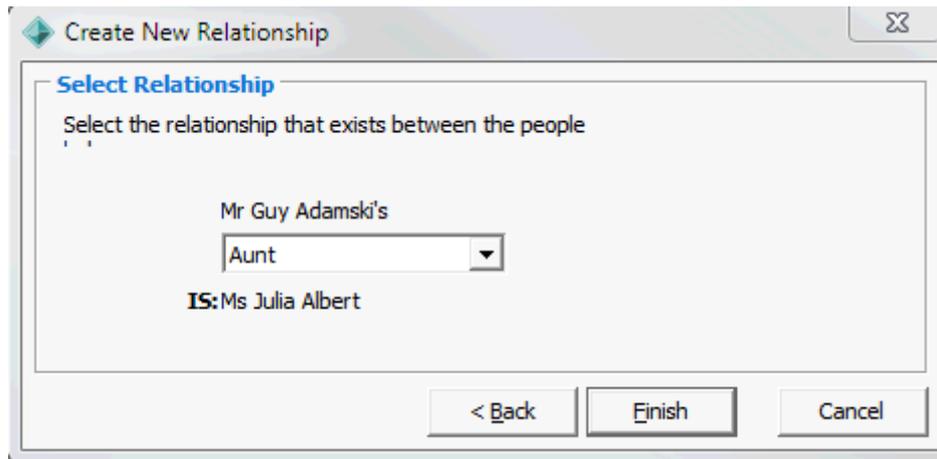
3. Enter details of the person or company to find.

4. Click .

**Note:** You can select **Non Community Relation** to enter a relation who is not in the database. However, you are limited in what you can do with the relation.

5. Select the person to record a relationship from the **Possible Name Match Found** window. See *Possible Name Match Found window* (on page 31).

The **Create New Relationship - Select Relationship** window is displayed.



6. Select the relationship.

7. Click **Finish**.

The relationship is added to the grid area.

---

**Note:** The reverse relationship is also created in Synergetic.

---

**Tip:** Depending on your organisation's preferences and the type of relationship, the **Use Email** or **Use SMS** flags may be automatically set to **Default**. Check the grid area **Relations** tab to override any inappropriate email or SMS settings for both members of the relationship.

## Community Maintenance - Flags tab

Use the **Flags** tab to:

- specify whether the community member receives particular types of correspondence
- record the death of a community member.

### Opening the Flags tab

To open the **Flags** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Flags** tab.

The **Flags** tab of the **Community Maintenance** window is displayed.

The screenshot shows the 'Community Maintenance [Ms A Adamski]' window. The 'Flags' tab is selected. The window displays the following information:

**Ms A Adamski** 1 Boys Home Rd, NEWHAVEN VIC 3925  
**Primary:-** Name: Ms Amanda Lola Adamski Partner: Partner ID:  
 ID: 56 Phone BH: AH: (03) 9871 6518 Mobile:

Navigation tabs: Constits | Name | Home Address | Postal Address | Phone | Occupation | Occupation Address | Education | Qualifications | Skills | Photo | Household | Vehicles | Keys | Objects | Sales | DocMan | User Forms | Maint | International | Other | Attributes | Relations | **Flags** | Notify Methods | Current Comms | Comms | Current Events | Events | Notes/Bio

**Mailing Flags**

Reason for change:
<input checked="" type="checkbox"/> Receives Mail
<input checked="" type="checkbox"/> Receives Magazine
<input checked="" type="checkbox"/> Receives Solicitation
<input checked="" type="checkbox"/> Receives Raffle

**Other Flags**

- Include in Directory
- Provide Directory
- Publish to Associated Organisations
- Spouse

Buttons: **Mark as Deceased**

Deceased Date: [Dropdown] Pre 1900 Date...

**Addresses User Flags**

- Postal Address is Occupation
- Postal Address is Accommodation
- Postal address is not residence

**Community User Flags**

- Wishes to attend fundraising events
- Consents To Receive Updates

Buttons at the bottom: **Create Spouse...** **Keep** **Criteria...** **< Back** **Next >** **OK** **Exit**

## Community Maintenance - Flags tab key fields and buttons

### Mailing Flags area fields

Field	Description
<b>Receives Mail</b>	Receives general correspondence from your organisation.
<b>Receives Magazine</b>	Receives your organisation's magazine.
<b>Receives Solicitation</b>	Receives fund raising requests from your organisation.
<b>Receives Raffle</b>	Receives raffle tickets to sell on behalf of your organisation.
<b>Reason for Change</b>	Reason for adding or removing a flag, if applicable.

### Other Flags area fields

Field	Description
<b>Include in Directory</b>	Include the community member in your organisation's directory of contact details.
<b>Provide Directory</b>	Receives a copy of your organisation's directory of contact details.
<b>Publish to Associated Organisations</b>	Publish community member's details to associated organisations.
<b>Spouse</b>	Displays whether the community member has a spouse who is also a community member.
<b>Deceased</b>	Displays if community member is deceased. To set this flag, click  . See below.
<b>Date</b>	Date the community member died.

### Community User Flags and Addresses User Flags area fields

Community user flags and addresses user flags are defined by the Synergetic administrator at your organisation.

Either:

- select the flag if it applies to the community member
- clear the flag if it no longer applies to the community member.

### Other Flags area buttons

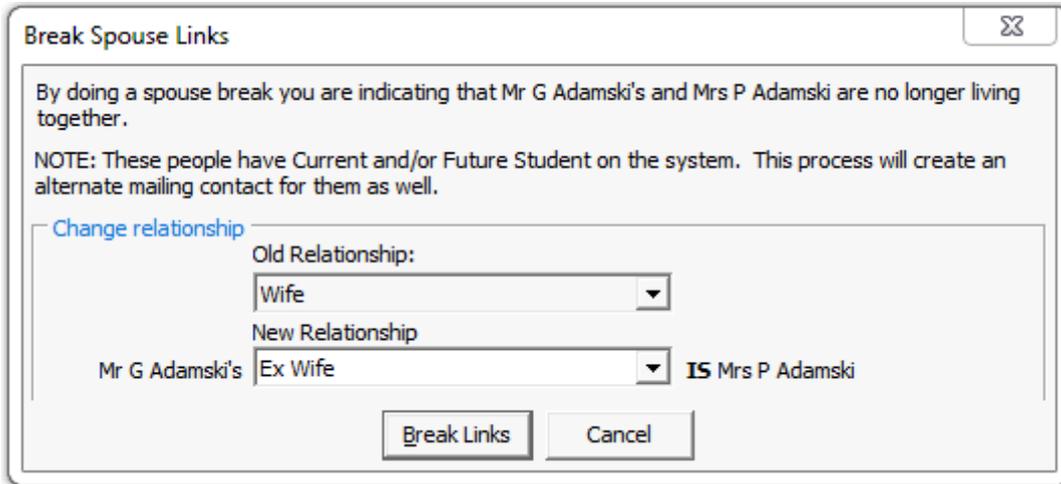
Button	Description
	Select to mark the community member as deceased.  <b>Note:</b> The link with the spouse community member record needs to be broken before the <b>Deceased</b> and <b>Deceased Date</b> fields can be updated. See <a href="#">Breaking links to a spouse (on page 80)</a> .  <b>Tip:</b> To break spouse links, click  on the <b>Community Maintenance</b> toolbar.

## Breaking links to a spouse

To break links to a spouse:

1. Click  on the **Community Maintenance** toolbar.

The following warning is displayed.



**Break Spouse Links**

By doing a spouse break you are indicating that Mr G Adamski's and Mrs P Adamski are no longer living together.

NOTE: These people have Current and/or Future Student on the system. This process will create an alternate mailing contact for them as well.

**Change relationship**

Old Relationship:  
Wife

New Relationship:  
Mr G Adamski's Ex Wife **IS** Mrs P Adamski

Break Links Cancel

2. Click .

The link is broken. Synergetic creates:

- an alternative mailing contact for any linked students
- separate address records for each of the spouses, although both will have the same details initially.

## Community Maintenance - Notify Methods tab

Use the **Notify Methods** tab to maintain the methods you use to communicate with the community member.

### Opening the Notify Methods tab

To open the **Notify Methods** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

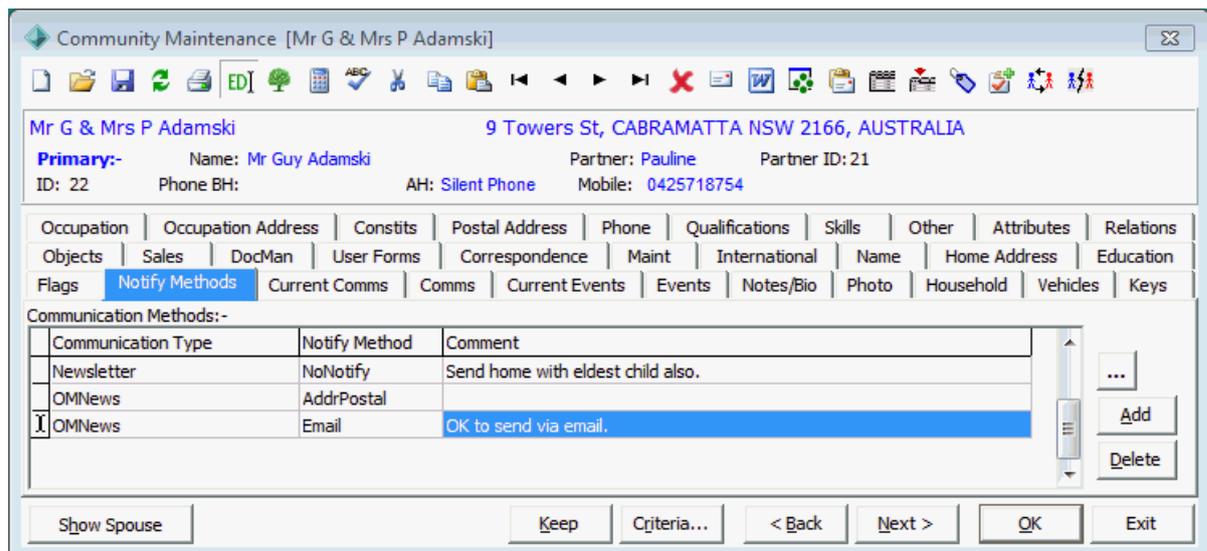


2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

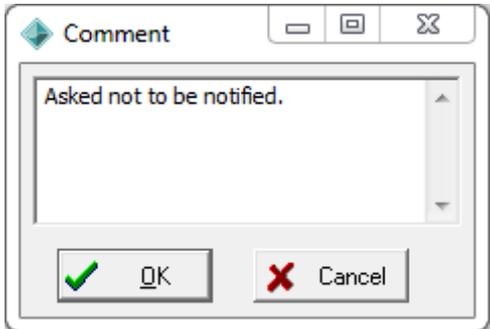
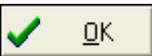
3. Click the **Notify Methods** tab.

The **Notify Methods** tab of the **Community Maintenance** window is displayed.



## Notify Methods tab key fields and buttons

### Fields

Field	Description
<b>Communication Type</b>	Code for the type of communication. For example, the code for the school magazine.
<b>Notify Method</b>	Default method for the community member. For example, community members with email addresses can elect to receive the newsletter via email rather than via post.
<b>Comment</b>	<p>Comments about the notification method.</p> <p>To create or edit a comment:</p> <ol style="list-style-type: none"> <li>Double click on the comment grid cell where you want the comment to appear. The <b>Comment</b> window appears.</li> </ol>  <ol style="list-style-type: none"> <li>Type your comment and click .</li> </ol>

### Buttons

Button	Description
	Launch the <b>Communication Types Maintenance</b> window. See <i>Maintaining communication types</i> in the Development manual.
	Add a communication method.
	Delete the selected communication method.

## Community Maintenance - Current Comms tab

Use the **Current Comms** tab to:

- Maintain communications with community members that have yet to be sent using the **Communications** sub-tab, as outlined below.
- Maintain notification methods for the community member using the **Notification Methods** sub-tab. See *Maintaining notification methods* (on page 86).

Current communications are those that have **not** yet been sent. To maintain communications that have been sent, see:

- *Maintaining communications* in the Development manual
- *Community Maintenance - Comms tab* (on page 88).

## Opening the Current Comms tab

To open the **Current Comms** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

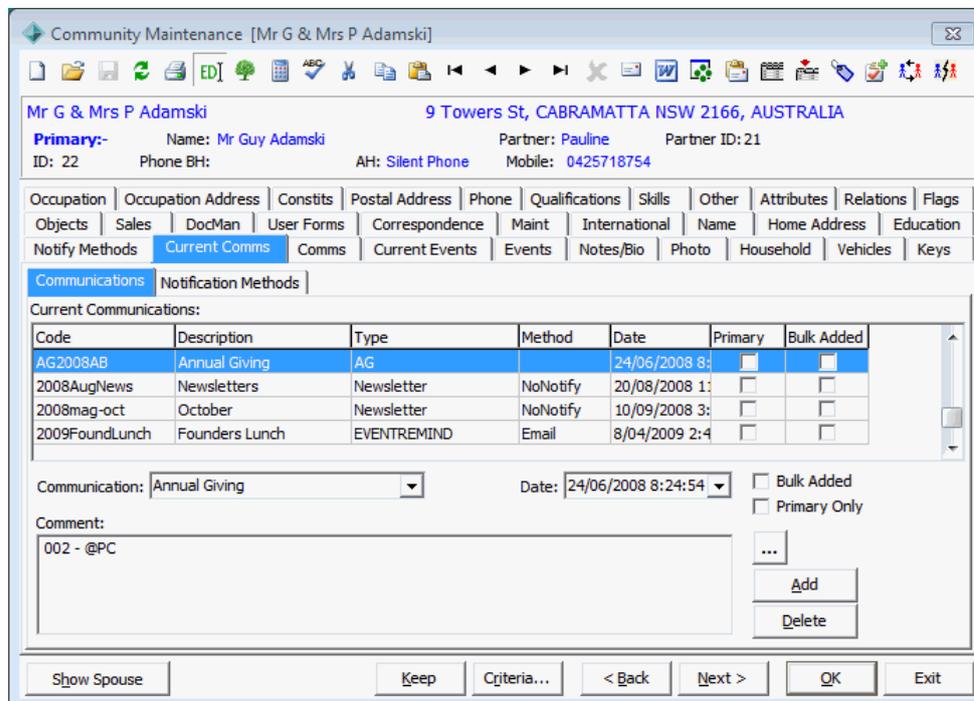
**Tip:** You can also access the **Set Community Search Criteria** window by clicking  Community.

2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Current Comms** tab.

The **Communications** sub-tab of the **Current Comms** tab of the **Community Maintenance** window is displayed.



Community Maintenance [Mr G & Mrs P Adamski]

Mr G & Mrs P Adamski 9 Towers St, CABRAMATTA NSW 2166, AUSTRALIA

**Primary:-** Name: Mr Guy Adamski Partner: Pauline Partner ID: 21  
 ID: 22 Phone BH: AH: Silent Phone Mobile: 0425718754

Occupation | Occupation Address | Constits | Postal Address | Phone | Qualifications | Skills | Other | Attributes | Relations | Flags  
 Objects | Sales | DocMan | User Forms | Correspondence | Maint | International | Name | Home Address | Education  
 Notify Methods | **Current Comms** | Comms | Current Events | Events | Notes/Bio | Photo | Household | Vehicles | Keys

**Communications** | Notification Methods

Current Communications:

Code	Description	Type	Method	Date	Primary	Bulk Added
AG2008AB	Annual Giving	AG		24/06/2008 8:	<input type="checkbox"/>	<input type="checkbox"/>
2008AugNews	Newsletters	Newsletter	NoNotify	20/08/2008 1:	<input type="checkbox"/>	<input type="checkbox"/>
2008mag-oct	October	Newsletter	NoNotify	10/09/2008 3:	<input type="checkbox"/>	<input type="checkbox"/>
2009FoundLunch	Founders Lunch	EVENTREMIND	Email	8/04/2009 2:4	<input type="checkbox"/>	<input type="checkbox"/>

Communication: Annual Giving Date: 24/06/2008 8:24:54  Bulk Added  
 Primary Only

Comment:  
002 - @PC

...  
Add  
Delete

Show Spouse Keep Criteria... < Back Next > OK Exit

## Community Maintenance - Current Comms tab key fields and buttons

### Fields

Field	Description
<b>Code</b>	Unique code used to identify the communication. See <i>Maintaining communications</i> in the Development manual.
<b>Communication / Description</b>	Description of the communication. The <b>Communication</b> field is displayed as the <b>Description</b> field in the grid area.
<b>Type</b>	Type of communication. For example, newsletter or event reminder.
<b>Method</b>	Way the communication is to be sent. For example, posted or by email.
<b>Date</b>	Date and time of the communication.
<b>Primary Only</b>	Address the communication to the primary contact only.
<b>Bulk Added</b>	Flag is selected if the communication has been added in bulk.

### Buttons

Button	Description
	Launch into <b>Communications Maintenance</b> . See <i>Maintaining communications</i> in the Development manual.
	Add a new row then input the details of the current communication.
	Delete the highlighted current communication.

## Maintaining notification methods

Use the **Notification Methods** sub-tab of the **Current Comms** tab to maintain notification methods for current communications.

Also, see the **Communications** sub-tab of the *Community Maintenance - Current Comms tab* (on page 83) to maintain the details of the current communications.

## Opening the Notification Methods sub-tab

To open the **Notification Methods** sub-tab of the **Current Comms** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Current Comms** tab.

The **Current Comms** tab of the **Community Maintenance** window is displayed.

