SYNERGETIC
Management Systems

Synergetic User Guide

Future students

Version 66

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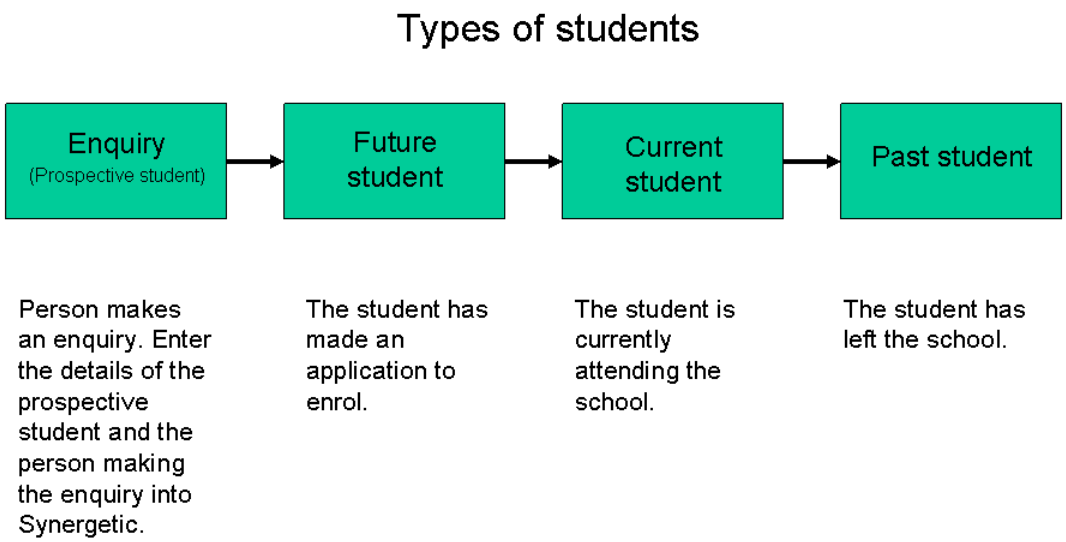
Future students

Synergetic allows you to enter and maintain details of the following types of student records:

- Prospective students are created when you receive **enrolment enquiries**.
- Once a prospective student has made an application to enrol, they become a **future student**.
- When a student starts at your organisation, they become a **current student**.
- When a student leaves your organisation, they become a **past student**.

Note: The Future, Current and Past student types are maintained as constituencies in the community database. It is possible for students to belong to more than one constituency. For example, a student would be both a past student and a current student if they had left your organisation for a period of time and then returned.



Enquiries:

- Are not created in the community database. Enquiry students are created through **Enquiry Student Maintenance**.
- Have an enquiry ID number associated with them instead of a community ID.
- Are transferred into future students when an enrolment application is received.

Future Students:

- Are part of the community and their ID is a Synergetic community ID.
- May be created by transferring an enquiry to a future student or directly, by creating a future student through **Future Student Maintenance**.
- Are transferred into current students when commencing at your organisation.

How to

Use the Future students module to:

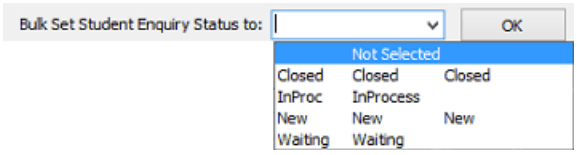
- Maintain enrolment enquiries. See *Maintaining enrolment enquiries* (on page 6).
- Maintain future students. See *Maintaining future students* (on page 73).
- Maintain course details for future students. See *Maintaining details of a future student's course* (on page 331).
- Select several future students and add activities for them. See *Adding future student activity in bulk* (on page 315).
- Process applications. See *Processing applications* (on page 382).
- Maintain enrolment deposits. See *Maintaining enrolment deposits* in the Debtors manual.
- Transfer future students to current students. See *Transferring future students to current students* (on page 385).
- Transfer scholarship information to current students. See *Transferring future student scholarship information to current students* (on page 398).
- Remove a future student from the future student constituency and place all of the details into an archive. See *Archiving a future student* (on page 399).
- Search for and restore a future student from the archive. See *Restoring a future student from the archive* (on page 401).
- Run future students reports. See *Key future student reports* (on page 404).
- Add an activity for a future student, to include in a mail merge letter. See *Future Student Maintenance - Activity tab* (on page 132).
- Change the status of a future student's application, to include in a mail merge letter. See *Future Student Maintenance - Applications tab* (on page 113).
- Transfer information about concessions and discounts to current students. See *Future Student Maintenance - Concessions tab* (on page 264).

What's new to Future students

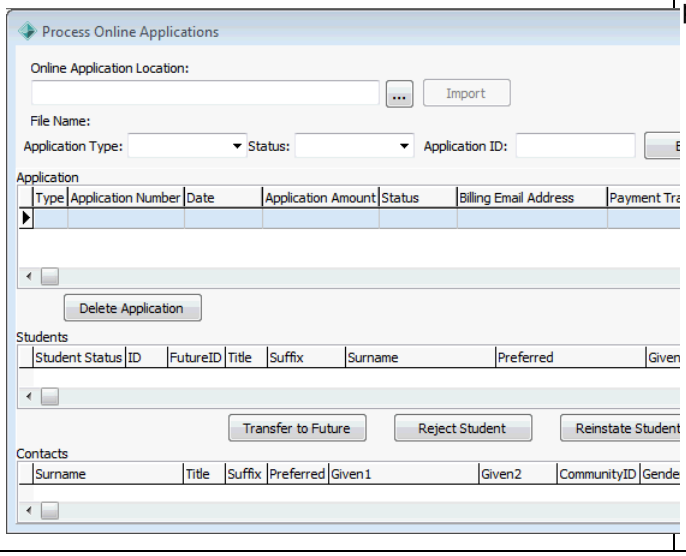
Version 66

This section outlines changes to the Future students manual arising from changes made to Synergetic (versions 65.19-66.01).

> **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...
Changes to the Future student creation wizard.	The future student creation wizard has been expanded to include: • couple relationship status • phone/occupation details • religion details including parish • student contact relationships.	*Future student creation windows* (on page 86)
New search filters in **Enquiry/Future Student Maintenance**.	New search filters in **Enquiry/Future Student Maintenance** allow users to search based on: • **Enquiry/Future** student fields such as enrol year, year level, sub-school, boarder and priority. • **Type/Status** fields such as whether the enquiry is active, duration active and enquiry status. • **Activity** fields such as activity, activity status and follow up date.	*Searching for enrolment enquiries* (on page 8)
New ability to bulk set the enquiry/future student search results.	New ability to bulk set enquiry/future student search results. 	*Searching for enrolment enquiries* (on page 8)
Compose letter icon added to **Enquiry Student Maintenance**.	Compose letter icon added to **Enquiry Student Maintenance**.	*Maintaining enrolment enquiries* (on page 6)
Religion field added to **Student** tab of **Enquiry Student Maintenance**.	**Religion** field added to the **Student** tab of **Enquiry Student Maintenance**.	*Enquiry Student Maintenance - Student tab* (on page 27)

Change	More information	See...
Fields added to **Enquiry** tab of **Enquiry Student Maintenance**.	Two fields added to the **Enquiry** tab of **Enquiry Student Maintenance**: • **Enquiry Status** field added to **Enquiry Details** area • **Full Fee Paying** checkbox added to **Enrolled For** area.	*Enquiry Student Maintenance - Enquiry tab* (on page 29)
Fields added to **Contact** tab of **Enquiry Student Maintenance**.	Two fields added to the **Contact** tab of **Enquiry Student Maintenance**: • **Religion** • **Relationship to Student**.	*Enquiry Student Maintenance - Contact tab* (on page 51)
Fields added to **Contact Spouse** tab of **Enquiry Student Maintenance**.	Two fields added to the **Contact Spouse** tab of **Enquiry Student Maintenance**: • **Religion** • **Relationship to Student** • **Relationship to Contact**.	*Enquiry Student Maintenance - Contact Spouse tab* (on page 54)
Links button removed from **DocMan** tab of **Enquiry Student Maintenance**.	**Links** button removed from the **DocMan** tab of **Enquiry Student Maintenance**.	*Enquiry Student Maintenance - DocMan tab* (on page 64)
Added field to **Flags** tab of **Future Student Maintenance**.	Added **Refugee (Now or Last 7 years)** field to **Special Flags** area of the **Flags** tab of **Future Student Maintenance**.	*Future Student Maintenance - Flags tab* (on page 104)
New **Other Schools** tab added to **Future Student Maintenance**.	New **Other Schools** tab in **Future Student Maintenance** displays the schools and preferences of future students.	*Future Student Maintenance - Other Schools tab* (on page 312)
New **Action Centre** tab added to **Future Student Maintenance**.	New **Action Centre** tab in **Future Student Maintenance** displays action centre notifications linked to community members.	*Future Student Maintenance - Action Centre tab* (on page 307)
New fields added to **Relations** tab of **Future Student Maintenance**.	New **Receive SMS** and **Receive Email** fields on the **Relations** tab in **Future Student Maintenance** list the people who send SMSs and emails to the selected community member.	*Future Student Maintenance - Relations tab* (on page 168)
New fields added to **Codes** tab of **Future Student Maintenance**.	Two field added to the **Codes** tab in **Future Student Maintenance**: • **Early Learning Code** • **Vocational Education Code**.	*Future Student Maintenance - Codes tab* (on page 183)
New field added to **NZMOE** tab of **Future Student Maintenance**.	**Include in Roll Return** field added to the **NZMOE** tab of **Future Student Maintenance**.	*Future Student Maintenance - NZMOE tab* (on page 215)

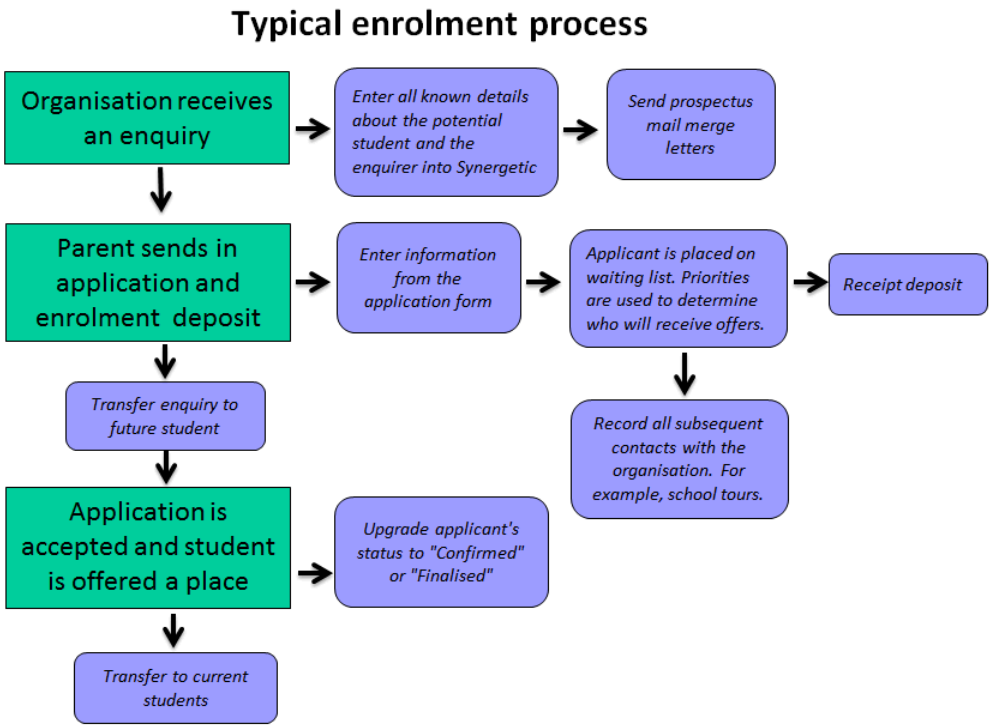
Change	More information	See...
Field changed in **International** tab of **Future Student Maintenance**.	**Active** field changed to **Primary** field on the **International** tab of **Future Student Maintenance**.	*Future Student Maintenance - International tab* (on page 222)
New field added to **Modify Student Class Details** window.	**PTI Request** field added to the **Modify Student Class Details** window.	*Modifying student class details* (on page 371)
Step added to updating a deferring future student's application).	Step added to updating a deferring future student's application.	*Updating a deferring future student's application* (on page 388)
New menu option to import future student applications.	New menu option to import future student applications made through an online program. 	*Processing online applications* (on page 69)

Maintaining enrolment enquiries

When someone makes an enquiry about enrolling a student at your organisation, you enter some of the basic details into Synergetic. You need to record the enquirer's name and address details at least, so that you can send out a prospectus.

You can then transfer the name and address information from all the enquiries you have received into Microsoft Word, and use the mail merge facility to send out a standard letter and prospectus.

You can use these details to send out other correspondence. For example, you can easily send out information about open days to all people who have made an enquiry in the past.



How to:

- Search for an enquiring student on the system. See *Searching for enrolment enquiries* (on page 8).
- Create a new enquiring student. See *Creating new enrolment enquiries* (on page 14).
- Create a prospectus letter. See *Creating prospectus letters* (on page 32).
- Add an activity for the enquiring student. See *Creating activities* (on page 45).
- Modify an existing activity. See *Modifying activities* (on page 49).
- Import an application through an online program, such as through a page on your organisation's website. See *Processing online applications* (on page 69).

What you can do:

What you can do...	See...
Maintain personal details about the student who is enquiring about enrolling at your organisation.	*Enquiry Student Maintenance - Student tab* (on page 27)
Maintain: • original date of enquiry and priority • preferred enrolment details.	*Enquiry Student Maintenance - Enquiry tab* (on page 29)
Maintain the: • source of the enquiry • student's current or previous school.	*Enquiry Student Maintenance - Source tab* (on page 33)
Maintain second and third enrolment preferences, should the enquiring student's first choice not be available.	*Enquiry Student Maintenance - Supplemental tab* (on page 35)
Maintain and view a list of scholarships that the enquiring student has applied for or been awarded.	*Enquiry Student Maintenance - Scholarships tab* (on page 37)
View and maintain activities for the enquiry student.	*Enquiry Student Maintenance - Activity tab* (on page 41)
Maintain contact details for the student's primary contact.	*Enquiry Student Maintenance - Contact tab* (on page 51)
Maintain details about the spouse of the primary contact.	*Enquiry Student Maintenance - Contact Spouse tab* (on page 54)
Maintain address details for the primary contact.	*Enquiry Student Maintenance - Contact Address tab* (on page 56)
View details about the siblings of the student.	*Enquiry Student Maintenance - Siblings tab* (on page 59)
Maintain comments about the student.	*Enquiry Student Maintenance - Comment tab* (on page 61)
Define your own tabs or programs within Synergetic.	*Enquiry Student Maintenance - User Forms tab* (on page 62)
Create a letter to send out to prospective students.	*Creating a prospectus letter* (on page 32)

Searching for enrolment enquiries

Use the **Process Future Student and Enquirers** window to search for:

- Contacts who have enquired about enrolling a student. For example, **Cassandra Dyson**.
- Prospective students who have been added after an enquiry. For example, **Jackie** who is **Cassandra Dyson's** daughter.
- Future students who may be enrolling at your organisation. For example, **James Dawson**.

Name	Type	Enrol Date	Level	ID	Status	App/Enq Date
Dawson, James	Future Student	1/01/2007	J0	236	A	28/01/2003
Dyson, Cassandra	Enq Contact			28		
Dyson, Jackie	Enq Student	1/01/2006	J0	29		13/09/2005

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

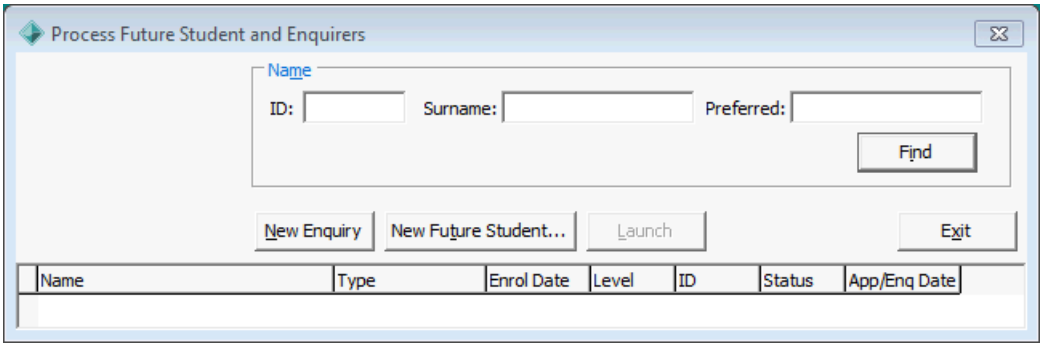
Note: If the enrolment enquiry is not found, click New Enquiry to add a new enrolment enquiry from this window. See *Creating new enrolment enquiries* (on page 14).

To search for enrolment enquiries or future students:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

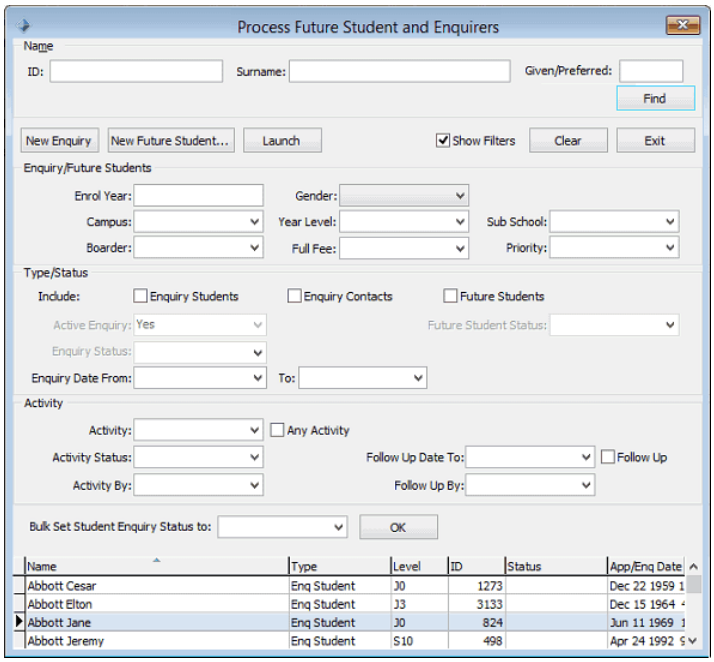
   The **Process Future Student and Enquirers** window is displayed.

Tip: You can also access the future student functions by clicking Future.



2. Click **Show Filters**.

   The Filters are displayed.

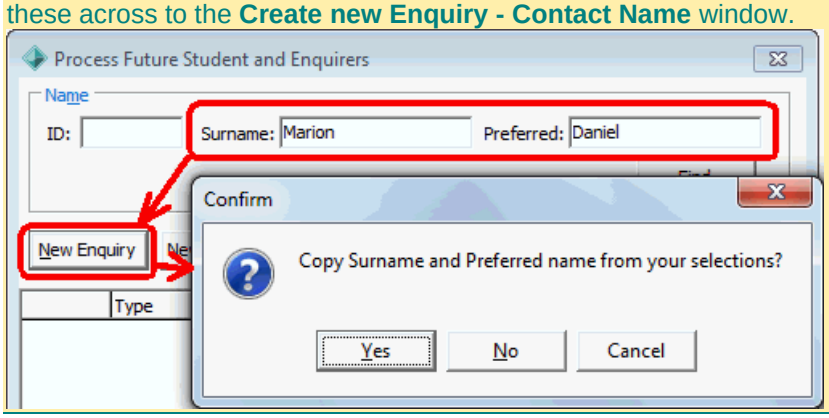


   You must have at least one of the following **Type/Status** fields selected to perform a search:

   - Enquiry Students
   - Enquiry Contacts
   - Future Students field.

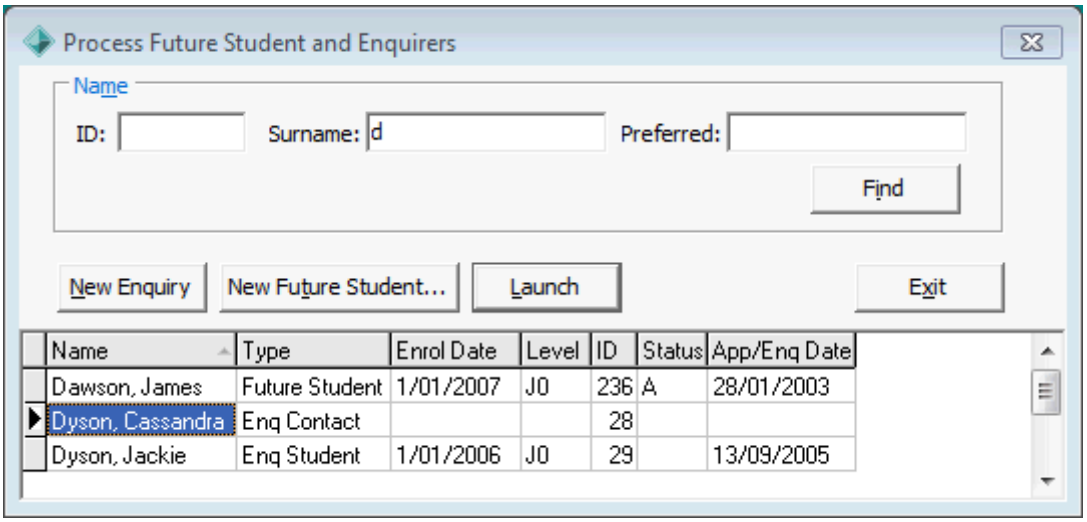
3. Enter whatever information you know in the fields.

Tip: Enter case-sensitive values in the **Surname** and **Preferred** fields as Synergetic offers to copy these across to the **Create new Enquiry - Contact Name** window.



4. Click Find.

Synergetic searches both the Enquiries database and for future students in the Community database for records that match your search criteria.

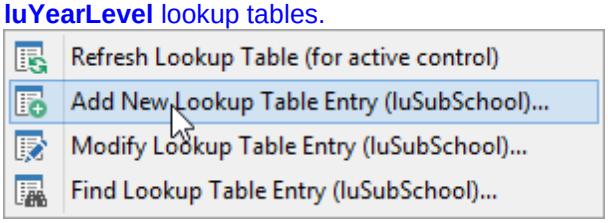


Process Future Student and Enquirers fields and buttons

Name Fields

Field	Description
ID	Search based on the Synergetic ID of the person enquiring or future student, if known.
Surname	Search based on the surname of the person enquiring or future student.
Given/Preferred	Search based on the preferred first name of the person enquiring or future student.

Enquiry/Future Students Fields

Field	Description
Enrol Year	Search based on the year applied for.
Gender	Search based on gender.
Campus	Search based on the campus applied for.
Year Level	Search based on the year level applied for.
Sub School	Search for students by the sub-school they are grouped into, if applicable. 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: • junior school • middle school • senior school. **Warning**: Do not add sub-schools by selecting from the right click menu because entries are required in both the **luSubSchool** and the **luYearLevel** lookup tables.  See *luSubSchool* and *luYearLevel* lookup tables in the System maintenance manual.
Boarder	Search based on the boarding status of the person enquiring or future student. Typical values include: • Boarder • Day Student • Home Stay. **Note:** Maintain the values in the **luBorder** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Full Fee	Search based on whether or not the student is a full-fee-paying student.

Field	Description
Priority	Search based on the priority of the person enquiring or future student. Typical values include: • Existing family • Sibling at school • Parent is Ex Student • Parent is Staff • Normal. **Note:** Maintain the values in the **luFuturePriority** lookup table. See *luFuturePriority lookup table* in the System maintenance manual.

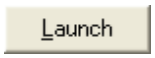
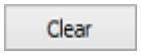
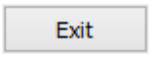
Type/Status Fields

Field	Description
Include: **Enquiry Students** **Enquiry Contacts** **Future Students**	Filter search results to display enquiry students. Filter search results to display enquiry student contacts. Filter search results to display future students. **Note:** You can select multiple filters.
Active Enquiry	Search based on whether the enquiry is active. See *Enquiry Student Maintenance - Enquiry tab* (on page 29). **Note:** This field is not selectable unless **Enquiry Students** or **Enquiry Contacts** has been selected as a search filter.
Future Student Status	Search based on the status of the future student application. Typical values include: • application made • place offered • finalised • cancelled. **Note:** Maintain the values in the **luFuturePriority** lookup table. See *luFuturePriority lookup table* in the System maintenance manual.
Enquiry Status	Search based on the status of the enquiry. Typical values include: • In Process • New • Waiting. **Note:** Maintain the values in the **luEnquiryStatus** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Enquiry Date From/To	Search based on the duration of the enquiry.
Bulk Set Student Enquiry Status to	Bulk set all results in the grid area to the enquiry status selected in the drop-down list.

Activity Fields

Field	Description
Activity	Search based on activities.
Any Activity	Search for enquirers or future students with any activity.
Activity Status	Search based on the status of the activity.
Follow Up Date To	Search based on the follow up date.
Follow Up	Search for enquirers or future students with the **Follow Up** flag selected.
Activity By	Search based on the person in your organisation who is responsible for the activity.
Follow Up By	Search based on the person in your organisation who is responsible for following up.

Buttons

Button	Description
	Find records based on the fields specified. These are displayed in the grid area of the window.
	Create a new enrolment enquiry. See *Creating new enrolment enquiries* (on page 14).
	Create a new future student. See *Creating future students* (on page 85).
	Once you have found records, launch one of the following maintenance functions for the highlighted record in the grid area: • **Enquiry Student Maintenance**. See *Maintaining enrolment enquiries* (on page 6). • **Future Student Maintenance**. See *Maintaining future students* (on page 73).
	Clear existing search filters.
	Close the **Process Future Student Enquirers** window.

Creating new enrolment enquiries

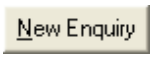
When you receive a phone call or other enquiry about a student enrolling at your organisation, you need to record some basic details about the person making the enquiry.

You can either:

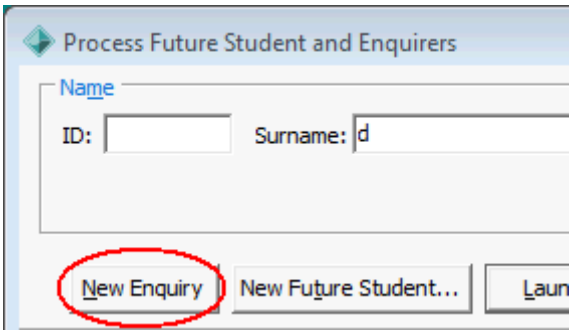
- select a current member of the community database and make them an enquiring student or contact
- create a new record in the Enquiry database.

To create a new enrolment enquiry:

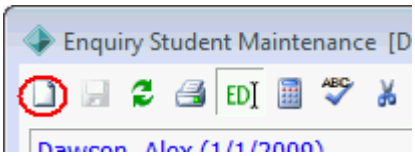
1. Either:

- click 

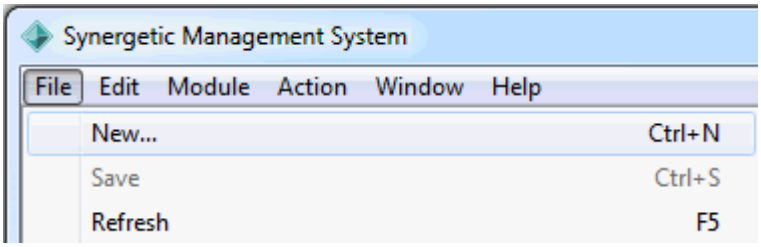
on the **Process Future Student and Enquirers** window



- click on the **Enquiry Student Maintenance** toolbar

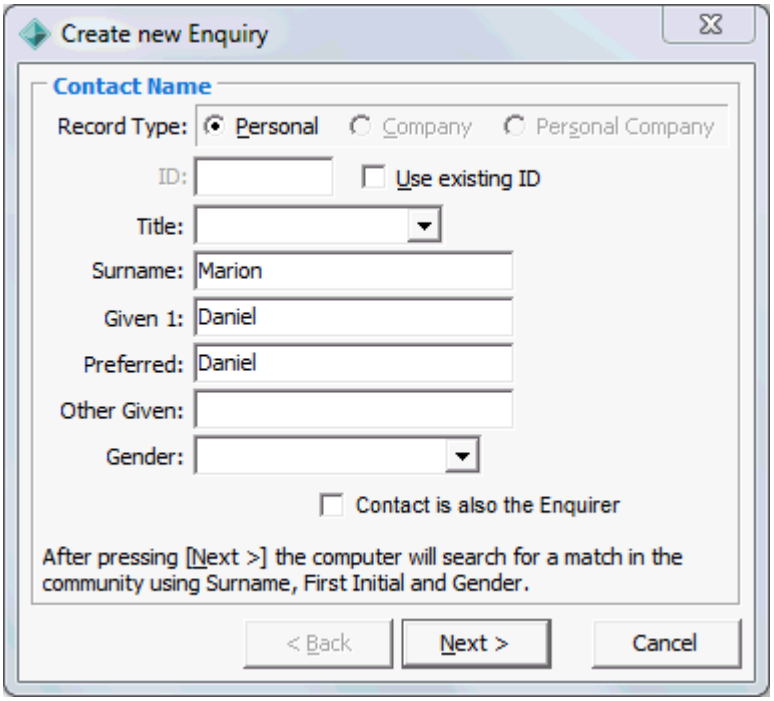


- select **File > New** from the main menu, when using **Enquiry Student Maintenance**

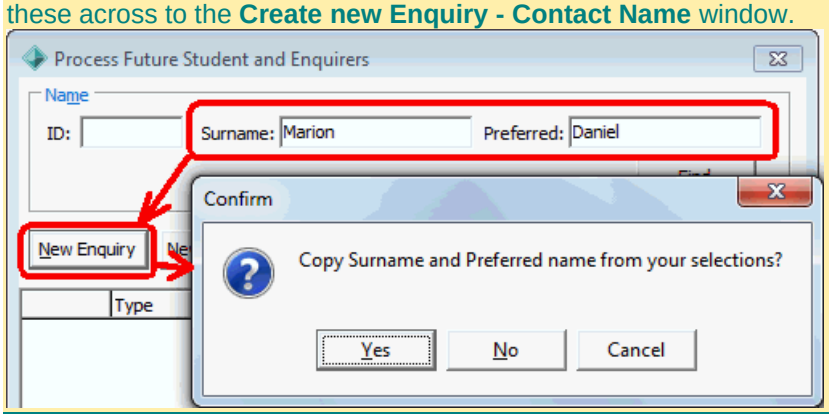


- press **Ctrl** + **N**, when using **Enquiry Student Maintenance**.

The **Create new Enquiry - Contact Name** window is displayed.



Tip: Enter case-sensitive values in the **Surname** and **Preferred** fields as Synergetic offers to copy these across to the **Create new Enquiry - Contact Name** window.



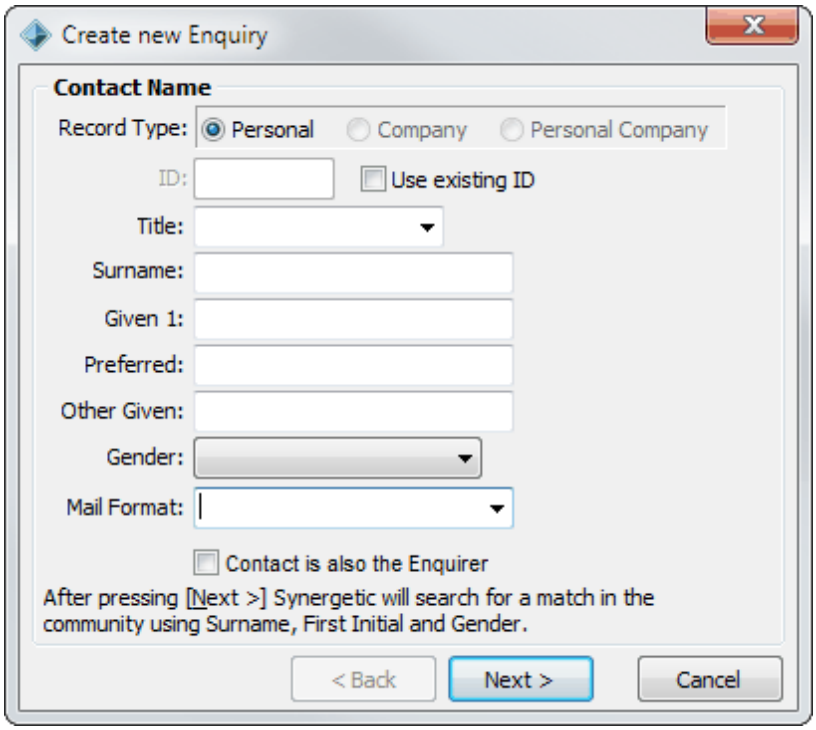
2. Use the < Back and Next > buttons to move through the data input windows.