4. Click the **Notification Methods** sub-tab.

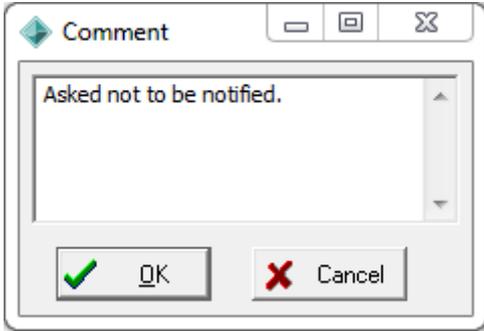
The **Notification Methods** sub-tab of the **Current Comms** tab of the **Community Maintenance** window is displayed.

The screenshot shows the 'Community Maintenance' window for 'Mr G & Mrs P Adamski' at '9 Towers St, CABRAMATTA NSW 2166, AUSTRALIA'. The 'Current Comms' tab is selected, and the 'Notification Methods' sub-tab is active. The 'Communication Methods' table is visible, showing three entries: 'Newsletter' with 'NoNotify', 'OMNews' with 'AddrPostal', and 'OMNews' with 'Email'. The 'OMNews' entry with 'Email' is selected. The window includes a toolbar with various icons and buttons at the bottom: 'Show Spouse', 'Keep', 'Criteria...', '< Back', 'Next >', 'OK', and 'Exit'.

Communication Type	Notify Method	Comment
Newsletter	NoNotify	
OMNews	AddrPostal	
OMNews	Email	

## Notification Methods sub-tab key fields and buttons

### Fields

Field	Description
<b>Communication Type</b>	Select what the communication is from the drop-down list. For example, newsletter or event reminder.
<b>Notify Method</b>	Select the way the communication is sent. For example, by mail or email.
<b>Comment</b>	<p>Comments about the selected notification method.</p> <p>To create or edit a comment:</p> <ol style="list-style-type: none"> <li>1. Double click on the comment grid cell where you want the comment to appear. The <b>Comment</b> window appears.</li> </ol>  <ol style="list-style-type: none"> <li>2. Type your comment and click .</li> </ol>

### Buttons

Button	Description
	Launch into <b>Communication Types Maintenance</b> . See <i>Maintaining communication types</i> in the Development manual.
	Add a new row then input the details of the notification method.
	Delete the highlighted notification method.

## Community Maintenance - Comms tab

Use the **Comms** tab to maintain communications that have been sent to donors and prospects.

### Opening the Comms tab

To open the **Comms** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

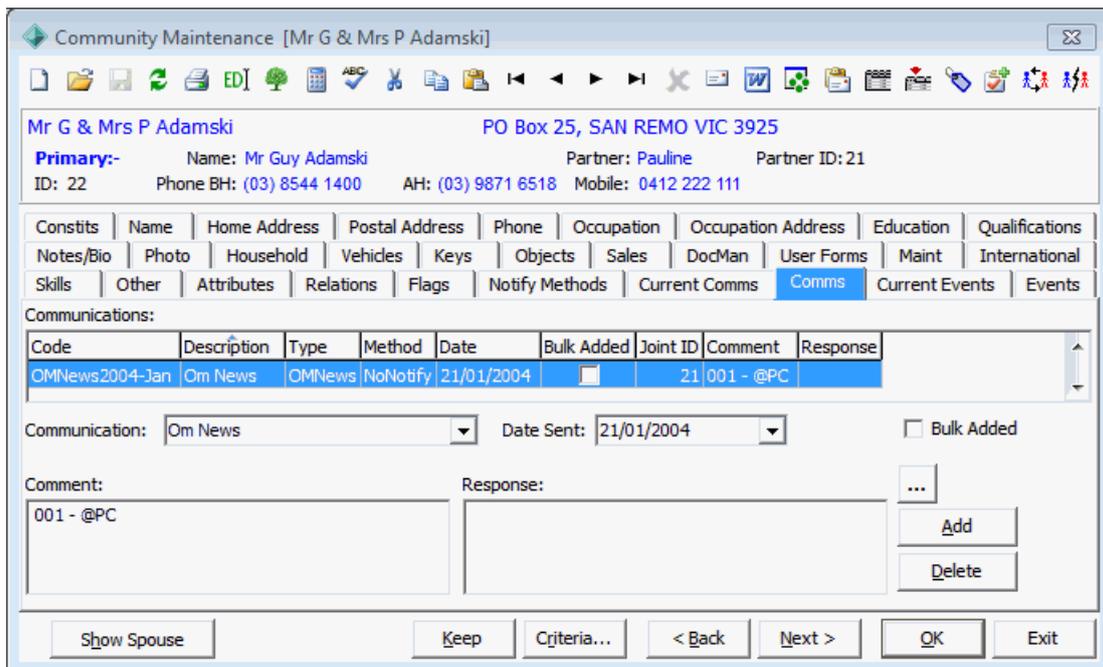
**Tip:** You can also access the **Set Community Search Criteria** window by clicking  Community.

2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Comms** tab.

The **Comms** tab of the **Community Maintenance** window is displayed.



Community Maintenance [Mr G & Mrs P Adamski]

Mr G & Mrs P Adamski PO Box 25, SAN REMO VIC 3925

**Primary:-** Name: Mr Guy Adamski Partner: Pauline Partner ID: 21  
 ID: 22 Phone BH: (03) 8544 1400 AH: (03) 9871 6518 Mobile: 0412 222 111

Code	Description	Type	Method	Date	Bulk Added	Joint ID	Comment	Response
OMNews2004-Jan	Om News	OMNews NoNotify		21/01/2004	<input type="checkbox"/>	21	001 - @PC	

Communication: Om News Date Sent: 21/01/2004  Bulk Added

Comment: 001 - @PC Response:

Buttons: Show Spouse, Keep, Criteria..., < Back, Next >, OK, Exit

## Community Maintenance - Comms tab key fields and buttons

### Fields

Field	Description
<b>Code</b>	Unique code used to identify the communication. See <i>Maintaining communications</i> in the Development manual.
<b>Description</b>	Description of the communication. The <b>Communication</b> field is displayed as the <b>Description</b> field in the grid area.
<b>Type</b>	Type of communication. For example, newsletter or event reminder.
<b>Method</b>	Way the communication is to be sent. For example, posted or by email.
<b>Date / Date Sent</b>	Date and time of the communication.
<b>Bulk Added</b>	Flag is selected if the communication has been added in bulk.
<b>Joint ID</b>	Synergetic ID of the person who received the communication as well as the primary contact, if applicable.
<b>Comment</b>	Optional comments about the communication.
<b>Response</b>	Response of the donor or prospect to the communication sent.

### Buttons

Button	Description
	Launch into <b>Communications Maintenance</b> . See <i>Maintaining communications</i> in the Development manual.
	Add a new row then input the details of the communication.
	Delete the highlighted communication.

## Community Maintenance - Current Events tab

Use the **Current Events** tab to:

- Review the events that the community member is attending or about to attend.
- Add a person to an existing event.
- Update status and other fields relating to their attendance at the event.
- Launch the **Events Maintenance** window to process multiple attendees. See *Events Maintenance - Current Attendees* in the Development manual.

### What you can do:

What you can do...	See...
Enter the event details for the community member and their spouse, including: <ul style="list-style-type: none"> <li>• event name</li> <li>• event status</li> <li>• attendee payments</li> <li>• any attendee special dietary or physical needs</li> <li>• tickets issued by type and their cost, if different to normal</li> <li>• period they are attending the event, if different to normal</li> <li>• attendee attributes, if defined.</li> </ul>	<i>Community Maintenance - Current Events tab - Details sub-tab</i> (on page 91)
Record the details of any guests attending the event.	<i>Community Maintenance - Current Events tab - Guests sub-tab</i> (on page 97)

## Community Maintenance - Current Events tab - Details sub-tab

Use the **Details** sub-tab of the **Current Events** tab to enter the event details for the community member and their spouse, including:

- event name
- event status
- attendee payments
- any attendee special dietary or physical needs
- tickets issued by type and their cost, if different to normal
- period they are attending the event, if different to normal
- attendee attributes, if defined.

The **Details** sub-tab consists of several sub-sub-tabs:

- **<community member name>** sub-sub-tab. Record any special needs the community member has. For example:
  - dietary needs, such as vegetarian meals
  - physical needs, such as wheelchair access and positioning at a table.
- **Times** sub-sub-tab. Period the attendees are attending the event, if different to normal.
- **Tickets** sub-sub-tab. Number of tickets:
  - of each type, such as adult, concession and so on, and
  - their cost, if the cost is overridden.
- **Attributes** sub-sub-tab. Attributes for the attendee, if defined. For example, **VIP** or **Disabled Parking**.

---

**Note:** Use the **Guests** sub-tab to record the details of any guests attending the event. See [Community Maintenance - Current Events tab - Guests sub-tab](#) (on page 97).

---

## Opening the Details sub-tab

To open the **Details** sub-tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

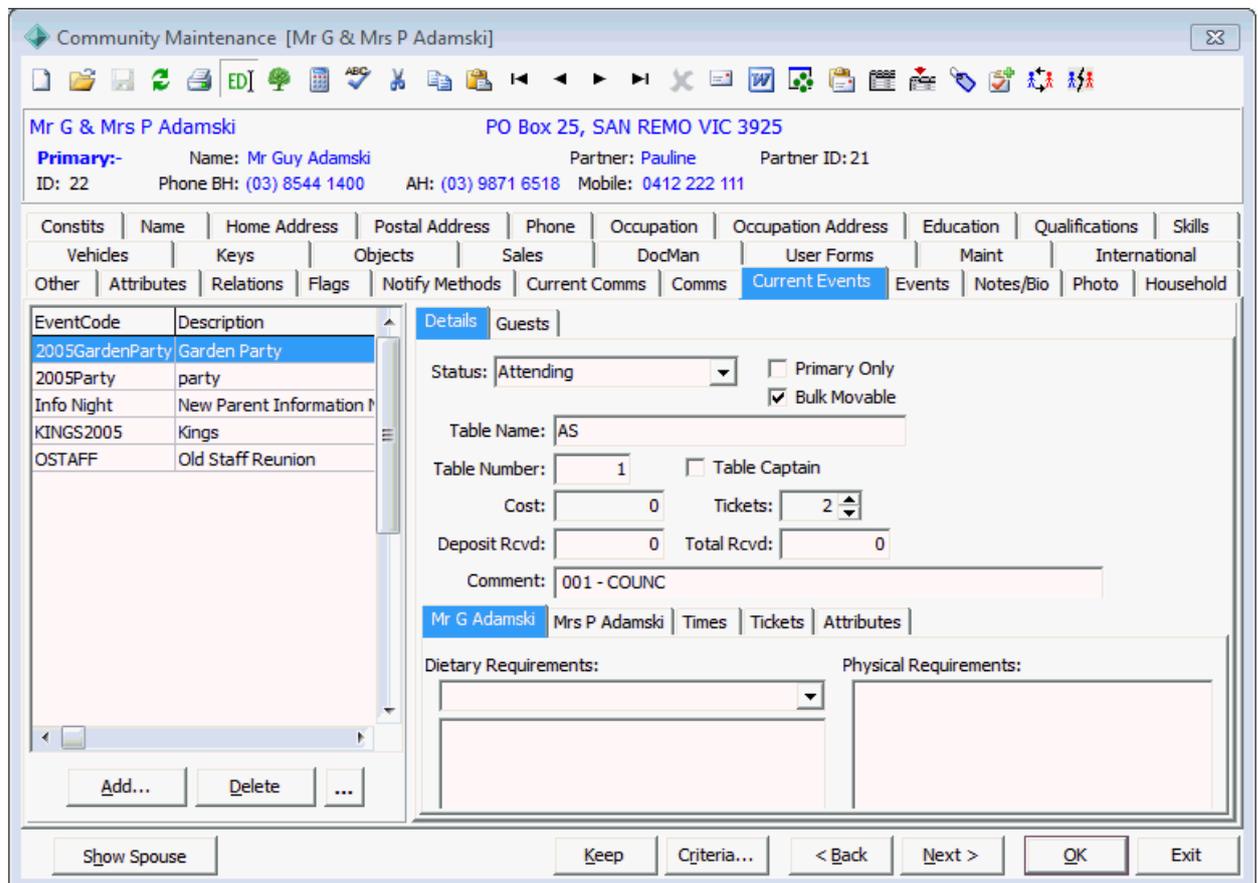
**Tip:** You can also access the **Set Community Search Criteria** window by clicking  Community.

2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Current Events** tab.

The **Details** sub-tab of the **Current Events** tab of the **Community Maintenance** window is displayed.



The screenshot shows the 'Community Maintenance [Mr G & Mrs P Adamski]' window. The 'Current Events' tab is active, and the 'Details' sub-tab is selected. The main area displays event details for '2005GardenParty' (Garden Party). The status is 'Attending', and the table name is 'AS'. The table number is '1', cost is '0', and tickets are '2'. The deposit received is '0' and total received is '0'. The comment is '001 - COUNC'. Below the details, there are sections for 'Dietary Requirements' and 'Physical Requirements'. At the bottom, there are buttons for 'Show Spouse', 'Keep', 'Criteria...', '< Back', 'Next >', 'OK', and 'Exit'.

EventCode	Description
2005GardenParty	Garden Party
2005Party	party
Info Night	New Parent Information N
KINGS2005	Kings
OSTAFF	Old Staff Reunion

**Details** | Guests |

Status:   Primary Only  Bulk Movable

Table Name:

Table Number:   Table Captain

Cost:  Tickets:

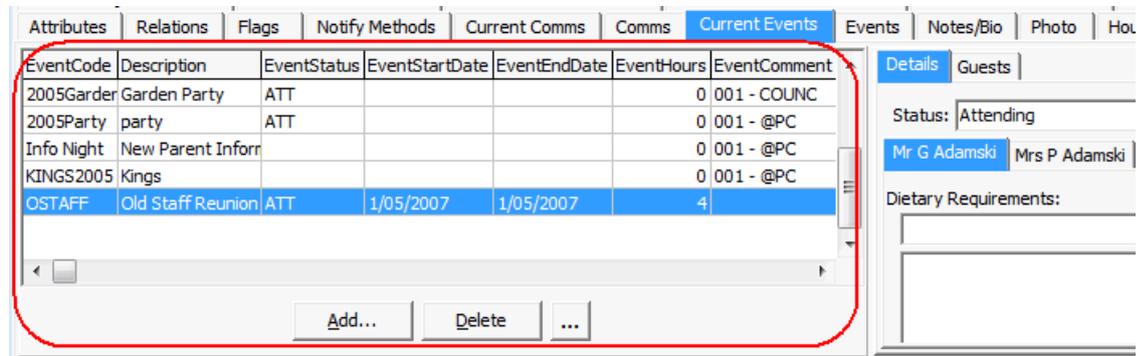
Deposit Rcvd:  Total Rcvd:

Comment:

Dietary Requirements:  Physical Requirements:

## Community Maintenance - Current Events tab - Details sub-tab key fields and buttons

### Grid area fields



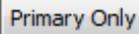
Field	Description
<b>EventCode</b>	Code referring to the event.
<b>Description</b>	Description of the event.
<b>EventStatus</b>	Status of attendance for the selected person.
<b>EventStartDate</b>	Start date of attendance for the selected person, if different to the start date of the event.
<b>EventEndDate</b>	End date of attendance for the selected person, if different to the end time of the event.
<b>EventHours</b>	Number of hours which this person is able to attend.
<b>EventComment</b>	Any comments relating to this person's attendance at the event.

### Grid area buttons

Button	Description
	Add a new event to the grid area, using the drop-down list in the <b>Select Event Code</b> window. 
	Delete an event from the grid area.
	Launch into the <b>Events Maintenance</b> window for the highlighted event. See <i>Maintaining events</i> in the Development manual.

### Fields

The fields displayed correspond to the selected record in the grid area.

Field	Description
<b>Status</b>	Status of the attendee. For example, whether attending or unable to attend.
<b>Primary Only</b>	If selected, only the primary contact is invited. The default is to include the attendee and their spouse, if they have one.  <b>Note:</b> This field is not editable. To select or clear this field, use the  button.
<b>Bulk Movable</b>	If selected, this attendee can be moved to the <b>Past Attendees</b> tab once the event is concluded. Clear if you want this guest to remain in the <b>Current Attendees</b> tab. For example, staff members can attend multiple events.
<b>Table Name</b>	Name that the table is known by, if tables are used at the event. For example, tables can be given humorous names for a trivia night event.
<b>Table Number</b>	Nominate the table that the attendee is seated at, if numbered tables are used at the event.
<b>Table Captain</b>	Select to indicate that the attendee is the nominated leader for the table, if tables are used at the event.
<b>Cost</b>	Cost of each type of ticket. The costs are defined using the <b>Attributes</b> tab of the <b>Events Maintenance</b> window. See <i>Events Maintenance - Attributes tab</i> in the Development manual.
<b>Tickets</b>	Number of tickets issued to the attendee.
<b>Deposit Rcvd</b>	Amount of the deposit received.
<b>Total Rcvd</b>	Total amount received so far.
<b>Comment</b>	Add any general comments about the attendee and their guests.

<Community member name> sub-sub-tab fields

Field	Description
<b>Dietary Requirements</b>	List any special dietary requirements for the selected person. For example, the primary person may be a vegetarian while their partner may be a vegan.
<b>Physical Requirements</b>	List any requirements to cater for particular physical needs. For example, wheelchair access is required.

Times sub-sub-tab fields

Mr G M Adamski | Mrs P Adamski | **Times** | Tickets | Attributes

Start Date: 22/06/2007 7:30:00 PM

End Date: 22/06/2007 10:30:00 PM

Hours: 3

Field	Description
<b>Start Date</b>	Date if the starting date of the person's attendance is different from the event's starting date. For example, an event can cover several days but the person only attends for part of the event.
<b>End Date</b>	Date the person finishes attending the event, if this is different from the event's end date. For example, an event can cover several days but the person only attends for part of the event.
<b>Hours</b>	Number of hours the attendee attends the event.