Different windows are displayed, depending on your selections on the first window. See *Enrolment enquiry creation windows* (on page 16) if you need more information about what to enter when you are creating a new enrolment enquiry.

Note: If the student or contact has no affiliation with your organisation, create a record in the enquiry database. See *Enrolment enquiry creation windows* (on page 16).

Enrolment enquiry creation windows

The **Create new Enquiry - Contact Name** window is displayed first when creating a new enquiry.

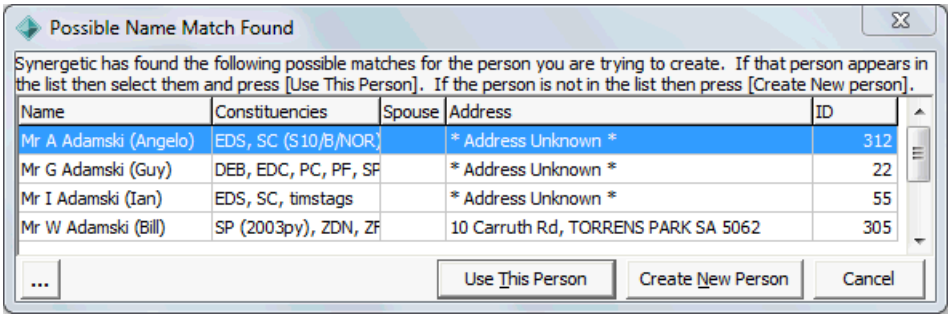


To add details for a new enquiry:

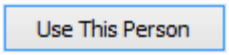
1. Enter the details of the person enquiring for the student. The person enquiring may be:
   - the primary contact who is legally responsible for the student; usually a parent or guardian
   - an enquiring contact, such as a grandparent or a friend, requesting a prospectus on behalf of the parents.
2. Either:
   - Select the **Contact is also the Enquirer** field if the enquiry student and the contact are the same person. For example, mature age students enrolling in a course.
   - Clear the field, if not.
3. Click

.

   The **Possible Name Match Found** window is displayed if the information you enter matches one or more members of the community database.



4. You can either:

   - Select a community record from the grid and click 

to make them the enquiring student's contact.
   - Click

to create a new enquiry record.

     The following windows are displayed, depending on the selections made:

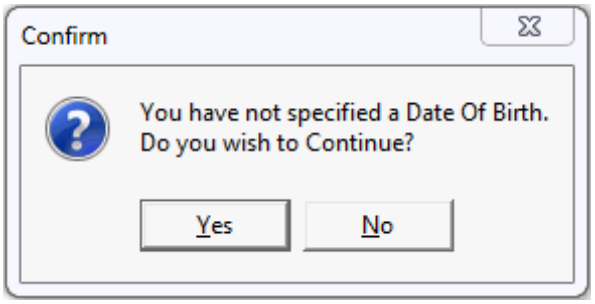
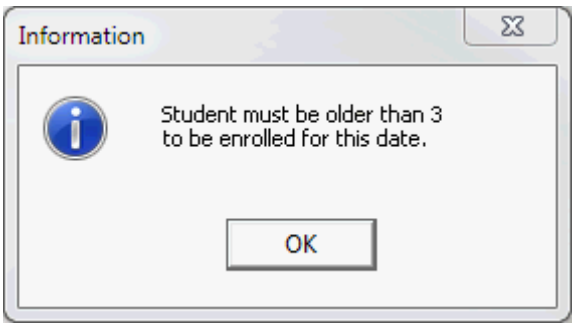
     – Spouse details, if offered. See *Spouse Details window* in the Community manual for a similar example.
     – Address details. See *Home Address window* in the Community manual for a similar example.
     – Mobile phone and email details. See *Create New Enquiry - Mobile/Email window* (on page 22).
     – Relationship details. See *Select Couple Relationship window* in the Community manual for a similar example.
     – Contact's phone and occupation details. See *Phone/Occupation window* in the Community manual for a similar example.
     – Spouse's phone and occupation details. See *Phone/Occupation window* in the Community manual for a similar example.
     – Student details. See *Create New Enquiry - Enquiry Student Name window* (on page 20).
     – Student contact relationship details. See *Create New Student - Establish Relationships window in the Current students manual for a similar example.*
     – Enrolment details for the future student. See *Create New Enquiry - Enrol Details window* (on page 23).
     – Enrolment status for the future student. See *Create New Future Student - Enrol Status window* (on page 96).

It is recommended that you create a student record, not just a contact so that:

- you can produce a prospectus
- there is an enrolment date associated with the records.

Create new Enquiry - Contact Name window key fields

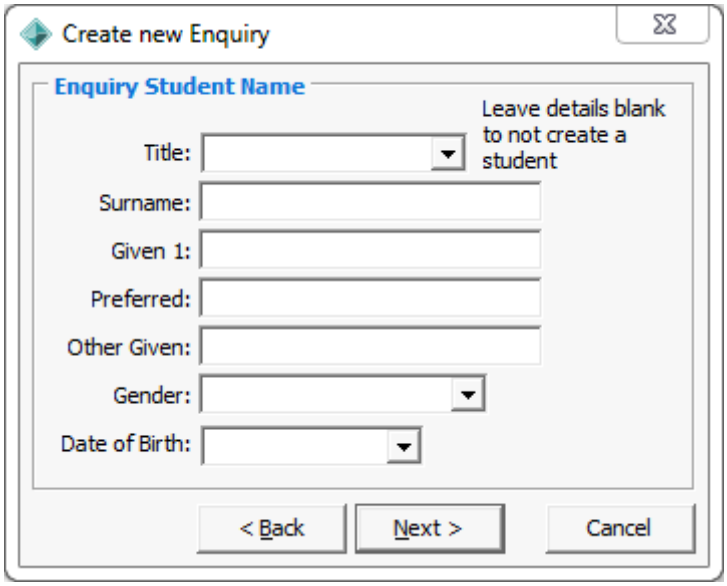
Field	Description
Use existing ID	If you know the Synergetic ID of an existing community member, select this field and enter the ID in the **ID** field. The details of the person are retrieved from the community database.
Title	Primary contact's title.
Surname	Primary contact's last name.
Given 1	Primary contact's given name.
Preferred	Primary contact's preferred name. **Tip:** When the **Given 1** field is selected, press the **Tab** key to automatically populate the same value in the **Preferred** field. You can type another name if required, for example if the primary contact's given name is Stephen, you could type Steve.
Other Given	Primary contact's other given names.
Gender	Primary contact'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, **Dr** (doctor).

Field	Description
Date of Birth	Primary contact's date of birth. **Note:** This field is only displayed if the **Contact is also the enquirer** field is selected. This usually applies to tertiary organisations or international students doing the final year of their studies. If the **Contact is also the Enquirer** field is selected and their date of birth is: • *Not* specified for the student, a message is displayed.  • *Outside* the minimum or maximum range, a message is displayed on the **Create New Enquiry - Enrol Details** window. See *Create New Enquiry - Enrol Details window* (on page 23).  **Note**: See *MinimumStartingAge*, *MaximumStartingAge* configuration settings in the System maintenance manual.
Mail Format	Address format for the community member. For example, whether their initials should be used, or an ampersand instead of 'and'.
Contact is also the Enquirer	Select if the contact is also the student enquiring, to avoid repeating address information. This normally only applies to mature age students. Clear the field if the person making the enquiry is **not** the student enquiring.

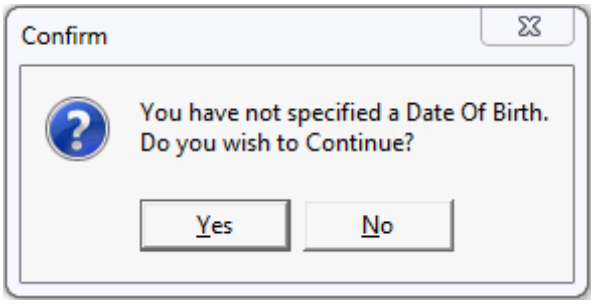
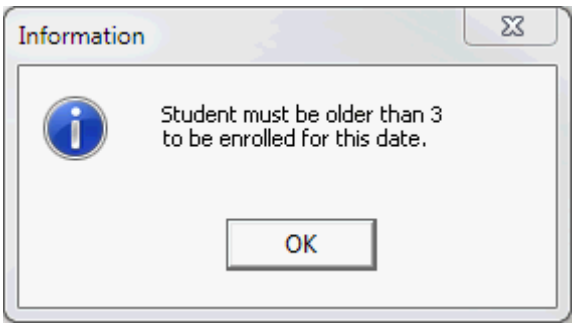
Create new Enquiry - Enquiry Student Name window

Use the **Enquiry Student Name** window to enter an enquiring student's details. This may include known information and inferred information such as gender.

Tip: Leave the student's details blank if they are not available from the enquirer.



Create new Enquiry - Enquiry Student Name window key fields

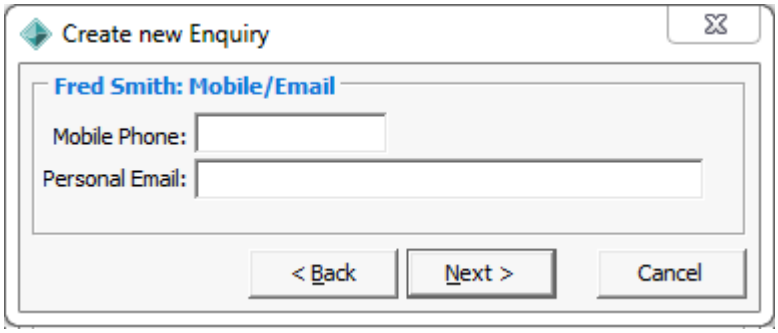
Field	Description
Title	Student's title.
Surname	Student's last name.
Given 1	Student's first name, as it appears on their birth certificate.
Preferred	Student's preferred name. This field is automatically completed with the student's given name. You can type another name if required, for example if the student's given name is Stephen, you could type Steve.
Other Given	Student's other given names.
Gender	Student's gender. This field is automatically completed when you select the student's title.
Date of birth	Student's date of birth. If their date of birth is: • *Not* specified for the student, a message is displayed.  • *Outside* the minimum or maximum range, a message is displayed on the **Create New Enquiry - Enrol Details** window. See *Create New Enquiry - Enrol Details window* (on page 23).  **Note**: See *MinimumStartingAge*, *MaximumStartingAge* configuration settings in the System maintenance manual.
Religion	Student's religion. See *luReligion lookup table* in the System maintenance manual.
Parish	Student's parish. See *luParish lookup table* in the System maintenance manual.

Create new Enquiry - Mobile/Email window

Use the **Mobile/Email** window to enter an enquiring contact's:

- mobile phone number
- personal email address.

This information helps you follow up with the contact enquiring about enrolling at your organisation.

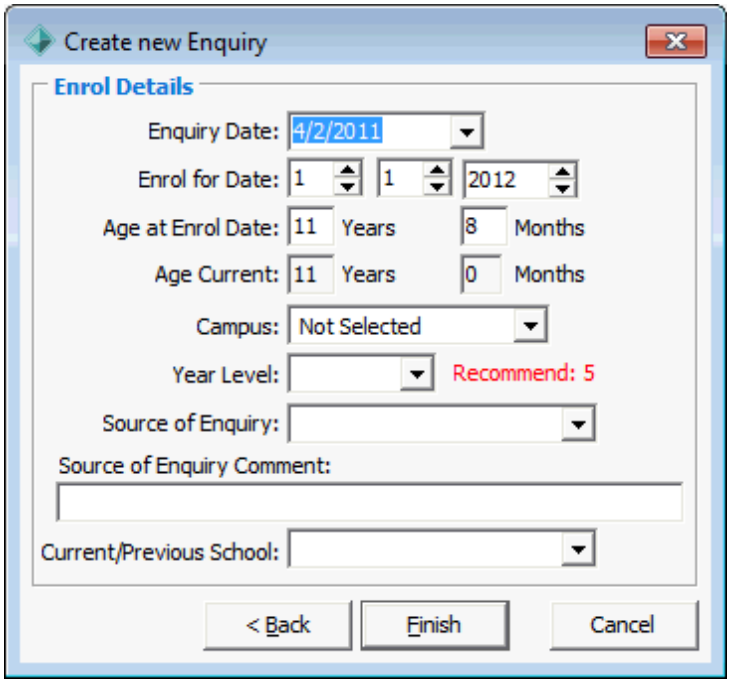


The values can be maintained on the **Contact** tab of **Enquiry Student Maintenance**. See *Enquiry Student Maintenance - Contact tab* (on page 51).

Tip: You can add the spouse's contact details on the **Contact Spouse** of **Enquiry Student Maintenance**. See *Enquiry Student Maintenance - Contact Spouse tab* (on page 54).

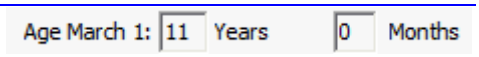
Create new Enquiry - Enrol Details window

Use the **Enrol Details** window to enter enrolment details for an enquiring student.



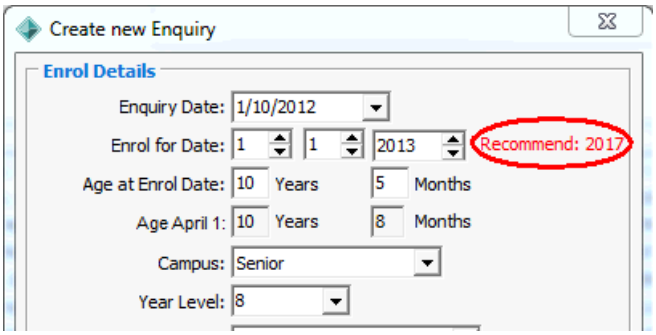
Tip: See *Enrolment enquiry creation windows* (on page 16) if any age-related errors are displayed.

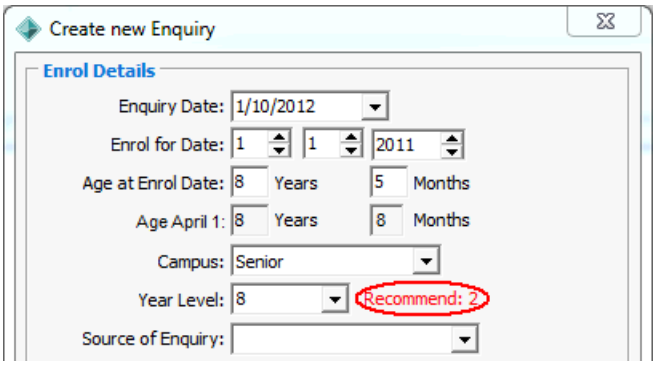
Note: The **Age Current** label may be displayed differently.



When you click **Finish**, the **Enquiry Student Maintenance** window is displayed. You can enter any information that you did not enter through the wizard in the tabs on this window.

Create new Enquiry - Enrol Details window key fields

Field	Description
Enquiry Date	Date the person making the enquiry first contacted your organisation. This field shows the current date by default. **Note:** Your organisation may elect to use the date of the first enquiry as one of the criteria for allocating priorities to applicants.
Enrol for Date	Date the student is proposing to enrol at the organisation. **Note:** Set to the first day of the year in most cases. Set to the actual start date when a student starts later in the year. If the **Year Level** is specified, the recommended year is displayed based on the: • **Year Level** field. • Student's **Date of Birth**, if it is specified on the *Enquiry Student Name window* (on page 20). • Cut-off date for your organisation. See *DayCutOff*, *MonthCutOff* configuration settings in the System maintenance manual. In the following example, the year **2017** is recommended as the: • **Year Level** is **8** • student's date of birth is **9/07/2002** • cut-off date is 1st April. 
Age at Enrol Date	Student's age at the enrolment date of the application. This is calculated from the: • **Enrol for Date** field • **Date of Birth** field, updated on the **Create New Enquiry - Enquiry Student Name** window. **Note:** If **1/1** (1st January) is entered in the **Enrol for Date** field, the value is calculated from the first day of the first term of the specified year. If the actual start date is entered, the value is calculated based on this date.

Field	Description
Age Current / **Age <BaseDate>**	Student's age either: • currently • compared to the base date, if set. The value displayed depends on the **BaseDate** configuration setting used at your organisation. See *BaseDate configuration setting* in the System maintenance manual.
Campus	Campus the student is enquiring about attending. For example, Senior.
Year Level	Student's year level. All year levels are numeric and depend on your organisation. For example, **0** for Prep or Reception. **Note:** Early learning centres such as preschool and pre-prep are allocated year levels **30** (3 year old) and **40** (4 year old). This is because year levels must be integers. If the **Year Level** field is blank, the recommended year level is displayed based on the: • **Enrol for Date** field. • Student's **Date of Birth**, if it is specified on the *Enquiry Student Name window* (on page 20). • Cut-off date for your organisation. See *DayCutOff configuration setting* and *MonthCutOff configuration setting* in the System maintenance manual. In the following example, year level **2** is recommended as the: • **Enrol for Date** is **1/1/2011** • student's date of birth is **9/07/2002** • cut-off date is 1st April. 

Field	Description
Source of Enquiry	How the person making the enquiry became aware of your organisation. Examples include: • Friends Living in Area • Local Newspaper Advertising • Parent is Past Student • Television Commercial. **Note**: Use the **luEnquirySource** lookup table to maintain the values. See *Maintaining lookup tables* in the System maintenance manual.
Source of Enquiry Comment	Any notes or comments. For example, 'Referred by the Smiths, who have three children currently at the school'.
Current/Previous School	Student's current or previous school, if applicable.

Tip: If you are authorised, right click on fields to add lookups. For example, **Source of Enquiry** and **Current/Previous School**.

Enquiry Student Maintenance - Student tab

Use the **Student** tab to maintain personal details about the student who is enquiring about enrolling at your organisation.

Opening the Student tab

To open the **Student** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

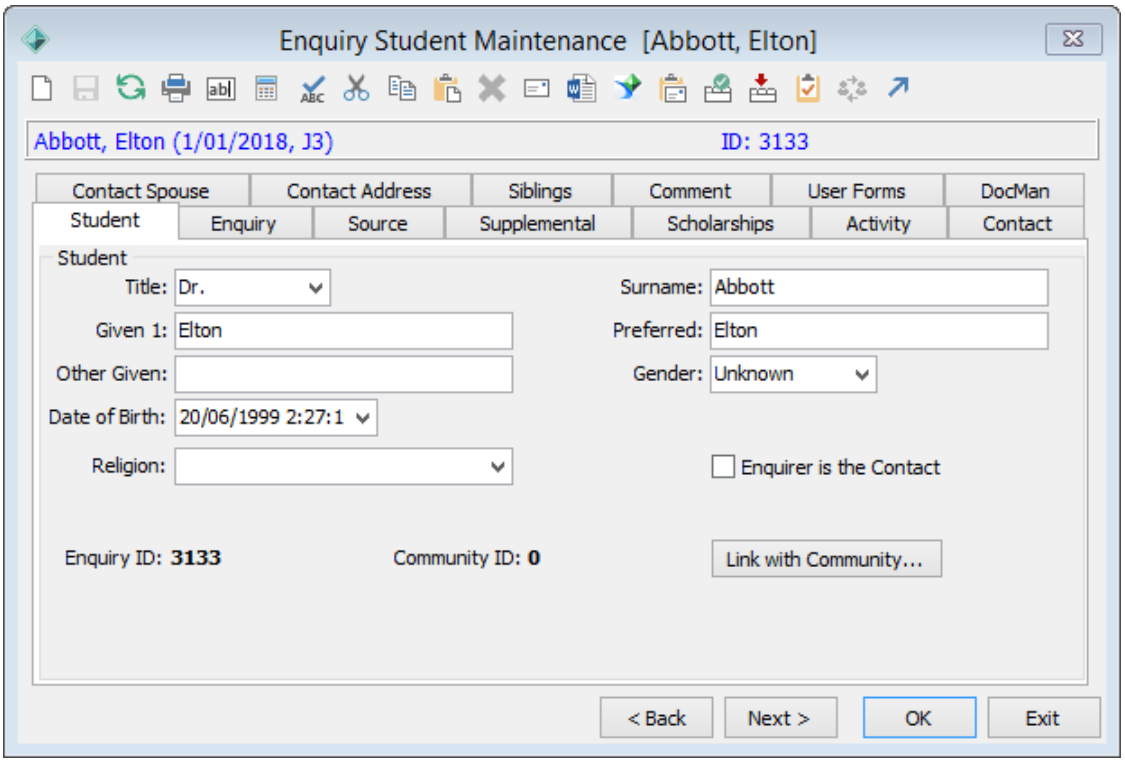
   The **Process Future Student and Enquiries** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

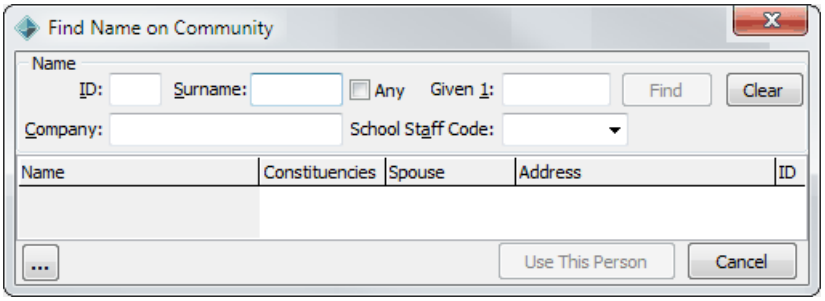


Enquiry Student Maintenance window - Student tab key fields and buttons

Fields

Field	Description
Title	Student's title. For example Master, Miss.
Surname	Student's surname.
Given 1	Student's first name.
Preferred	Student's preferred name, for example James may prefer to be called Jim.
Other Given	All the student's other given names.
Gender	Student's gender. This field is automatically completed when you select the student's title.
Date of birth	Student's date of birth.
Religion	Student's religion.
Enquirer is the Contact	Either: • select the field if the contact is also the enquirer • clear the field if not. If the field is selected, the **ParentFlag** configuration setting determines whether either the: • **@PF** constituency (**Future Parent**) • **@FSOC** constituency (**Future Student Other Contact**) is added to the student. See *ParentFlag configuration setting* in the System maintenance manual.

Buttons

Button	Description
Link with Community...	If the prospective student is related in some way to an existing community member, you can link them in the community database. For example, the prospective student's parent might be a past student with an existing record in the community database. **Note:** A prospective student only has an **Enquiry ID**, and does not exist in the community database. The **Find Name on Community window** is displayed. 

Enquiry Student Maintenance - Enquiry tab

Use the **Enquiry** tab to maintain the:

- original date of enquiry and priority
- preferred enrolment details.

Opening the Enquiry tab

To open the **Enquiry** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

   The **Process Future Student and Enquiries** window is displayed.

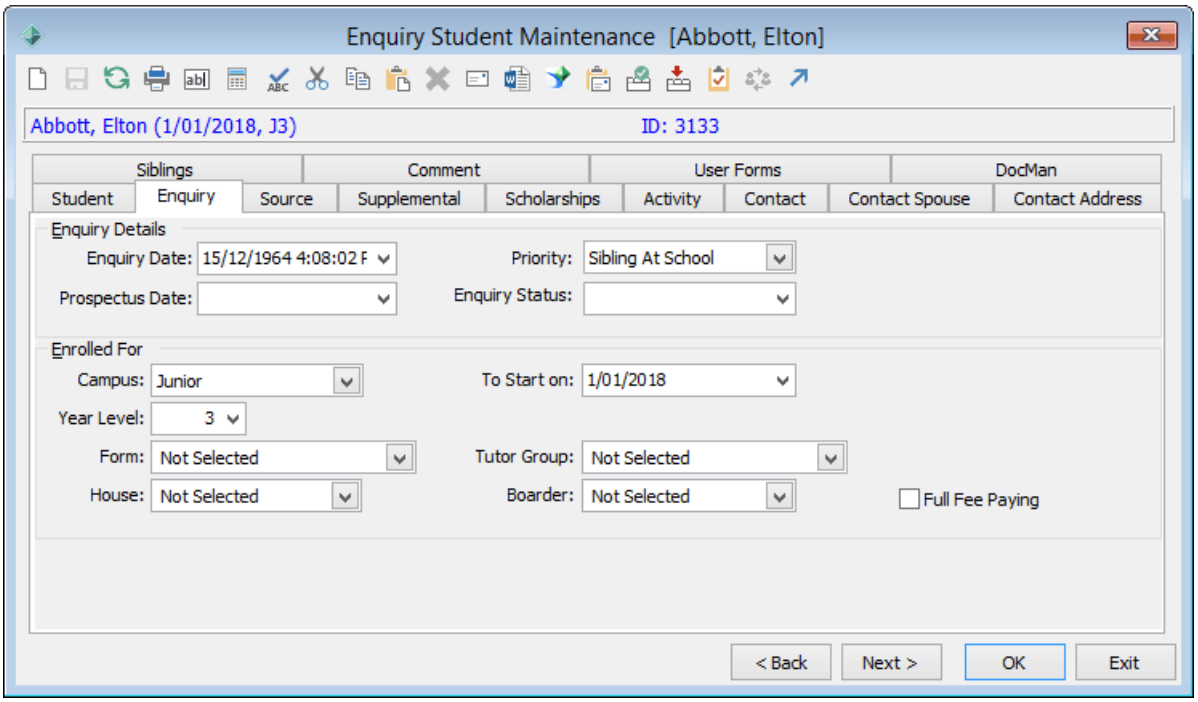
> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

3. Click the **Enquiry** tab.

   The **Enquiry** tab of the **Enquiry Student Maintenance** window is displayed.



Enquiry Student Maintenance - Enquiry tab key fields

Enquiry Details area fields

Field	Description
Enquiry Date	Date the person making the enquiry first contacted your organisation. This field shows the current date by default when adding a new record. **Note:** Your organisation may elect to use the date of the first enquiry as one of the criteria for allocating priorities to applicants.
Priority	Priority the application has been assigned. Your organisation can decide how to prioritise the offer of places. Typical values include: • Existing Family • Sibling at School • Parent is Ex Student • Parent is Staff • Normal.
Prospectus Date	Date a prospectus was sent to the primary contact. This field is set automatically if you used the **crspEnquiryProspectusPrint** stored procedure to create mail merge letters. See *Using stored procedures to retrieve Synergetic data* in the Extracting data manual. If you clear this field, you can then reprint the letter that was sent earlier. See *Reprinting mail merge letters* in the Extracting data manual.
Enquiry Status	Status of the enquiry. The enquiry can be new, waiting, in process or closed.

Enrolled For area fields

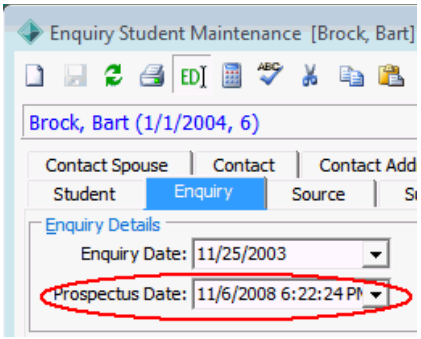
Field	Description
Campus	Student's campus.
To Start on	Date the student will commence at your organisation. **Note:** Set to the first day of the year in most cases. Set to the actual start date when a student starts later in the year. Applicants can be enrolled in more than one year / campus combination using the **Supplemental** tab. However, they must have a preferred choice. This defaults to the first application you entered.
Year Level	Student's year level. All year levels are numeric and depend on your organisation. For example, **0** for Prep or Reception. **Note:** Early learning centres such as preschool and pre-prep are allocated year levels **30** (3 year old) and **40** (4 year old). This is because year levels must be integers.
Form	Student's form (if known). **Note:** Maintain the values in the **luForm** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Tutor Group	Student's tutor group (if known). **Note:** Maintain the values in the **luTutor** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
House	Student's house (if known). **Note:** Maintain the values in the **luHouse** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Boarder	Student's residential status. Typical values include: • Boarder • Day Student • Home Stay. **Note:** Maintain the values in the **luBorder** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Full Fee Paying	Check if a student is full fee paying.

Creating prospectus letters

You can transfer the name and address information from all the enquiries you have received into Microsoft Word and use the mail merge facility to send out correspondence.

For example, you can use the mail merge facility to send out a standard letter with a prospectus; the letter will include personalised information from the Synergetic enquiry data.

Use the **EnquiryProspectusPrint** stored procedure. This populates the **Prospectus Date** field on the **Enquiry** tab of the selected enquiry students.



For examples of developing and printing mail merge letters, see:

- *Creating mail merge letters using stored procedures* in the Extracting data manual
- *Printing mail merge letters using an existing document* in the Extracting data manual
- *Reprinting mail merge letters* in the Extracting data manual.

Enquiry Student Maintenance - Source tab

Use the **Source** tab to maintain the:

- details of how the enquirer found out about your organisation
- prospective student's current or previous school.

Opening the Source tab

To open the **Source** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

   The **Process Future Student and Enquiries** window is displayed.

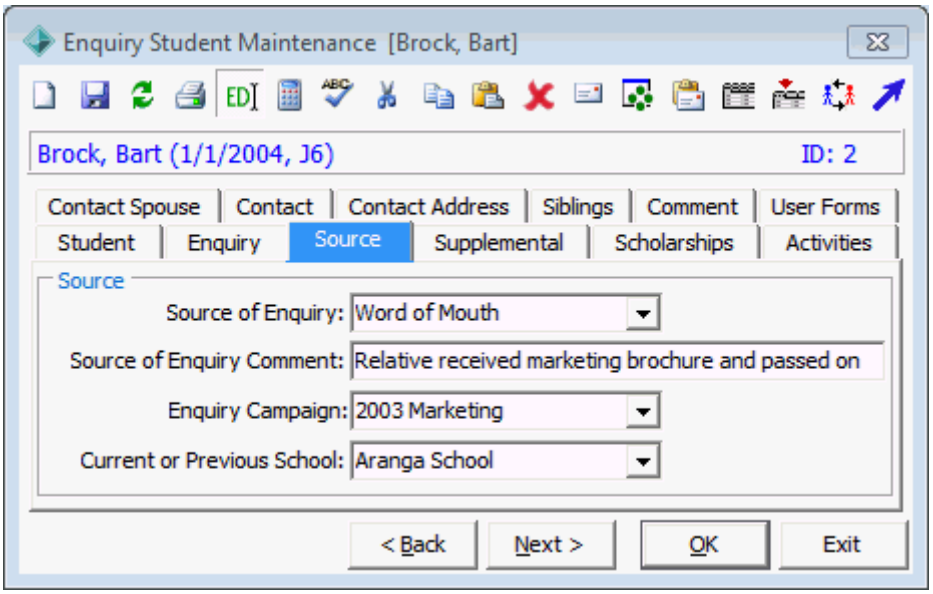
> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

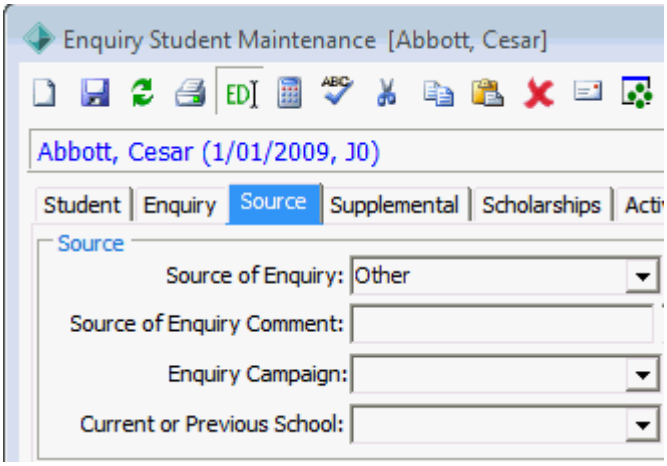
   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

3. Click the **Source** tab.

   The **Source** tab of the **Enquiry Student Maintenance** window is displayed.