### Tickets sub-sub-tab fields

Mr G M Adamski   Mrs P Adamski   Times   <b>Tickets</b>   Attributes
Adult (\$70.00) 2 Cost: 140.00 <input type="checkbox"/> Override
Student (\$50.00) 2 Cost: 100.00 <input type="checkbox"/> Override
Concession (\$40.00) 0 Cost: 0.00 <input type="checkbox"/> Override
Family Ticket (\$150.00) 0 Cost: 0.00 <input type="checkbox"/> Override

Field	Description
<b>Ticket type</b>	Lists all the types of tickets available for this event. For example: <ul style="list-style-type: none"> <li>• Adult</li> <li>• Student</li> <li>• Concession.</li> </ul> <p>The ticket types are defined using the <b>Attributes</b> tab of the <b>Events Maintenance</b> window. See <i>Events Maintenance - Attributes tab</i> in the Development manual.</p>
<b>Cost</b>	Cost of each type of ticket. <p>The costs are defined using the <b>Attributes</b> tab of the <b>Events Maintenance</b> window. See <i>Events Maintenance - Attributes tab</i> in the Development manual.</p>
<b>Override</b>	Select to override the ticket price. For example, offer a discount to this particular attendee.

### Attributes sub-sub-sub-tab fields

Mr C Agius   Times   Tickets   <b>Attributes</b>
<input checked="" type="checkbox"/> Disabled access <input checked="" type="checkbox"/> Past student <input type="checkbox"/> VIP Comments: <input type="text"/>

The fields that appear on this tab are the attributes for the event that are defined using the **Attributes** tab of the **Events Maintenance** window. See *Events Maintenance - Attributes tab* in the Development manual.

See *Events Maintenance - Attributes tab* in the Development manual.

## Community Maintenance - Current Events tab - Guests sub-tab

Use the **Guests** sub-tab of the **Current Events** tab to record the details of any guests attending the event.

**Note:** Use the **Details** sub-tab to enter the event details for the community member and their spouse. See *Community Maintenance - Current Events tab - Details sub-tab* (on page 91).

### Opening the Guests sub-tab

To open the **Guests** sub-tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

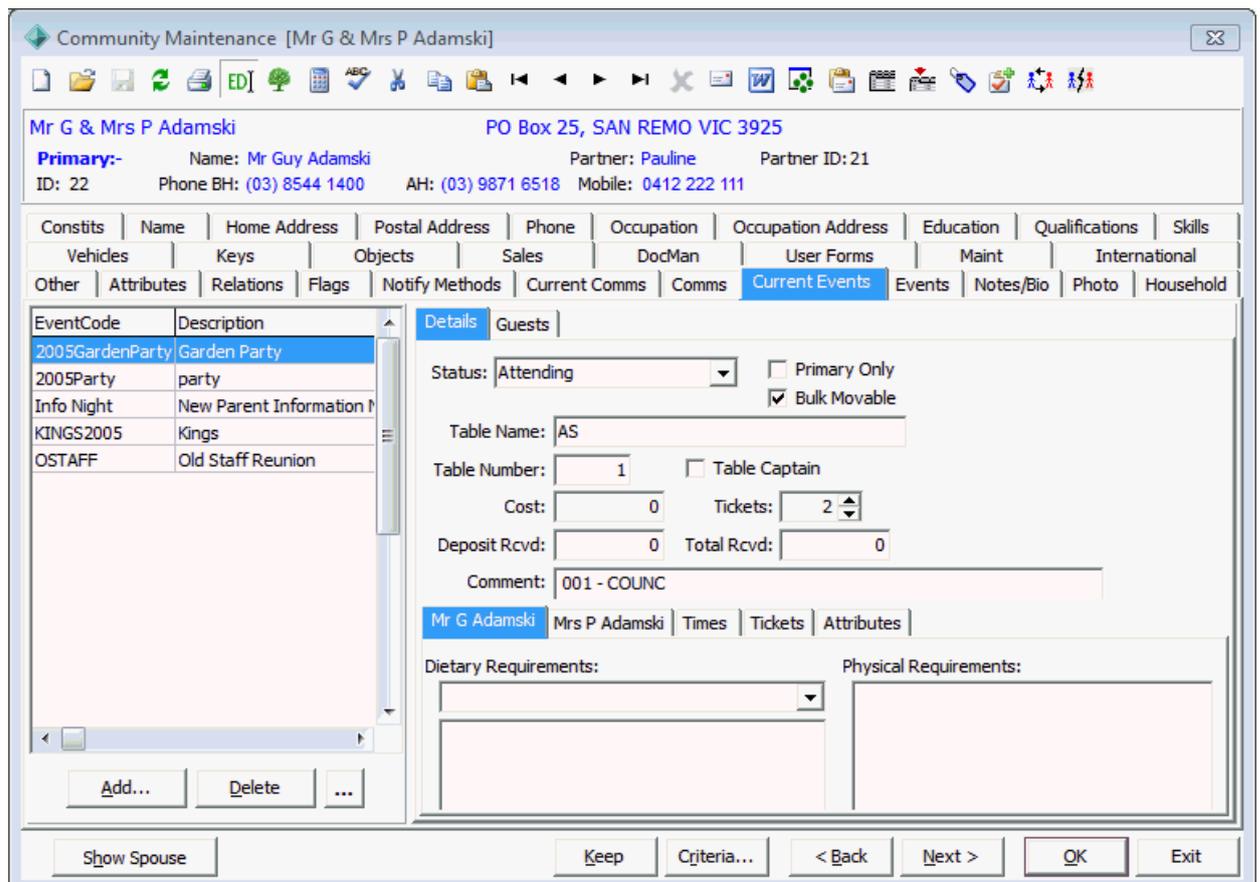


2. Search for the community member. See *Searching for community members* (on page 12).

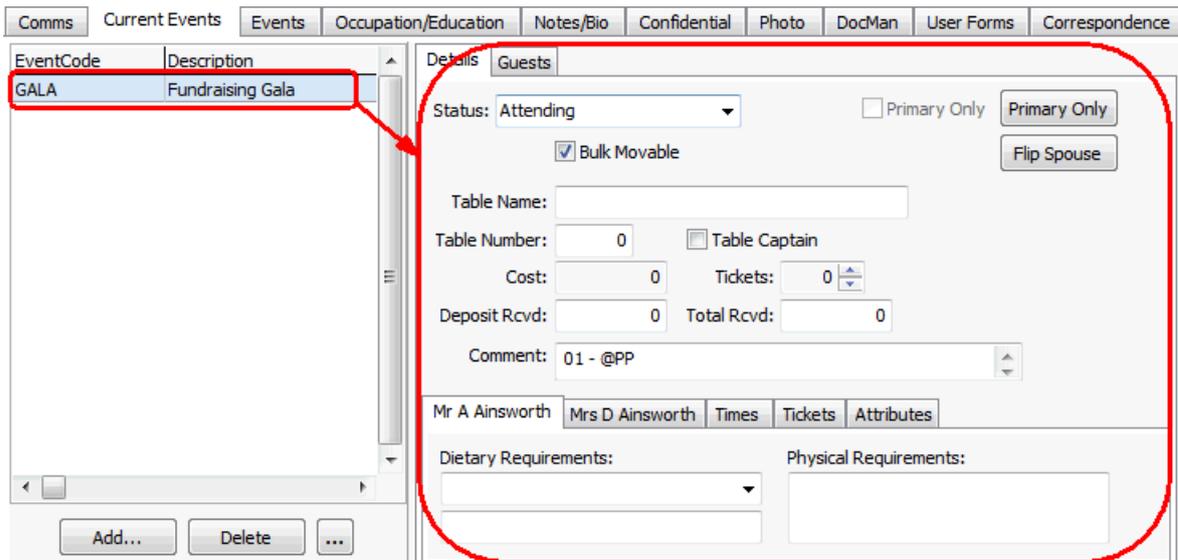
The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Current Events** tab.

The **Details** sub-tab of the **Current Events** tab of the **Community Maintenance** window is displayed.

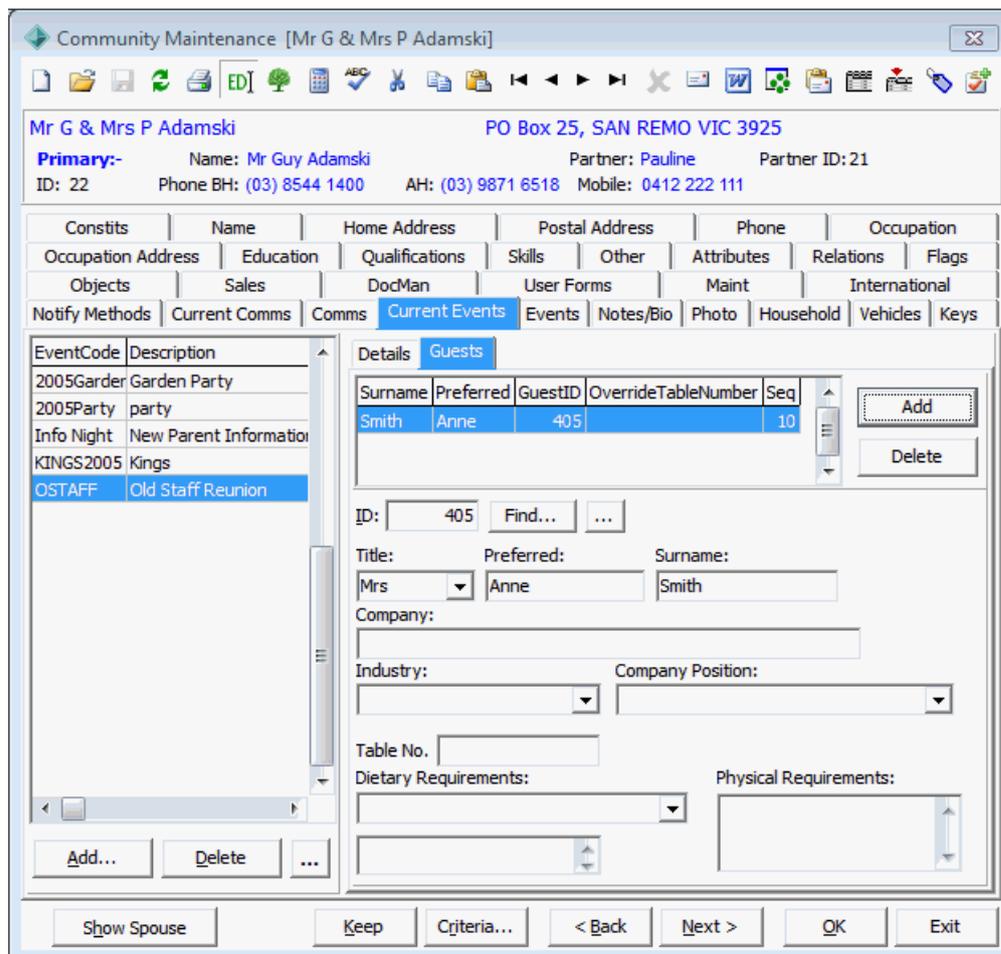


4. Select the required event in the left-hand grid.



5. Click the **Guests** sub-tab.

The **Guests** sub-tab of the **Community Maintenance** window is displayed.



## Community Maintenance - Current Events tab - Guests sub-tab key fields and buttons

### Fields

Field	Description
<b>Surname</b>	Guest's surname.
<b>Preferred</b>	Guest's preferred name.
<b>Guest ID</b>	Guest's Synergetic ID number, if applicable.
<b>OverrideTable Number</b>	Guest's table number.  <a href="#">Note: By default, guests are placed at the community member's table.</a>
<b>Seq</b>	Sequence number for the guest.
<b>ID</b>	Event ID number.
<b>Title</b>	Community member's title.
<b>Preferred</b>	Community member's preferred name.
<b>Surname</b>	Community member's surname.
<b>Company</b>	Community member's company name, if applicable.
<b>Industry</b>	Community member's industry, if applicable.
<b>Company Position</b>	Community member's position in the company.
<b>Table No.</b>	Community member's table number.
<b>Dietary Requirements</b>	Any special dietary requirements for the selected person. For example, the primary person may be a vegetarian while their partner may be a vegan.
<b>Physical Requirements</b>	Any requirements to cater for particular physical needs. For example, wheelchair access is required.

### Grid area

Field	Description
<b>Surname</b>	Guest's surname.
<b>Preferred</b>	Guest's preferred name.
<b>GuestID</b>	Synergetic ID of the guest, if they are found in the Synergetic database.  This field is blank if you have typed in the <b>Surname</b> and <b>Preferred</b> fields for a guest not listed in Synergetic.
<b>OverrideTableNumber</b>	The table of the guest, if different from the primary person invited.
<b>Seq</b>	Sequence number of the guest, automatically generated by Synergetic.

**Buttons**

Buttons	Description
	Add a new guest to the community member's record.
	Delete a guest from the community member's record.
	Launch the <b>Enter the details to find the guest</b> window.
	Launch <b>Community Maintenance</b> for the selected community member.

## Community Maintenance - Events tab

Use the **Events** tab to:

- review **past** events that the community member attended
- update status and other fields relating to their attendance at the event
- launch the **Events Maintenance** window to process multiple attendees.

---

**Note:** Use the **Current Events** tab to process events yet to occur. See *Community Maintenance - Current Events tab* (on page 90).

---

### Opening the Events tab

To open the **Events** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Events** tab.

The **Events** tab of the **Community Maintenance** window is displayed.

**Note:** The sub-tabs on the **Events** tab are identical to the sub-tabs on the **Current Events** tab. See *Community Maintenance - Current Events tab* (on page 90).

The fields and buttons on the following tabs are identical to the fields and buttons on the **Current Events** tab:

- **Details** sub-tab
  - **<Community Member Name>** sub-sub-tab
  - **Tickets** sub-sub-tab
  - **Attributes** sub-sub-tab
  - **Times** sub-sub-tab
- **Guests** sub-tab.

**Names sub-tab fields**

Field	Description
<b>ID</b>	Community member's Synergetic ID number.
<b>Joint ID</b>	Spouse's Synergetic ID number, if addressed together for this event. This displays as <b>0</b> if the spouse is not attending.
<b>Name at time of event</b>	Community member's name at the time of the event, if applicable.

## Community Maintenance - Notes/Bio tab

Use the **Notes/Bio** tab to record:

- general comments about the community member
- biographical comments about their achievements.

### Opening the Notes/Bio tab

To open the **Notes/Bio** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Notes/Bio** tab.

The **Notes/Bio** tab of the **Community Maintenance** window is displayed.

The screenshot shows the 'Community Maintenance [Mr F Adamski]' window. The 'Notes/Bio' tab is selected. The window displays the following information:

- Mr F Adamski** (ID: 123)
- Primary:-** Name: Mr Frederick Adamski (Fred), Partner: Partner ID:
- ID: 412, Phone BH: AH: Mobile: 0412 555 555

The window has a menu bar with options: Constits, Name, Home Address, Postal Address, Phone, Occupation, Occupation Address, Education, Qualifications, Skills, Other, Attributes, Relations, Flags, Keys, Objects, Sales, DocMan, User Forms, Maint, International, Notify Methods, Current Comms, Comms, Current Events, Events, **Notes/Bio**, Photo, Household, Vehicles.

The 'Notes/Bio' tab contains two text areas: 'Notes' and 'Biography'.

Buttons at the bottom: Create Spouse..., Keep, Criteria..., < Back, Next >, OK, Exit.

### Community Maintenance - Notes/Bio tab fields

Field	Description
<b>Notes</b>	General comments about the community member.
<b>Biography</b>	Biographical comments about their achievements.

## Community Maintenance - Photo tab

Use the **Photo** tab to:

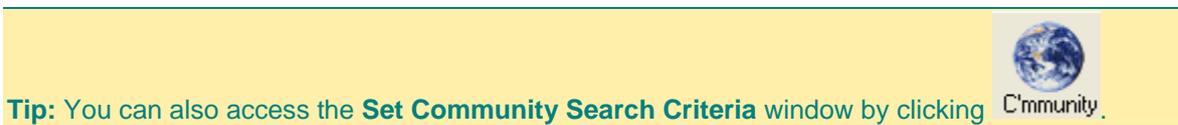
- view the most recent photo of the community member
- review the details of when the photo was updated
- indicate whether the community member has given permission to use the photo in your organisation's external communications.