Enquiry Student Maintenance - Source tab key fields

Field	Description
Source of Enquiry	How the person making the enquiry became aware of your organisation. Examples include: • Friends Living in Area • Local Newspaper Advertising • Parent is Past Student • Television Commercial. **Note**: Use the **luEnquirySource** lookup table to maintain the values. See *Maintaining lookup tables* in the System maintenance manual.
Source of Enquiry Comment	Any notes or comments. For example, 'Referred by the Smiths, who have three children currently at the school'.
Enquiry Campaign	Campaign that the enquiry is in response to.  Campaigns are maintained in the **luEnquiryCampaign** lookup table. See *luEnquiryCampaign lookup table* in the System maintenance manual.
Current or Previous School	Student's current or previous school, if applicable.

Enquiry Student Maintenance - Supplemental tab

Use the **Supplemental** tab to maintain second and third enrolment preferences, should the enquiring student's first choice not be available.

You can record several applications for a prospective student for different years. The first application you enter is, by default, their first choice.

You can track applications over time, and change the person's preferred application at any time. See *Future Student Maintenance - Applications tab* (on page 113).

Note: Different entry dates, campus or year levels can be entered.

Opening the Supplemental tab

To open the **Supplemental** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

   The **Process Future Student and Enquiries** window is displayed.

   Tip: You can also access the future student functions by clicking

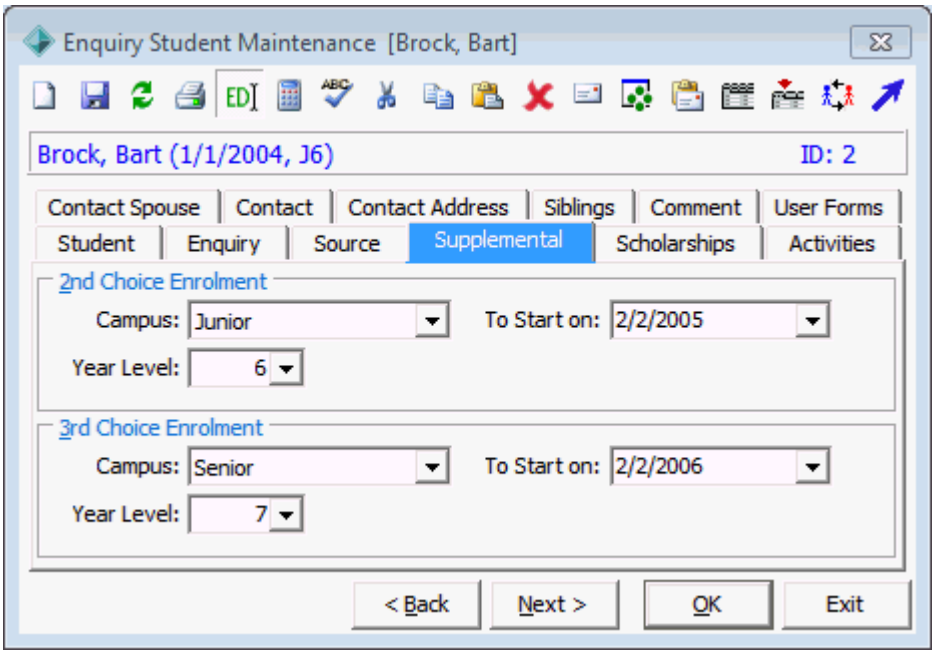
.

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

3. Click the **Supplemental** tab.

   The **Supplemental** tab of the **Enquiry Student Maintenance** window is displayed.



Enquiry Student Maintenance - Supplemental tab key fields

Field	Description
Campus	Campus the student will attend for their second or third enrolment choice.
To Start on	Date the student prefers to start their second or third enrolment choice. **Note:** Set to the first day of the year of enrolment in most cases. Applicants can be enrolled in more than one year / campus combination.
Year Level	Year level the student prefers to start their second or third enrolment choice.

Enquiry Student Maintenance - Scholarships tab

Use the **Scholarships** tab to maintain and view a list of scholarships that the enquiring student has applied for or been awarded.

Tip: If your organisation has an entrance exam or assessment test, you can record the results on the **Scholarships** tab.

Opening the Scholarships tab

To open the **Scholarships** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

   The **Process Future Student and Enquiries** window is displayed.

   Tip: You can also access the future student functions by clicking

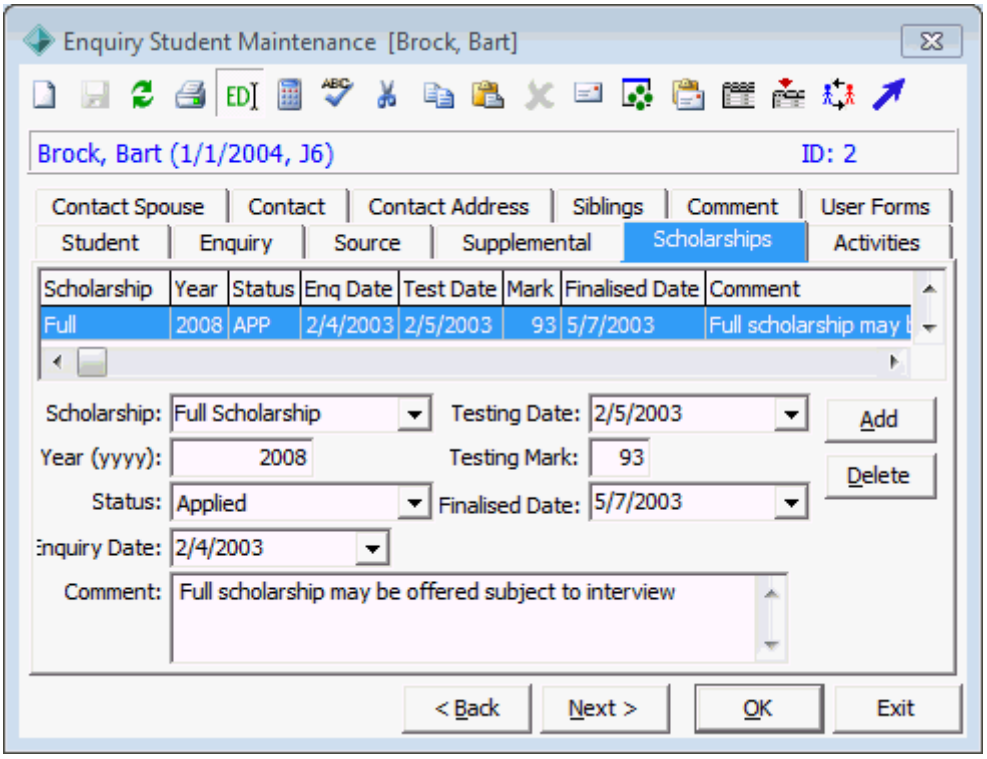
.

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

3. Click the **Scholarships** tab.

   The **Scholarships** tab of the **Enquiry Student Maintenance** window is displayed.

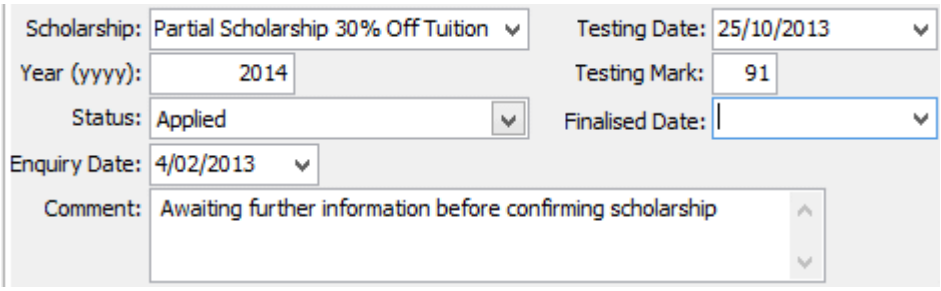


Enquiry Student Maintenance - Scholarships tab key fields and buttons

Grid area fields

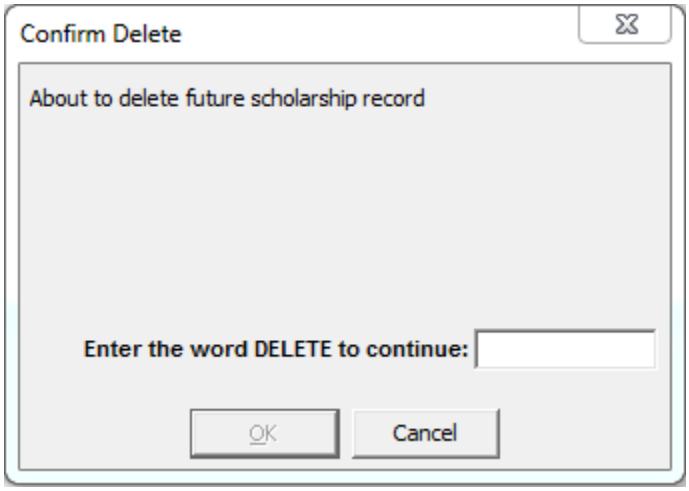
Field	Description
Scholarship	Name of the scholarship.
Year	Year the student applied for the scholarship.
Status	Status of the scholarship application. Typical values are: • Applied • Confirmed. A **SynergyMeaning** of **Confirmed** identifies scholarships that are confirmed. When future students are transferred to current students: • scholarship entries with a status of **Confirmed** are shown on the **Scholarships** tab when the **Current Scholarships** radio button is selected • any other scholarship entries can be viewed by selecting the **Scholarships Applied For** radio button. **Note:** Maintain the values in the **luScholarshipStatus** lookup table. See *luScholarshipStatus lookup table* in the System maintenance manual.
Enquiry Date	Date of the initial enquiry for the scholarship.
Test Date	Date the student was tested for the scholarship.
Mark	Result of the scholarship test.
Finalised Date	Date the student's scholarship application was finalised.
Comment	Any comments about the student's scholarship application.

Fields



Field	Description
Scholarship	Type of scholarship applied for or awarded. **Note:** Maintain the values in the **luScholarship** lookup table. See *luScholarship lookup table* in the System maintenance manual.
Testing Date	Date of the scholarship test.
Year	Year the scholarship was granted or applied for.
Testing Mark	Result of the scholarship test.
Status	Status of the scholarship application. Typical values are: • Applied • Confirmed. A **SynergyMeaning** of **Confirmed** identifies scholarships that are confirmed. When future students are transferred to current students: • scholarship entries with a status of **Confirmed** are shown on the **Scholarships** tab when the **Current Scholarships** radio button is selected • any other scholarship entries can be viewed by selecting the **Scholarships Applied For** radio button. **Note:** Maintain the values in the **luScholarshipStatus** lookup table. See *luScholarshipStatus lookup table* in the System maintenance manual.
Finalised Date	Date that the scholarship application was finalised.
Enquiry Date	Date of the initial enquiry for the scholarship.
Comment	Any comments about the student's scholarship application.

Buttons

Button	Description
Add	Add a new scholarship record for the student. This adds a new row after the current row, and allows you to update the fields in the **Scholarship** area.
Delete	Delete the selected row.  Type **delete** and click OK.

Enquiry Student Maintenance - Activity tab

Use the **Activity** tab to view and maintain activities for the enquiry student. You can record information such as when they attended an open day, when you phoned them or when they visited the principal.

If the activity record is displayed in:

- *italics*, a follow up has been set up for the activity
- **bold**, the follow up is overdue.

Opening the Activity tab

To open the **Activity** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

   The **Process Future Student and Enquiries** window is displayed.

Tip: You can also access the future student functions by clicking

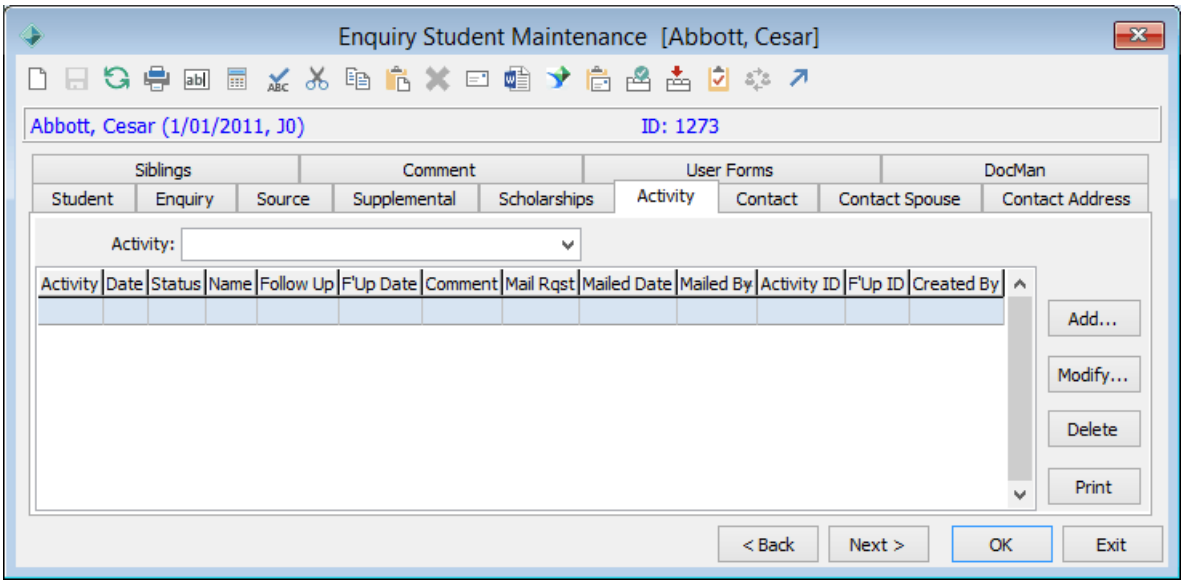
.

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

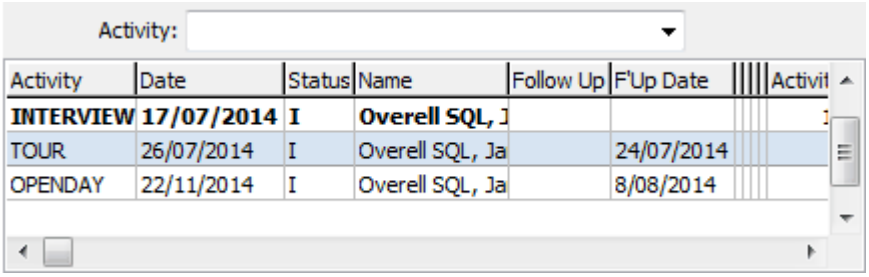
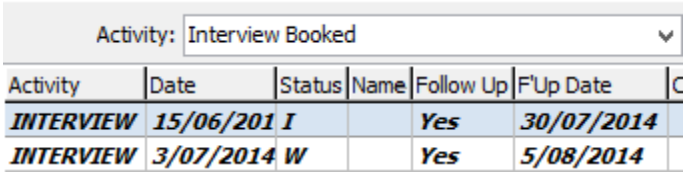
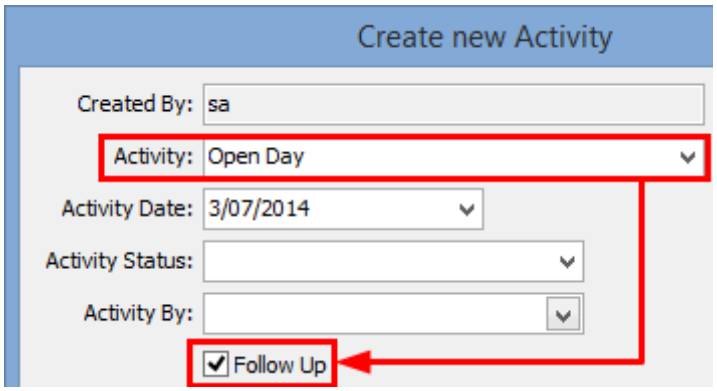
3. Click the **Activity** tab.

   The **Activity** tab of the **Enquiry Student Maintenance** window is displayed.

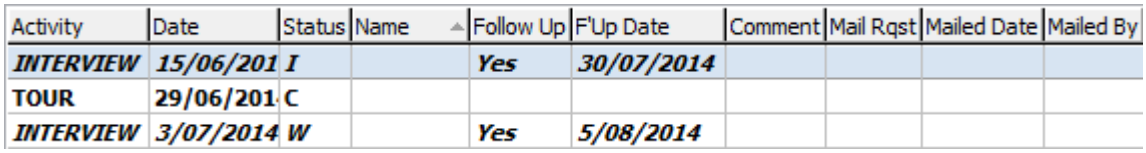


Enquiry Student Maintenance - Activity tab key fields and buttons

Fields

Field	Description
Activity	Filter activities displayed in the grid.  Select one of the values from the drop-down list. This restricts the activities displayed.  If this filter is selected and you click Add..., the **Activity** field is set on the **Create New Activity** window, along with any related selections.  **Note:** Maintain the values in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual.

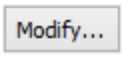
Grid area fields

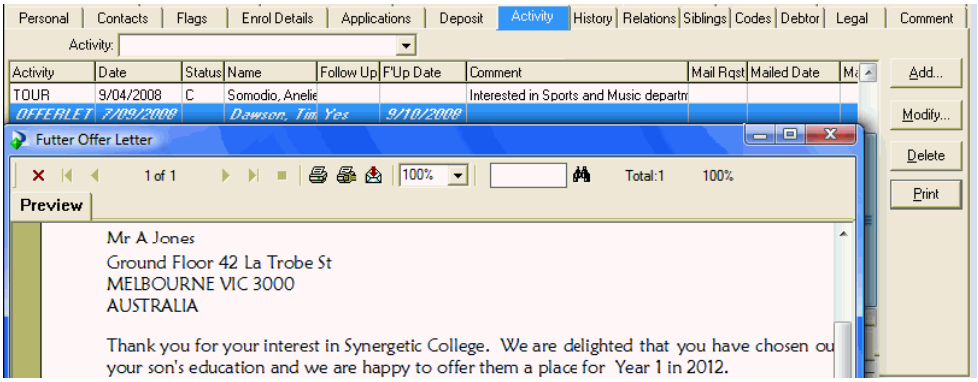
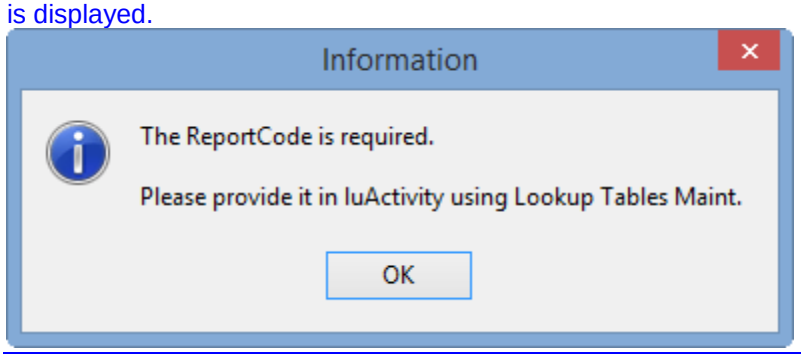
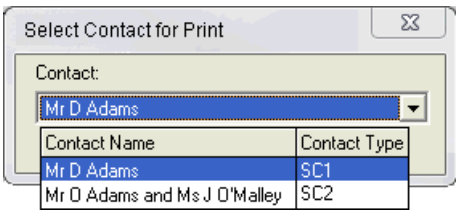


Activity	Date	Status	Name	Follow Up	F'Up Date	Comment	Mail Rqst	Mailed Date	Mailed By
INTERVIEW	15/06/201	I		Yes	30/07/2014				
TOUR	29/06/201	C							
INTERVIEW	3/07/2014	W		Yes	5/08/2014				

Field	Description
Activity	Identifier for the activity planned.
Date	Date the activity is scheduled for.
Status	Status of the activity. For example: • **Complete** • **Incomplete** • **Waiting for someone**.
Name	Person in your organisation who is responsible for the activity.
Follow Up / F'Up Date	Indicates if a follow up is required and if so, the date the follow up is scheduled for.
Comment	Notes regarding the follow up.
Mail Rqst / Mailed Date / Mailed By	Indicates if a mailed request is required and if so: • the date the mail request is scheduled for • who mailed the request.
Activity ID	Unique number identifying the activity.
F'Up ID	Unique number identifying the follow up to the activity.
Created By	User ID of the user who created the activity.

Buttons

Button	Description
	Add an activity for the prospective student.
	Modify the highlighted activity.
	Delete the selected activity.

Button	Description
Print	Print a report for the selected activity. For example, an offer letter.  The report must be: • Created using Crystal Reports. • Placed in the Synergetic site reports directory. • Set up with the correct parameters. *Contact Synergetic Management Systems* to set up a report for this purpose. • Defined in the lookup table for the type of activity. See *luActivity lookup table* in the System maintenance manual. **Note**: If a report is not defined for the type of activity, the following dialog window is displayed.  The report prompts you: • If any of the required parameters are missing, such as **Mailed Date** and **Mailed By** fields. • If a form letter, or similar report, is set up to be addressed to one of the student's contacts.  This is set using the **ReportPromptContactTypeFlag** field in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual.

Creating activities

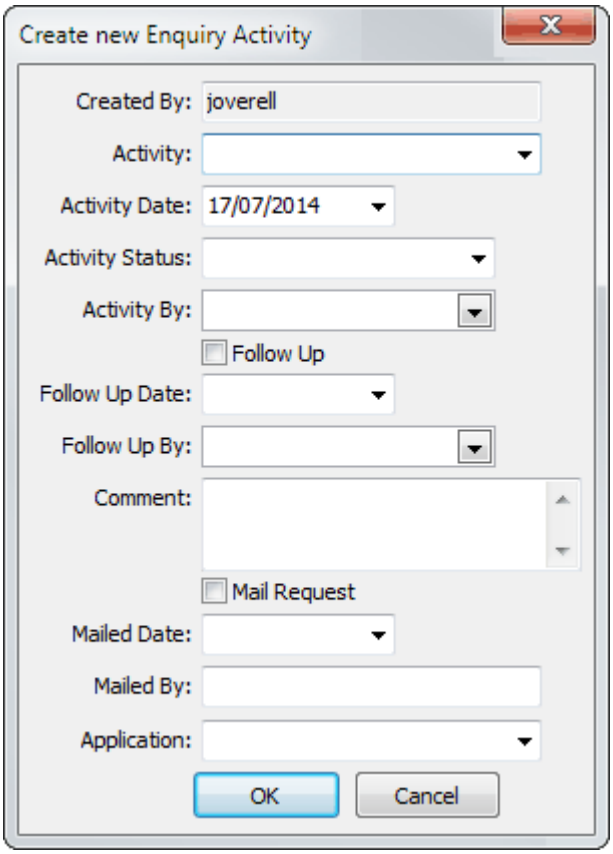
To create a new activity for an enquiring student:

1. Open the **Activity** tab in **Enquiry Student Maintenance**. See *Enquiry Student Maintenance - Activity tab* (on page 41).

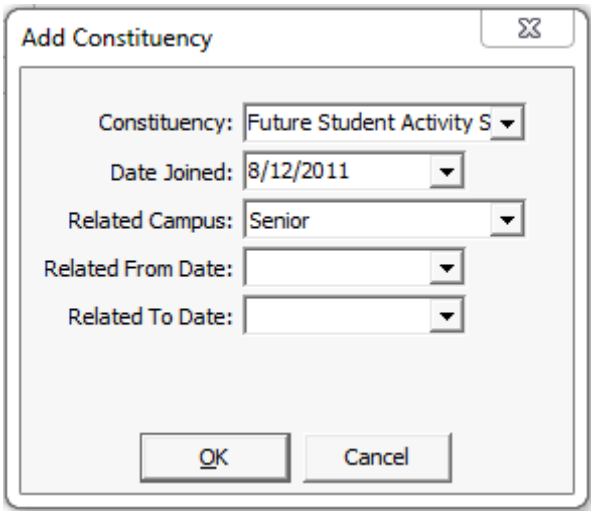
   The **Activity** tab of the **Enquiry Student Maintenance** window is displayed.

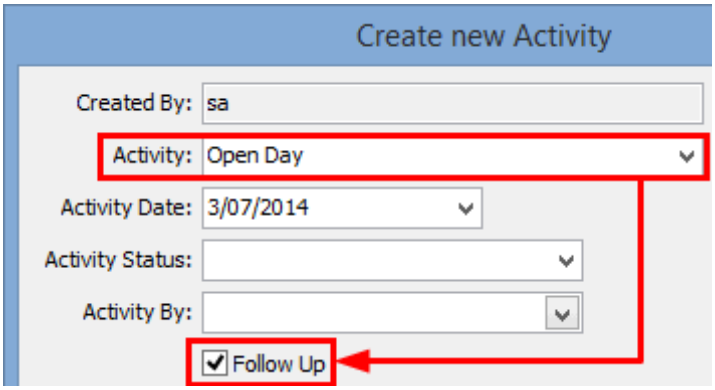
2. Click Add... .

   The **Create new Enquiry Activity** window is displayed.



Create New Activity window key fields

Field	Description
Created By	Person who created the activity. This is a read-only field.
Activity	Description of the activity. The available options are maintained in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual.
Activity Date	Date the activity is scheduled for.
Activity Status	Status of the activity. For example: • **Complete** • **Incomplete** • **Waiting for someone**. The available options are maintained in the **luActivityStatus** lookup table. See *luActivityStatus lookup table* in the System maintenance manual.
Activity By	Person in your organisation who is responsible for the activity. Valid values include all community members that belong to the **FSAS** (Future Student Activity Staff) constituency.  See *Adding a community member to a user-defined constituency* in the Community manual.

Field	Description
Follow Up	Indicates whether or not follow up is required. **Note**: The activity record is displayed in italics on the **Activity** tab if you select the **Follow Up** field. Activity | Date | Follow Up | F'Up Date *INTERVIEW* | *15/06/201* | *Yes* | *30/07/2014* *INTERVIEW* | *3/07/2014* | *Yes* | *5/08/2014* See the **Follow Up Date** field. When creating activities, the **Follow Up** field may be selected by default for the type of activity. This depends on the **FollowUpFlag** in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual. 
Follow Up Date / Follow Up By	Follow up date and person responsible for following up. The responsible person must be a member of the **FSAS** constituency to be listed. See the **Activity By** field. **Note:** The activity record is displayed in bold italics on the **Activity** tab if the **Follow Up Date** is in the past. Activity | Date | Follow Up | F'Up Date *INTERVIEW* | *15/06/201* | *Yes* | *30/07/2014*
Comment	Comments and information regarding follow up and mail requests. Use any comments with the **Mail Request** field to record either: • A request for information from the student. For example, they may want you to send out more information on the music program. • Information to be included in a mail merge letter to the student. For example, the time and room that you are meeting with the student and their parents or guardians.
Mail Request	Indicates whether or not: • mailed information is required • a letter is being sent using the mail merge feature of Microsoft Word. You can use a database query or a stored procedure to list all the people who have this flag set. For example, this can be used in mail merges with Microsoft Word. The **crspFutureActivityPrint** stored procedure has the advantage that, in addition to retrieving key activity data, it also updates fields to indicate when the letter was printed. See *Using stored procedures to retrieve Synergetic data* in the Extracting data manual.

Field	Description
Mailed Date / Mailed By	Date of the mailed communication and who mailed the item. These are set by a stored procedure when merging mail. See the **Mail Request** field.
Application	Type of application enquiry.

Modifying activities

To modify an existing activity for an enquiry student:

1. Open the **Activity** tab in **Enquiry Student Maintenance**. See .

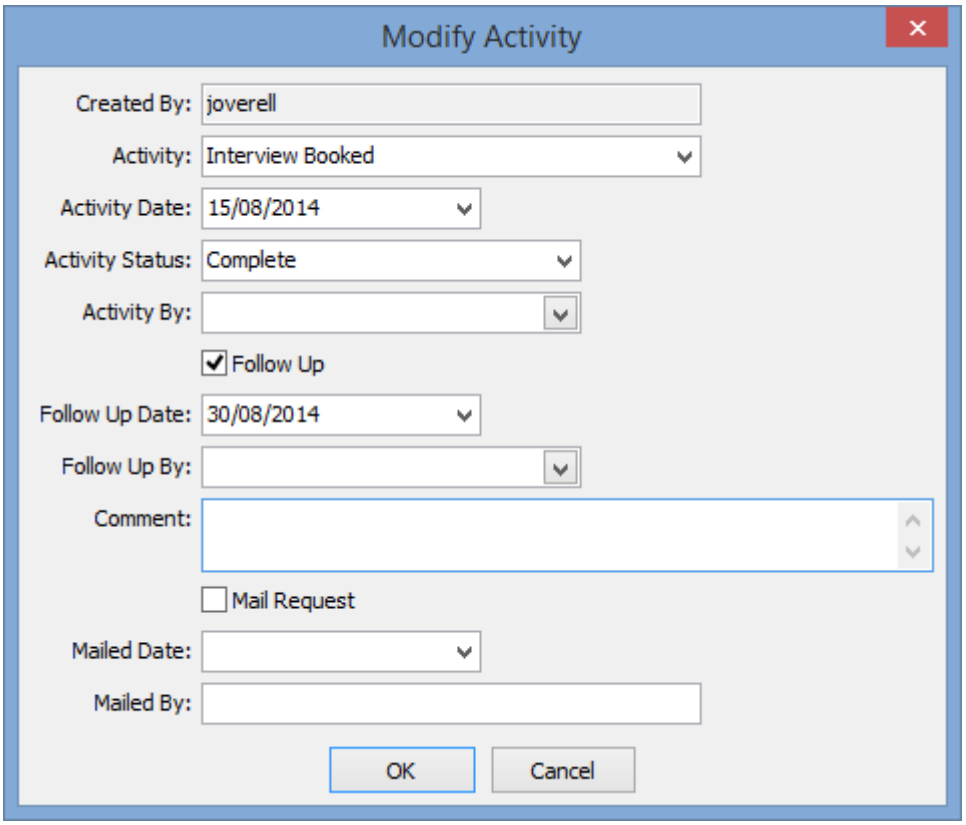
   The **Activity** tab of the **Enquiry Student Maintenance** window is displayed *Enquiry Student Maintenance - Activity tab* (on page 41).

2. Select the activity to modify.

   Tip: Double click the required activity to modify the details.

3. Click Modify... .

   The **Modify Activity** window is displayed.



Modify Activity window key fields

Field	Description
Created By	Person who created the activity. This is a read-only field.
Activity	Description of the activity. The available options are maintained in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual.
Activity Date	Date the activity is scheduled for.
Activity Status	Status of the activity. For example: • **Complete** • **Incomplete** • **Waiting for someone**. The available options are maintained in the **luActivityStatus** lookup table. See *luActivityStatus lookup table* in the System maintenance manual.

Enquiry Student Maintenance - Contact tab

Use the **Contact** tab to maintain primary contact details for the person who is enquiring about enrolling a student at your organisation. The contact is typically the parent or guardian of the student.

Also see:

- Spouse details. See *Enquiry Student Maintenance - Contact Spouse tab* (on page 54).
- Additional contact details. See *Enquiry Student Maintenance - Contact Address tab* (on page 56).

Note: If the contact is linked with a community member the fields on the **Contact**, **Contact Spouse** and **Contact Address** tabs are greyed out.

Opening the Contact tab

To open the **Contact** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

   The **Process Future Student and Enquiries** window is displayed.

   Tip: You can also access the future student functions by clicking

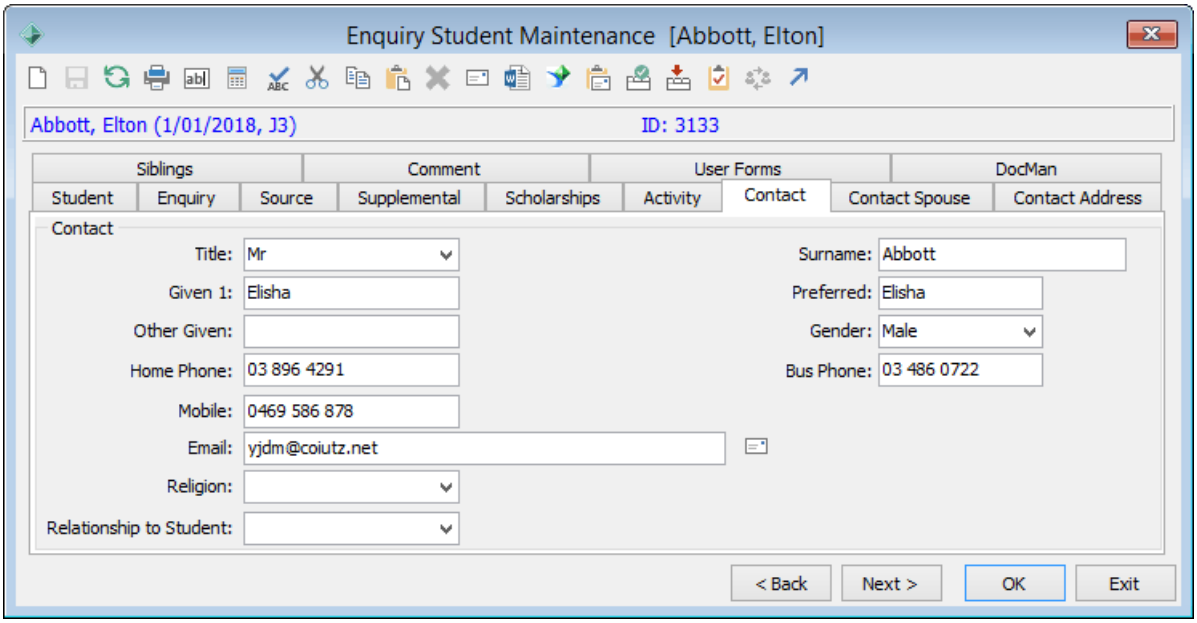
.