### Opening the Photo tab

To open the **Photo** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

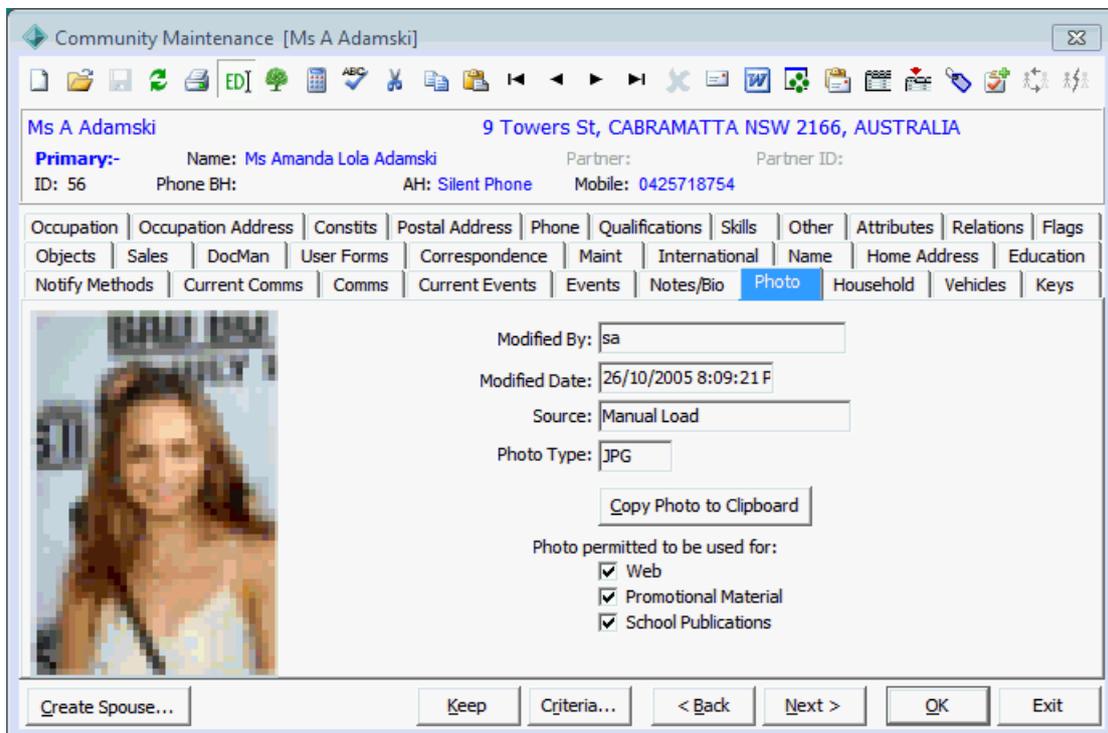


2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Photo** tab.

The **Photo** tab of the **Community Maintenance** window is displayed.



## Community Maintenance - Photo tab fields and buttons

### Fields

Field	Description	
<b>Modified By</b>	User ID of the person who last modified the photo.	
<b>Modified Date</b>	Date the person last modified the photo.	
<b>Source</b>	Source of the photo.	
<b>Photo Type</b>	Type of file. For example JPG, GIF.	
<b>Photo permitted to be used for:</b>	Selection	Can use in your organisation's...
	<b>Web</b>	Web site.
	<b>Promotional Material</b>	Promotional material.
	<b>School Publications</b>	Publications.

### Buttons

Button	Description
	Copy the photograph to the Microsoft Windows clipboard. From within the Windows operating system, paste the photo into the document as required.

## Community Maintenance - Household tab

Use the **Household** tab to:

- create a new address record
- view the community members living at the same address
- move selected community members to another address.

The following community members share the same household address identifier:

- a couple (**Primary** and **Spouse**)
- current students share the address of the term contact
- future students share the address of the primary contact.

When students are transferred to past students, they are:

- assigned a new household address identifier even though they can still physically live at the same address as the rest of the household
- not displayed on the same **Household** tab as current students, future students and their family.

This means that you do not have to manually move the student when they move residence in the future.

## Opening the Household tab

To open the **Household** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

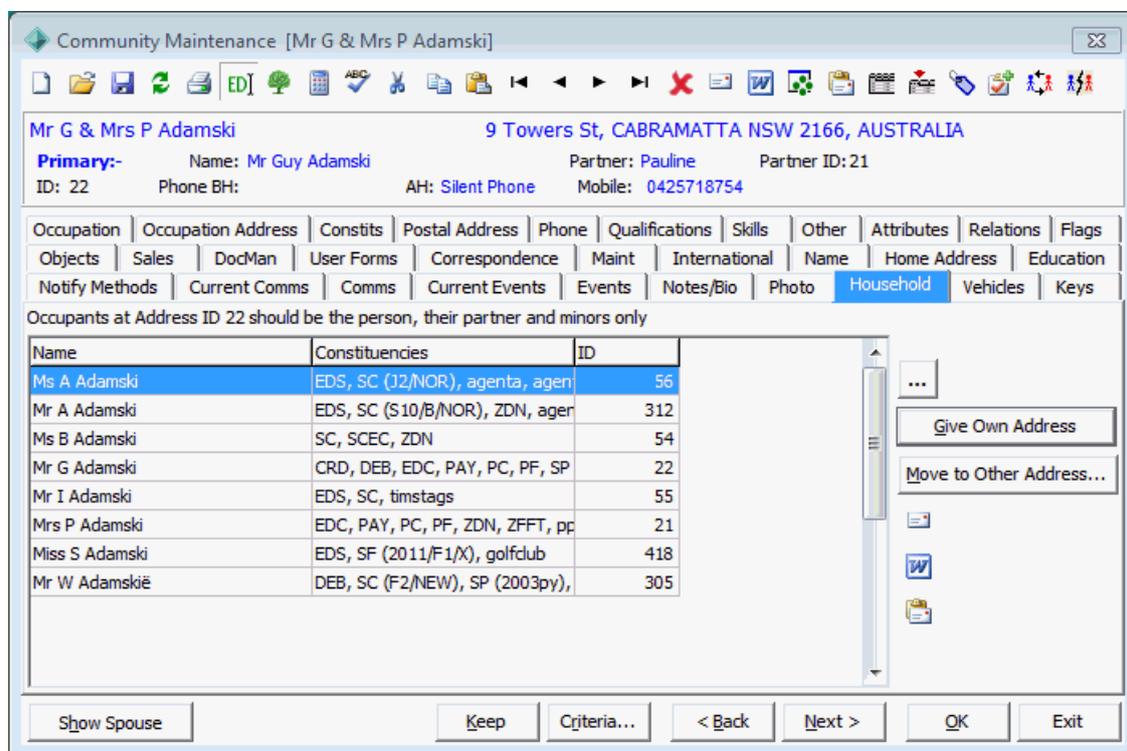
**Tip:** You can also access the **Set Community Search Criteria** window by clicking  Community.

2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Household** tab.

The **Household** tab of the **Community Maintenance** window is displayed.



Community Maintenance [Mr G & Mrs P Adamski]

Mr G & Mrs P Adamski 9 Towers St, CABRAMATTA NSW 2166, AUSTRALIA

**Primary:-** Name: Mr Guy Adamski Partner: Pauline Partner ID: 21  
 ID: 22 Phone BH: AH: Silent Phone Mobile: 0425718754

Occupation | Occupation Address | Constits | Postal Address | Phone | Qualifications | Skills | Other | Attributes | Relations | Flags  
 Objects | Sales | DocMan | User Forms | Correspondence | Maint | International | Name | Home Address | Education  
 Notify Methods | Current Comms | Comms | Current Events | Events | Notes/Bio | Photo | **Household** | Vehicles | Keys

Occupants at Address ID 22 should be the person, their partner and minors only

Name	Constituencies	ID
Ms A Adamski	EDS, SC (J2/NOR), agenta, agen	56
Mr A Adamski	EDS, SC (S10/B/NOR), ZDN, ager	312
Ms B Adamski	SC, SCEC, ZDN	54
Mr G Adamski	CRD, DEB, EDC, PAY, PC, PF, SP	22
Mr I Adamski	EDS, SC, timstags	55
Mrs P Adamski	EDC, PAY, PC, PF, ZDN, ZFFT, pp	21
Miss S Adamski	EDS, SF (2011/F1/X), golfclub	418
Mr W Adamskië	DEB, SC (F2/NEW), SP (2003py),	305

Show Spouse Keep Criteria... < Back Next > OK Exit

## Community Maintenance - Household tab fields and buttons

### Fields

Field	Description
<b>Name</b>	Household member's name.
<b>Constituencies</b>	Constituencies the household member belongs to.
<b>ID</b>	Household member's Synergetic ID number.

### Buttons

Button	Description
	Launch the <b>Community Maintenance</b> window for the selected record.
	<p>Create a new address record for the selected person if they are not a student.</p> <p>This can be useful in the case of married parents where one spouse is away working overseas.</p> <p><b>Note:</b> When a new address record is created, current and future students linked to that community member will move to the new address as well.</p>
	<p>Move the selected person to another existing address record.</p> <p><b>Note:</b> This button is only available to users with super user security access.</p>
	Send an email. See <i>Sending emails</i> in the Introduction manual.
	Compose a letter. See <i>Composing letters with Microsoft Word</i> in the Introduction manual.
	<p>Copy the address details of the selected record to the Windows clipboard.</p> <p>Go the Microsoft Windows application you are using and paste the address details into the document you are editing.</p>

## Community Maintenance - Vehicles tab

Use the **Vehicles** tab to:

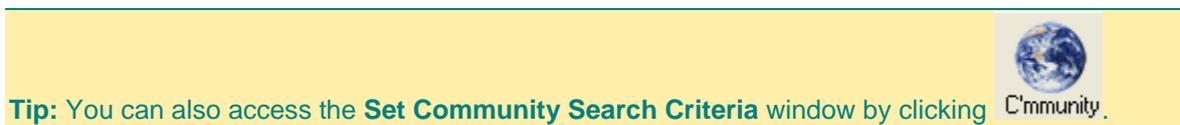
- list vehicles associated with a community member
- add a new vehicle and update the previous vehicle record as it is no longer current
- allocate parking spaces for vehicles used by your organisation.

### Opening the Vehicles tab

To open the **Vehicles** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Vehicles** tab.

The **Vehicles** tab of the **Community Maintenance** window is displayed.

Community Maintenance [Mr G & Mrs P Adamski]

Mr G & Mrs P Adamski PO Box 75, SAN REMO VIC 3795, AUSTRALIA

**Primary:-** Name: Mr Guy Adamski Partner: Pauline Partner ID: 21  
 ID: 22 Phone BH: AH: Silent Phone Mobile: 0423456789

Occupation | Occupation Address | Constits | Postal Address | Phone | Qualifications | Skills | Other | Attributes | Relations | Flags  
 Objects | Sales | DocMan | User Forms | Correspondence | Maint | International | Name | Home Address | Education  
 Notify Methods | Current Comms | Comms | Current Events | Events | Notes/Bio | Photo | Household | **Vehicles** | Keys

Registration	Make	Model	Year	Colour	School Used	Current Vehicle
ABC123	Ford	Falcon	1995	Blue	<input type="checkbox"/>	<input type="checkbox"/>

Vehicle

Registration: ABC123 Class: Four Door Sedan Expiry Date: 24/11/2015

Make: Ford Model: Falcon

Year: 1995 Colour: Blue  School Used  Current Vehicle

Parking Space:

Show Spouse Keep Criteria... < Back Next > OK Exit

## Community Maintenance - Vehicles tab fields and buttons

### Fields

Fields in the vehicle area correspond to the selected row in the grid area.

Field	Description
<b>Registration</b>	Vehicle registration number.
<b>Class</b>	Type of vehicle.
<b>Expiry Date</b>	Vehicle registration expiry date.
<b>Make</b>	Make of vehicle.
<b>Model</b>	Model of vehicle.
<b>Year</b>	Vehicle year of manufacture.
<b>Colour</b>	Vehicle colour.
<b>School Used</b>	Select if the vehicle is used for your organisation's purposes.
<b>Current Vehicle</b>	Select if the vehicle is currently in use.
<b>Parking Space</b>	Allotted parking space.

### Buttons

Button	Description
	A new row is added in the grid area. Enter the new details in the vehicle area.
	Delete the selected vehicle from the community member's record.

## Community Maintenance - Keys tab

Use the **Keys** tab to maintain keys allocated to the community member.

### Opening the Keys tab

To open the **Keys** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

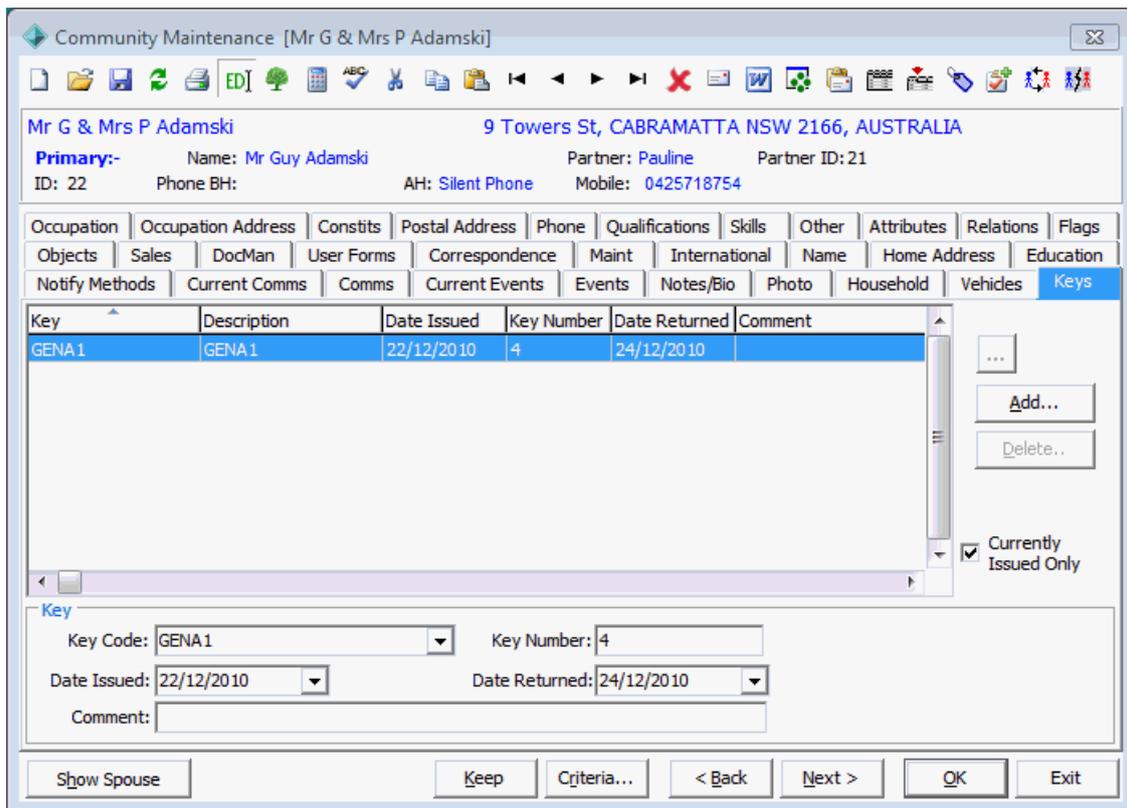
**Tip:** You can also access the **Set Community Search Criteria** window by clicking  Community.

2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Keys** tab.

The **Keys** tab of the **Community Maintenance** window is displayed.



Community Maintenance [Mr G & Mrs P Adamski]

Mr G & Mrs P Adamski 9 Towers St, CABRAMATTA NSW 2166, AUSTRALIA

**Primary:-** Name: Mr Guy Adamski Partner: Pauline Partner ID: 21  
 ID: 22 Phone BH: AH: Silent Phone Mobile: 0425718754

Occupation | Occupation Address | Constits | Postal Address | Phone | Qualifications | Skills | Other | Attributes | Relations | Flags  
 Objects | Sales | DocMan | User Forms | Correspondence | Maint | International | Name | Home Address | Education  
 Notify Methods | Current Comms | Comms | Current Events | Events | Notes/Bio | Photo | Household | Vehicles | **Keys**

Key	Description	Date Issued	Key Number	Date Returned	Comment
GENA1	GENA1	22/12/2010	4	24/12/2010	

Key Code: GENA1 Key Number: 4  
 Date Issued: 22/12/2010 Date Returned: 24/12/2010  
 Comment:

Show Spouse Keep Criteria... < Back Next > OK Exit

## Community Maintenance - Keys tab key fields and buttons

**Note:** Fields in the **Key** area correspond to the selected row in the grid area.

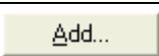
### Grid area fields

Field	Description
<b>Key</b>	Key code.
<b>Key Number</b>	Number of the specific key issued to the community member, if multiple copies of the same key exist.
<b>Description</b>	Description of the key's use. For example, <b>Key to Admin stationery cupboard.</b>
<b>Date Issued</b>	Date key was issued to the community member.
<b>Date Returned</b>	Date key was returned by the community member.
<b>Comment</b>	Optional information about the key.
<b>Currently Issued Only</b>	Select to display only keys that have not yet been returned.

### Key area fields

Field	Description
<b>Key Code</b>	Unique identifier for the key.
<b>Key Number</b>	Number of the specific key issued to the community member, if multiple copies of the same key exist.
<b>Date Issued</b>	Date key was issued to the community member.
<b>Date Returned</b>	Date key was returned by the community member.
<b>Comment</b>	Optional information about the key.

### Buttons

Button	Description
	Launch the <b>Key Maintenance</b> window. See <i>Maintaining keys</i> in the Human resources manual.
	A new row is added in the grid area. Edit the details in the key area.
	Delete the selected key from the community member's record.

## Community Maintenance - Objects tab

Use the **Objects** tab to:

- maintain existing loans
- create new loans
- maintain bookings for planned lending of objects
- create new bookings.

The **Objects** tab is comprised of two sub-tabs:

- **Loans** sub-tab. See below for more details.
- **Bookings** sub-tab. See *Community Maintenance - Objects tab - Bookings sub-tab* (on page 117).

### Opening the Objects tab

To open the **Objects** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Objects** tab.

The **Loans** sub-tab of the **Objects** tab of the **Community Maintenance** window is displayed.