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

3. Click the **Contact** tab.

   The **Contact** tab of the **Enquiry Student Maintenance** window is displayed.

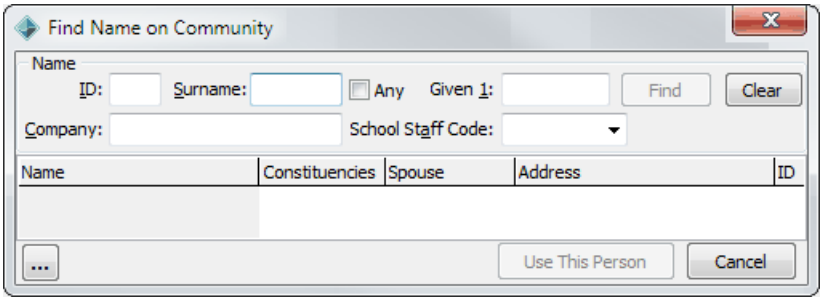
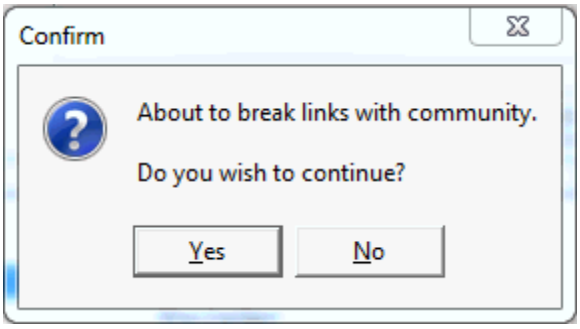


Enquiry Student Maintenance - Contact tab key fields and buttons

Fields

Field	Description
Title	Contact's title.
Surname	Contact's surname.
Given 1	Contact's given name.
Preferred	Contact's preferred name. This field is automatically completed with the contact's given name. You can type another name if required. For example if the contact's given name is Stephen, you could type Steve.
Other Given	Contact's other given names.
Gender	Contact'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, **Dr** (doctor).
Home Phone	Contact's home telephone number.
Bus Phone	Contact's business telephone number.
Mobile	Contact's mobile telephone number.
Email	Contact's email address.
Relationship to Student	Contact's relationship to the student. See *luRelationship lookup table* in the **Synergetic** System Maintenance manual.
Religion	Contact's religion. See *luReligion lookup table* in the **Synergetic** System Maintenance manual.
Enquiry ID	The identifier of the enquiring contact. This is relevant if the enquiry record has **not** been linked to a community member's record.
Community ID	Either: • the Synergetic ID of the community member, if they are linked • **0** (**zero**), if not.

Buttons

Button	Description
...	Launch into **Community Maintenance**. See *Maintaining community members* in the Community manual.
	Send an email to the person's email address. See *Sending emails* in the Introduction manual.
Link with Community...	Link the enquiry contact with an **existing** community member. **Note:** Do not add a contact with only an **Enquiry ID** to the community. The **Find Name on Community window** is displayed. 
Break Community Link	Break the link with the community member who has been assigned as the contact for the enquiry. 

Enquiry Student Maintenance - Contact Spouse tab

Use the **Contact Spouse** tab to maintain details about the spouse of the primary contact who is enquiring about enrolling a student at your organisation.

Note: If the contact is linked with a community member the fields on the **Contact**, **Contact Spouse** and **Contact Address** tabs are greyed out.

Opening the Contact Spouse tab

To open the **Contact Spouse** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

   The **Process Future Student and Enquiries** window is displayed.

Tip: You can also access the future student functions by clicking

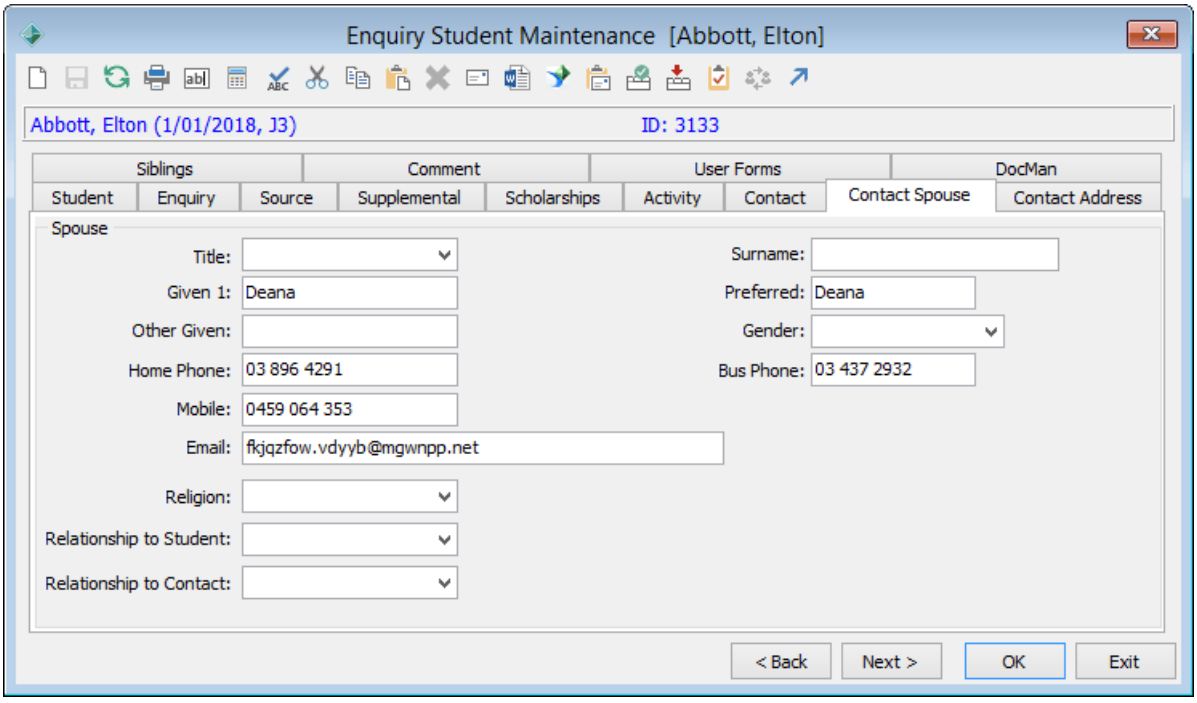
.

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

3. Click the **Contact Spouse** tab.

   The **Contact Spouse** tab of the **Enquiry Student Maintenance** window is displayed.



Tip: Click the **Flip Spouses** icon to change the contact spouse details from wife to husband, or vice versa. This useful if you enter the mother's details from the first contact and then later set up the father's details.

Enquiry Student Maintenance - Contact Spouse tab key fields

Field	Description
Title	Contact's title.
Surname	Contact's surname.
Given 1	Contact's given name.
Preferred	Contact's preferred name. This field is automatically completed with the contact's given name. You can type another name if required. For example if the contact's given name is Stephen, you could type Steve.
Other Given	Contact's other given names.
Gender	Contact'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, **Dr** (doctor).
Home Phone	Contact's home telephone number.
Bus Phone	Contact's business telephone number.
Mobile	Contact's mobile telephone number.
Email	Contact's email address.
Relationship to Student	Contact's relationship to the student. See *luRelationship lookup table* in the **Synergetic** System Maintenance manual.
Religion	Contact's religion. See *luReligion lookup table* in the **Synergetic** System Maintenance manual.
Enquiry ID	The identifier of the enquiring contact. This is relevant if the enquiry record has **not** been linked to a community member's record.
Community ID	Either: • the Synergetic ID of the community member, if they are linked • **0** (**zero**), if not.
Relationship to Contact	Contact's relationship to primary contact. See *luRelationship lookup table* in the **Synergetic** System Maintenance manual.

Enquiry Student Maintenance - Contact Address tab

Use the **Contact Address** tab to maintain address details for the primary contact who is enquiring about enrolling a student at your organisation.

Tip: If you have RAT (Rapid Addressing Tool), you can use this to speed up the entry of address details, and to validate the address against the Australia Post database. *Contact Synergetic Management Systems* for details about purchasing RAT.

Note: If the contact is linked with a community member the fields on the **Contact**, **Contact Spouse** and **Contact Address** tabs are greyed out.

Opening the Contact Address tab

To open the **Contact Address** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

   The **Process Future Student and Enquiries** window is displayed.

   Tip: You can also access the future student functions by clicking

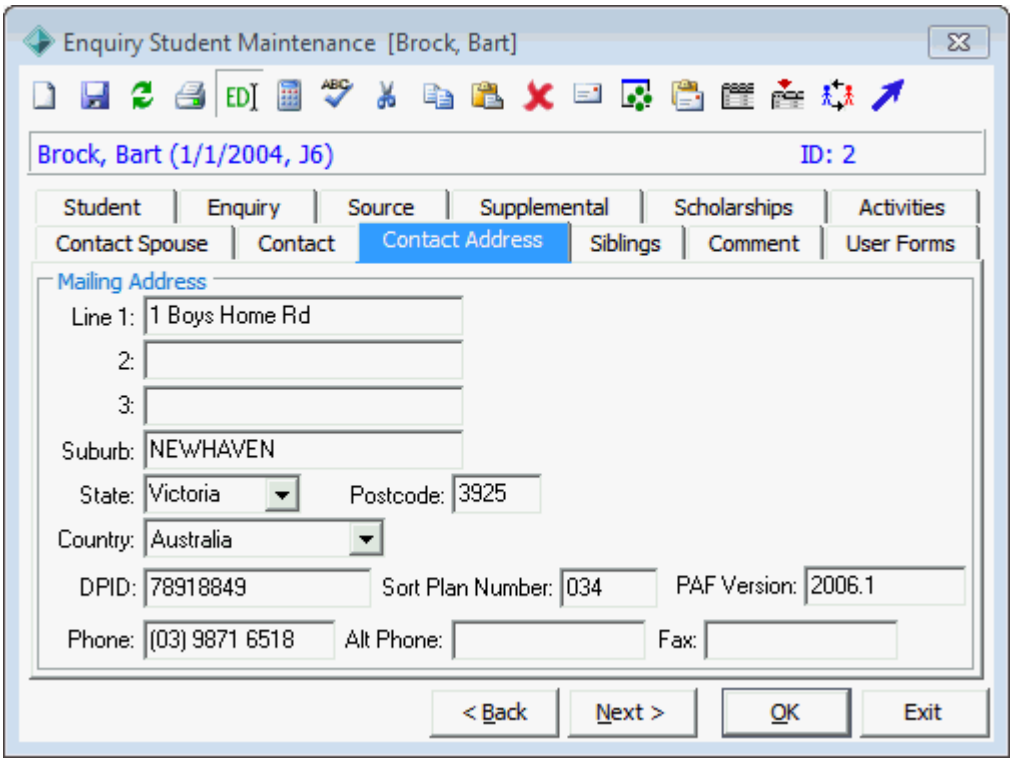
.

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

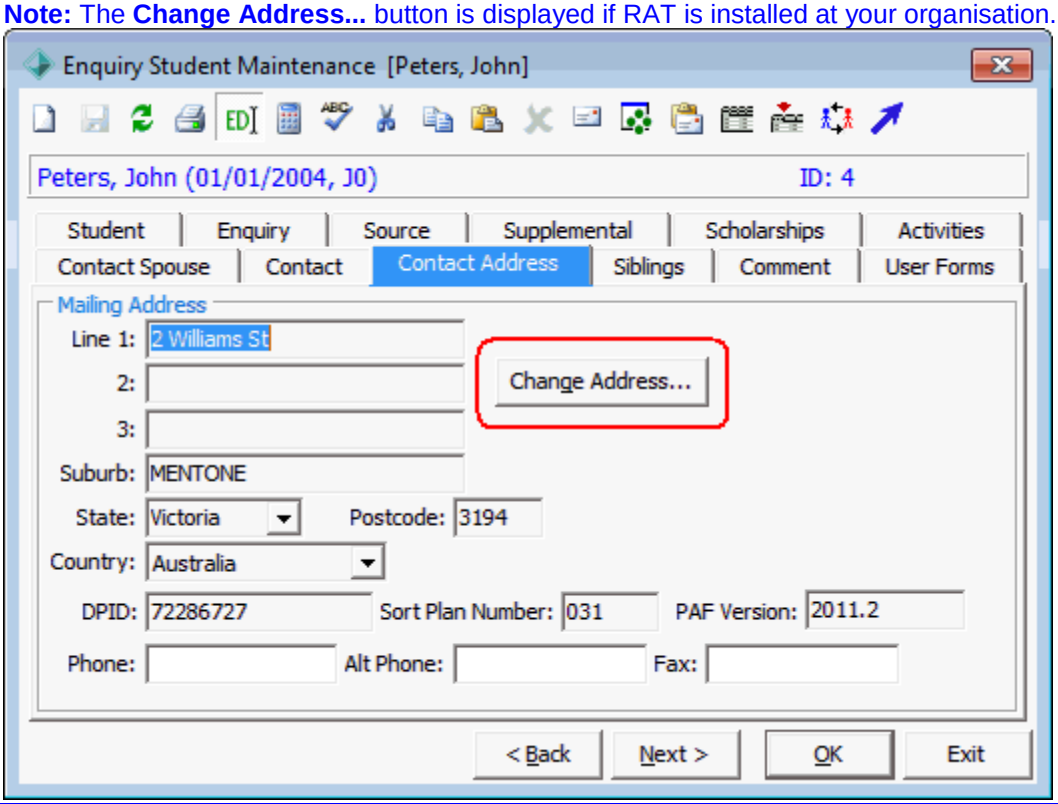
   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

3. Click the **Contact Address** tab.

   The **Contact Address** tab of the **Enquiry Student Maintenance** window is displayed.



Note: The **Change Address...** button is displayed if RAT is installed at your organisation.



Enquiry Student Maintenance - Contact Address tab key fields and buttons

Fields

Field	Description
Line 1 and **Line 2 and** **Line 3**	Primary contact's postal address.
Suburb	Primary contact's suburb.
State	Primary contact's state of residence.
Postcode	Primary contact's postal code. **Note:** Only use the **Postcode** field for Australian and New Zealand post codes.
Country	Primary contact's country of residence. **Note:** If the primary contact lives overseas, select the country before entering the address details.
DPID	Delivery postal identifier used to format postal addressing information on envelopes. Used to: • increase mailing accuracy • reduce postal charges. **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.
Sort Plan Number	Barcode sort plan number used for large mailing runs using either: • Australia Post • New Zealand Post.
PAF Version	Version of the postal address file from either: • Australia Post • New Zealand Post.
Phone	Primary contact's telephone number. This field is automatically completed with the primary contact's telephone number from the **Contact** tab. See *Enquiry Student Maintenance - Contact tab* (on page 51).
Alt phone	Alternative contact telephone number for the primary contact.
Fax	Primary contact's fax number.

Buttons

Field	Description
Change Address...	Manually change the primary contact's address details. **Note:** This button is only displayed if RAT is installed at your organisation.

Enquiry Student Maintenance - Siblings tab

Use the **Siblings** tab to list siblings who:

- used to attend your organisation
- are currently attending
- are planning to attend in the future.

Use this tab to see how the student's family is defined in Synergetic. The relative order of this student in the family is based on birth date.

Note: Synergetic defines siblings as students who share the same primary contact (**SC1**), including current, future and past students.
Siblings affect the billing process if your organisation offers a sibling discount.

Opening the Siblings tab

To open the **Siblings** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

   The **Process Future Student and Enquiries** window is displayed.

   Tip: You can also access the future student functions by clicking

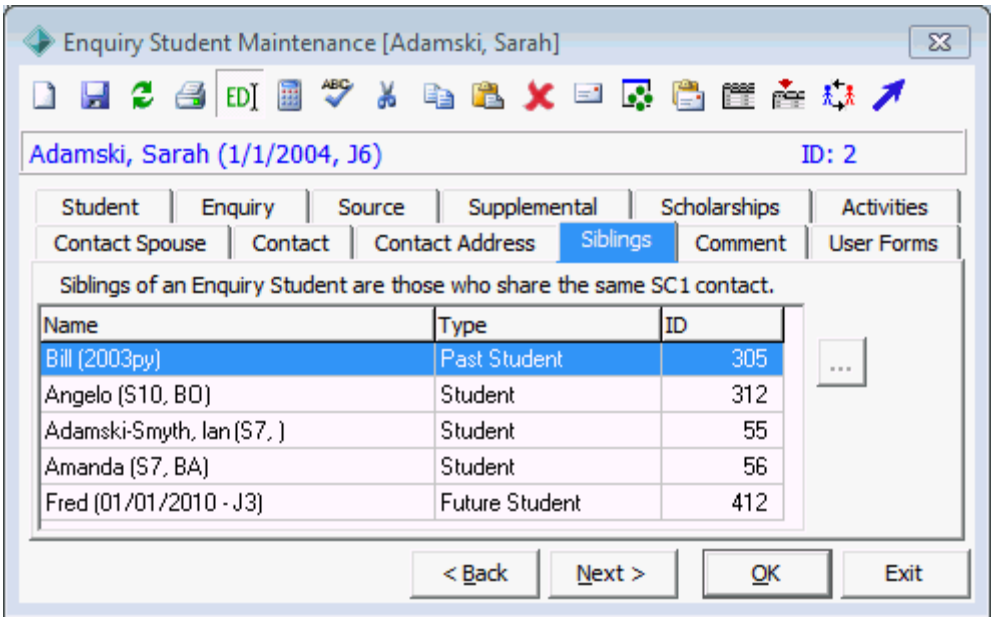
.

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

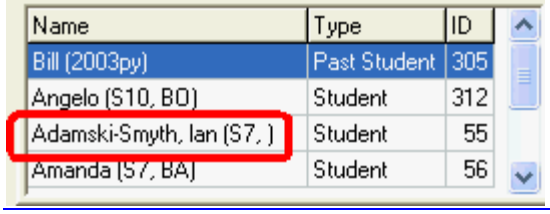
3. Click the **Siblings** tab.

   The **Siblings** tab of the **Enquiry Student Maintenance** window is displayed.



Enquiry Student Maintenance - Siblings tab key fields and buttons

Grid area fields

Field	Description
Name	Sibling's name. **Note:** The sibling's surname is shown if it is different to the selected student. In the following example, Amanda Adamski's half-brother Ian Adamski-Smyth is listed on the **Siblings** tab. 
Type	Type of student, such as: • **Current Student** • **Future Student** • **Past Student**. **Note:** A sibling who is a future student continues to show as a **Future Student** in this field until their start date, even if they have already been transferred into the Current Students file area.
ID	Synergetic ID of the sibling.

Buttons

Button	Description
...	For the selected sibling, launch their record in the corresponding maintenance function window: • **Current Student Maintenance** • **Future Student Maintenance** • **Past Student Maintenance**. **Tip:** Double click on the selected sibling to launch their record.

Enquiry Student Maintenance - Comment tab

Use the **Comment** tab to maintain comments about either the:

- enquiry
- student who is enquiring about enrolling at your organisation.

Opening the Comment tab

To open the **Comment** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

   The **Process Future Student and Enquiries** window is displayed.

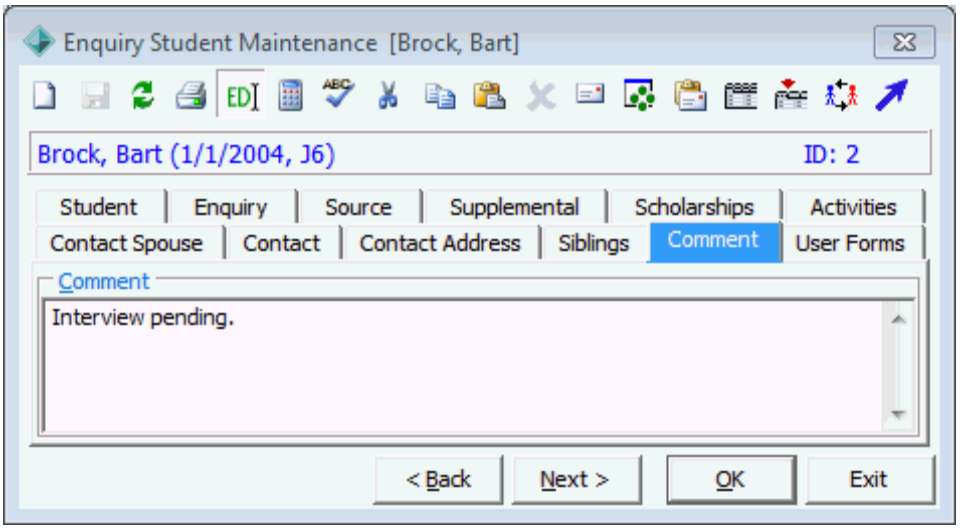
> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

3. Click the **Comment** tab.

   The **Comment** tab of the **Enquiry Student Maintenance** window is displayed.



Enquiry Student 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 > Future Students > Enquiry/Future Student Maintenance** from the main menu.

   The **Process Future Student and Enquiries** window is displayed.

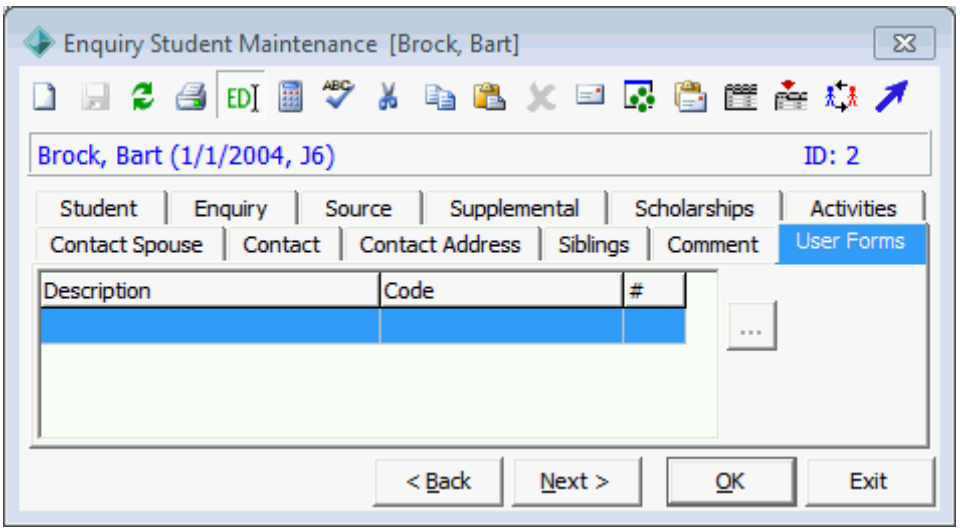
   Tip: You can also access the future student functions by clicking Future.

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).

   The **Student** tab of the **Enquiry Student Maintenance** window is displayed.

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

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



Enquiry Student 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.

Enquiry Student Maintenance - DocMan tab

Use the **DocMan** tab to add documents, spreadsheets and pictures, such as:

- an offer letter
- a scanned birth certificate
- scanned reports.

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

Opening the DocMan tab

To open the **DocMan** tab:

1. Select **Module > Future Students > Enquiry/Future Student Maintenance** from the main menu.

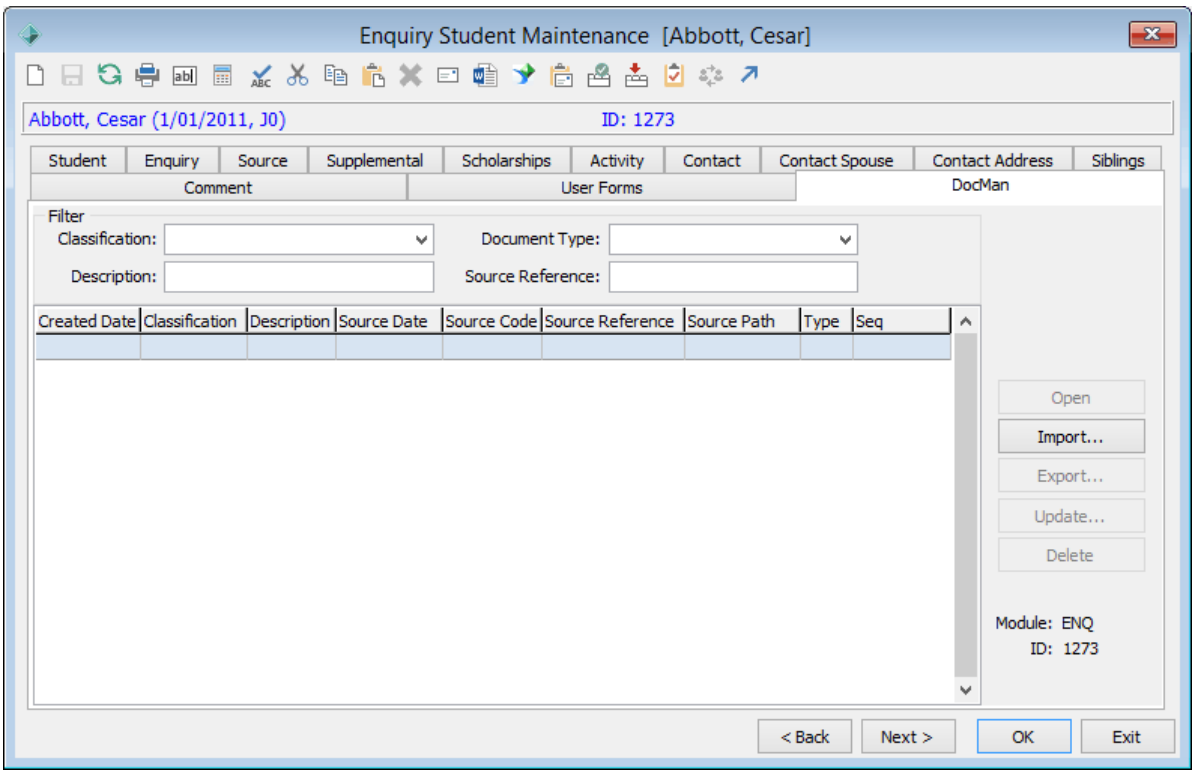
   The **Process Future Student and Enquiries** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the person the enquiry is about. See *Searching for enrolment enquiries* (on page 8).
3. The **Student** tab of the **Enquiry Student Maintenance** window is displayed.
4. Click the **DocMan** tab.

   The **DocMan** tab of the **Enquiry Student Maintenance** window is displayed.



Enquiry Student Maintenance - DocMan tab key fields and buttons

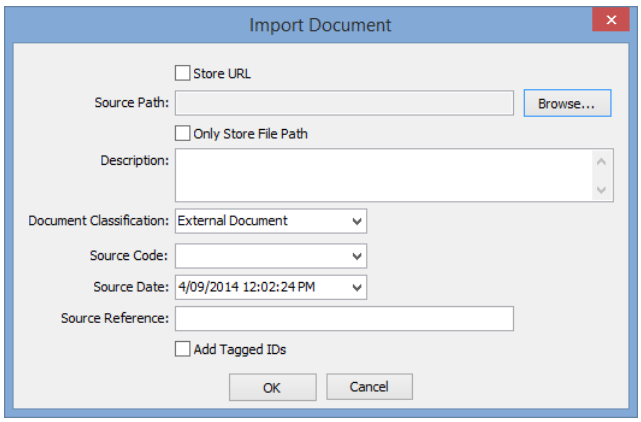
Fields

Field	Description
Classification	Classification of the documents to be displayed. Access to documents can be restricted based on user security levels. Select the classification from the drop-down list to filter the documents displayed.
Document Type	Type of document. For example: • Microsoft Word Document • JPG Photo • Adobe Acrobat File • Microsoft Excel Spreadsheet. **Note:** The document types set up are those that are used at your organisation. Select the type of document from the drop-down list to filter the documents displayed.
Description	Filter the documents to those which have the typed words in the description.
Source Reference	Filter the documents to those which have the typed words in the source reference.

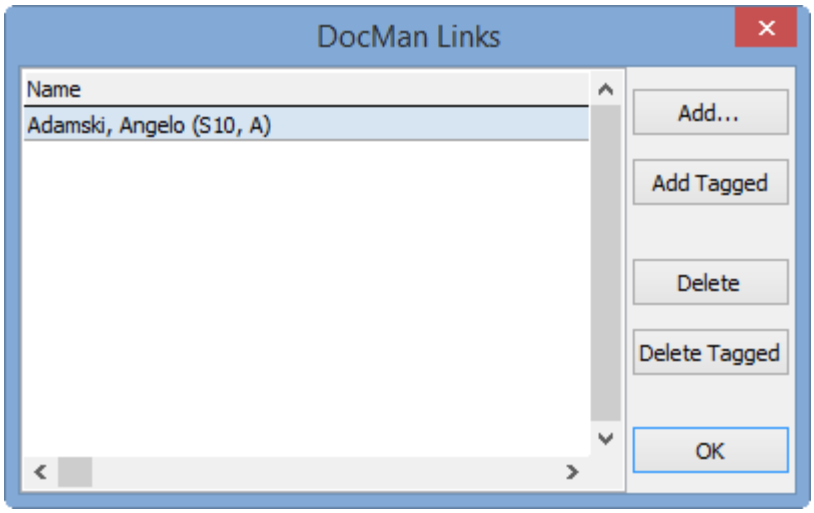
Grid area fields

Field	Description
Created Date	Date and time the document, spreadsheet or picture was imported into Synergetic.
Classification	Classification of the document. Classifications are maintained in the **luDocumentClassification** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Description	Short description of the document.
Source Code	Source of the document. Typical examples include: • Archive • Magazine • Newspaper • School Photo • Website. Document sources are maintained in the **luDocumentSourceCode** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Source Date	Date the document was published or received.
Source Reference	Cross-reference to the source. For example the name, issue date and page of a newspaper where the student's photograph appeared.
Source Path	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.
Type	Type of document. Typical examples include: • DOC, DOCX (Microsoft Word document) • JPG (photo using the Joint Photographic Experts Group format) • PDF (Adobe Acrobat file) • XLS, XLSX (Microsoft Excel spreadsheet). Document types are maintained in the **luDocumentType** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Seq	Unique number identifying the document.

Buttons

Button	Description
Open	Open the highlighted document in the appropriate application to view the document. For example, a community member's record includes a Microsoft Word document in the **DocMan** tab. Click Open to open the document in Microsoft Word.
Import ...	Import a document, spreadsheet, picture or link an external web page. See: • *Linking documents using a tag list* in the Introduction manual • *Importing one or more documents* (on page 206) • *Updating existing documents* (on page 211). 
Export...	Export a document, spreadsheet or picture. To copy a document, spreadsheet or picture from the Synergetic database and save it in a Windows folder: 1. Click Export.... 2. Browse for the folder. 3. Click Save.
Update ...	Open the highlighted document on the **DocMan** tab and update the information about the document. **Note:** You cannot update fields if the document is a photo loaded using **Photo Maintenance**.
Delete	Delete the highlighted document from the **DocMan** tab. **Note:** 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.

DocMan Links window key buttons



Button	Description
Add...	Add a community member to share the document. See *Sharing a document with other community members* in the Introduction manual.
Add Tagged	Add the document to the **DocMan** tab for each of the community members contained in the current tag list.
Delete	Remove the document from the **DocMan** tab of the highlighted community member.
Delete Tagged	Remove the document from the **DocMan** tab of all community members in the current tag list.

Processing online applications

Use the **Process Online Applications** window to import applications made through an online program. For example, through a page on your organisation's website.

> **Note:** Applications must be in a specific format to be imported. See *Creating importable applications* in the System maintenance manual.