Date	Description	Return Due	Returned	Returned To
29/11/2006 3:04:5	Toshiba Tecra M2	1/06/2006		
18/06/2008 11:33:	Violins	31/12/2008		

## Community Maintenance - Objects tab - Loans sub-tab key fields and buttons

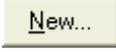
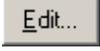
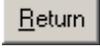
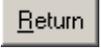
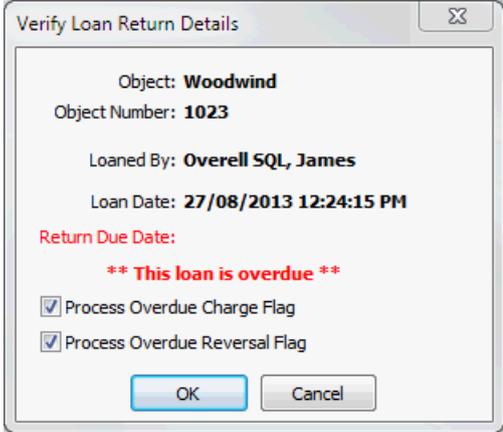
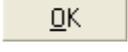
### Fields

Field	Description
<b>Include Past Loans</b>	Select to display past loans, in addition to the current loans, for the community member. A current loan becomes a past loan once the object is returned by the community member.  Clear to display only the current loans for the community member.

### Grid area fields

Field	Description
<b>Date</b>	Date that the loan started.
<b>Description</b>	Description of the object on loan.
<b>Return Due</b>	Date that the object is due to be returned.
<b>Returned</b>	Date the object was returned, if applicable.
<b>Returned To</b>	Person who processed the return, if applicable.
<b>Loan Seq</b>	Number generated when the object is loaned.
<b>Obj No</b>	Unique identifier of the object.
<b>Barcode</b>	Barcode of the object.
<b>Issued By</b>	Person who issued the object to the community member.
<b>Booking Seq</b>	Number generated for bookings. For example, can be used for searching for existing bookings.
<b>Issued ID</b>	Synergetic ID of the person who issued the object.
<b>Return ID</b>	Synergetic ID of the person who processed the return, if applicable.

## Buttons

Button	Description
	Launch into <b>Object Maintenance</b> for the selected object that is on loan. See <i>Maintaining objects</i> in the Objects manual.
	Add a new ad hoc loan using the <b>Ad Hoc Loan</b> window. See <i>Ad Hoc Loan window</i> in the Objects manual.
	Edit the booking for the selected loan. See <i>Object Booking - Object Bookings tab</i> in the Objects manual.
	<p>To return an object from the community member:</p> <ol style="list-style-type: none"> <li>Click .</li> </ol> <p>The <b>Verify Loan Return Details</b> window is displayed.</p>  <ol style="list-style-type: none"> <li>Click .</li> </ol> <p><b>Note:</b> For the usual method of returning objects, see <a href="#">Returning loans</a> in the Objects manual.</p>

## Community Maintenance - Objects tab - Bookings sub-tab

Use the **Bookings** sub-tab of the **Objects** tab to view and add bookings for future lending of objects at your organisation.

Also, see the **Loans** sub-tab of the *Community Maintenance - Objects tab* (on page 114).

### Opening the Bookings sub-tab

To open the **Objects** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

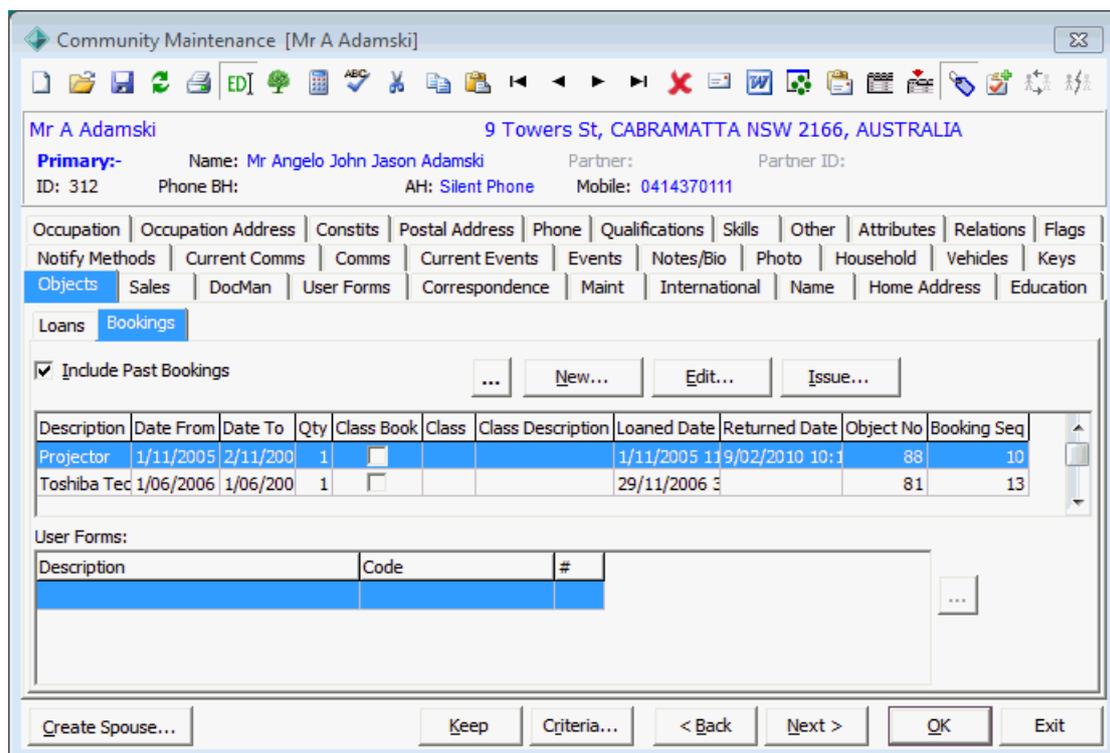
The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Objects** tab.

The **Loans** sub-tab of the **Objects** tab of the **Community Maintenance** window is displayed.

4. Click the **Bookings** sub-tab.

The **Bookings** sub-tab of the **Objects** tab of the **Community Maintenance** window is displayed.



## Community Maintenance - Objects tab - Bookings sub-tab key fields and buttons

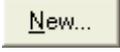
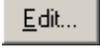
### Fields

Field	Description
<b>Include Past Bookings</b>	Select to display past bookings, in addition to the current bookings, for the community member. A current booking becomes a past booking once the object is lent to the community member.  Clear to display only the current bookings for the community member.

### Grid area fields

Field	Description
<b>Description</b>	Description of the object being booked.
<b>Date From</b>	Date the booking starts.
<b>Date To</b>	Date that the booking ends.
<b>Qty</b>	Number of items being booked.
<b>Class Book</b>	Selected if a booking is for a class.  For example, a teacher can book a class set of textbooks for one or more classes. In this case, it is not necessary to specify which textbook from the set is to be booked for each individual student. The teacher makes a class booking in which a set of objects are booked against a class. Synergetic assigns individual books to each student in the class.  <i>See Issuing loans to a class from a prior booking in the Objects manual.</i>
<b>Class</b>	Class identifier if the booking is for a class. See <b>Class Book</b> field above.
<b>Class Description</b>	Description of the class if the booking is for a class. See <b>Class Book</b> field above.
<b>Loaned Date</b>	Date that the object was loaned, if applicable.
<b>Returned Date</b>	Date that the object was returned, if applicable.
<b>Object No</b>	Unique identifier for the object.
<b>Booking Seq</b>	Number generated for bookings.  For example, can be used for searching for existing bookings.

## Buttons

Button	Description
	<p>Launch into <b>Object Bookings Maintenance</b>.</p> <p>See <i>Maintaining object bookings</i> in the Objects manual.</p>
	<p>Add a new ad hoc loan using the <b>Ad Hoc Loan</b> window.</p> <p>See <i>Ad Hoc Loan window</i> in the Objects manual.</p>
	<p>Edit the selected booking.</p> <p>See <i>Object Booking - Object Bookings tab</i> in the Objects manual.</p>
	<p>Launch the <b>Issue Object Loan</b> window to issue a new loan from the booking.</p> <hr/> <p><b>Note:</b> By launching this window you can elect to print a loan issue docket by selecting <b>Print Loan Issue Docket</b> in the <b>Issue Object Loan</b> window.</p> <hr/> <p>See <i>Issuing loans to an individual from a prior booking</i> in the Objects manual.</p>

## Community Maintenance - Sales tab

Use the **Sales** tab to:

- view sales made to a community member
- reprint the sales docket for a previous sale.

### Opening the Sales tab

To open the **Sales** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

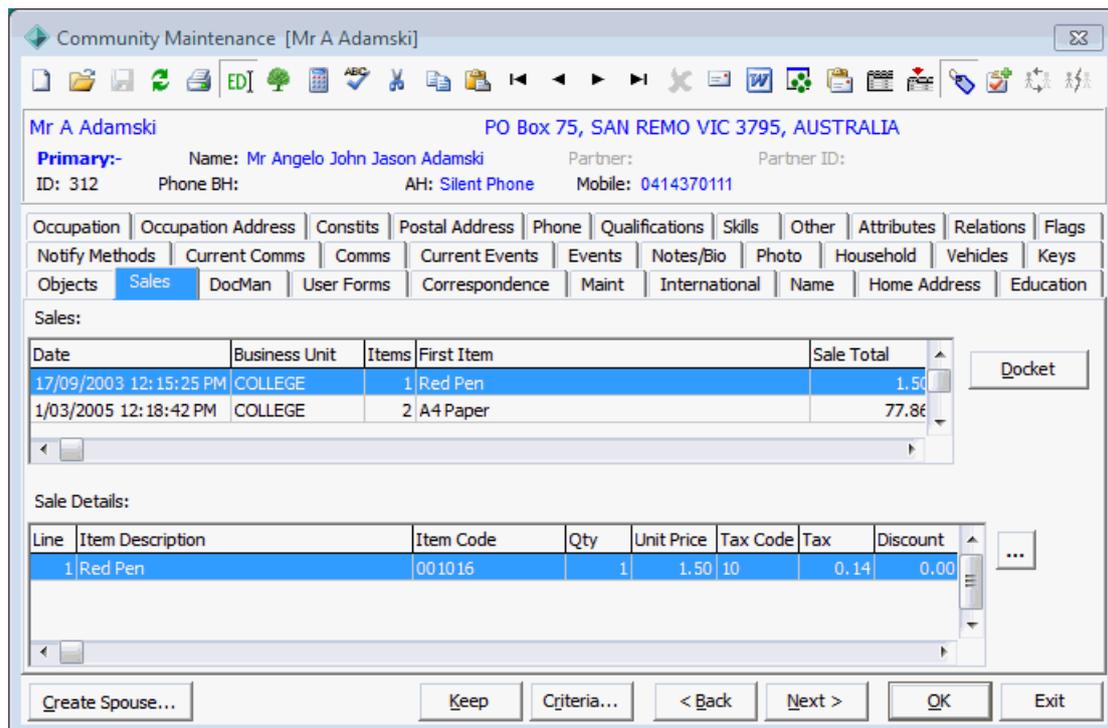
**Tip:** You can also access the **Set Community Search Criteria** window by clicking .

2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Sales** tab.

The **Sales** tab of the **Community Maintenance** window is displayed.



Community Maintenance [Mr A Adamski]

Mr A Adamski PO Box 75, SAN REMO VIC 3795, AUSTRALIA

**Primary:-** Name: Mr Angelo John Jason Adamski Partner: Partner ID:  
 ID: 312 Phone BH: AH: Silent Phone Mobile: 0414370111

Occupation | Occupation Address | Constits | Postal Address | Phone | Qualifications | Skills | Other | Attributes | Relations | Flags  
 Notify Methods | Current Comms | Comms | Current Events | Events | Notes/Bio | Photo | Household | Vehicles | Keys  
 Objects | **Sales** | DocMan | User Forms | Correspondence | Maint | International | Name | Home Address | Education

Sales:

Date	Business Unit	Items	First Item	Sale Total
17/09/2003 12:15:25 PM	COLLEGE	1	Red Pen	1.50
1/03/2005 12:18:42 PM	COLLEGE	2	A4 Paper	77.86

Docket

Sale Details:

Line	Item Description	Item Code	Qty	Unit Price	Tax Code	Tax	Discount
1	Red Pen	001016	1	1.50	10	0.14	0.00

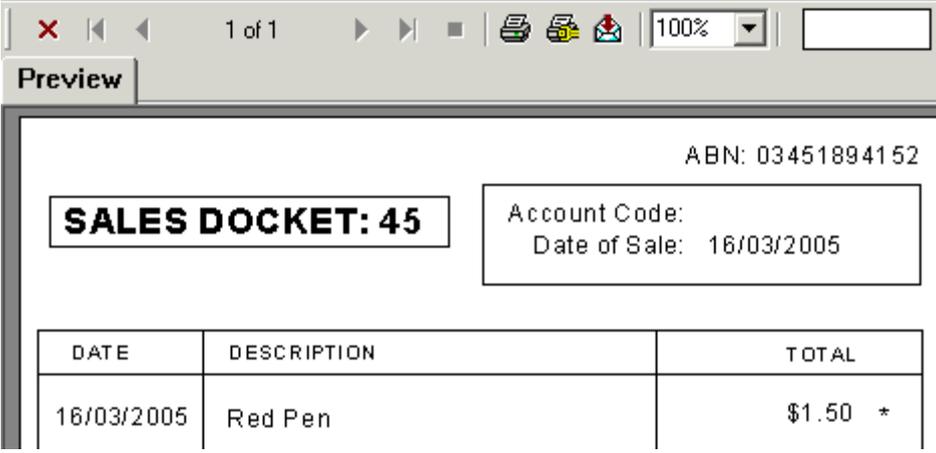
Create Spouse... Keep Criteria... < Back Next > OK Exit

## Community Maintenance - Sales tab key fields and buttons

### Sales grid area fields

Field	Description
<b>Date</b>	Date of the sale.
<b>Business Unit</b>	Business unit used for the sale.
<b>Items</b>	Number of items sold.
<b>First Item</b>	Description of the first item sold.
<b>Sale Total</b>	Total amount of the sale, including GST.
<b>Payment Method</b>	Method of payment used.
<b>Seq</b>	Number generated by Synergetic for the sale.
	<b>Tip:</b> This can be useful for queries.

### Sales grid area buttons

Button	Description
	<p>Preview the sales docket for the selected sale in Crystal Reports.</p>  <p><b>Tip:</b> You can quickly display the docket for a sale by double clicking on a sale in the <b>Sales</b> grid area.</p>

## Sales Details grid area fields

Field	Description																											
<b>Line</b>	Line number of the sales line item.																											
<b>Item Description</b>	Description of the item.																											
<b>Item Code</b>	Unique identifier of the item.																											
<b>Qty</b>	Quantity of this item that was sold to the customer.																											
<b>Unit Price</b>	Price for each individual item, including GST, if any.																											
<b>Tax Code</b>	Tax code used for the sale. For example, tax code <b>10</b> is used for GST of 10%.																											
<b>Tax</b>	Total tax payable for the line item.  Sale Details: <table border="1"> <thead> <tr> <th>Line</th> <th>Item Description</th> <th>Item Code</th> <th>Qty</th> <th>Unit Price</th> <th>Tax Code</th> <th>Tax</th> <th>Discount</th> <th>Extended</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>A4 Paper</td> <td>001014</td> <td>1</td> <td>1.50</td> <td>10</td> <td>0.14</td> <td>0.00</td> <td>1.50</td> </tr> <tr> <td>2</td> <td>Reeds Clarinet</td> <td>001015</td> <td>5</td> <td>5.00</td> <td>10</td> <td>2.27</td> <td>0.00</td> <td>25.00</td> </tr> </tbody> </table> <p>For example, the <b>Tax</b> amount for <b>Reeds Clarinet</b> is calculated by multiplying the <b>Qty</b> (5 in this example) by the tax on the individual item (approximately \$0.45) with a result of \$2.27.</p>	Line	Item Description	Item Code	Qty	Unit Price	Tax Code	Tax	Discount	Extended	1	A4 Paper	001014	1	1.50	10	0.14	0.00	1.50	2	Reeds Clarinet	001015	5	5.00	10	2.27	0.00	25.00
Line	Item Description	Item Code	Qty	Unit Price	Tax Code	Tax	Discount	Extended																				
1	A4 Paper	001014	1	1.50	10	0.14	0.00	1.50																				
2	Reeds Clarinet	001015	5	5.00	10	2.27	0.00	25.00																				
<b>Discount</b>	Total discount applied to the line item.																											
<b>Extended</b>	Extended quantity for the line item, calculated by multiplying the <b>Qty</b> and <b>Unit Price</b> fields and subtracting the <b>Discount</b> field.																											
<b>Item Sale Seq</b>	Number generated by Synergetic for the sale. All items in one sale have the same <b>ItemSaleSeq</b> .  <b>Tip:</b> This can be useful for queries.																											

## Sales Details grid area buttons

Button	Description
	Launch into <b>Item Maintenance</b> for the selected line item. See <i>Maintaining items</i> in the Sales manual.  <b>Tip:</b> You can quickly display the <b>Item Maintenance</b> window for an item by double clicking on a line item in the <b>Sales Details</b> grid area.

## Community Maintenance - DocMan tab

Use the **DocMan** tab to view, import, export, update and delete documents, pictures and spreadsheets related to the community member.

Also see *Using document management (DocMan)* in the Introduction manual.

### Opening the DocMan tab

To open the **DocMan** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

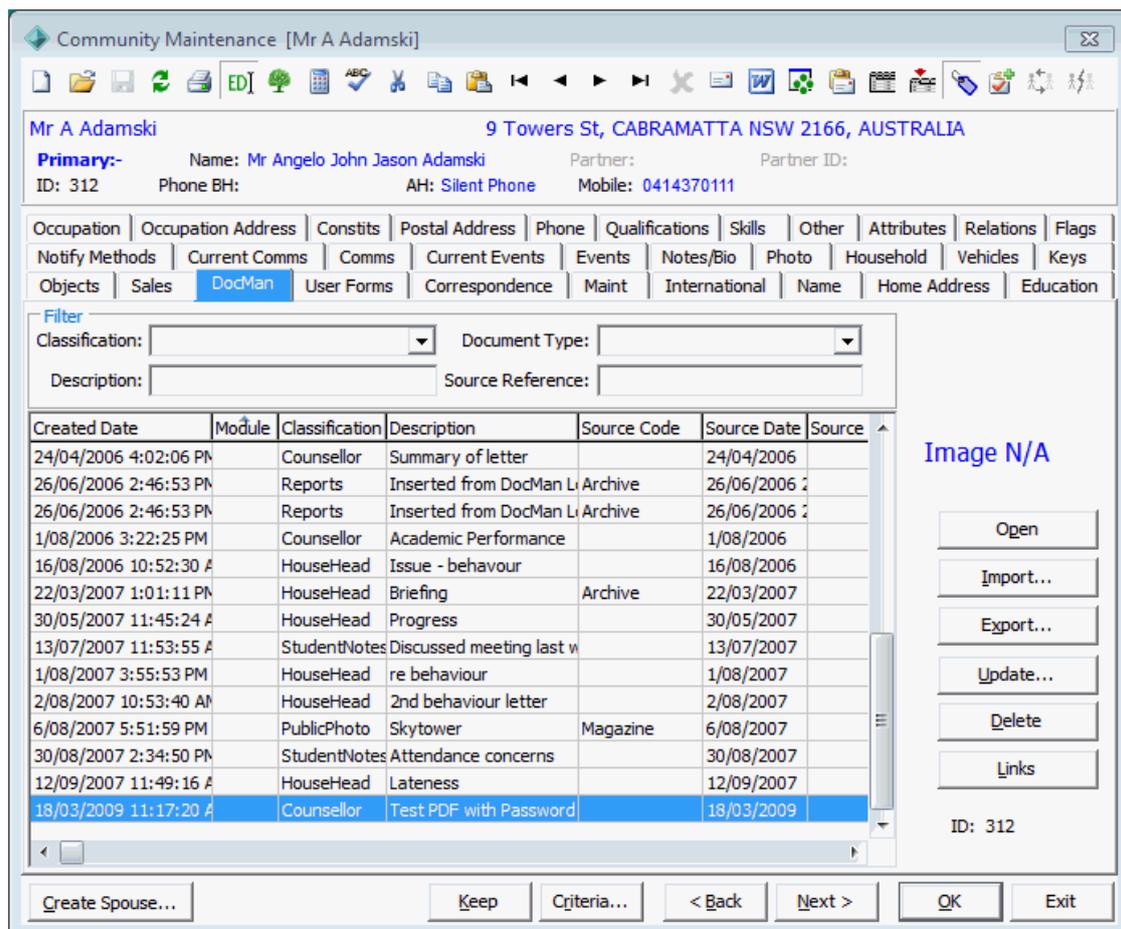


2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **DocMan** tab.

The **DocMan** tab of the **Community Maintenance** window is displayed.



## Community Maintenance - DocMan tab key fields and buttons

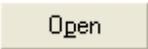
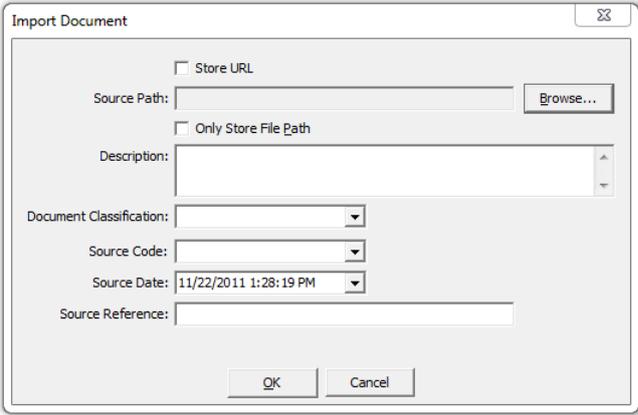
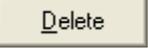
### Fields

Field	Description
<b>Classification</b>	<p>Classification of the documents to be displayed. Access to documents can be restricted based on user security levels.</p> <p>Select the classification from the drop-down list to filter the documents displayed.</p>
<b>Document Type</b>	<p>Type of document. For example:</p> <ul style="list-style-type: none"> <li>• Microsoft Word Document</li> <li>• JPG Photo</li> <li>• Adobe Acrobat File</li> <li>• Microsoft Excel Spreadsheet.</li> </ul> <hr/> <p><b>Note:</b> The document types set up are those that are used at your organisation.</p> <hr/> <p>Select the type of document from the drop-down list to filter the documents displayed.</p>
<b>Description</b>	Filter the documents to those which have the typed words in the description.
<b>Source Reference</b>	Filter the documents to those which have the typed words in the source reference.

### Grid area fields

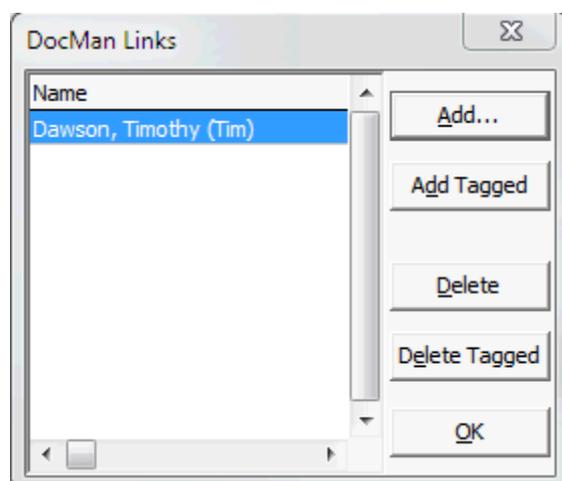
Field	Description
<b>Created Date</b>	Date and time the document, spreadsheet or picture was imported into Synergetic.
<b>Classification</b>	Classification of the item. Classifications are maintained in the <b>luDocumentClassification</b> lookup table. See <i>Maintaining lookup tables</i> in the System maintenance manual.
<b>Description</b>	Short description of the item.
<b>Source Code</b>	Source of the item. Typical examples include: <ul style="list-style-type: none"> <li>• Archive</li> <li>• Magazine</li> <li>• Newspaper</li> <li>• School Photo</li> <li>• Website.</li> </ul> Document sources are maintained in the <b>luDocumentSourceCode</b> lookup table. See <i>Maintaining lookup tables</i> in the System maintenance manual.
<b>Source Date</b>	Date the item was published or received.
<b>Source Reference</b>	Cross-reference to the source. For example the name, issue date and page of a newspaper where the student's photograph appeared.
<b>Source Path</b>	Location of the document in the file system or URL. This field shows the document's original location if the file has been embedded in the Synergetic database.
<b>Type</b>	Type of document. Typical examples include: <ul style="list-style-type: none"> <li>• DOC, DOCX (Microsoft Word document)</li> <li>• JPG (photo using the Joint Photographic Experts Group format)</li> <li>• PDF (Adobe Acrobat file)</li> <li>• XLS, XLSX (Microsoft Excel spreadsheet).</li> </ul> Document types are maintained in the <b>luDocumentType</b> lookup table. See <i>Maintaining lookup tables</i> in the System maintenance manual.
<b>Seq</b>	Unique number identifying the document.

## Buttons

Button	Description
	<p>Open the highlighted item in the appropriate application to view or change the item. For example, a community member's record includes a Microsoft Word document in the <b>DocMan</b> tab. Click  to open the document in Microsoft Word.</p>
	<p>Import a document, spreadsheet, picture or link an external web page. See:</p> <ul style="list-style-type: none"> <li>• <i>Linking documents using a tag list</i> in the Introduction manual</li> <li>• <i>Importing one or more documents</i> in the Introduction manual.</li> </ul> 
	<p>Export a document, spreadsheet or picture.</p> <p>To copy a document, spreadsheet or picture from the Synergetic database and save it in a Windows folder:</p> <ol style="list-style-type: none"> <li>1. Click .</li> <li>2. Browse for the folder.</li> <li>3. Click .</li> </ol>
	<p>Open the highlighted item on the <b>DocMan</b> tab and update the information about the item.</p> <hr/> <p><b>Note:</b> You cannot update fields if the document is a photo loaded using <a href="#">Photo Maintenance</a>.</p>
	<p>Delete the highlighted item from the <b>DocMan</b> tab.</p> <hr/> <p><b>Note:</b> Deleting an embedded record deletes the original document, spreadsheet or picture from the Synergetic database. Deleting a linked document removes the link from the Synergetic database but does not affect the original document.</p>

Button	Description
	<p>Maintain the community members linked to the document, spreadsheet or photo. You can:</p> <ul style="list-style-type: none"> <li>• view the community members who share a link to the document</li> <li>• link a document to:                             <ul style="list-style-type: none"> <li>– one or more community members</li> <li>– community members in the current tag list.</li> </ul> </li> <li>• remove the link to the:                             <ul style="list-style-type: none"> <li>– highlighted community member</li> <li>– community members in the current tag list.</li> </ul> </li> </ul> <p>See <b>DocMan Links window key buttons</b> below.</p>

### DocMan Links window key buttons



Button	Description
	<p>Add a community member to share the document. See <i>Sharing a document with other community members</i> in the Introduction manual.</p>
	<p>Add the document to the <b>DocMan</b> tab for each of the community members contained in the current tag list.</p>
	<p>Remove the document from the <b>DocMan</b> tab of the highlighted community member.</p>
	<p>Remove the document from the <b>DocMan</b> tab of all community members in the current tag list.</p>

## Community Maintenance - User Forms tab

Use the **User Forms** tab to open forms that have been created at your organisation.

To launch the program linked to the user form listed, either:

- select the user form in the grid area and click 
- double click on the user form record in the grid area.

### Opening the User Forms tab

To open the **User Forms** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.

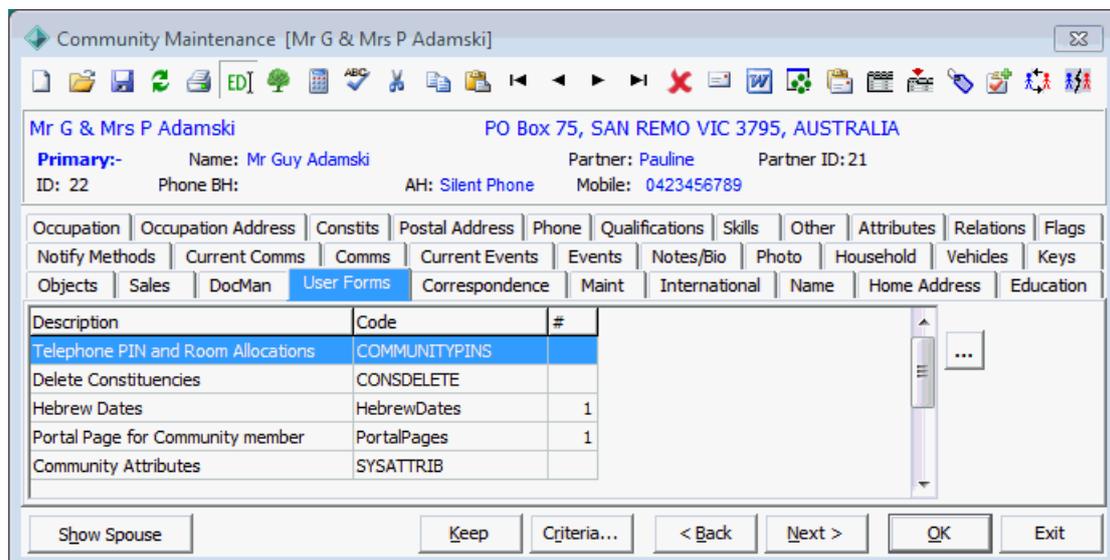


2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **User Forms** tab.

The **User Forms** tab of the **Community Maintenance** window is displayed.



## Community Maintenance - User Forms tab key fields and buttons

### Grid area fields

Field	Description
Description	Description of the user form.
Code	User form code.
#	Number of records displayed.

### Buttons

Button	Description
	Launch the highlighted user-defined form.

## Community Maintenance - Maint tab

Use the **Maint** tab to view changes made to the community member's details. This information is retained for audit purposes.

### Opening the Maint tab

To open the **Maint** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Maint** tab.

The **Maint** tab of the **Community Maintenance** window is displayed.

The screenshot shows the 'Community Maintenance' window for 'Mr G & Mrs P Adamski' at '9 Towers St, CABRAMATTA NSW 2166, AUSTRALIA'. The 'Maint' tab is selected. The window displays a table of community records for the member.

ID	IDType	AddressID	SpouseID	SpouseFlag	CommunityCreatedDate	CommunityCreatedBy	CommunityModifiedDate	CommunityModifiedBy	Surname
22	I	21	21	☑	27/08/2002 2:04:36 PM	sa	21/11/2002 12:02:55 PM	sa	Adamski
22	I	21	21	☑	27/08/2002 2:04:36 PM	sa	19/08/2003 2:18:46 PM	sa	Adamski
22	I	21	21	☐	27/08/2002 2:04:36 PM	sa	25/08/2003 11:10:22 AM	sa	Adamski
22	I	21	21	☑	27/08/2002 2:04:36 PM	sa	1/09/2003 3:23:33 PM	sa	Adamski
22	I	21	21	☐	27/08/2002 2:04:36 PM	sa	1/09/2003 3:23:51 PM	sa	Adamski
22	I	21	21	☐	27/08/2002 2:04:36 PM	sa	1/09/2003 3:23:58 PM	sa	Adamskis
22	I	21	21	☐	27/08/2002 2:04:36 PM	sa	1/09/2003 3:24:07 PM	sa	Adamski
22	I	21	21	☐	27/08/2002 2:04:36 PM	sa	21/10/2003 2:04:19 PM	sa	Adamskis

Buttons at the bottom: Show Spouse, Keep, Criteria..., < Back, Next >, OK, Exit.

## Community Maintenance - International tab

Use the **International** tab to:

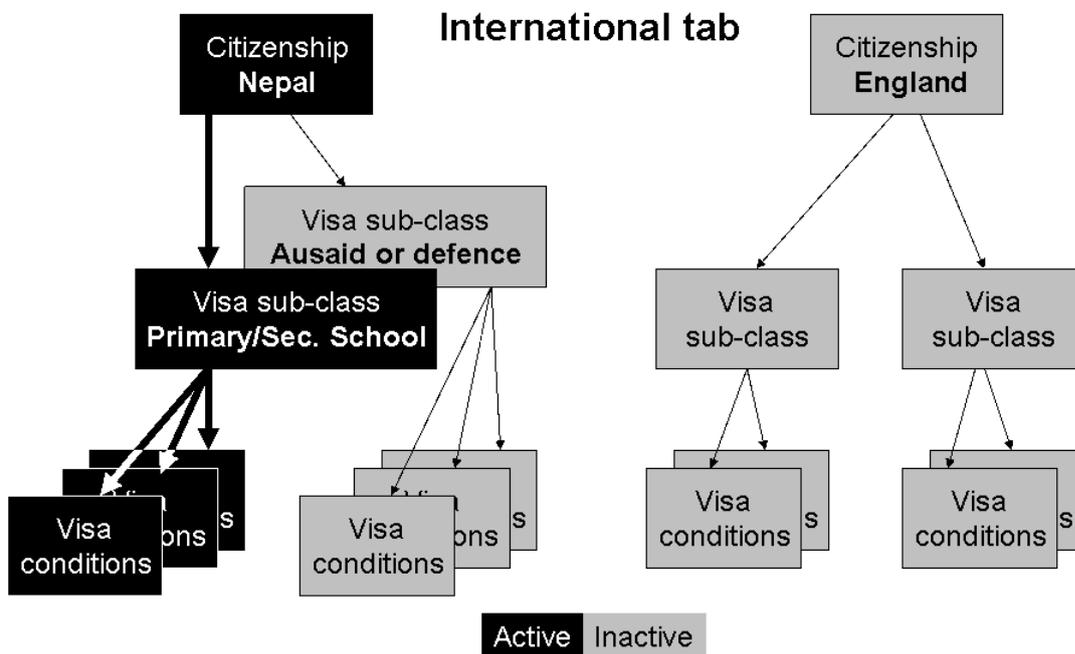
- record citizenship, passport and visa details
- set which citizenship or visa subclass is active at present.

The **International** tab consists of three areas:

- **Citizenship** (or passport) area
- **Visa Subclasses** area
- **Visa Conditions** area.

The following rules apply:

- Each citizenship (or passport) record can have one or more visa subclasses.
- Only one citizenship record is active at a time. In the example, the citizenship of **Nepal** is active.
- Each visa subclass can have one or more conditions.
- Only one visa subclass record is active at a time. In the example, the **Primary and Secondary School** visa subclass is active.
- Visa conditions under an active visa subclass are all active.

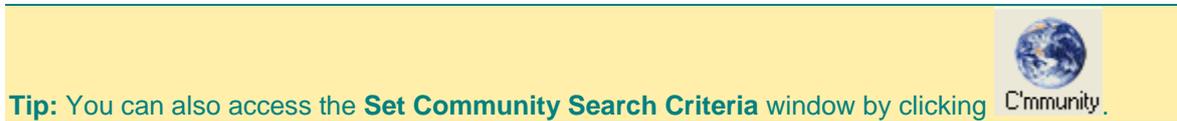


## Opening the International tab

To open the **International** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **International** tab.

The **International** tab of the **Community Maintenance** window is displayed.

The screenshot shows the 'Community Maintenance [Mr A Adamski]' window. The 'International' tab is selected. The window displays personal details for Mr Angelo George Adamski, including his name, address, phone numbers, and partner information. Below this, there are sections for 'Citizenship', 'Visa Subclasses', and 'Visa Conditions', each with a table of data and associated form fields.