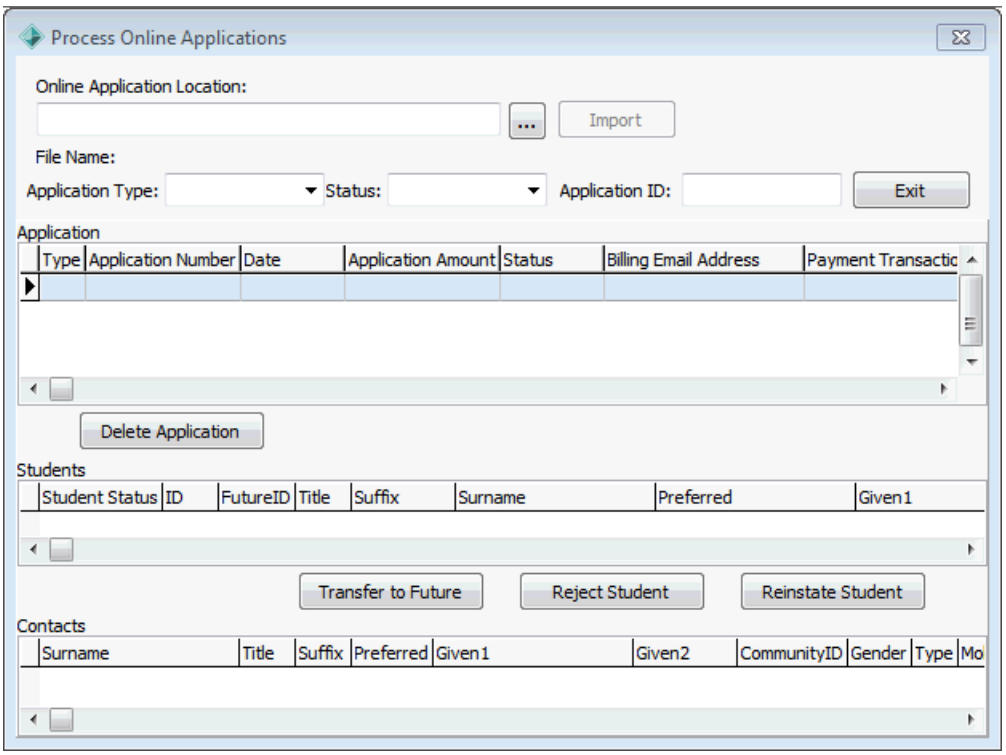
Opening the Process Online Applications window

To open the **Process Online Applications** window:

1. Select **Module > Future > Online Application Import**.

> **Tip:** You can also access the future student functions by clicking
>
> .

The **Process Online Applications** window is displayed.



Process Online Applications window key fields and buttons

Fields

Field	Description
Online Application Location	Folder location where the application file is stored.
File Name	Name of the selected application file.
Application Type	Filter the display by application type. Options include: • all applications • future student applications • enquiry applications.
Status	Filter the display by the application status. Options include: • all applications • completed applications • applications in process • pending applications.
Application ID	Filter the display by the ID number for the application.

Application area

Grid area fields

Note: Optional fields are used depending on your organisation's online payment process.

Field	Description
Type	Type of application. For example, enquiry or future student.
Application Number	Unique number identifying the application.
Date	Date the application was made.
Application Amount	The enrolment deposit amount. **Note:** Cash receipts can be generated automatically for enrolment deposits created through the online application process. See *Synergetic Financial Configuration - Enrolment Deposits tab i*n the Finance manual.
Status	Status of the application.
Billing Email Address	Billing email address provided with the application.
Payment Transaction Code	Code for the third party payment transaction.
Payment Response Code	Code for the third party payment response.
Payment Response Text	Text provided with the third party payment response.
Payment Error	Any error that occurred during the payment.
AgentID	Synergetic ID of the agent responsible for the application.

Students area

The fields in the **Students** area are a superset of the fields available in the **Future Student Maintenance** window on the:

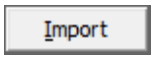
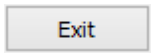
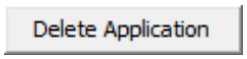
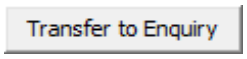
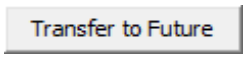
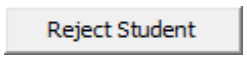
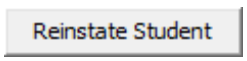
- **Personal** tab. See *Future Student Maintenance - Personal tab* (on page 99).
- **Flags** tab. See *Future Student Maintenance - Flags tab* (on page 104).
- **Enrol Details** tab. See *Future Student Maintenance - Enrol Details tab* (on page 108).
- **Applications** tab. See *Future Student Maintenance - Applications tab* (on page 113).
- **Supplemental** tab. See *Future Student Maintenance - Supplemental tab* (on page 128).
- **Source** tab. See *Future Student Maintenance - Source tab* (on page 142).
- **Transport** tab. See *Future Student Maintenance - Transport tab* (on page 151).
- **Courses** tab. See *Future Student Maintenance - Courses tab* (on page 155).
- **Emergency** tab. See *Future Student Maintenance - Emergency tab* (on page 177).
- **Doctor** tab. See *Future Student Maintenance - Doctor tab* (on page 179).
- **Medical** tab. See *Future Student Maintenance - Medical tab* (on page 181).
- **Debtor** tab. See *Future Student Maintenance - Debtor tab* (on page 187).
- **Photo** tab. See *Future Student Maintenance - Photo tab* (on page 195).
- **Comment** tab. See *Future Student Maintenance - Comment tab* (on page 197).
- **International** tab. See *Future Student Maintenance - International tab* (on page 222).

Contacts area

The fields in the **Contacts** area are a superset of the fields available on the:

- **Contacts** tab of **Future Student Maintenance**. See *Future Student Maintenance - Contacts tab* (on page 159) in the Community manual.
- **Name** tab of **Community Maintenance**. See *Community Maintenance - Name tab* in the Community manual.
- **Home address** tab of **Community Maintenance**. See *Community Maintenance - Home Address tab* in the Community manual.
- **Occupation** tab of **Community Maintenance**. See *Community Maintenance - Occupation tab* in the Community manual.
- **Phone** tab of **Community Maintenance**. See *Community Maintenance - Phone tab* in the Community manual.

Buttons

Button	Description
	Launch the **File Chooser** window to load the import file.
	Load the data file selected into the grid areas in the **Process Online Applications** window.
	Exit the **Process Online Applications** window.
	Delete the application from the grid. All students in the application are removed from the window. **Note:** You cannot delete an application once students in the application have been transferred to enquiry or future students or have been added as a community member.
	Set the selected student's status as **Enq Student** and transfer them into **Enquiry Student Maintenance**. See *Maintaining enrolment enquiries* (on page 6). **Note:** Your organisation can configure whether this button is displayed. See *StudentTransferMode configuration setting* in the System maintenance manual.
	Set the selected student's status as **Future Student** and transfer them into **Future Student Maintenance**. See *Maintaining future students* (on page 73). **Note:** Your organisation can configure whether this button is displayed. See *StudentTransferMode configuration setting* in the System maintenance manual.
	Set the selected student's application as rejected.
	Reinstate a student whose application status has been set as rejected.

Maintaining future students

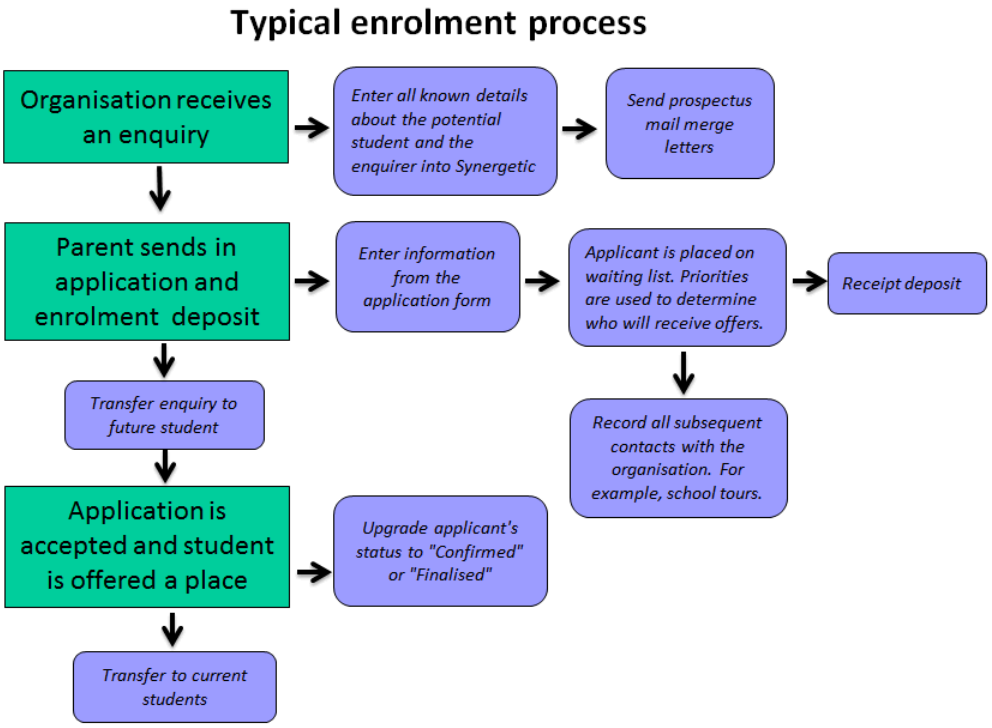
Future students are students who have applied to enrol at your organisation.

You can incorporate the student's:

- personal details, address and contact details entered when they first enquired
- newly allocated classes and external courses.

Future student records are stored in the community database.

Once you know that the student is enrolled, you can confirm entry dates and enter financial details.



Generally a student is:

- Added using **Enquiry Student Maintenance**. See *Maintaining enrolment enquiries* (on page 6).
- Imported through an online program, such as through a page on your organisation's website. See *Processing online applications* (on page 69).
- Maintained in **Future Student Maintenance**, after their application to enrol at your organisation has been accepted.

In addition to maintaining the details added in **Enquiry Student Maintenance**, you can:

- confirm entry dates
- enter financial details
- allocate the student to classes
- allocate the student to external courses.

How to:

- Search for a future student. See *Searching for future students* (on page 78).
- Create a new future student. See *Creating future students* (on page 85).
- Add a new contact for an existing student. See *Adding new contacts (on page 164).*
- Swap the contacts for an existing student. See *Swapping and shuffling contacts (on page 167).*
- Add a new relation for an existing student. See *Adding new relations (on page 172).*
- Delete a relationship with a student. See *Deleting relationships (on page 174).*
- Transfer a future student to current students. See *Transferring future students to current students* (on page 385).
- Transfer a future student's scholarship information to current students. See *Transferring future student scholarship information to current students* (on page 398).
- Delete a future student and retain student details in the future student archive. See *Archiving a future student (on page 399).*
- Restore a future student from the future student archive. See *Restoring a future student from the archive* (on page 401).

What you can do:

What you can do...	See...
Maintain personal information about the student.	*Future Student Maintenance - Personal tab* (on page 99)
Maintain flags and related information to: • categorise students for school and government reporting • specify religious milestones • record passport and visa details • determine the position of the student in a family by age • record pre-enrolment requirements such as photo, immunisation certificates or out of hours school care needs.	*Future Student Maintenance - Flags tab* (on page 104)
You can: • maintain enquiry or application details • maintain planned schooling details including the year enrolled and starting year level, campus, form and so on • display the status of the enrolment.	*Future Student Maintenance - Enrol Details tab* (on page 108)
View and maintain details about enrolment applications.	*Future Student Maintenance - Applications tab* (on page 113)
Maintain the source of the enrolment enquiry.	*Future Student Maintenance - Supplemental tab* (on page 128)

What you can do...	See...
You can: • view a history of default enrolment applications and changes made to them • modify the mail merge code of individual enrolment applications • delete status history records.	*Future Student Maintenance - History tab* (on page 130)
View and maintain details of any activities. For example, school tours or a meeting with the principal that the family have been invited to or have attended. You can flag activities with a follow up date.	*Future Student Maintenance - Activity tab* (on page 132)
Maintain details about the source of the enquiry and any pre-entry comments.	*Future Student Maintenance - Source tab* (on page 142)
Maintain scholarships applied for and awarded at your organisation.	*Future Student Maintenance - Scholarships tab* (on page 144)
You can: • list enrolment deposit details • check that entrance payments are complete for a student.	*Future Student Maintenance - Deposit tab* (on page 148)
Maintain how future students intend to be transported to and from your organisation. For example, by school bus.	*Future Student Maintenance - Transport tab* (on page 151)
Maintain details of courses planned by the future student. You can: • list courses being undertaken • add courses individually • review a summary of financial information for the courses • maintain student course details.	*Future Student Maintenance - Courses tab* (on page 155)
Maintain details for people to be contacted in the event of an emergency.	*Future Student Maintenance - Emergency tab* (on page 177)
Maintain contact details for primary contacts; usually parents and guardians.	*Future Student Maintenance - Contacts tab* (on page 159)
Maintain family and guardianship relationships and contact details, from the student's perspective.	*Future Student Maintenance - Relations tab* (on page 168)
List siblings who used to attend, are currently attending and planning to attend your organisation in the future.	*Future Student Maintenance - Siblings tab* (on page 175)
Maintain details for people to be contacted in the event of an emergency.	*Future Student Maintenance - Emergency tab* (on page 177)
Maintain contact details for the student's preferred doctor (and an optional alternative) for medical attention.	*Future Student Maintenance - Doctor tab* (on page 179)

What you can do...	See...
Maintain: • public medical alerts • dentist contact details • medical details and incidents.	*Future Student Maintenance - Medical tab* (on page 181)
Maintain codes used to: • link to other database records in use at your organisation • cross link records back to previous systems used.	*Future Student Maintenance - Codes tab* (on page 183)
Maintain parameters that determine how billing is undertaken for this student and family.	*Future Student Maintenance - Debtor tab* (on page 187)
If the parents are separated, maintain details of the separation and any court orders relating to the student.	*Future Student Maintenance - Legal tab* (on page 193)
Display the most recent student photograph.	*Future Student Maintenance - Photo tab* (on page 195)
Maintain relevant and important comments that should be borne in mind by staff.	*Future Student Maintenance - Comment tab* (on page 197)
Define your own tabs or programs within Synergetic.	*Future Student Maintenance - User Forms tab* (on page 199)
View documents associated with the student.	*Future Student Maintenance - DocMan tab* (on page 201)
Update settings required by NZ MOE (New Zealand Ministry of Education). This tab is used by New Zealand organisations.	*Future Student Maintenance - NZMOE tab* (on page 215)
You can: • record citizenship, passport and visa details • set which citizenship or visa subclass is active at present.	*Future Student Maintenance - International tab* (on page 222)
Add time-based alerts that are displayed when the student is selected in **Future Student Maintenance** The alert is only displayed during the period entered on the **Alerts** tab.	*Future Student Maintenance - Alerts tab* (on page 229)
Maintain: • bookings with accommodation suppliers, such as hostels • bookings with one of a student's contacts, such as a relative or an individual providing home stay services.	*Future Student Maintenance - Accommodation tab* (on page 233)
Maintain discounts and concessions associated with the student.	*Future Student Maintenance - Concessions tab* (on page 264)
Maintain information required by NZQA (New Zealand Qualifications Authority). This tab is used by New Zealand organisations.	*Future Student Maintenance - NZQA tab* (on page 267)
Maintain academic and co-curricular classes that are part of a course attended.	*Future Student Maintenance - Classes tab* (on page 272)

What you can do...	See...
View and maintain: • documents uploaded to the student's **DocMan** tab • correspondence sent to the student • emails included from Microsoft Outlook.	*Future Student Maintenance - Correspondence tab* (on page 274)
Maintain information about: • students • parents or guardians for MCEECDYA (Australian Ministerial Council on Education, Early Childhood Development and Youth Affairs) requirements.	*Future Student Maintenance - MCEECDYA tab* (on page 280)
View and maintain: • communications yet to be sent to the student • the student's notification methods.	*Future Student Maintenance - Current Comms tab* (on page 290)
View past communications sent to students.	*Future Student Maintenance - Comms tab* (on page 293)
View and maintain events the student is attending.	*Future Student Maintenance - Current Events tab* (on page 295)
View events the student has attended in the past.	*Future Student Maintenance - Events tab* (on page 305)
View action centre tasks or notifications linked to the selected future student.	*Future Student Maintenance - Action Centre tab* (on page 307)
View and edit the schools and preferences a student has listed on their application form.	*Future Student Maintenance - Other Schools tab* (on page 312)

Searching for future students

Use the **Set Future Student Search Criteria** window to search for future students.

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

Note: If the student is not found, click New... to add a new future student from this window. See *Creating future students* (on page 85).

Tip: If you cannot find the person you are looking for, it could be because they are not yet a future student but still only hold enquiry status. See *Searching for enrolment enquiries* (on page 8). You can also use the **Process Future Student and Enquirers** window to search for future students.

Tip: The **Future Student** area allows you to search by year of enrolment, while the **Application** area allows you to search by enrolment year of each application.

Opening the Set Future Student Search Criteria window

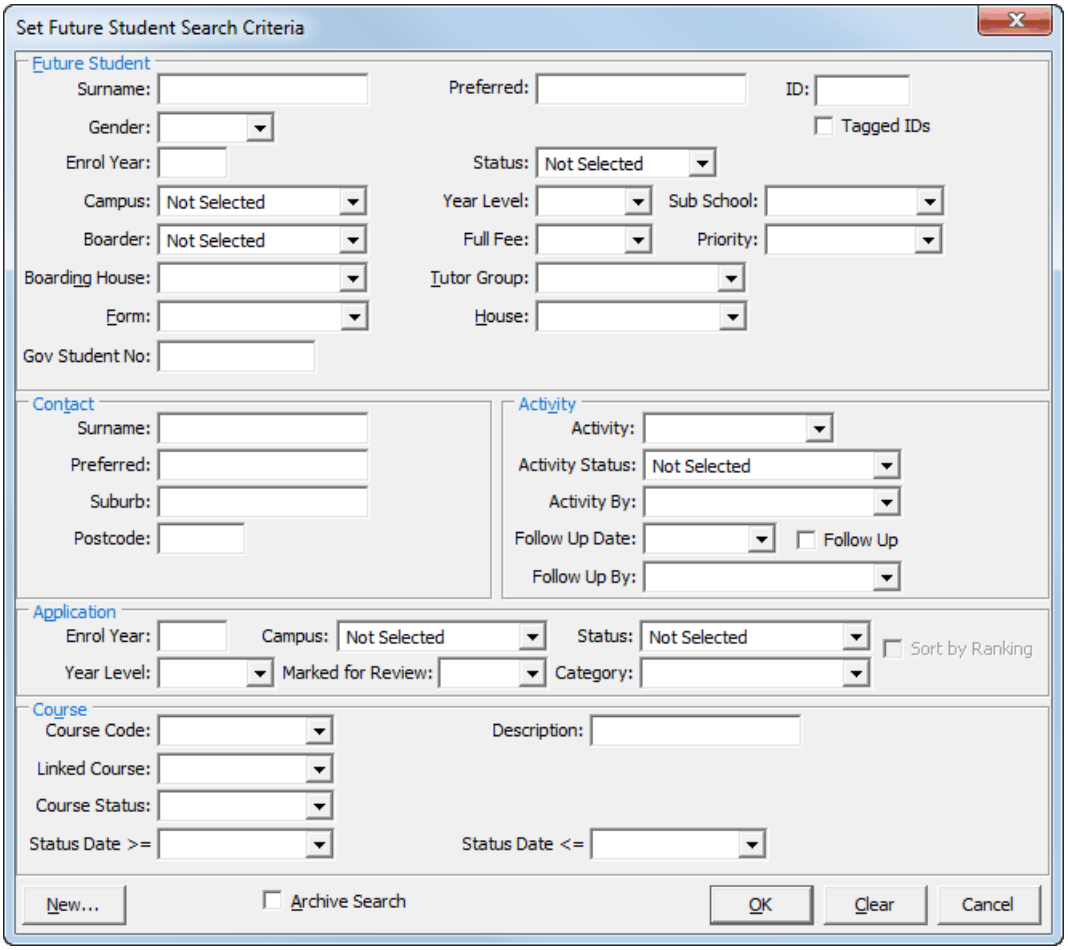
To open the **Set Future Student Search Criteria** window:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

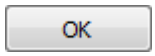
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.



2. Type the information you know about the student or group of students. For example, type the student's surname in the **Surname** field.

3. Click 

.

Tip: If you are not sure of the student's personal details, search using the **Application** selection area. For example, select the campus that the student applied for in the **Campus** field.

Set Future Student Search Criteria window areas

Area	Description
Future Student	Future student's details.
Contact	Primary contact's details.
Activity	Record of student activities. Activities include things such as school tours, interviews or phone calls.
Application	Student's application details.
Course	Information about any courses the student attends.

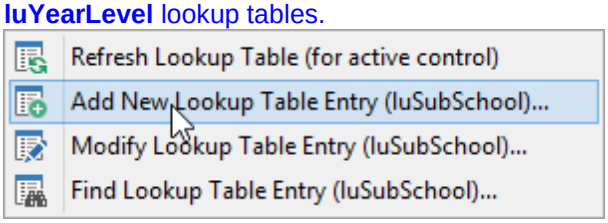
Set Future Student Search Criteria window key fields and buttons

Fields

Area	Description
Archive Search	Select this field to display all students deleted from the future student constituency. These students may have either been: • transferred to current students • deleted from the future students constituency using **Future Student Maintenance**. **Note:** Students who were added using **Current Student Maintenance** directly do not appear when this field is selected.

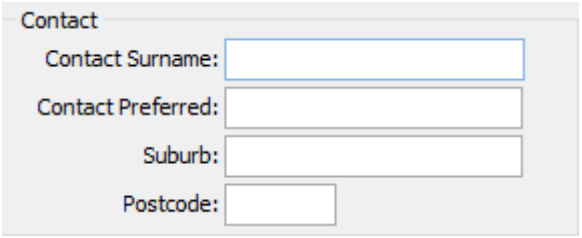
Future Student area fields

Field	Description
Surname	Student's surname.
Preferred	Student's preferred name.
ID	Automatically generated by Synergetic when you create a new future student. Used for searching for an individual student.
Tagged IDs	Select **Tagged IDs** to restrict the search to your tag list. See *Tag lists* in the Introduction manual.
Gender	Student's gender.
Enrol Year	Year the future students are enrolled to join your organisation. **Note:** If the student has applied to be enrolled in more than one year/ campus, this field shows their default application. The enrolment year is also known as the default year.
Status	Status of the future students. These include: • application made • place offered • finalised • cancelled. **Note:** Maintain the values in the **luFutureStatus** lookup table. See *luFutureStatus lookup table* in the System maintenance manual.

Field	Description
Campus	Campus where the student is enrolled.
Year Level	Student's year level.
Sub School	Search for students by the sub-school they are grouped into, if applicable. 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: • junior school • middle school • senior school. **Warning**: Do not add sub-schools by selecting from the right click menu because entries are required in both the **luSubSchool** and the **luYearLevel** lookup tables.  See *luSubSchool* and *luYearLevel* lookup tables in the System maintenance manual.
Boarder	Student's residential status. Typical values include: • Boarder • Day Student • Home Stay. **Note:** Maintain the values in the **luBorder** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Full Fee	Whether or not the student is a full-fee-paying student.
Priority	The assigned relative priority of the future student's enrolment. For example, high priority due to having a sibling at your organisation. Typical values include: • Existing Family • Sibling at School • Parent is Ex Student • Parent is Staff • Normal. **Note:** Maintain the values in the **luFuturePriority** lookup table. See *luFuturePriority lookup table* in the System maintenance manual.
Boarding House	Indicates in which boarding house the student boards. For example, Buckley House, Stanley Avenue House. This is used at organisations that have multiple boarding houses. **Note:** Maintain the values in the **luBoardingHouse** lookup table. See *Maintaining lookup tables* in the System maintenance manual.

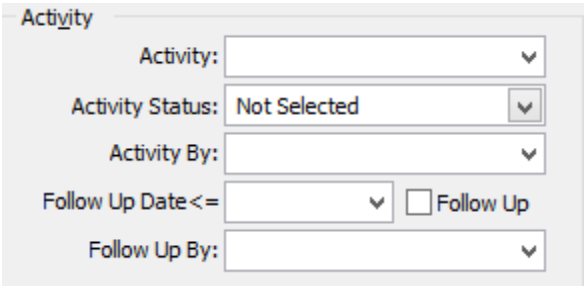
Field	Description
Form	Allocated student form. **Note:** Maintain the values in the **luForm** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Tutor Group	Allocated student tutor group. For example, students may meet with their tutor before the first period to receive information about forthcoming events and other matters. **Note:** Maintain the values in the **luTutor** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
House	Allocated house group. **Note:** Maintain the values in the **luHouse** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Gov Student No	Student number assigned to the student by the government. Used for searching for an individual student. **Note:** Currently used in the State of Victoria, Australia. Also known as VSN.

Contact area fields



Field	Description
Contact Surname	Search for students by contact surname.
Contact Preferred	Search for students by contact preferred name.
Suburb	Search for students by suburb.
Postcode	Search for students by postcode.

Activity area fields

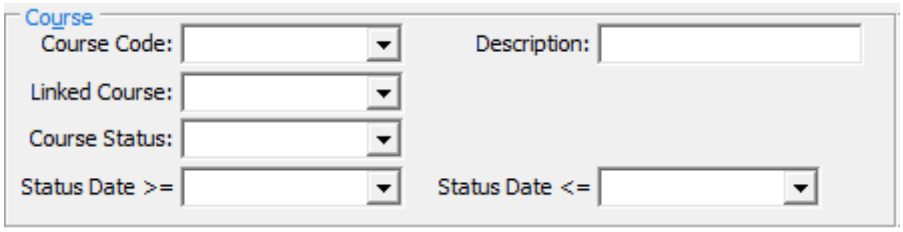


Field	Description
Activity	Search for students based on activities.
Activity Status	Search for students based on the status of activities.
Activity By	Search for students based on activities performed by a selected community member.
Follow Up Date	Search for students based on activities with a set follow up date.
Follow Up	Search for students based on activities that have been marked as requiring a follow up.
Follow Up By	Search for students based on activities that have been marked as requiring a follow up by the specified community member.

Application area fields

Field	Description
Enrol Year	Search for students based on the year that the future student has applied for.
Campus	Search for students based on the campus that the future student has applied for.
Status	Search for students based on the status of the future student's application.
Year Level	Search for students based on the year level that the student has applied for.
Marked for Review	Search for students based on whether the future student has been marked for review.
Category	Search for students based on the category assigned to their application. **Note:** This field is not displayed if the **UseApplicationCategory** configuration setting is **False**. See *UseApplicationCategory configuration setting* in the System maintenance manual.

Course area fields



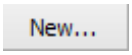
Field	Description
Course Code	Search for students based on the course they have applied for.
Description	Search for students based on the description of the course they have applied for.
Linked Course	Search for students based on the linked course they have applied for.
Course Status	Search for students based on the status of the course they have applied for.
Status Date >= / <=	Search for students based on what the status of the course they applied for was during this period.

Buttons

Button	Description
New...	Add a new student record. See *Creating future students* (on page 85).

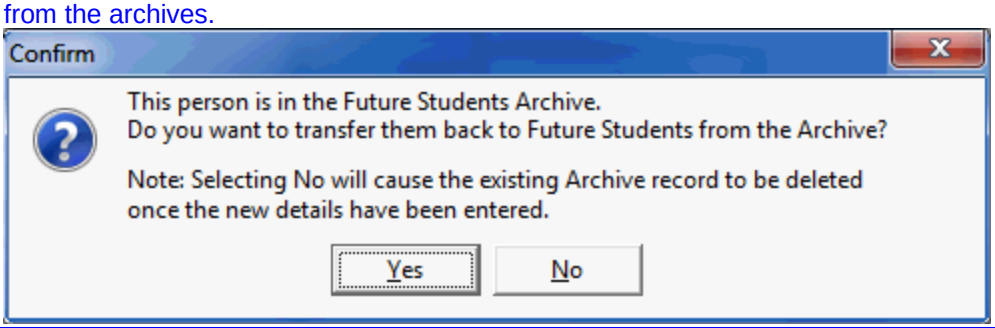
Creating future students

To create a new future student, open the **Future Student Maintenance** window and either:

- click 

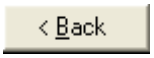
on the **Future Student Maintenance** toolbar
- click on the **Future Student Maintenance** toolbar
- select **File > New...** from the main menu, when **Future Student Maintenance** is active
- right click on the **Future Student Selector** grid and select **New...**
- press **Ctrl** + **N** when a **Future Student Maintenance** window is open.

Note: If an archived record already exists for the student, you are prompted to restore the record from the archives.



You can also create a new future student by clicking

on the **Process Future Students and Enquirers** window. See *Searching for enrolment enquiries* (on page 8).

The first **Create New Future Student** window is displayed. Use the 

and

buttons to move through the data input windows. Different windows are displayed, depending on your selections on the first window.

See:

- *Future student creation windows* (on page 86) if you need more information about what to enter when you are creating a new future student.
- *Enrolment enquiry creation windows* (on page 16) if you need more information about what to enter when you are creating a new enrolment enquiry.
- *Processing online applications* (on page 69) for applications made through an online program, such as a page on your organisation's website.

Future student creation windows

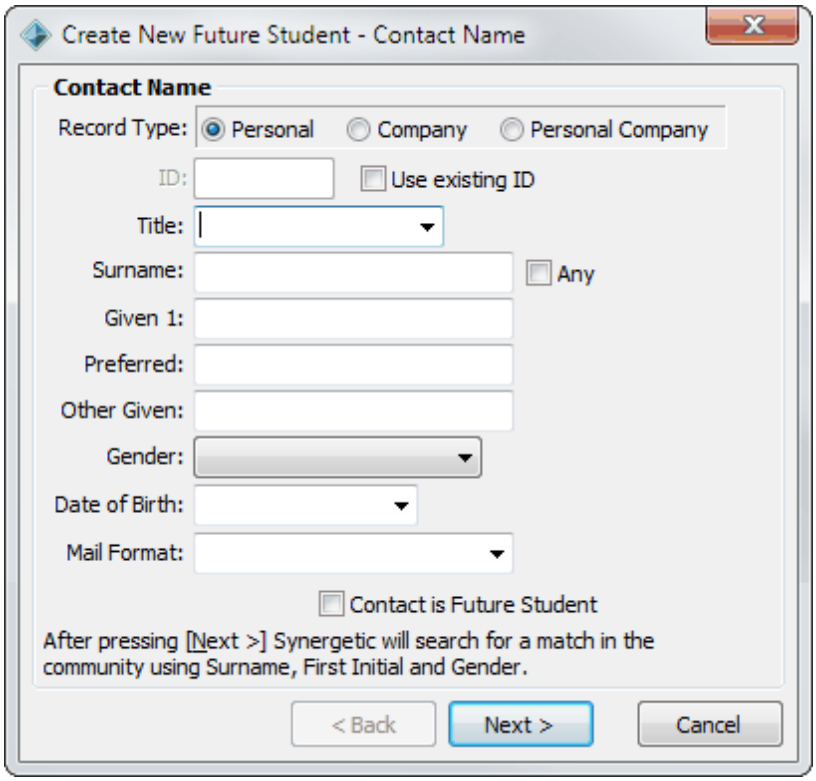
The **Create New Future Student - Contact Name** window is displayed first.

Enter the details of the primary contact person for the future student. The primary contact person can be an individual, a company or an individual at a company address (personal company). The fields on the **Contact Name** windows are identical if a **Record Type** of **Personal** or **Personal Company** is selected.

If a **Record Type** of **Company** is selected, the company name, company occupation description and company contact person are displayed. The latter two fields are optional.

Note: The primary contact is legally responsible for the student; usually a parent or guardian. The first contact also determines the **family** for sibling discounts.

Note: If you are processing online applications the **Create New Future Student** windows are pre-populated with values from the import file. See *Processing online applications* (on page 69).