**Mr A Adamski** Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151

**Primary:-** Name: Mr Angelo George Adamski Partner: Partner ID:  
 ID: 18337 Phone BH: AH: 9803 8000 Default Mobile: 0409 984 577

Constits | Name | Home Address | Postal Address | Phone | Occupation | Occupation Address | Education | Qualifications  
 Other | Attributes | Relations | Flags | Notify Methods | Current Comms | Comms | Correspondence | Current Events | Events | Notes/Bio  
 Photo | Household | Vehicles | Keys | Objects | Sales | DocMan | User Forms | Maint | **International**

**Citizenship**

Code	Country	Name On Passport	Passport Number	Issued Date	Expiry Date
I AUT	Austria	Mr Angelo George Adamski	N12345789	05/02/2012	05/02/2018

Citizenship Country: Austria  Active Name on passport: Mr Angelo George Adamski  
 Passport Number: N12345789 Issued Date: 05/02/2012 Expiry Date: 05/02/2018 Status: Temporary Resident

**Visa Subclasses**

Visa Class	Subclass Code	Subclass Description	Visa Number	Issued Date	Expiry Date
* AJ	105		4567891	15/12/2012	05/02/2018

Visa Class: AJ Subclass: Skilled ? Australian linked Visa Number: 4567891  
 Arrival Date: 01/01/2013 Visa Application Date: 01/12/2012 Issued Date: 15/12/2012 Expiry Date: 05/02/2018  Active

**Visa Conditions**

Code	Condition Description	Issued Date
* B105	The holder must not engage in work in Australia for more than 20 hours a week during any w	05/02/2013

Issued Date: 05/02/2013 Condition: The holder must not engage in work in Australia for more than 20 hours a week during any week w

Create Spouse... Keep Criteria... < Back Next > OK Exit

## Community Maintenance - International tab key fields and buttons

### Citizenship area fields and buttons

Citizenship

	Code	Country	Name On Passport	Passport Number	Issued Date	Expiry Date			
▶	NPL	Nepal	Anthony Reginald Agius	1234567-8	6/05/2000	5/05/2010	▲	▲	Add
	ENG	England	Mr Anthony Agius	1245678-9	6/04/2004	6/04/2014	▼	▼	Delete

Citizenship Country:   Active Name on passport:

Passport Number:  Issued Date:  Expiry Date:  Status:

### Grid area fields

The values of the selected record correspond to the fields below.

Citizenship

	Code	Country	Name On Passport	Passport Number	Issued Date	Expiry Date			
▶	NPL	Nepal	Anthony Reginald Agius	1234567-8	6/05/2000	5/05/2010	▲	▲	Add
	ENG	England	Mr Anthony Agius	1245678-9	6/04/2004	6/04/2014	▼	▼	Delete

Citizenship Country:   Active Name on passport:

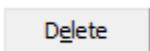
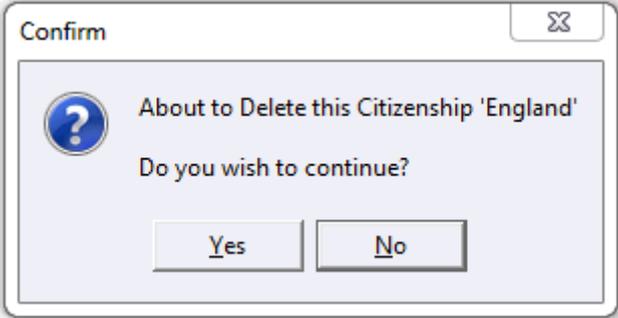
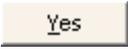
Passport Number:  Issued Date:  Expiry Date:  Status:

### Fields

Field	Description									
<b>Citizenship Country</b>	Country of citizenship that applies to the passport. Select the required value from the drop-down list.  Citizenship Country: <input type="text" value="England"/> <input type="checkbox"/> Active <div style="border: 1px solid black; padding: 2px; width: fit-content;"> <table border="1"> <tr> <td>ENG</td> <td>England</td> <td>▲</td> </tr> <tr> <td>ESH</td> <td>Spanish Sahara</td> <td></td> </tr> <tr> <td>ESP</td> <td>Spain</td> <td>▼</td> </tr> </table> </div>	ENG	England	▲	ESH	Spanish Sahara		ESP	Spain	▼
ENG	England	▲								
ESH	Spanish Sahara									
ESP	Spain	▼								
<b>Active</b>	Whether the citizenship is active for your organisation's purposes. The field is automatically selected if the record is the first citizenship record. Only one citizenship record can be active at a time.  Click the  button to move a record to the first position and make it active.									
<b>Name on Passport</b>	Name as it appears on the passport.									
<b>Passport Number</b>	Number of the passport.									
<b>Issued Date</b>	Date the passport was issued.									
<b>Expiry Date</b>	Date the passport expires.									

Field	Description
<b>Status</b>	<p>Citizenship status that applies to the person. Select the value from the drop-down list.</p>  <p><b>Note:</b> The person's citizenship status is used only for CEOVIC export.</p>

### Buttons

Button	Description
	<p>Move the current record up one place in the list. If the record is moved to the top of the list, the <b>Active</b> flag is automatically set.</p>
	<p>Move the current record down one place in the list. If the record is moved from the top of the list, the <b>Active</b> flag is automatically cleared.</p>
	<p>Add a new row and edit the values. See the <b>Fields</b> section above.</p>
	<p>Delete the selected row. The following dialog is displayed.</p>  <p>Click  to delete the citizenship record, along with its visa subclasses and conditions.</p> <p><b>Note:</b> Before you delete a citizenship, make sure that the <b>Visa Subclasses</b> and <b>Visa Conditions</b> for that citizenship have been deleted.</p>

### Visa Subclasses area fields and buttons

Visa Subclasses

Visa Class	Subclass Code	Subclass Description	Visa Number	Issued Date	Expiry Date			
Student Visa	571	Primary or Secondary Schools	1290984-x	6/02/2005	6/02/2009			Add
Student Visa	576	AusAID and Defence	988647672-z	6/02/2004	5/02/2005			Delete

Visa Class:  Subclass:  Visa Number:   
 Arrival Date:  Visa Application Date:  Issued Date:  Expiry Date:   Active

### Grid area fields

The values of the selected record correspond to the fields below.

Visa Subclasses

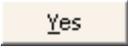
Visa Class	Subclass Code	Subclass Description	Visa Number	Issued Date	Expiry Date			
Student Visa	571	Primary or Secondary Schools	1290984-x	6/02/2005	6/02/2009			Add
Student Visa	576	AusAID and Defence	988647672-z	6/02/2004	5/02/2005			Delete

Visa Class:  Subclass:  Visa Number:   
 Arrival Date:  Visa Application Date:  Issued Date:  Expiry Date:   Active

### Fields

Field	Description
<b>Visa Class</b>	Class of visa provided by the Government department. Select the required value from the drop-down list. 
<b>Subclass</b>	Code and description of visa subclass that applies. Select the required value from the drop-down list. 
<b>Visa Number</b>	Number assigned.
<b>Arrival Date</b>	Date the community member arrived in the country.
<b>Visa Application Date</b>	Date the application was provided to the Government department.
<b>Issued Date</b>	Date the visa was issued.
<b>Expiry Date</b>	Date the visa expires.
<b>Active</b>	Whether the visa is active for your organisation's purposes. The field is automatically selected if the record is the first visa subclass record. Only one visa subclass record can be active at a time. Click the  button to move a record to the first position and make it active.

## Buttons

Button	Description
	<p>Move the current record up one place in the list.</p> <p>If the record is moved to the top of the list, the <b>Active</b> flag is automatically set.</p>
	<p>Move the current record down one place in the list.</p> <p>If the record is moved from the top of the list, the <b>Active</b> flag is automatically cleared.</p>
	<p>Add a new row and edit the values. See the <b>Fields</b> section above.</p>
	<p>Delete the selected row.</p> <p>The following dialog is displayed.</p> <div data-bbox="491 719 1126 1032" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>Confirm <span style="float: right;">✖</span></p> <div style="border: 1px solid gray; padding: 5px; margin: 5px 0;">  <p>About to Delete this Visa Subclass code '128'</p> <p>Do you wish to continue?</p> <p style="text-align: center;"> <input type="button" value="Yes"/> <input type="button" value="No"/> </p> </div> </div> <p>Click  to delete the visa subclass record, along with its conditions.</p>

### Visa Conditions area fields and buttons

Visa Conditions

Code	Condition Description	Issued Date		
8101	The holder must not engage in work in Australia	6/02/2005	<input type="button" value="Add"/> <input type="button" value="Delete"/>	

Issued Date:  Condition:

### Grid area fields

The values of the selected record correspond to the fields below.

Visa Conditions

Code	Condition Description	Issued Date		
8101	The holder must not engage in work in Australia	6/02/2005	<input type="button" value="Add"/> <input type="button" value="Delete"/>	

Issued Date:  Condition:

### Fields

Field	Description
Issued Date	Date the visa condition was imposed.
Condition	Description of the visa condition. This defaults to the standard description that applies to the selected <b>Code</b> .

### Buttons

Button	Description
<input type="button" value="Add"/>	Add a new row and edit the values. See the <b>Fields</b> section above.
<input type="button" value="Delete"/>	Delete the selected row. The following dialog is displayed. <div data-bbox="491 1391 1114 1715" data-label="Image"> </div> <p>Click <input type="button" value="Yes"/> to delete the visa condition.</p>

## Community Maintenance - Company tab

Use the **Company** tab to maintain company details for **Company** record types.

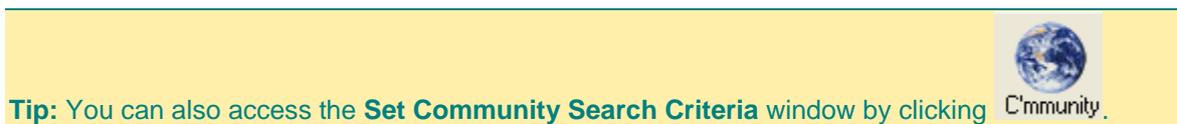
**Note:** The **Company** tab is not displayed for **Personal** record types. See *Community Maintenance - Name tab* (on page 54).

### Opening the Company tab

To open the **Company** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Company** tab.

The **Company** tab of the **Community Maintenance** window is displayed.

The screenshot shows the 'Community Maintenance [ABC books]' window. The 'Company' tab is selected. The record details are as follows:

- Primary:-** Name: ABC books, Partner: Partner ID:
- ID:** 393, **Phone BH:**, **AH:**, **Mobile:**

The navigation tabs include: Occupation, Occupation Address, Constits, Postal Address, Phone, Qualifications, Skills, Other, Attributes, Relations, Flags, Notify Methods, Current Comms, Comms, Current Events, Events, Notes/Bio, Photo, Household, Vehides, Keys, Objects, Sales, DocMan, User Forms, Correspondence, Maint, International, **Company**, and Company Address.

Under the 'Company' tab, the 'Community Record Type' is set to 'Company' (selected). The 'Occupation Description' field is empty. The 'Company' field contains 'ABC books' and has a 'Display Names...' button next to it. The 'Attention' field is empty.

At the bottom, there are buttons for 'Create Spouse...', 'Keep', 'Criteria...', '< Back', 'Next >', 'OK', and 'Exit'.

The fields displayed on the **Company** tab for a **Personal Company** record type are slightly different to those displayed for a **Company** record type:

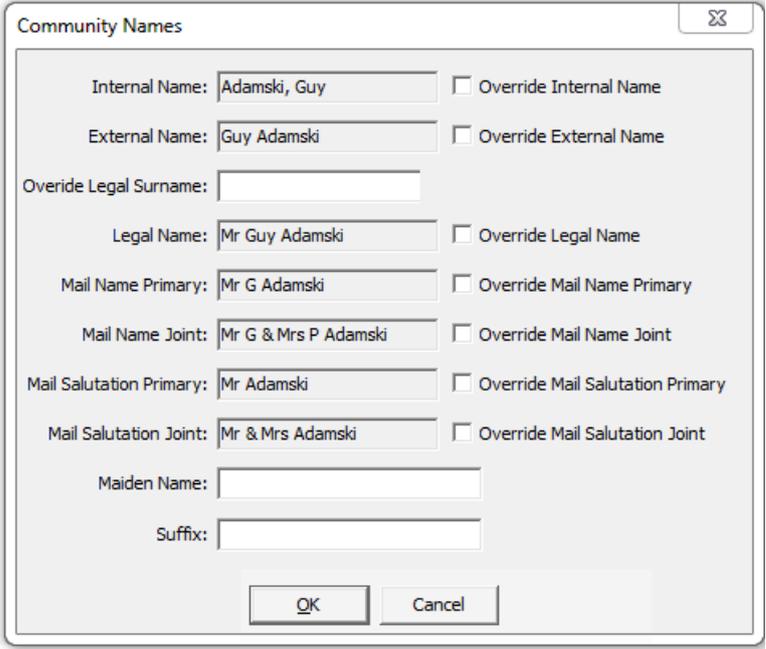
The screenshot shows the 'Company' tab for a record named 'Rivers General Practice'. The 'Community Record Type' is set to 'Personal Company' (selected). The 'Occupation Description' field contains 'Medical Practitioner'. The 'Company' field contains 'Rivers General Practice' and has a 'Display Names...' button next to it. The 'Attention' field is empty.

## Community Maintenance - Company tab key fields and buttons

### Fields

Field	Description
<b>Record Type</b>	Type of community record.  <b>Note:</b> The <b>Company</b> tab is only displayed for <b>Company</b> and <b>Personal Company</b> records.
<b>Occupation Description</b>	Description of the company's main business. For example, <b>Garden Maintenance</b> .
<b>Company</b>	Company name.
<b>Attention</b>	Name of recipient within the company, if required.

### Buttons

Button	Description
Display Names...	<p>The <b>Community Names</b> window is displayed.</p>  <p>To override one or more community names:</p> <ol style="list-style-type: none"> <li>1. Select the override flag next to the field being changed.</li> <li>2. Type in the new value for the community name.</li> <li>3. Click <b>OK</b>.</li> </ol>

## Community Maintenance - Home Address tab

Use the **Home Address** tab to enter and maintain the community member's home address details.

**Note:** The **Home Address** tab is not displayed for **Company** or **Personal Company** record types. See *Community Maintenance - Company Address tab* (on page 143) in the Community manual.

### Opening the Home Address tab

To open the **Home Address** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Home Address** tab.

The **Home Address** tab of the **Community Maintenance** window is displayed.

The screenshot shows the 'Community Maintenance [Mr G & Mrs P Adamski]' window. The title bar includes a search icon. The main area displays the member's name 'Mr G & Mrs P Adamski' and address '9 Towers St, CABRAMATTA NSW 2166, AUSTRALIA'. Below this, there are fields for 'Primary:- Name: Mr Guy Adamski', 'Partner: Pauline', and 'Partner ID: 21'. Further down, there are fields for 'ID: 22', 'Phone BH:', 'AH: Silent Phone', and 'Mobile: 0425718754'. A tabbed interface is visible with tabs for 'Occupation', 'Occupation Address', 'Constits', 'Postal Address', 'Phone', 'Qualifications', 'Skills', 'Other', 'Attributes', 'Relations', 'Flags', 'Notify Methods', 'Current Comms', 'Comms', 'Current Events', 'Events', 'Notes/Bio', 'Photo', 'Household', 'Vehicles', 'Keys', 'Objects', 'Sales', 'DocMan', 'User Forms', 'Correspondence', 'Maint', 'International', 'Name', 'Home Address', and 'Education'. The 'Home Address' tab is selected. The 'Home Address' section contains several input fields: 'Line 1: 9 Towers St', 'Line 2:', 'Line 3:', 'Suburb: CABRAMATTA', 'State: New South Wales', 'Postcode: 2166', 'Country: Australia', 'Region: Not Selected', 'DPID: 36562150', 'Sort Plan Number: 009', 'PAF Version: 2011.2', 'Latitude:', and 'Longitude:'. There are checkboxes for 'Valid Address' (checked) and 'Silent Address' (unchecked). A note states: 'Only use Silent Address in exceptional circumstances as it will prevent most mailings'. At the bottom, there are buttons for 'Show Spouse', 'Keep', 'Criteria...', '< Back', 'Next >', 'OK', and 'Exit'.

## Community Maintenance - Home Address tab key fields

Field	Description
<b>Line 1</b>	First line of the address. For New Zealand roll returns, <b>Line 1</b> is used for the <i>First Address</i> line of the student's address.
<b>Line 2</b>	Second line of the address, if required. In New Zealand, the community member's suburb, if applicable. For New Zealand roll returns, <b>Line 2</b> is used for the <i>Second Address</i> line of the student's address.
<b>Line 3</b>	Third line of the address, if required.
<b>Valid address</b>	Select to indicate that the address has been verified as correct. If this is not selected, an <b>*Address unknown*</b> message is displayed.
<b>Address ID</b>	Identifier automatically generated for a given address. Used to: <ul style="list-style-type: none"> <li>allow multiple community members to share the same address</li> <li>avoid any duplication when mailing.</li> </ul>
<b>Silent Address</b>	Select to set the address to be hidden from all communications for security purposes. Access to address information is restricted to key staff only. In New Zealand schools, this is used as the <i>Privacy Indicator</i> when compiling roll returns.  <u>Note: Only use under exceptional circumstances. If you select this option, the community member is automatically excluded from all communications.</u>
<b>Suburb (Aus) / City (NZ)</b>	In Australia, the community member's suburb. In New Zealand, the community member's city or town. For New Zealand roll returns, <b>City</b> is used as the <i>Third Address</i> line of the student's address.
<b>State</b>	Community member's state.  <u>Note: Only Australian states are available for selection. If the community member lives overseas, do not enter state details.</u>
<b>Postcode</b>	Community member's postcode.  <u>Note: Only Australian (or New Zealand, if a NZ organisation) postcodes can be entered. If the community member lives overseas, do not enter a postcode.</u>  For New Zealand roll returns, <b>Postcode</b> is used as the <i>Fourth Address</i> line of the student's address.
<b>Country</b>	Country of residence if applicable.  <u>Note: Only use for overseas community members.</u>
<b>Comment</b>	Additional addressing information, such as the nearest cross road.
<b>Region</b>	User-defined region. Used mainly for postal sort districts.