If the information you enter matches one or more members of the community database, Synergetic displays a window showing possible matches. You can either:

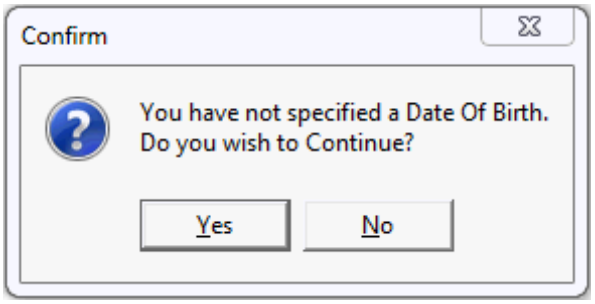
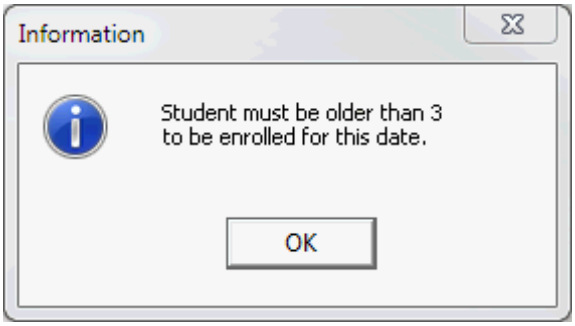
- Select a record from the grid and make them the future student's contact.
- Create a new record. This creates a completely new member in the community database.

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

- Spouse details, if available. See *Spouse Name window* in the Community manual for a similar example.
- Address details. See *Home Address window* in the Community manual for a similar example.
- Relationship details. See *Select Couple Relationship window* in the Community manual for a similar example.
- Contact's phone and occupation details. See *Phone/Occupation window* in the Community manual for a similar example.
- Spouse's phone and occupation details. See *Phone/Occupation window* in the Community manual for a similar example.
- Student details. See *Create New Future Student - Future Student Name window* (on page 89).
- Student contact relationship details. See *Create New Student - Establish Relationships window in the Current students manual for a similar example.*
- Enrolment details for the future student. See *Create New Future Student - Enrol Details window* (on page 91).
- Enrolment status for the future student. See *Create New Future Student - Enrol Status window* (on page 96).

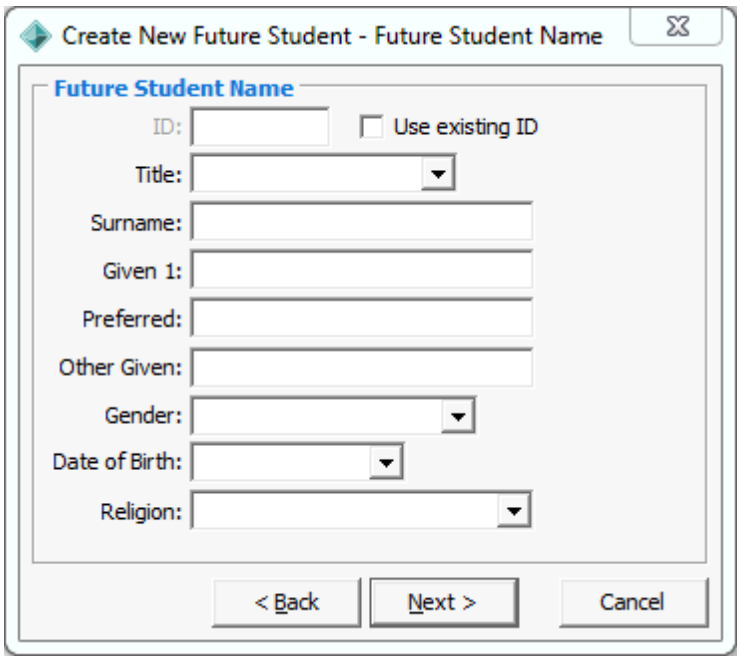
Create New Future Student - Contact Name window key fields

Field	Description
Use existing ID	If you know the Synergetic ID of an existing community member, select this field and enter the ID in the **ID** field. The details of the person are retrieved from the community database.
Title	Primary contact's title.
Surname	Primary contact's last name.
Given 1	Primary contact's given name.
Preferred	Primary contact's preferred name. **Tip:** When the **Given 1** field is selected, press the **Tab** key to automatically populate the same value in the **Preferred** field. You can type another name if required, for example if the primary contact's given name is Stephen, you could type Steve.
Other Given	Primary contact's other given names.
Gender	Primary contact'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, **Dr** (doctor).

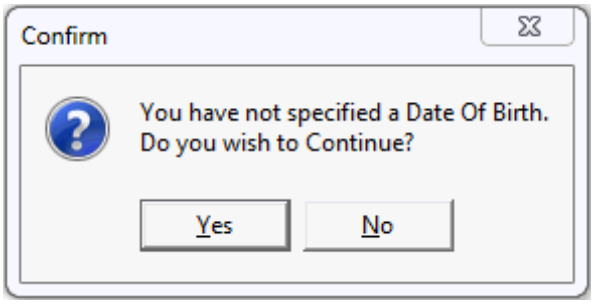
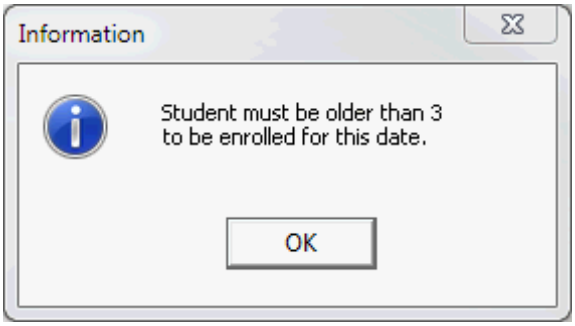
Field	Description
Date of Birth	Primary contact's date of birth. If the **Contact is Future Student** field is selected and their date of birth is: • *Not* specified for the student, a message is displayed.  • *Outside* the minimum or maximum range, a message is displayed on the **Create New Future Student - Future Student Name** window. See *Create New Future Student - Future Student Name window* (on page 89).  **Note**: See *MinimumStartingAge*, *MaximumStartingAge* configuration settings in the System maintenance manual.
Mail format	Address format for the community member. For example, whether their initials should be used, or an ampersand instead of 'and'.
Contact is Future Student	Select if the contact is also the future student enrolling to avoid repeating address information. For example: • you have a mature age student • your organisation is a tertiary educational institution. Clear the field if the person is **not** the future student enrolling.

Create New Future Student - Future Student Name window

Use the **Future Student Name** window to enter a future student's details. This may include known information and inferred information such as gender.

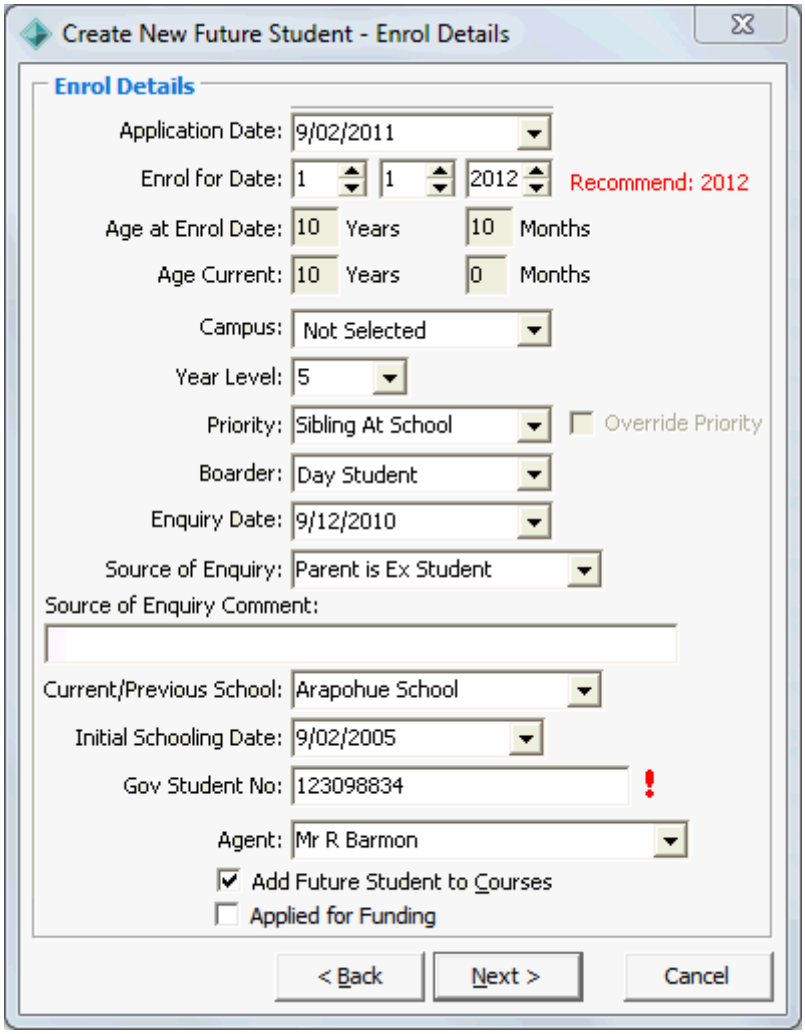


Create New Future Student - Future Student Name window key fields

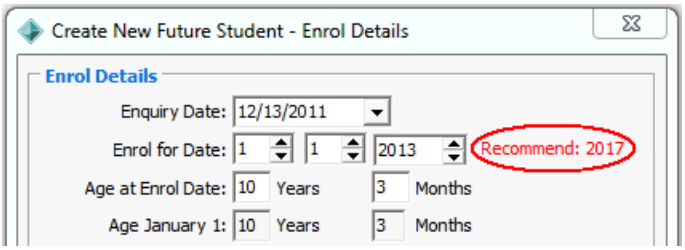
Field	Description
Title	Future student's title.
Surname	Future student's surname.
Given 1	Future student's given name.
Preferred	Future student's preferred name. This field is automatically populated with the student's given name. You can type another name if required, for example if the student's given name is Stephen, you could type Steve.
Other Given	Future student's middle name and any other given names.
Gender	Future student's gender. This field is automatically completed when you select the student's title.
Date of Birth	Future student's date of birth. If their date of birth is: • *Not* specified for the student, a message is displayed.  • *Outside* the minimum or maximum range, a message is displayed on the **Create New Future Student - Future Student Name** window. See *Create New Future Student - Future Student Name window* (on page 89).  **Note**: See *MinimumStartingAge*, *MaximumStartingAge* configuration settings in the System maintenance manual.
Religion	Student's religion. See *luReligion lookup table* in the System maintenance manual.
Parish	Student's parish. See *luParish lookup table* in the System maintenance manual.

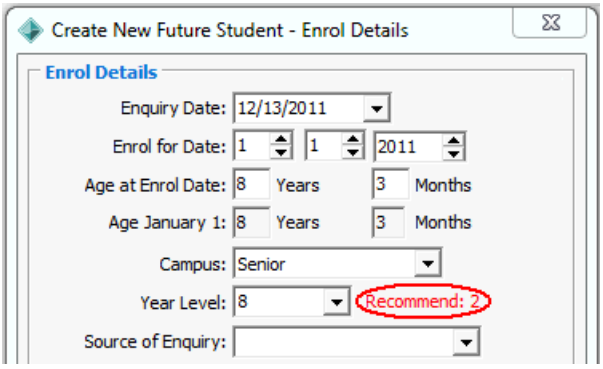
Create New Future Student - Enrol Details window

Use the **Enrol Details** window to enter enrolment details for a new future student.

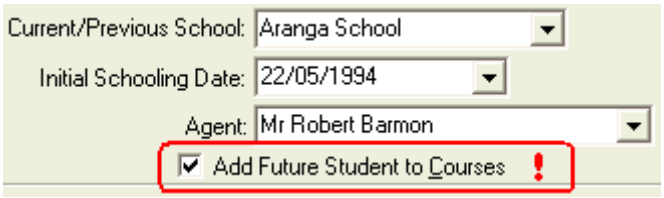
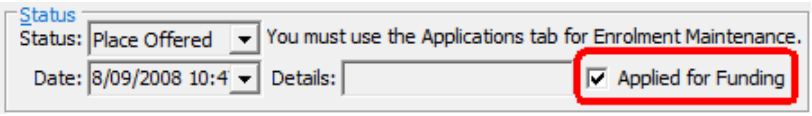


Create New Future Student - Enrol Details window key fields

Field	Description
Application Date	Date the application was made to enrol at your organisation.
Enrol for Date	Date the student is proposing to enrol at the organisation. **Note:** Set to the first day of the year in most cases. Set to the actual start date when a student starts later in the year. If the **Year Level** is specified, the recommended year is displayed based on the: • **Year Level** field. • Student's **Date of Birth**, if it is specified on the *Create New Future Student - Future Student Name window* (on page 89). • Cut-off date for your organisation. See *DayCutOff*, *MonthCutOff* configuration settings in the System maintenance manual. In the following example, the year **2017** is recommended as the: • **Year Level** is **8** • student's date of birth is **9/07/2002** • cut-off date is 1st April. 
Campus	Campus the future student will attend.

Field	Description
Year Level	Student's year level. All year levels are numeric and depend on your organisation. For example, **0** for Prep or Reception. **Note:** Early learning centres such as preschool and pre-prep are allocated year levels **30** (3 year old) and **40** (4 year old). This is because year levels must be integers. If the **Year Level** field is blank, the recommended year level is displayed based on the: • **Enrol for Date** field. • Student's **Date of Birth**, if it is specified on the *Create New Future Student - Future Student Name window* (on page 89). • Cut-off date for your organisation. See *DayCutOff configuration setting* and *MonthCutOff configuration setting* in the System maintenance manual. In the following example, year level **2** is recommended as the: • **Enrol for Date** is **1/1/2011** • student's date of birth is **9/07/2002** • cut-off date is 1st April. 
Priority	Priority the application has been assigned. Your organisation can decide how to prioritise the offer of places. Typical values include: • Existing Family • Sibling at School • Parent is Ex Student • Parent is Staff • Normal.
Boarder	The enrolment residential status. Typical values include: • Boarder • Day Student • Home Stay. **Note:** This setting is critical for boarding students as it affects their funding.

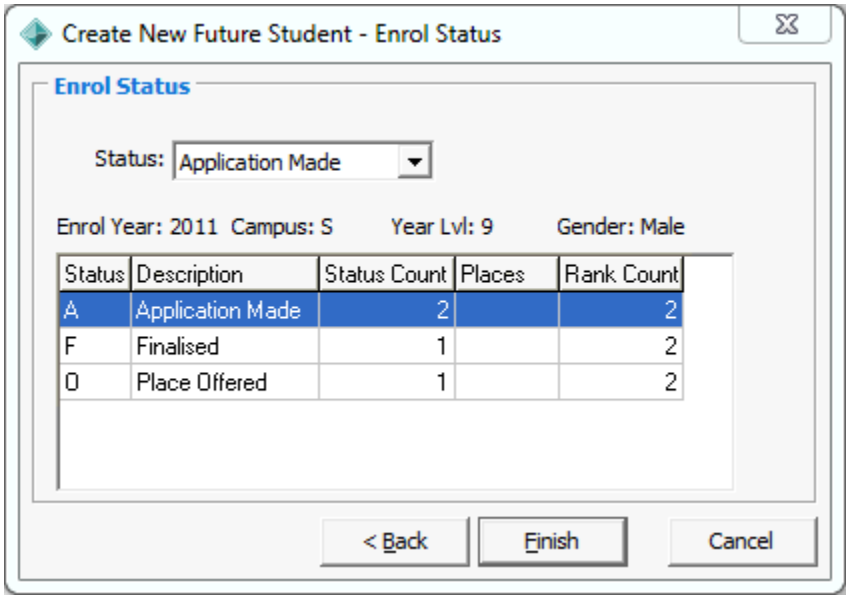
Field	Description
Enquiry Date	Date the person making the enquiry first contacted your organisation. This field shows the current date by default when created from an enquiry. The field is not populated automatically when created as a future student. **Note:** Your organisation may elect to use the date of the first enquiry as one of the criteria for allocating priorities to applicants.
Source of Enquiry	How the person making the enquiry became aware of your organisation. Examples include: • Friends Living in Area • Local Newspaper Advertising • Parent is Past Student • Television Commercial. **Note**: Use the **luEnquirySource** lookup table to maintain the values. See *Maintaining lookup tables* in the System maintenance manual.
Source of Enquiry Comment	Any notes or comments. For example, 'Referred by the Smiths, who have three children currently at the school'.
Current/Previous School	Student's current or previous school or institution, if applicable.
Initial Schooling Date	Usually the date when the student first attends your organisation. However for: • CEO schools, the date a student first studies in Australia • For NZ schools, the date when a student turns **5** years old.
Gov Student No	Student number assigned to the student by the government. Type: • **N** if a new VSN (Victorian Student Number) is required • **U** if the student has a VSN but is unsure of the number • the VSN if known. **Note:** Currently used in the State of Victoria, Australia. Also known as VSN.

Field	Description
Add Future Student to Courses	Select to add the future student to the courses immediately.  The enrolment date is set to the start date of the course the student is applying for. **Tip**: Mouse over the ! icon to display the related tip. Clear the field if you either: • do **not** need to add courses for this student • plan to add courses manually later. **Note**: The field can default to **set** or **cleared**. See *FutureStudents:AutoAddCourse configuration setting* in the System maintenance manual.
Applied for Funding	Select if the student has applied for funding.  The field is maintained on the **Enrol Details** tab. See *Future Student Maintenance - Enrol Details tab* (on page 108).

Create New Future Student - Enrol Status window

Use the **Enrol Status** window to:

- view the applications made by the future student
- update the enrolment status of the future student.



Create New Future Student - Enrol Status window key fields

Fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Status</td><td>Status of the future student's application.
The typical default options are:
<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>A</td><td>Application made.</td></tr>
<tr><td>D</td><td>Deferred.</td></tr>
<tr><td>F</td><td>Finalised.</td></tr>
<tr><td>O</td><td>Deferred.</td></tr>
<tr><td>W</td><td>Waitlisted.</td></tr>
<tr><td>X</td><td>Cancelled by the applicant.</td></tr>
</table>
Note: Use the luFutureStatus lookup table to maintain entries. See luFutureStatus lookup table in the System maintenance manual.</td></tr>
</table>

Grid area fields

Field	Description
Status	Status of the application. See **Status** field above.
Description	Brief description of the status.
Status Count	Total number of students with the same: • enrolment year • campus • year level • gender • status. The count increases each time a student with this status is added to the database.
Places	Number of student places allocated for this gender and status within the year level for a given year. This is based on: • enrolment year • campus • year level • gender • status. This number is specified in the **luFutureYearPlaces** lookup table. See *Maintaining lookup tables* in the System maintenance manual.

Field	Description
Rank Count	Count of future students with the same: • enrolment year • campus • year level • gender • status.

Future Student Maintenance - Personal tab

Use the **Personal** tab to maintain personal information about the student, such as nationality and religion.

Opening the Personal tab

To open the **Personal** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

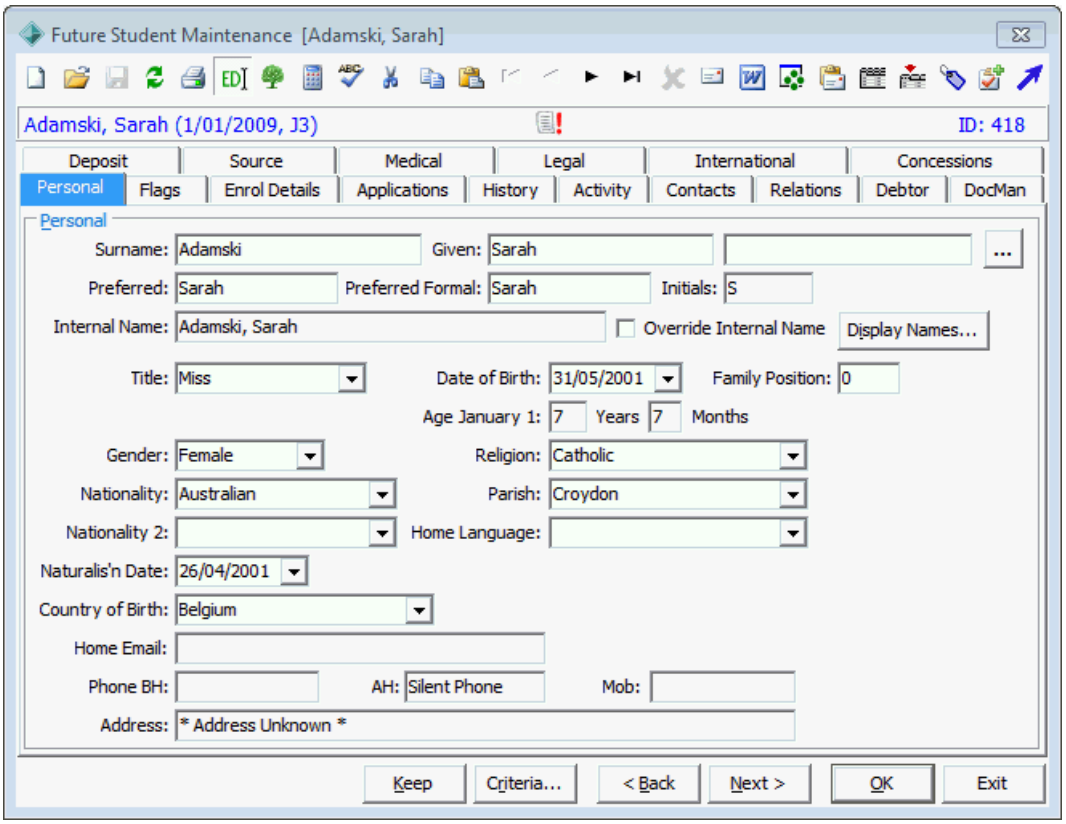
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Personal** tab, if it is not already displayed.

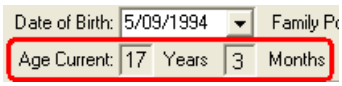
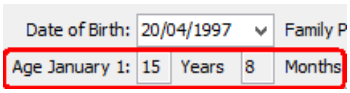
   The **Personal** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Personal tab key fields and buttons

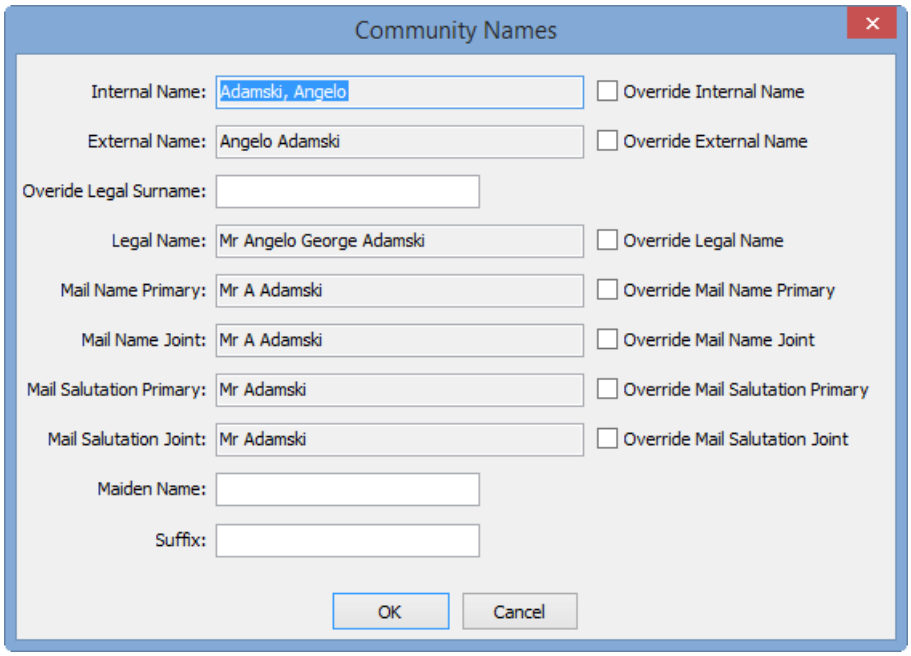
Fields

Field	Description
Surname	Student's surname. In New Zealand schools: • This field should not contain brackets or multiple spaces before or after hyphens or apostrophes. This affects the roll return file sent to NZ MOE. • The student's legal surname only **must** be entered in the **Surname** field.
Given	Student's given names. In New Zealand schools: • These fields should not contain brackets or multiple spaces before or after hyphens or apostrophes. This affects the roll return file sent to NZ MOE. • Only the student's legal given names **must** be entered in the two **Given** fields. • Ensure that the student's middle names are **not** included in the first **Given** field but are included in the second **Given** field.
Preferred	Student's preferred first name. For example, a student named Robert might prefer to be called Rob.
Preferred Formal	Student's preferred first name for use on formal documents and occasions.
Initials	Student's initials.
Internal Name	Community member's name as used by the Synergetic database.
Override Internal Name	Select **Override Internal Name** to enter a different internal name.
Title	Student's title abbreviation. For example, Mr, Ms, Master or Miss. This is important for adult students.
Date of Birth	Student's date of birth. A student's date of birth is used for NZ MOE roll returns.

Field	Description
Age 1st Jan / Age Current	Depending on the configuration setting, either the student's: • current age for the current file year  • age as at 1st January for the current file year.  **Age 1st Jan** The field is useful to quickly refer to a student's age. For example, when preparing a NZ MOE roll return the following dates are useful when resolving errors: • Age at 1st January • Age at the March roll return date = Age 1st Jan + 3 months • Age at the July roll return date = Age 1st Jan + 7 months. See *Roll return errors and warnings* in the Roll returns manual. **Configuration** You can configure which field is displayed at your organisation. See *ShowCurrent configuration setting* in the System maintenance manual.
Family Position	Student's position in their family. For example, the eldest child's family position is **1**. **Note**: You must complete the **Family Position** field manually in future students. The student's family position is automatically calculated once the future student has been transferred into the Current Students constituency.
Gender	Student's gender. Gender is used for NZ MOE roll returns.
Religion	Student's religion. See *luReligion lookup table*.
Nationality	Student's nationality. **Note:** You can define the default **Nationality** in the system configuration. The **Country of Citizenship** on the **NZMOE** tab is used for NZ MOE roll returns not the **Nationality** field. See *Future Student Maintenance - NZMOE tab* (on page 215).
Parish	Student's parish, if applicable. Required by CEO schools.
Nationality 2	Nationality of a citizen with dual nationality.
Naturalis'n Date	Date that the student became a citizen of your country, if applicable.
Country of Birth	Student's country of birth. **Note:** To set the default value see the *Default:CountryOfBirthCode configuration setting* in the System maintenance manual.

Field	Description
Home Language	Native language spoken by the student, if different from the native language used in your organisation. **Note:** Maintain the values in the **luLanguage** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Home Email	Student's home email address. **Note**: This is important for adult students who are also the contact. Once they become a current student, they are usually assigned a network login for ongoing communication.
Phone BH / AH/ Mob	Student's telephone number during business hours, after hours, and mobile telephone number.
Address	Student's address during term time. **Note:** If both contacts have their **Lives With** flag selected, the address defaults to the **SC1** contact's address. Where there is a joint custody arrangement, this field shows the address of the first listed contact who the **Lives With** flag is selected for. **Note:** The **Lives With** flag is maintained on the **Contacts** tab. See *Future Student Maintenance - Contacts tab* (on page 159).

Buttons

Button	Description
...	Launch the **Community Maintenance** window for the student. See *Maintaining community members* in the Community manual. For example, you can launch into **Community Maintenance** then update address fields on the **Home Address** tab, when preparing NZ MOE roll returns. See *Updating community member details for roll returns* in the Roll returns manual.
Display Names...	Opens the **Community Names** window. Override the way Synergetic displays community names, if required. **Note:** This should be done sparingly in unusual circumstances. If you have to do this often, *Contact Synergetic Management Systems* support as you may have an incorrect setting. For example, you can update the **Main Name Primary** field to address mail to *Mr Adamski* instead of the mail being addressed in the Synergetic format (*Mr G Adamski*). 

Future Student Maintenance - Flags tab

Use the **Flags** tab to maintain flags and related information to:

- categorise students for school and government reporting
- specify religious milestones
- record passport and visa details
- record pre-enrolment requirements such as photo, immunisation certificates or out of hours school care needs.

Opening the Flags tab

To open the **Flags** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

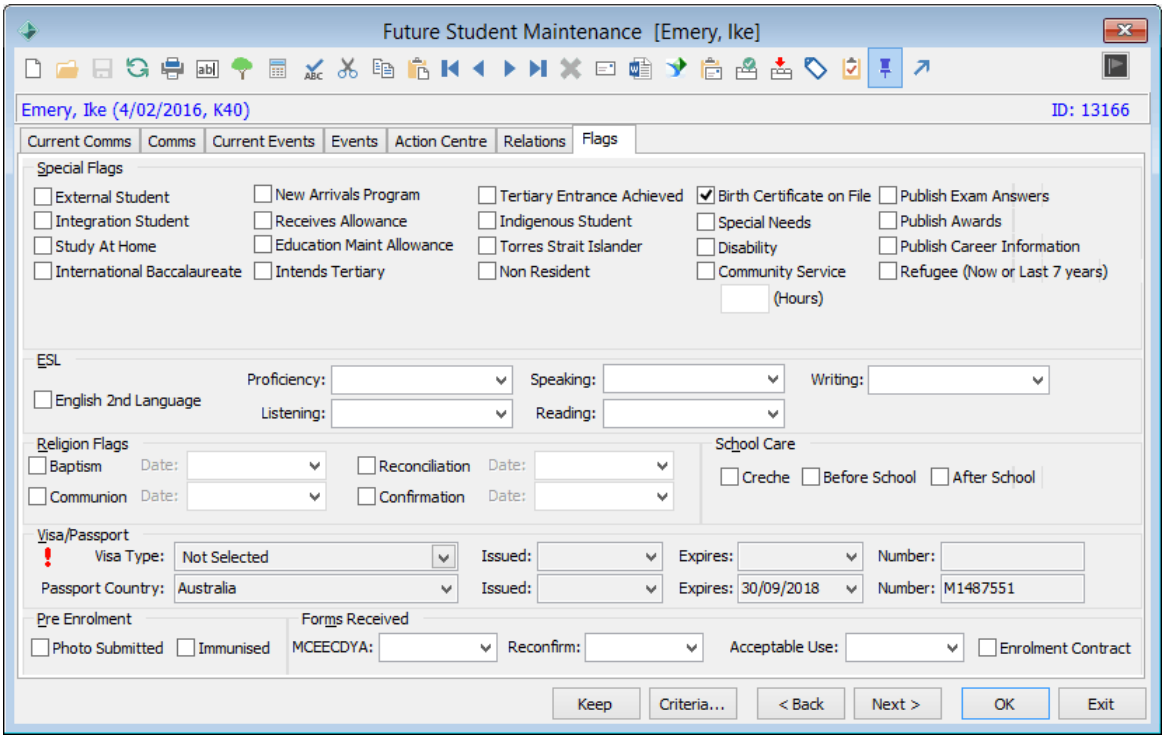
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Flags** tab.

   The **Flags** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Flags tab key fields and buttons

Special Flags area fields

Field	Description
External Student	Student is enrolled at another school and is undertaking classes at your organisation.
Integration Student	Student has learning difficulties and has a staff member assigned to assist them with their integration at your organisation.
Study At Home	Student studies from home.
International Baccalaureate	Student is undertaking International Baccalaureate subjects and examinations.
New Arrivals Program	Student is part of a new arrivals program.
Receives Allowance	Student receives a government allowance. This was formerly the Austudy/Youth Allowance.
Education Maintenance Allowance	Student receives an education maintenance allowance.
Intends Tertiary	Student intends to go on to tertiary study.
Tertiary Entrance Achieved	Student has successfully achieved tertiary entrance. In NZ MOE roll returns, this flag is selected to indicate that University Entrance has been awarded to the student. Applies to: • full- time secondary level students (student type is RE, FF, TPRE or TPREOM) • adult students (student type is RA, AD, TPRAE, TPAD or TPRAOM) leaving the NZ schooling sector and where the **Reason** is L, E, O, X or C. See *Updating current student details for roll returns* in the Roll returns manual.
Indigenous Student	Student is classified as an indigenous student in your country.
Torres Strait Islander	Student is classified as an Australian Torres Strait Islander.
Non Resident	Student is from overseas and not classified as a resident of your country.
Birth Certificate on File	A copy of the student's birth certificate is on file.
Special Needs	Student has special needs. The icon is displayed on the **Student Maintenance** window. **Tip:** Click on the icon on the **Student Maintenance** window to go straight to the **Flags** tab.
Disability	Student has a disability that may affect their learning.
Community Service	Student has completed community service.
Publish Exam Answers	Permission has been received to publish the student's exam results, including answers.
Publish Awards	Permission has been received to publish any awards received by the student.
Publish Career Information	Permission has been received to publish career information.

Field	Description
Refugee / **Refugee (Now or Last 7 Years)**	Student is a refugee. **Note:** In CEOVIC schools, select if the student is a refugee or has been a refugee in the last seven years.

Note: Enter additional information on the **Comments** tab or create a user form to store any additional attributes.

ESL (English as a Second Language) area fields

Field	Description
English 2nd Language	Select if the student's first language is **not** English. **Note:** Maintain the values for the following fields in the **luESLProficiencyLevel** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Proficiency	Student's overall command of English.
Listening	Student's understanding of spoken English.
Speaking	Student's ability to speak English.
Reading	Student's ability to read English.
Writing	Student's ability to write English.

Visa/Passport area fields

Visa and passport details can be viewed for:

- overseas students who are not residents of your country
- students embarking on international school excursions.

You can maintain one or more passports, and visa types and conditions on the **International** tab of **Future Student Maintenance**. See *Future Student Maintenance - International tab* (on page 222).

Field	Description
Visa Type	Type of visa the student holds.
Passport Country	Country that issued the student's passport.
Issued	Date the visa or passport was issued.
Expires	Date the visa or passport expires.
Number	Visa or passport number.

Buttons

Button	Description
!	Switch to the **International** tab to edit the student's visa and passport details, if you have security access. See *Future Student Maintenance - International tab* (on page 222).

Religion Flags area fields

Field	Description
Baptism	Select if baptised and specify the date.
Communion	Select if able to take Communion and specify the effective date.
Reconciliation	Select if reconciled and specify the date.
Confirmation	Select if confirmed and specify the date.

School Care area fields

Field	Description
Creche	Select if attending crèche at your organisation.
Before School	Select if attending before school care at your organisation.
After School	Select if attending after school care at your organisation.

Pre Enrolment area fields

Field	Description
Photo Submitted	Select if a photo has been received.
Immunised	Select if immunisation certificates have been received.

Forms Received area fields

Field	Description
MCEECDYA	Select the date when the student's MCEECDYA data collection form was last received. Applies only in Australia.
Reconfirmation	Select the date when the student's reconfirmation form was last received.
Acceptable Use	Select the date when the student's acceptable use form was last received, for the use of your organisation's computer-related resources.
Enrolment Contract	Select if the enrolment contract was received, if applicable at your organisation.

Future Student Maintenance - Enrol Details tab

Use the **Enrol Details** tab to:

- Maintain enquiry or application details.
- Maintain planned schooling details including the year enrolled and starting year level, campus and form.
- Display status of enrolment. To maintain enrolment status, see *Future Student Maintenance - Applications tab* (on page 113).
- Display details of activity related to the current application. To maintain activities, see *Future Student Maintenance - Activity tab* (on page 132).
- Maintain intended tertiary details for the application student.

Opening the Enrol Details tab

To open the **Enrol Details** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

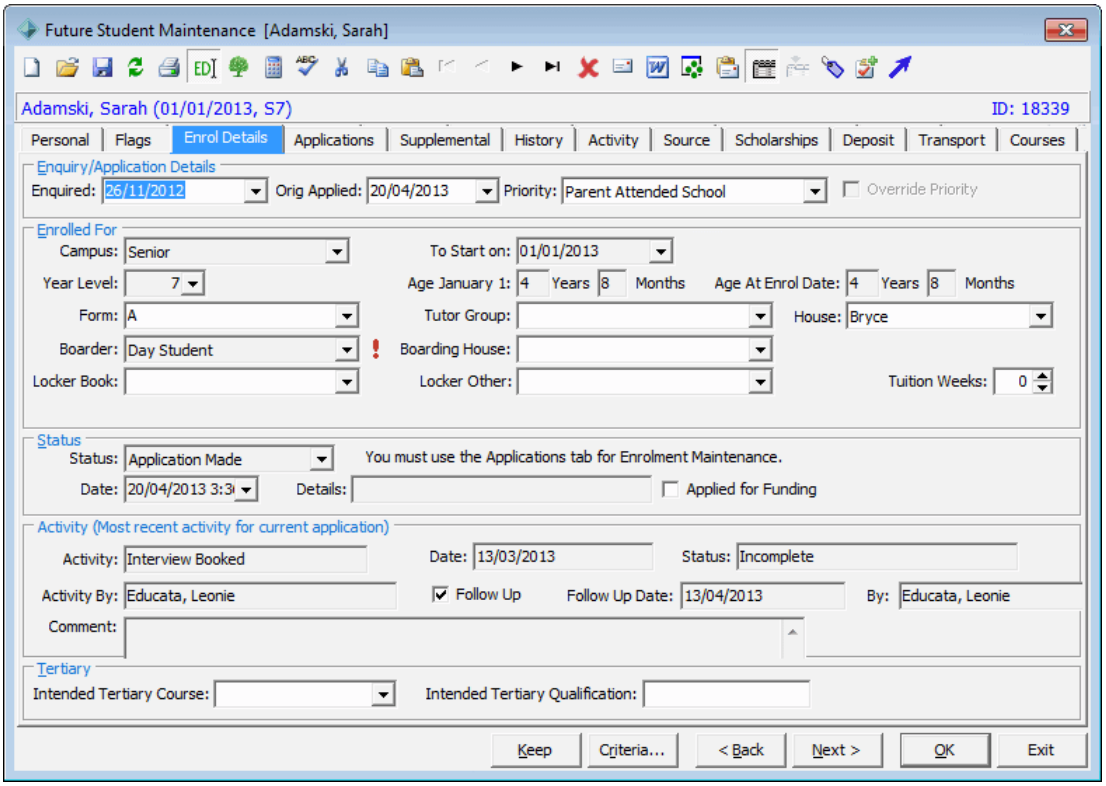
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

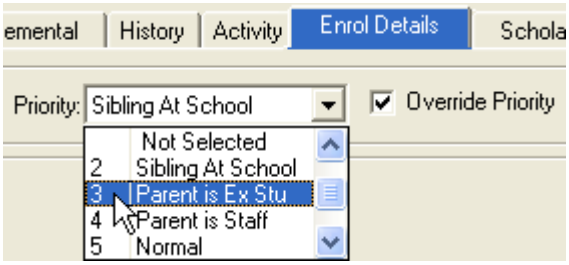
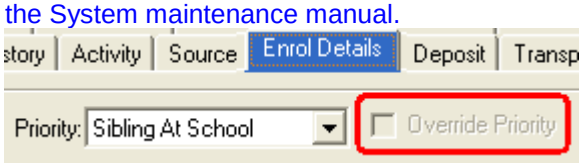
2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Enrol Details** tab.

   The **Enrol Details** tab of the **Future Student Maintenance** window is displayed.



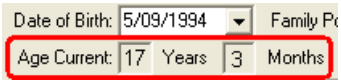
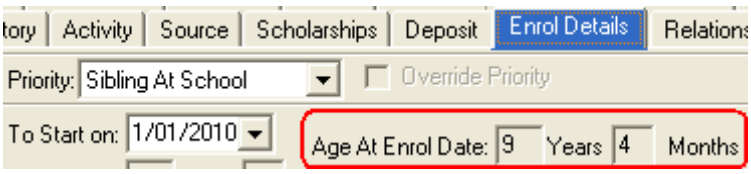
Future Student Maintenance - Enrol Details tab key fields

Enquiry/Application details area fields

Field	Description
Enquired	Date of the first enquiry for enrolment for the student.
Orig Applied	Date that the first application was received for enrolment.
Priority	Priority the application has been assigned. Typical values include: • Existing Family • Sibling at School • Parent is Ex Student • Parent is Staff • Normal. **Note:** Maintain the values in the **luFuturePriority** lookup table. See *luFuturePriority lookup table* in the System maintenance manual. **Note:** The **Priority** field is greyed out and read-only if the **AutoUpdate** configuration setting is set to **True**. See *AutoUpdate configuration setting* in the System maintenance manual.
Override Priority	Select the **Override Priority** field to enable the **Priority** field if: • the **Priority** field is greyed out and read-only • you need to update the value manually.  Also, see the **Priority** field. **Note:** The **Override Priority** field is greyed out if the **AutoUpdate** configuration setting is set to **False**. See *AutoUpdate configuration setting* in the System maintenance manual. 

Enrolled For area fields

Most of these fields are only defined when the student becomes a current student.

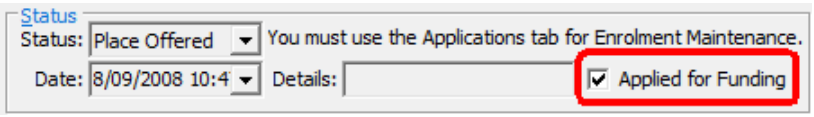
Field	Description
Campus	Student's campus, if your organisation has multiple campuses.
To Start On	Date the student will commence at your organisation. **Note:** Set to the first day of the year in most cases. Set to the actual start date when a student starts later in the year.
Year Level	Student year level.
Age 1st Jan / Age Current	Depending on the configuration setting, either the student's: • current age for the current file year  • age as at 1st January for the current file year. **Age 1st Jan** The field is useful to quickly refer to a student's age. For example, when preparing a NZ MOE roll return the following dates are useful when resolving errors: • Age at 1st January • Age at the March roll return date = Age 1st Jan + 3 months • Age at the July roll return date = Age 1st Jan + 7 months. See *Roll return errors and warnings* in the Roll returns manual. **Configuration** You can configure which field is displayed at your organisation. See *ShowCurrent configuration setting* in the System maintenance manual.
Age At Enrol Date	Student's age at the enrolment date. This is calculated from the: • **To Start on** field • **Date of Birth** field, updated on the **Personal** tab.  **Note:** If **1/1** (1st January) is entered in the **To Start on** field, the value is calculated from the first day of the first term of the specified year. If the actual start date is entered, the value is calculated based on this date.
Form	Allocated student form. **Note:** Maintain the values in the **luForm** lookup table. See *Maintaining lookup tables* in the System maintenance manual.

Field	Description
Tutor Group	Allocated student tutor group. For example, students may meet with their tutor before the first period to receive information about forthcoming events and other matters. **Note:** Maintain the values in the **luTutor** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
House	Student's allocated house.
Boarder	Student's residential status. Typical values include: • Boarder • Day Student • Home Stay. **Note:** Maintain the values in the **luBorder** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Boarding House	House that the boarder is allocated to.
Locker Book	Locker area.
Locker Other	Additional locker area, if required.
Tuition weeks	Number of tuition weeks.

Tip: Some organisations use the **Locker Book** or **Locker Other** field to record locker or lock details.

Status area fields

The fields in this area are maintained on the **Applications** tab. See *Future Student Maintenance - Applications tab* (on page 113).

Field	Description
Status	Status of the enquiry or enrolment, with the most recent entry displayed.
Date	Date of the most recent status entry of the enquiry or enrolment.
Details	Additional details about the most recent status entry of the enquiry or enrolment.
Applied for Funding	Select if the student has applied for funding. 

Activity area fields

The fields in this area are maintained on the **Activity** tab. See *Future Student Maintenance - Activity tab* (on page 132).

Field	Description
Activity	Identifier for the activity planned.
Date	Date the activity is scheduled for.
Status	Status of the activity. For example: • **Complete** • **Incomplete** • **Waiting for someone**.
Activity by	Person in your organisation who is responsible for the activity.
Follow Up / F'Up Date	Indicates if a follow up is required and if so, the date the follow up is scheduled for.
By	Person in your organisation who followed up on this activity.
Comment	Notes regarding the follow up.

Tertiary area fields

Field	Description
Intended Tertiary Course	Course the student intends to study, whether at: • another organisation • your organisation, if tertiary courses are offered. Select the course from the drop-down list. **Note:** Maintain the values using the **luTertiaryCourse** lookup table. See *luTertiaryCourse lookup table* in the System maintenance manual. **Tip**: You can use course codes designated by the tertiary admissions body.
Intended Tertiary Qualification	Qualification the student aims to complete successfully.

Future Student Maintenance - Applications tab

Use the **Applications** tab to view and maintain details about enrolment applications.

The applications are based on their order of entry into the system within date. The default application, that is, the applicant's first choice, is displayed in bold.

Opening the Applications tab

To open the **Applications** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

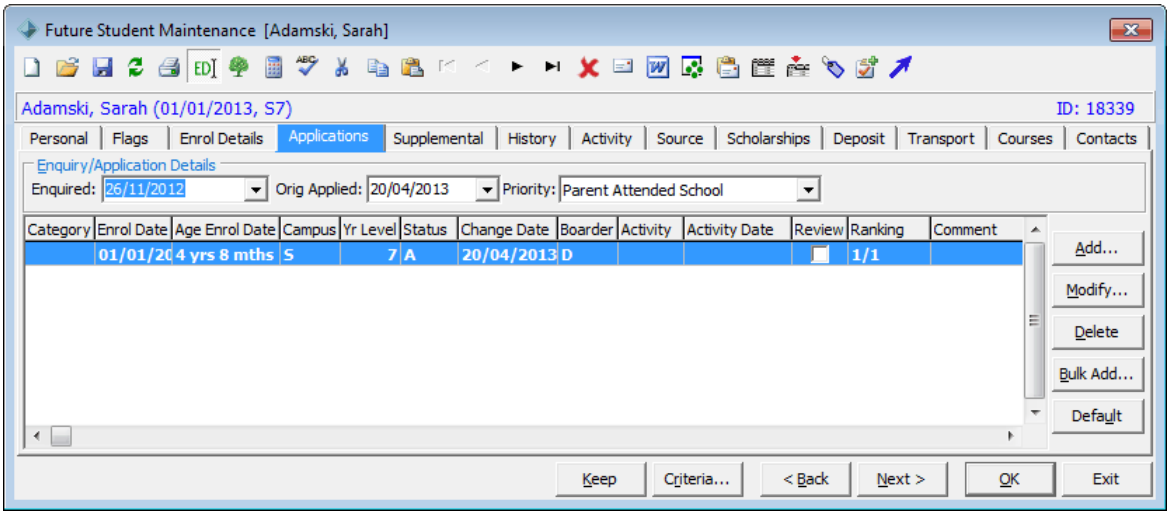
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Applications** tab.

   The **Applications** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Applications tab key fields and buttons

Enquiry/Application Details area fields

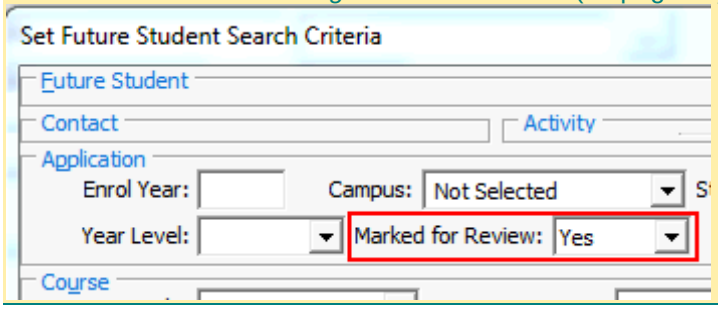
Field	Description
Enquired	Date of the first enquiry for enrolment of the student.
Orig Applied	Date that the first application was received for enrolment.
Priority	Priority category that the application has been assigned to.

Grid area fields

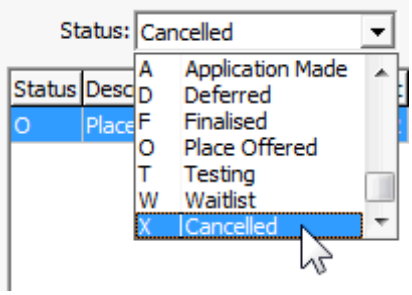
Field	Description
Category	Category for the application. **Note:** This grid field is only visible if the **UseApplicationCategory** configuration setting is **True**. See *UseApplicationCategory configuration setting*.
Enrol Date	Date the future student has applied to enrol at the campus starting at the specified year level.
Age Enrol Date	Student's age at the enrolment date of the application. This is calculated from the: • **Enrol Date** field • **Date of Birth** field, updated on the **Personal** tab. **Note:** If **1/1** (1st January) is entered in the **Enrol Date** field, the value is calculated from the first day of the first term of the specified year. If the actual start date is entered, the value is calculated based on this date.
Campus	Future student's campus.
Yr Level	Future student's year level.

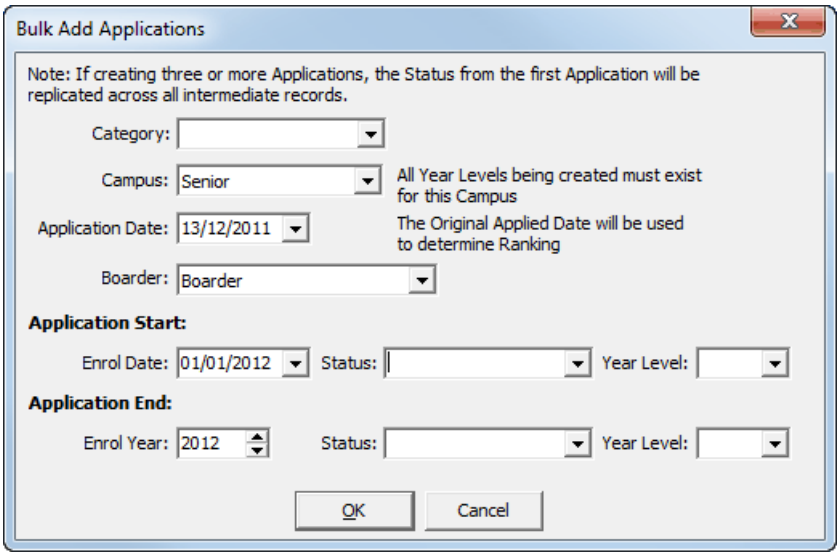
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Status</td><td>Status of the future student's application.
The typical default options are:
<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>A</td><td>Application made.</td></tr>
<tr><td>D</td><td>Deferred.</td></tr>
<tr><td>F</td><td>Finalised.</td></tr>
<tr><td>O</td><td>Place Offered.</td></tr>
<tr><td>W</td><td>Waitlisted.</td></tr>
<tr><td>X</td><td>Cancelled by the applicant.</td></tr>
</table>
Note: Use the luFutureStatus lookup table to maintain entries. See luFutureStatus lookup table in the System maintenance manual.

Tip: You can create mail merge letters using the crspFutureStatusChangePrint stored procedure. See Printing mail merge letters using an existing document in the Extracting data manual. The luFutureStatus table is linked to the luFutureStatusMerge lookup table using its MergeCode. When a status is changed, its MergeCode is also changed as well. Any applications with this MergeCode are selected by the stored procedure.</td></tr>
<tr><td>Change Date</td><td>Date the application was last updated. For example, the application may have been updated because the:
person changed their mind about their first choice for year of enrolment
status was altered.</td></tr>
<tr><td>Boarder</td><td>Boarding status of the application.</td></tr>
<tr><td>Activity</td><td>Activity associated with the application.</td></tr>
<tr><td>Activity Date</td><td>Date of the associated activity.</td></tr>
<tr><td>Review</td><td>Mark the record for future review or follow up.

Tip: When searching for future students, you can display all the applications that require review by selecting Yes in the Marked for Review field. See Searching for future students (on page 78).
 
</td></tr>
<tr><td>Ranking</td><td>Ranking applied to this application. See How ranking works (on page 383).</td></tr>
<tr><td>Application date</td><td>Date the application was created.</td></tr>
<tr><td>Comment</td><td>Any comments on the applications.</td></tr>
</table>

Buttons

Button	Description
Add...	Create an enrolment application. See *Creating future student enrolment applications* (on page 118). **Tip:** You can create mail merge letters using the **crspFutureStatusChangePrint** stored procedure. See *Printing mail merge letters using an existing document* in the Extracting data manual.
Modify...	Modify the highlighted enrolment application. See *Modifying future student enrolment applications* (on page 121). **Tip:** Double click the required application to modify the details.
Delete	Delete the highlighted enrolment application. **Tip:** We suggest that you cancel an application rather than deleting it so that you can maintain a history for the applicant. To cancel an application: 1. Highlight the application on the **Applications** tab. 2. Click Modify.... 3. Select **Cancelled** from the **Status** drop-down list. 

Button	Description
Bulk Add...	Create future student applications in bulk.  See *Creating future student applications in bulk* (on page 124).
Default	Make the highlighted application the applicant's first choice.

Creating future student enrolment applications

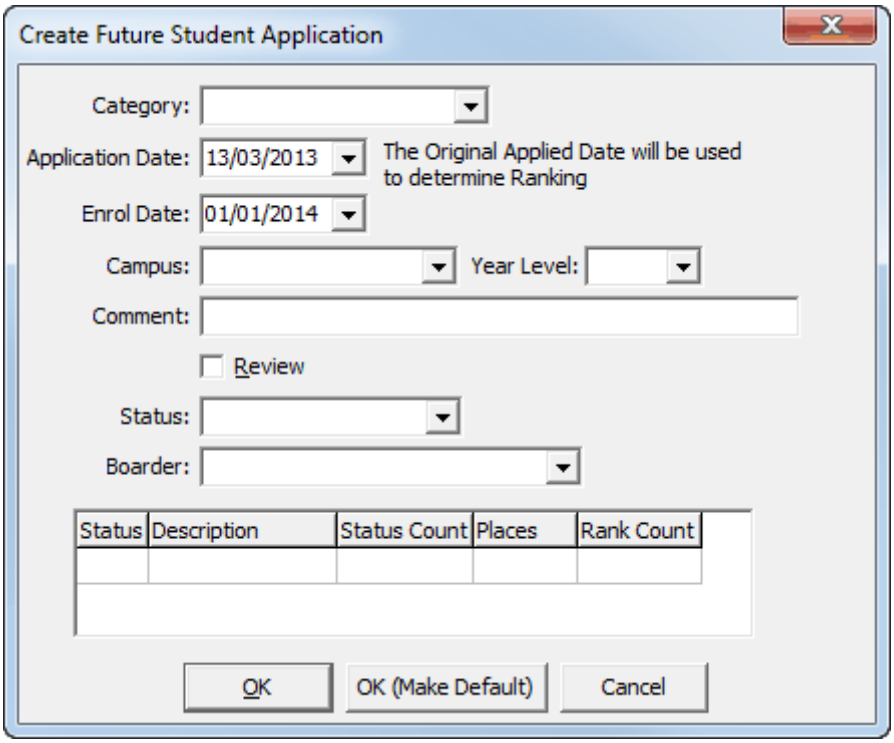
To create a new application for a future student:

1. Open the **Applications** tab in **Future Student Maintenance**. See *Future Student Maintenance - Applications tab* (on page 113).

   The **Applications** tab of the **Future Student Maintenance** window is displayed.

2. Click Add... .

   The **Create Future Student Application** window is displayed.



Create Future Student Application window key fields and buttons

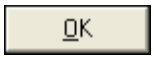
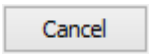
Fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Category</td><td>The category for the application, if applicable.
Note: This field may not be available at your organisation.</td></tr>
<tr><td>Application Date</td><td>Date of this application or default date.
Note: The original application date is used to determine the ranking of enrolment applications. You can change the ranking. See Future Student Maintenance - Applications tab (on page 113).</td></tr>
<tr><td>Enrol Date</td><td>Date the future student is applying to be enrolled for.</td></tr>
<tr><td>Campus</td><td>Campus the future student is enrolling in, for this application.</td></tr>
<tr><td>Year Level</td><td>Year level the future student is enrolling in, for this application.</td></tr>
<tr><td>Comment</td><td>Any comments about the application.</td></tr>
<tr><td>Review</td><td>Mark the application for further review or follow up.
Tip: When searching for future students, you can display all the applications that require review by selecting Yes in the Marked for Review field. See Searching for future students (on page 78).</td></tr>
<tr><td>Status</td><td>Status of the future student's application.
The typical default options are:
<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>A</td><td>Application made.</td></tr>
<tr><td>D</td><td>Deferred.</td></tr>
<tr><td>F</td><td>Finalised.</td></tr>
<tr><td>O</td><td>Place Offered.</td></tr>
<tr><td>W</td><td>Waitlisted.</td></tr>
<tr><td>X</td><td>Cancelled by the applicant.</td></tr>
</table>
Note: Use the luFutureStatus lookup table to maintain entries. See luFutureStatus lookup table in the System maintenance manual.
Tip: You can create mail merge letters using the crspFutureStatusChangePrint stored procedure. See Printing mail merge letters using an existing document in the Extracting data manual. The luFutureStatus table is linked to the luFutureStatusMerge lookup table using its MergeCode. When a status is changed, its MergeCode is also changed as well. Any applications with this MergeCode are selected by the stored procedure.</td></tr>
<tr><td>Boarder</td><td>Boarding status of the application.</td></tr>
</table>

Grid area fields

Field	Description
Status	Status of the application. See **Status** field above.
Description	Brief description of the status.
Status Count	Total number of students with the same: • enrolment year • campus • year level • gender • status. The count increases each time a student with this status is added to the database.
Places	Number of student places allocated for this gender and status within the year level for a given year. This is based on: • enrolment year • campus • year level • gender • status. This number is specified in the **luFutureYearPlaces** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Rank Count	Count of future students with the same: • enrolment year • campus • year level • gender • status.

Buttons

Button	Description
	Save the changes made.
	Save the changes made and make this application the default. That is, the application you are working towards.
	Cancel any changes made.

Modifying future student enrolment applications

To modify an existing application of a future student:

1. Open the **Applications** tab in **Future Student Maintenance**. See *Future Student Maintenance - Applications tab* (on page 113).

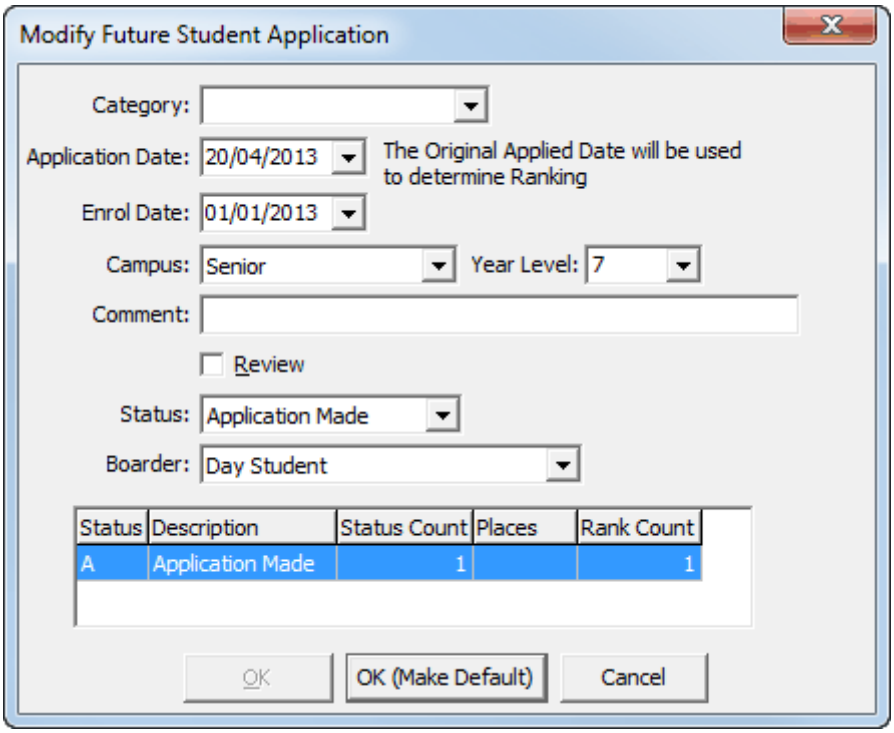
   The **Applications** tab of the **Future Student Maintenance** window is displayed.

2. Select the application to modify.

3. Click Modify... .

   The **Modify Future Student Application** window is displayed.

Tip: Double click on the required application to modify it.



Modify Future Student Application window key fields and buttons

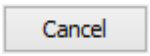
Fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Category</td><td>The category for the application, if applicable.
Note: This field may not be available at your organisation.</td></tr>
<tr><td>Application Date</td><td>Date of this application or default date.
Note: The original application date is used to determine the ranking of enrolment applications. You can change the ranking. See Future Student Maintenance - Applications tab (on page 113).</td></tr>
<tr><td>Enrol Date</td><td>Date the future student is applying to be enrolled for.</td></tr>
<tr><td>Campus</td><td>Campus the future student is enrolling in, for this application.</td></tr>
<tr><td>Year Level</td><td>Year level the future student is enrolling in, for this application.</td></tr>
<tr><td>Comment</td><td>Any comments about the application.</td></tr>
<tr><td>Review</td><td>Mark the application for further review or follow up.
Tip: When searching for future students, you can display all the applications that require review by selecting Yes in the Marked for Review field. See Searching for future students (on page 78).</td></tr>
<tr><td>Status</td><td>Status of the future student's application.
The typical default options are:
<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>A</td><td>Application made.</td></tr>
<tr><td>D</td><td>Deferred.</td></tr>
<tr><td>F</td><td>Finalised.</td></tr>
<tr><td>O</td><td>Place Offered.</td></tr>
<tr><td>W</td><td>Waitlisted.</td></tr>
<tr><td>X</td><td>Cancelled by the applicant.</td></tr>
</table>
Note: Use the luFutureStatus lookup table to maintain entries. See luFutureStatus lookup table in the System maintenance manual.
Tip: You can create mail merge letters using the crspFutureStatusChangePrint stored procedure. See Printing mail merge letters using an existing document in the Extracting data manual. The luFutureStatus table is linked to the luFutureStatusMerge lookup table using its MergeCode. When a status is changed, its MergeCode is also changed as well. Any applications with this MergeCode are selected by the stored procedure.</td></tr>
<tr><td>Boarder</td><td>Boarding status of the application.</td></tr>
</table>

Grid area fields

Field	Description
Status	Status of the application. See **Status** field above.
Description	Brief description of the status.
Status Count	Total number of students with the same: • enrolment year • campus • year level • gender • status. The count increases each time a student with this status is added to the database.
Places	Number of student places allocated for this gender and status within the year level for a given year. This is based on: • enrolment year • campus • year level • gender • status. This number is specified in the **luFutureYearPlaces** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Rank Count	Count of future students with the same: • enrolment year • campus • year level • gender • status.

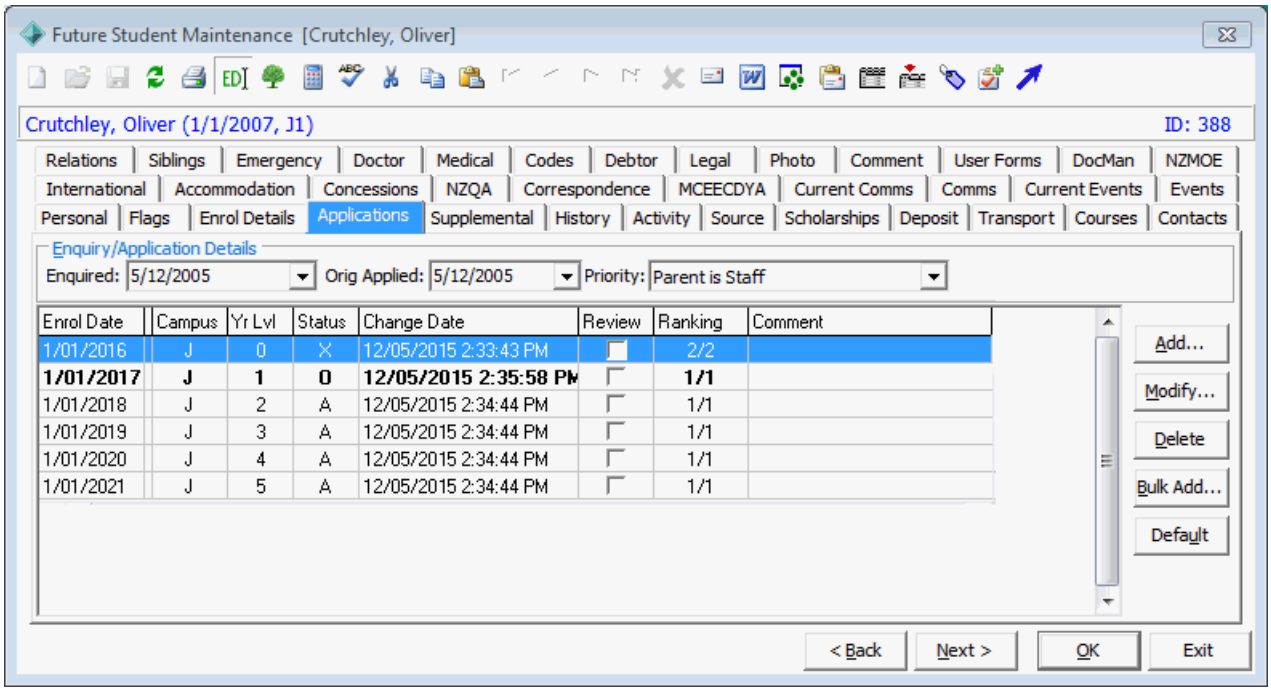
Buttons

Button	Description
	Save the changes made.
	Save the changes made and make this application the default. That is, the application you are working towards.
	Cancel any changes made.