Field	Description
<b>Override Region</b>	Select to override the region.
<b>DPID</b>	Delivery postal identifier used to format postal addressing information on envelopes. Used to: <ul style="list-style-type: none"> <li>• increase mailing accuracy</li> <li>• reduce postal charges.</li> </ul> <hr/> <b>Note:</b> <b>DPID</b> , <b>Sort Plan Number</b> and <b>PAF Version</b> are automatically populated if RAT is used at your organisation. These fields are cleared to avoid them being made invalid by any manual address changes.
<b>Sort Plan Number</b>	Barcode sort plan number used for large mailing runs using Australia Post.
<b>PAF Version</b>	Version of the postal address file from Australia Post.
<b>Latitude</b>	Latitude coordinates of the community member's address. <hr/> <b>Note:</b> This field is only editable if the <b>AllowManualEdit</b> configuration setting is set to <b>true</b> . See <i>AllowManualEdit configuration setting</i> in the System maintenance manual.
<b>Longitude</b>	Longitude coordinates of the community member's address. <hr/> <b>Note:</b> This field is only editable if the <b>AllowManualEdit</b> configuration setting is set to <b>true</b> . See <i>AllowManualEdit configuration setting</i> in the System maintenance manual.

## Community Maintenance - Company Address tab

Use the **Company Address** tab to maintain company address details for **Company** record types.

**Note:** The **Company Address** tab is not displayed for **Personal** and **Personal Company** record types. See *Community Maintenance - Home Address tab* (on page 140).

### Opening the Company Address tab

To open the **Company Address** tab:

1. Select **Module > Community Maintenance**.

The **Set Community Search Criteria** window is displayed.



2. Search for the community member. See *Searching for community members* (on page 12).

The **Constits** tab of the **Community Maintenance** window is displayed.

3. Click the **Company Address** tab.

The **Company Address** tab of the **Community Maintenance** window is displayed.

**Community Maintenance [ABC books]**

ABC books  
**Primary:-** Name: ABC books Partner: Partner ID:  
 ID: 393 Phone BH: AH: Mobile:

Occupation | Occupation Address | Constits | Postal Address | Phone | Qualifications | Skills | Other | Attributes | Relations | Flags |  
 Notify Methods | Current Comms | Comms | Current Events | Events | Notes/Bio | Photo | Household | Vehicles | Keys |  
 Objects | Sales | DocMan | User Forms | Correspondence | Maint | International | Company | **Company Address**

**Company Address**

Line 1: 132-136 Link Rd  Valid Address Address ID: 393  
 2:   Silent Address Only use Silent Address in  
 3:  exceptional circumstances as it  
 will prevent most mailings

Suburb: MELBOURNE State: Victoria Postcode: 3000  
 Country: Australia Comment:

Region: Not Selected  Override Region  
 DPID:  Sort Plan Number:  PAF Version: 2005.2  
 Latitude:  Longitude:

Create Spouse... Keep Criteria... < Back Next > OK Exit

## Community Maintenance - Company Address tab key fields

Field	Description
<b>Line 1</b>	First line of the address.
<b>Line 2</b>	Second line of the address, if required. In New Zealand, the community member's suburb, if applicable.
<b>Line 3</b>	Third line of the address, if required.
<b>Valid address</b>	Select to indicate that the address has been verified as correct. If this is not selected, an <b>*Address unknown*</b> message is displayed.
<b>Address ID</b>	Identifier automatically generated for a given address. Used to: <ul style="list-style-type: none"> <li>allow multiple community members to share the same address</li> <li>avoid any duplication when mailing.</li> </ul>
<b>Silent Address</b>	Select to set the address to be hidden from all communications for security purposes. Access to address information is restricted to key staff only.  <u>Note: Only use under exceptional circumstances. If you select this option, the community member is automatically excluded from all communications.</u>
<b>Suburb</b>	Company address suburb.
<b>State</b>	Company address state.  <u>Note: Only Australian states are available for selection. If the community member lives overseas, do not enter state details.</u>
<b>Postcode</b>	Community member's postcode.  <u>Note: Only Australian postcodes can be entered. If the community member lives overseas, do not enter a postcode.</u>
<b>Country</b>	Country of residence if applicable.  <u>Note: Only use for overseas community members.</u>
<b>Comment</b>	Additional addressing information, such as the nearest cross road.
<b>Region</b>	User-defined region. Used mainly for postal sort districts.
<b>Override Region</b>	Select to override the region.
<b>DPID</b>	Delivery postal identifier used to format postal addressing information on envelopes. Used to: <ul style="list-style-type: none"> <li>print as a barcode on labels and envelopes</li> <li>increase mailing accuracy</li> <li>reduce postal charges.</li> </ul> <u>Note: DPID, Sort Plan Number and PAF Version are automatically populated if RAT is used at your organisation. These fields are cleared to avoid them being made invalid by any manual address changes.</u>
<b>Sort Plan Number</b>	Barcode sort plan number used for large mailing runs using Australia Post.

Field	Description
Line 1	First line of the address.
PAF Version	Version of the postal address file from Australia Post.
Latitude	Latitude coordinates of the community member's address.  <b>Note:</b> This field is only editable if the <b>AllowManualEdit</b> configuration setting is set to <b>true</b> . See <i>AllowManualEdit configuration setting</i> in the <i>System maintenance manual</i> .
Longitude	Longitude coordinates of the community member's address.  <b>Note:</b> This field is only editable if the <b>AllowManualEdit</b> configuration setting is set to <b>true</b> . See <i>AllowManualEdit configuration setting</i> in the <i>System maintenance manual</i> .

## Community Maintenance - Correspondence tab

The **Correspondence** tab stores communications and documents relating to a community member. All emails and SMS messages sent to community members and documents uploaded to **DocMan** tabs are automatically displayed in the appropriate **Correspondence** tab. You can:

- view SMS messages, emails and attachments sent to the community member in Synergetic
- view documents uploaded to the community member's **DocMan** tab
- import emails from Microsoft Outlook by dragging them from Microsoft Outlook and dropping them onto the correspondence grid. See *Dragging and dropping emails from Microsoft Outlook* in the Introduction manual.

---

**Note:** Fields in this tab are not editable. You cannot edit or delete correspondence through this tab.

---

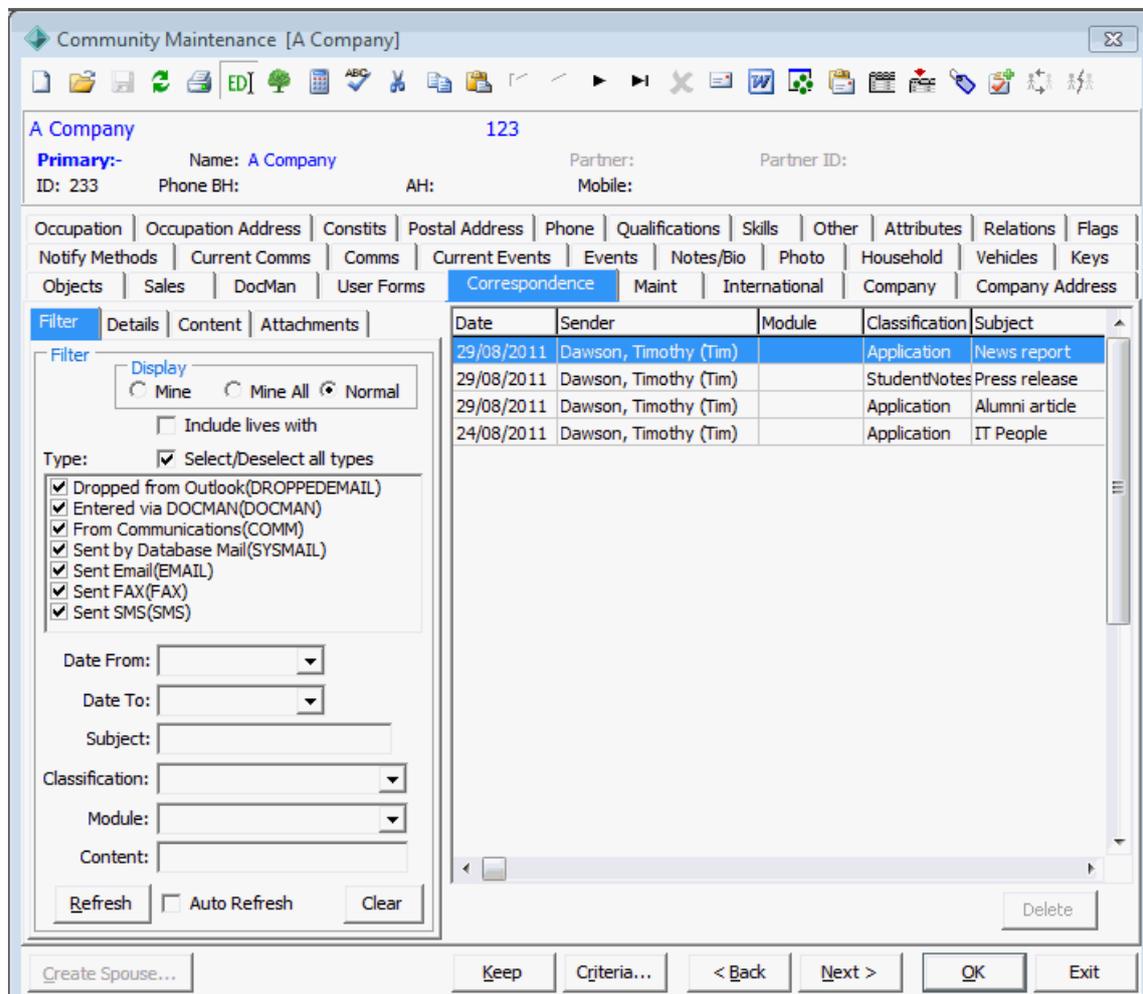
## Opening the Correspondence tab

To open the **Correspondence** tab:

1. Select **Module > Community Maintenance**.  
The **Set Community Search Criteria** window is displayed.

**Tip:** You can also access the **Set Community Search Criteria** window by clicking  Community.

2. Search for the community member. See *Searching for community members* (on page 12).  
The **Constits** tab of the **Community Maintenance** window is displayed.
3. Click the **Correspondence** tab.  
The **Correspondence** tab of the **Community Maintenance** window is displayed.



## Community Maintenance - Correspondence tab key fields and buttons

### Grid area fields

Date	Sender	Module	Classification	Subject	Attach	Type
29/08/2011	Dawson, Timothy (Tim)		Application	News report		1 DOCMAN
29/08/2011	Dawson, Timothy (Tim)		StudentNotes	Press release		DOCMAN
29/08/2011	Dawson, Timothy (Tim)		Application	Alumni article		1 DOCMAN
24/08/2011	Dawson, Timothy (Tim)		Application	IT People		1 DOCMAN

Field	Description
<b>Date</b>	Date the correspondence was added.
<b>Sender</b>	Name of the community member who sent the correspondence.  <u>Note: This field is only displayed if the <b>Display - Normal</b> filter field is selected.</u>
<b>Receiver</b>	Name of the community member who received the correspondence.  <u>Note: This field is only displayed if the <b>Display - Mine All</b> filter field is selected.</u>
<b>Module</b>	Module the correspondence originated from. For example: <ul style="list-style-type: none"> <li><b>SYS</b>, for emails and SMS messages sent from Synergetic.</li> <li><b>EXTERNAL</b> for emails imported from Microsoft Outlook.</li> </ul>
<b>Classification</b>	Classification of the document if the record is from DocMan. See <i>luDocumentClassification lookup table</i> in the System maintenance manual.
<b>Subject</b>	If the document is: <ul style="list-style-type: none"> <li>an email, this is the subject line of the correspondence</li> <li>a document from DocMan, this is the document description.</li> </ul>
<b>Attach</b>	Number of attachments an email correspondence has.
<b>Type</b>	Type of the correspondence. For example, email, document, SMS.

### Filter sub-tab fields and buttons

The screenshot shows a 'Filter' sub-tab with the following elements:

- Display:** Radio buttons for 'Mine', 'Mine All', and 'Normal'. 'Normal' is selected.
- Include lives with:** A checkbox that is currently unchecked.
- Select/Deselect all types:** A checked checkbox.
- Type:** A list of correspondence types with checkboxes:
  - Dropped from Outlook(DROPPEDEMAIL)
  - Entered via DOCMAN(DOCMAN)
  - From Communications(COMM)
  - Sent by Database Mail(SYSMAIL)
  - Sent Email(EMAIL)
  - Sent SMS(SMS)
- Date From:** A dropdown menu.
- Date To:** A dropdown menu.
- Subject:** A text input field.
- Classification:** A dropdown menu.
- Module:** A dropdown menu.
- Content:** A text input field.
- Buttons:** 'Refresh', 'Auto Refresh' (checkbox), and 'Clear'.

### Fields

Field	Description
<b>Display</b>	Select to display: <ul style="list-style-type: none"> <li>• <b>Mine</b> - correspondence you have sent to the community member</li> <li>• <b>Mine All</b> - all correspondence you have sent</li> <li>• <b>Normal</b> - all correspondence sent to this community member.</li> </ul>
<b>Include lives with</b>	Include correspondence sent to people the community member lives with.
<b>Select/Deselect all types</b>	Select or clear this field to select or clear all <b>Type</b> fields.
<b>Type</b>	Filter the correspondence grid by the type of correspondence. For example, email or SMS. Cleared correspondence types are not displayed.
<b>Date From</b>	View correspondence sent or imported on or after this date.
<b>Date To</b>	View correspondence sent or imported on or before this date.
<b>Subject</b>	View correspondence that includes these words in the subject line.
<b>Classification</b>	View correspondence of the specified classification.
<b>Module</b>	View correspondence created by the specified Synergetic module. For example, debtor statements generated by the debtor module.
<b>Content</b>	View correspondence that includes these words in the content.
<b>Auto Refresh</b>	Select to automatically refresh the grid when the filter fields are changed.

### Buttons

Button	Description
	Refresh the grid if you have changed the filter field selections.
	Clear the filter field selections.

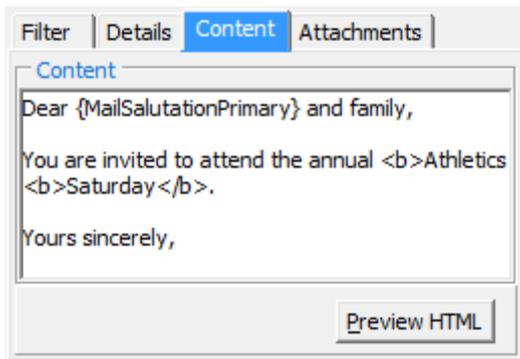
## Details sub-tab fields

The screenshot shows a software interface with four tabs: 'Filter', 'Details', 'Content', and 'Attachments'. The 'Details' tab is active. Below the tabs, there is a form with the following fields:

- Sender:** Dawson, Timothy (Tim)
- Sender Email:** ddillon@synergetic.net.au
- Received Email:** ttest-blah@test.com.au
- Subject:** News report
- Content Prev:** (empty)
- Classification:** Application
- Module:** (empty)
- Type:** Entered via DOCMAN
- Correspondence Sent

Field	Description
<b>Sender</b>	Name of the community member who sent the correspondence.
<b>Sender Email</b>	Email of the person who sent the correspondence.
<b>Received Email</b>	Email address the email correspondence was sent to.
<b>Subject</b>	If the document is: <ul style="list-style-type: none"> <li>• an email, this is the subject line of the correspondence</li> <li>• a document from DocMan, this is the document description.</li> </ul>
<b>ContentPrev</b>	Brief preview of the content of the correspondence.
<b>Classification</b>	Classification of the correspondence.
<b>Module</b>	Module the correspondence originated from. For example: <ul style="list-style-type: none"> <li>• <b>SYS</b>, for emails and SMS messages sent from Synergetic.</li> <li>• <b>EXTERNAL</b> for emails imported from Microsoft Outlook.</li> </ul>
<b>Type</b>	Type of the correspondence. For example, SMS, Sent email, etc.
<b>Correspondence Sent</b>	If selected, the correspondence was sent to the receiver email.

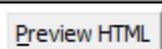
### Content sub-tab fields



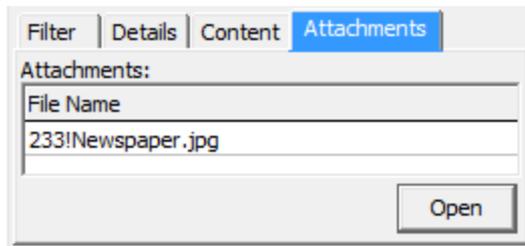
This tab displays the text content of the correspondence.

**Note:** If there is no text content, a representation of the content is displayed. For example, the 'content' of a jpg photograph uploaded to the **DocMan** tab would read '**JPG**'.

### Buttons

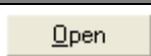
Button	Description
	Launch an internet browser to preview the correspondence in HTML.

### Attachments sub-tab fields and buttons



This tab lists the file names of any attachments included in the correspondence.

### Buttons

Button	Description
	Open the selected email attachment or document. <b>Tip:</b> You can also open the attachments by double clicking on their filename.

### Common Buttons

Button	Description
	Delete the imported email. <b>Note:</b> Only emails imported from Microsoft Outlook can be deleted. Communications sent from Synergetic and imported documents cannot be deleted from the <b>Correspondence</b> tab.

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