Creating future student applications in bulk

In the example, Synergetic generates six applications for the prospective student:

- Year 7 in 2016
- Year 8 in 2017
- and so on, up to Year 12 in 2021.



To create a number of new enrolment applications for a future student:

1. Open the **Applications** tab in **Future Student Maintenance**. See *Future Student Maintenance - Applications tab* (on page 113).

   The **Applications** tab of the **Future Student Maintenance** window is displayed.

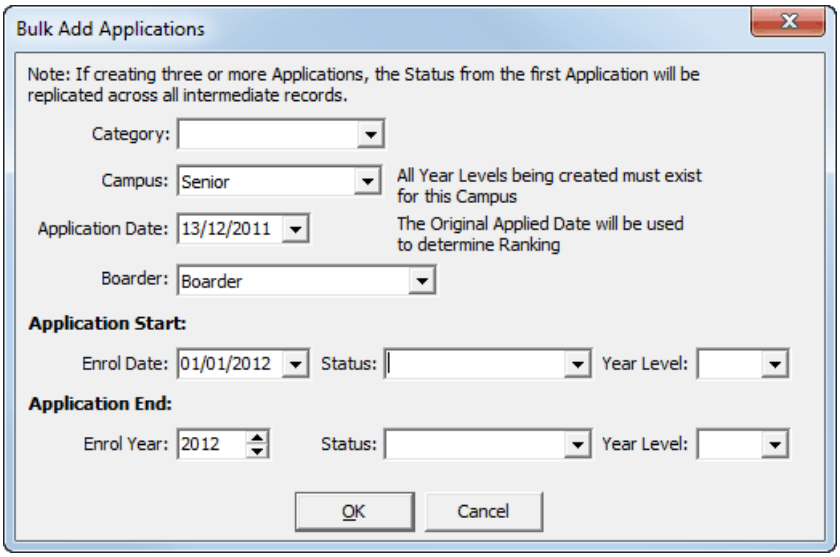
2. Click Bulk Add....

   The **Bulk Add Applications** window is displayed.

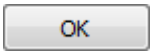
3. Select the campus in the **Campus** field.

   The application date defaults to the current date. If required, select a different application date.

4. Select the:
   - year for the first application in the **Application Start** area
   - last year of application in the **Application End** area.



   This allows you to create a series of applications for different enrolment years and year levels.

5. Click 

.

Note: Synergetic can also be configured to automatically generate an application record for all years and year levels past the selected enrol year. See *AutoGenerate configuration setting* in the System maintenance manual.

Bulk Add Applications window key fields and buttons

Fields

Field	Description
Category	Category of the application. **Note:** This field may not be displayed at your organisation.
Campus	Campus the future student is enrolling in for this application.
Application Date	Date of this application. **Note:** The original application date is used to determine the ranking of enrolment applications.
Boarder	Boarding status of the application.

Application Start area fields

Field	Description
Enrol Date	Enrolment date for the applicant's first choice.
Status	Status of the future student's application. The typical default options are:

Status	Description
A	Application made.
D	Deferred.
F	Finalised.
O	Place offered.
W	Waitlisted.
X	Cancelled by the applicant.

Note: Use the **luFutureStatus** lookup table to maintain entries. See *luFutureStatus lookup table* in the System maintenance manual.

Tip: You can create mail merge letters using the **crspFutureStatusChangePrint** stored procedure. See *Printing mail merge letters using an existing document* in the Extracting data manual. The **luFutureStatus** table is linked to the **luFutureStatusMerge** lookup table using its **MergeCode**. When a status is changed, its **MergeCode** is also changed as well. Any applications with this **MergeCode** are selected by the stored procedure.

Year Level	Year level the future student is enrolling in for this application.

Application End area fields

Field	Description
Enrol Year	Last year that the prospective student wants to make an application for.
Status	Status of the future student. As with the **Status** field above, the available options are maintained in the **luFutureStatus** lookup table.
Year Level	Year level the future student is enrolling in for this year.

Buttons

Button	Description
	Save the changes made.
	Cancel any changes made.

Future Student Maintenance - Supplemental tab

Use the **Supplemental** tab to maintain the source of the enrolment enquiry.

Opening the Supplemental tab

To open the **Supplemental** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

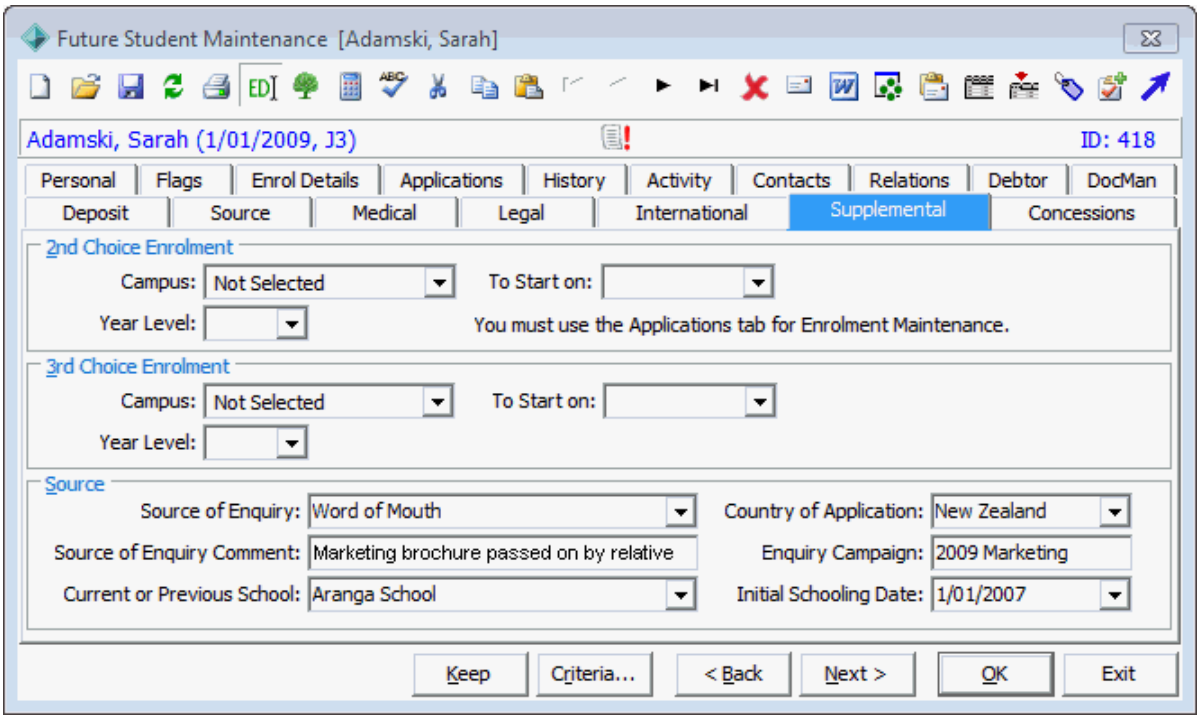
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Supplemental** tab.

   The **Supplemental** tab of the **Future Student Maintenance** window is displayed.

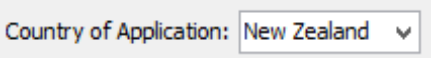


Future Student Maintenance - Supplemental tab key fields

2nd and 3rd Choice Enrolment areas fields

Additional enrolment applications are now maintained on the **Applications** tab.
See *Future Student Maintenance - Applications tab* (on page 113).

Source area fields

Field	Description
Source of Enquiry	How the person making the enquiry became aware of your organisation. Examples include: • Friends Living in Area • Local Newspaper Advertising • Parent is Past Student • Television Commercial. **Note**: Use the **luEnquirySource** lookup table to maintain the values. See *Maintaining lookup tables* in the System maintenance manual.
Country of Application	Country from which the application is received, if different from your organisation's. That is, overseas students.  **Note**: Use the **luCountry** lookup table to maintain the values. See *Maintaining lookup tables* in the System maintenance manual.
Source of Enquiry Comment	Any notes or comments. For example, 'Referred by the Smiths, who have three children currently at the school'.
Enquiry Campaign	Campaign that the enquiry is in response to. **Note**: Use the **luEnquiryCampaign** lookup table to maintain the values. See *luEnquiryCampaign lookup table* in the System maintenance manual.
Current or Previous School	Current or previous school attended by the future student, if applicable.
Date of Initial Schooling	Usually the date when the student first attends your organisation. However for: • CEO schools, the date a student first studies in Australia • For NZ schools, the date when a student turns **5** years old.

Future Student Maintenance - History tab

Use the **History** tab to:

- view a history of default enrolment applications and changes made to them
- modify the mail merge code of individual enrolment applications
- delete status history records.

Opening the History tab

To open the **History** tab:

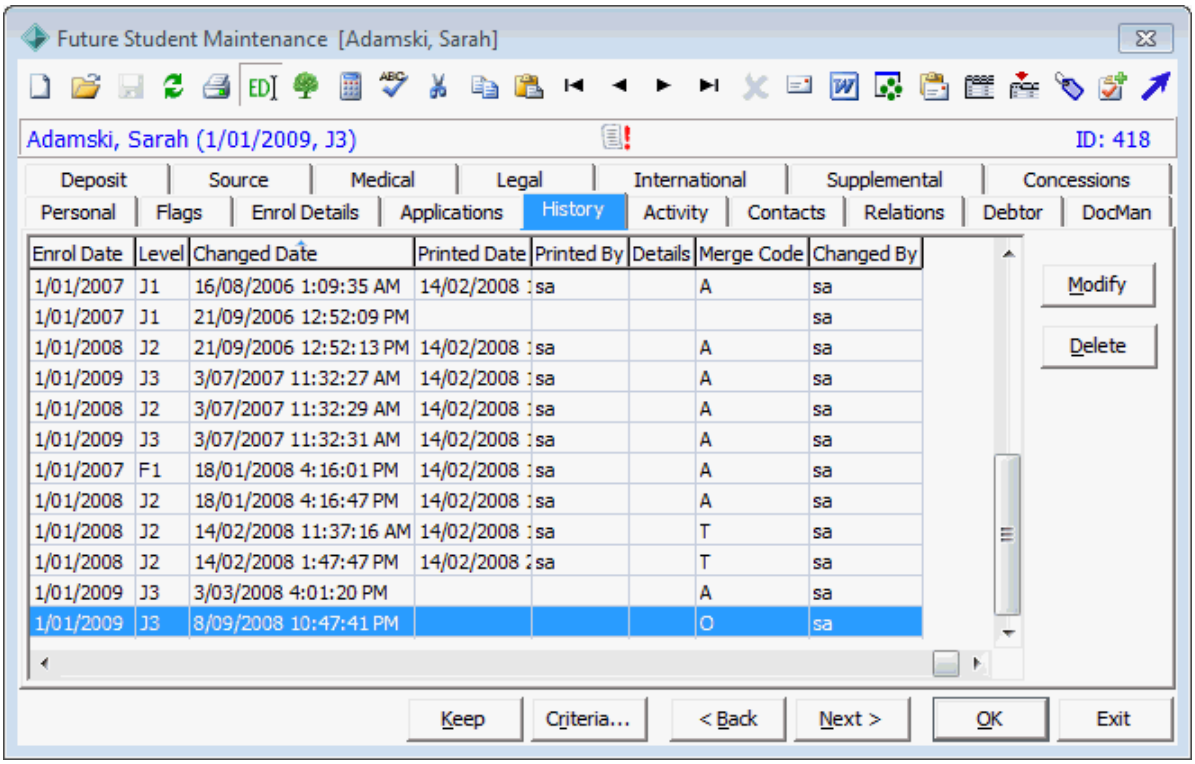
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **History** tab.

   The **History** tab of the **Future Student Maintenance** window is displayed.

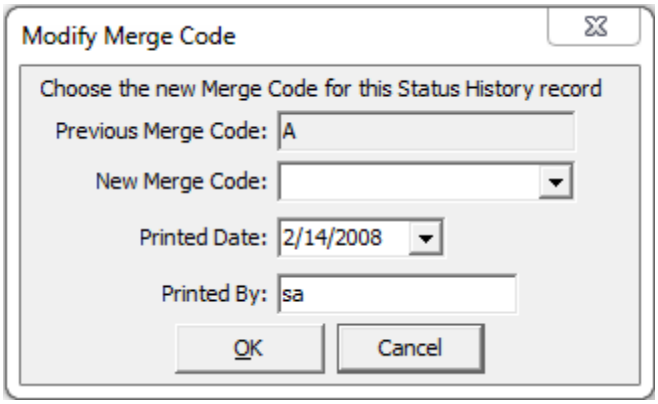


Future Student Maintenance - History tab key fields and buttons

Grid area fields

Field	Description
Status	Status code of the status history record for the enrolment application.
Description	Description of the status history record for the enrolment application.
Enrol Date	Date of enrolment of the application.
Level	Year level that the future student is enrolled in.
Changed Date	Date the change was made to the future student's record.
Printed Date and Printed By	Details of when the enrolment letters were printed and by whom.
Details	Comments originating from the **Application** tab. See *Future Student Maintenance - Applications tab* (on page 113).
Merge Code	Used by stored procedures when merging mail. **Tip:** You can create mail merge letters using the **crspFutureStatusChangePrint** stored procedure. See *Printing mail merge letters using an existing document* in the Extracting data manual. The **luFutureStatus** table is linked to the **luFutureStatusMerge** lookup table using its **MergeCode**. When a status is changed, its **MergeCode** is also changed as well. Any applications with this **MergeCode** are selected by the stored procedure.
Changed by	User ID of the person who made the changes to the future student's record.

Buttons

Button	Description
Modify	Modify the merge code of the highlighted status history record. The **Modify Merge Code** window is displayed.  **Note:** Clear the **Printed Date** and **Printed By** fields if you are reprinting a mail merge letter that was originally created using the **crspFutureStatusChangedPrint** stored procedure. See *Reprinting mail merge letters* in the Extracting data manual.
Delete	Delete the highlighted status history for the enrolment application.

Future Student Maintenance - Activity tab

Use the **Activity** tab to view and maintain activities for the future student. You can record information such as when they attended an open day, when you phoned them or when they visited the principal.

If the activity record is displayed in:

- *italics*, a follow up has been set up for the activity
- **bold**, the follow up is overdue.

Additional uses of the Activity tab

You can use a database query or a stored procedure to list all the people who have the **Mail Rqst** (request) flag set. For example, this can be used in mail merges with Microsoft Word.

The **crspFutureActivityPrint** stored procedure has the advantage that in addition to retrieving key activity data it also updates fields to indicate when the letter was printed (**Mailed Date**) and by whom (**Mailed By**). See *Using stored procedures to retrieve Synergetic data* in the Extracting data manual.

Opening the Activity tab

To open the **Activity** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

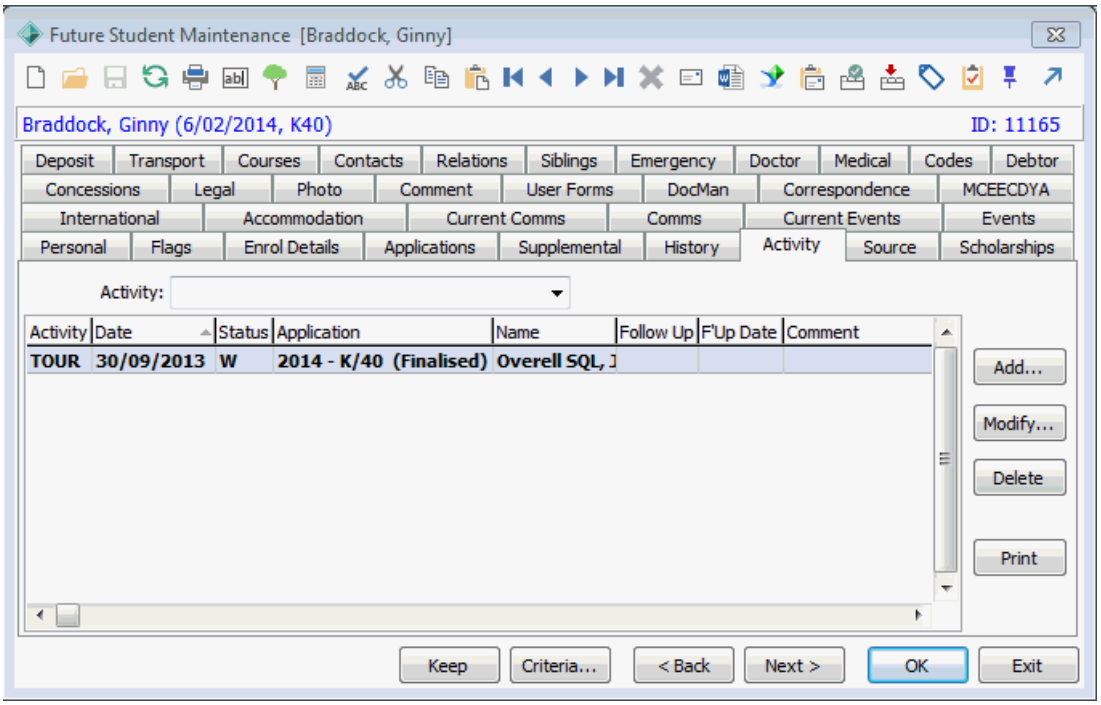
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

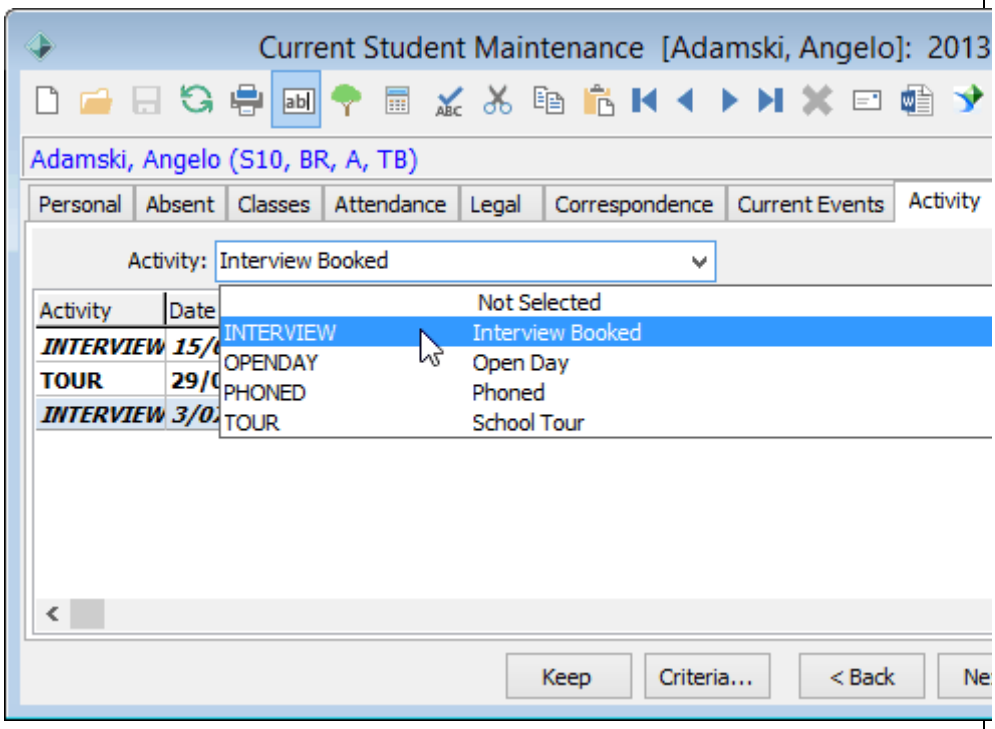
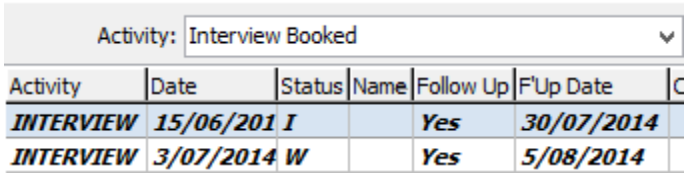
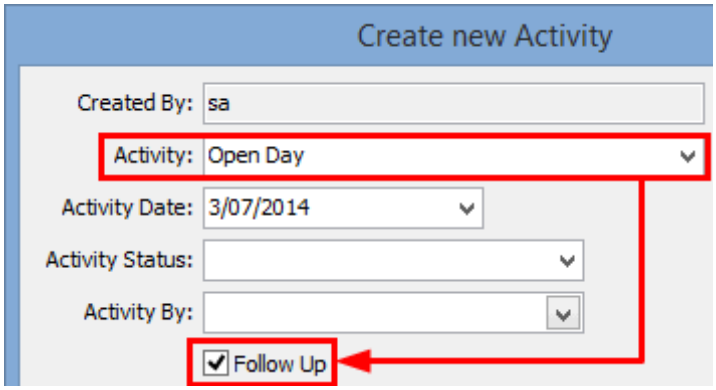
2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Activity** tab.

   The **Activity** tab of the **Future Student Maintenance** window is displayed.

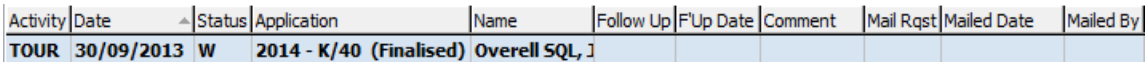


Future Student Maintenance - Activity tab key fields and buttons

Fields

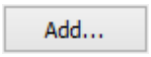
Field	Description
Activity	Filter activities displayed in the grid.  Select one of the values from the drop-down list. This restricts the activities displayed.  If this filter is selected and you click , the **Activity** field is set on the **Create New Activity** window, along with any related selections.  **Note:** Maintain the values in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual.

Grid area fields

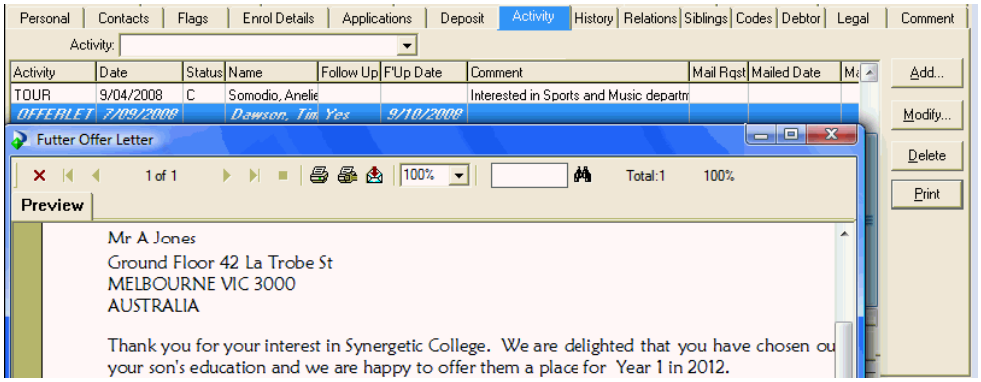


Field	Description
Activity	Identifier for the activity planned.
Date	Date the activity is scheduled for.
Status	Status of the activity. For example: • **Complete** • **Incomplete** • **Waiting for someone**.
Application	Enrolment application that the activity is related to.
Name	Person in your organisation who is responsible for the activity.
Follow Up / F'Up Date	Indicates if a follow up is required and if so, the date the follow up is scheduled for.
Comment	Notes regarding the follow up.
Mail Rqst / Mailed Date / Mailed By	Indicates if a mailed request is required and if so: • the date the mail request is scheduled for • who mailed the request.
Activity ID	Unique number identifying the activity.
F'Up ID	Unique number identifying the follow up to the activity.
Created By	User ID of the user who created the activity.

Buttons

Button	Description
	Add an activity for the prospective student. See *Creating activities* (on page 136).
	Modify the highlighted activity. See *Modifying activities* (on page 139).
	Delete the selected activity.

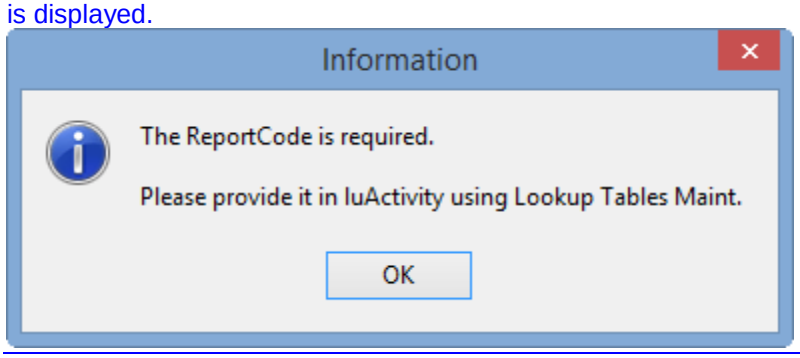
Button	Description
Print	Print a report for the selected activity. For example, an offer letter.



The report must be:

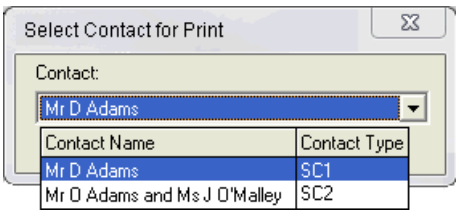
- Created using Crystal Reports.
- Placed in the Synergetic site reports directory.
- Set up with the correct parameters. *Contact Synergetic Management Systems* to set up a report for this purpose.
- Defined in the lookup table for the type of activity. See *luActivity lookup table* in the System maintenance manual.

Note: If a report is not defined for the type of activity, the following dialog window is displayed.



The report prompts you:

- If any of the required parameters are missing, such as **Mailed Date** and **Mailed By** fields.
- If a form letter, or similar report, is set up to be addressed to one of the student's contacts.



This is set using the **ReportPromptContactTypeFlag** field in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual.

Creating activities

To create a new activity for a future student:

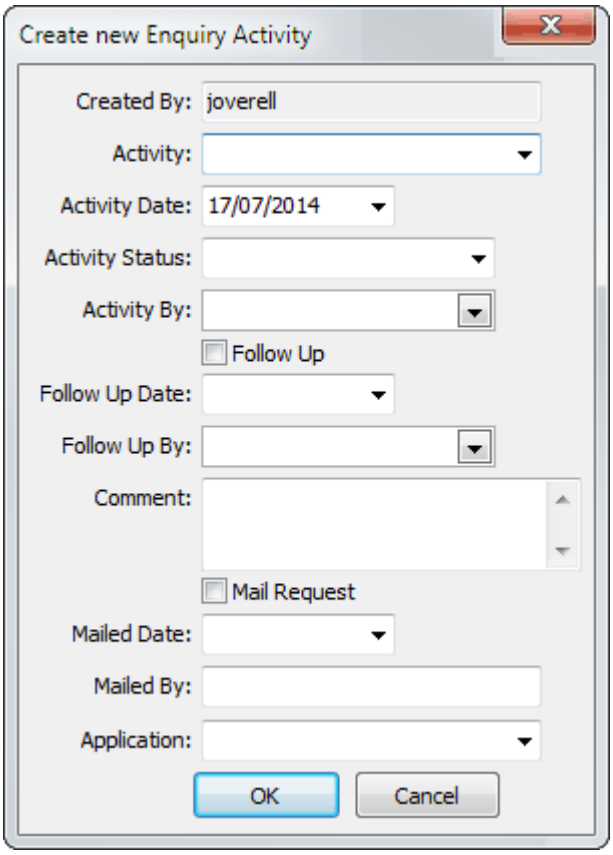
1. Open the **Activity** tab in **Future Student Maintenance**. See *Future Student Maintenance - Activity tab* (on page 132).

   The **Activity** tab of the **Future Student Maintenance** window is displayed.

2. Click

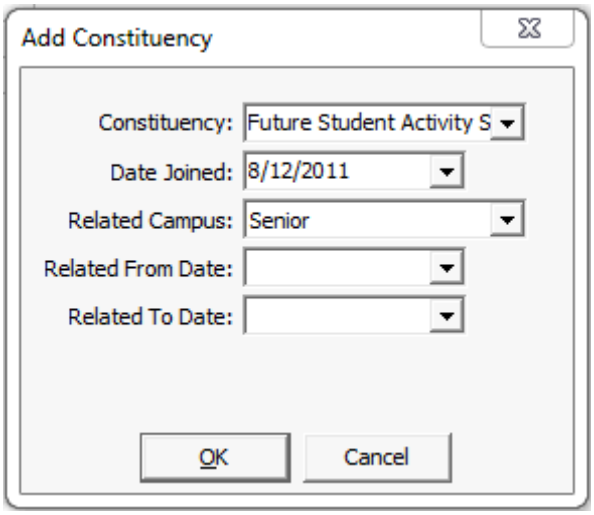
.

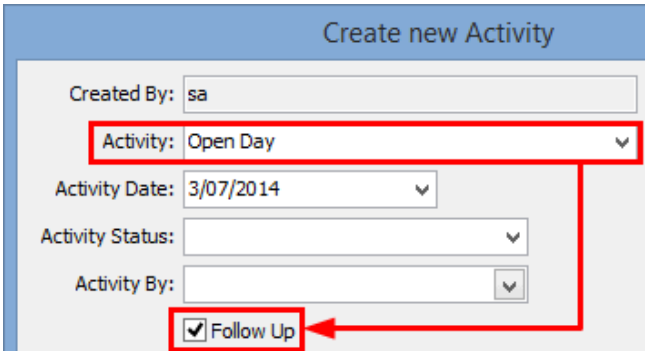
   The **Create New Activity** window is displayed.



Note: The drop-down list for **Activity By** and **Follow Up By** contain the staff who are in the **FSAS** constituency. To add a staff member to the drop-down list, bring up the staff member's community record and, on the **Constits** tab, click **Add** to put the staff member into the **FSAS** constituency.

Create New Activity window key fields

Field	Description
Created By	Person who created the activity. This is a read-only field.
Activity	Description of the activity. The available options are maintained in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual.
Activity Date	Date the activity is scheduled for.
Activity Status	Status of the activity. For example: • **Complete** • **Incomplete** • **Waiting for someone**. The available options are maintained in the **luActivityStatus** lookup table. See *luActivityStatus lookup table* in the System maintenance manual.
Activity By	Person in your organisation who is responsible for the activity. Valid values include all community members that belong to the **FSAS** constituency.  See *Adding a community member to a user-defined constituency* in the Community manual.

Field	Description
Follow Up	Indicates whether or not follow up is required. **Note**: The activity record is displayed in italics on the **Activity** tab if you select the **Follow Up** field. Activity | Date | Follow Up | F'Up Date *INTERVIEW* *15/06/201* *Yes* *30/07/2014* *INTERVIEW* *3/07/2014* *Yes* *5/08/2014* See the **Follow Up Date** field. When creating activities, the **Follow Up** field may be selected by default for the type of activity. This depends on the **FollowUpFlag** in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual. 
Follow Up Date / **Follow Up By**	Follow up date and person responsible for following up. The responsible person must be a member of the **FSAS** constituency to be listed. See the **Activity By** field. **Note:** The activity record is displayed in bold italics on the **Activity** tab if the **Follow Up Date** is in the past. Activity | Date | Follow Up | F'Up Date *INTERVIEW* *15/06/201* *Yes* *30/07/2014*
Comment	Comments and information regarding follow up and mail requests. Use any comments with the **Mail Request** field to record either: • A request for information from the student. For example, they may want you to send out more information on the music program. • Information to be included in a mail merge letter to the student. For example, the time and room that you are meeting with the student and their parents or guardians.
Mail Request	Indicates whether or not: • mailed information is required • a letter is being sent using the mail merge feature of Microsoft Word. You can use a database query or a stored procedure to list all the people who have this flag set. For example, this can be used in mail merges with Microsoft Word. The **crspFutureActivityPrint** stored procedure has the advantage that, in addition to retrieving key activity data, it also updates fields to indicate when the letter was printed. See *Using stored procedures to retrieve Synergetic data* in the Extracting data manual.
Mailed Date / **Mailed By**	Date of the mailed communication and who mailed the item. These are set by a stored procedure when merging mail. See the **Mail Request** field.

Modifying activities

To modify an existing activity for a future student:

1. Open the **Activity** tab in **Future Student Maintenance**. See *Future Student Maintenance - Activity tab* (on page 132).

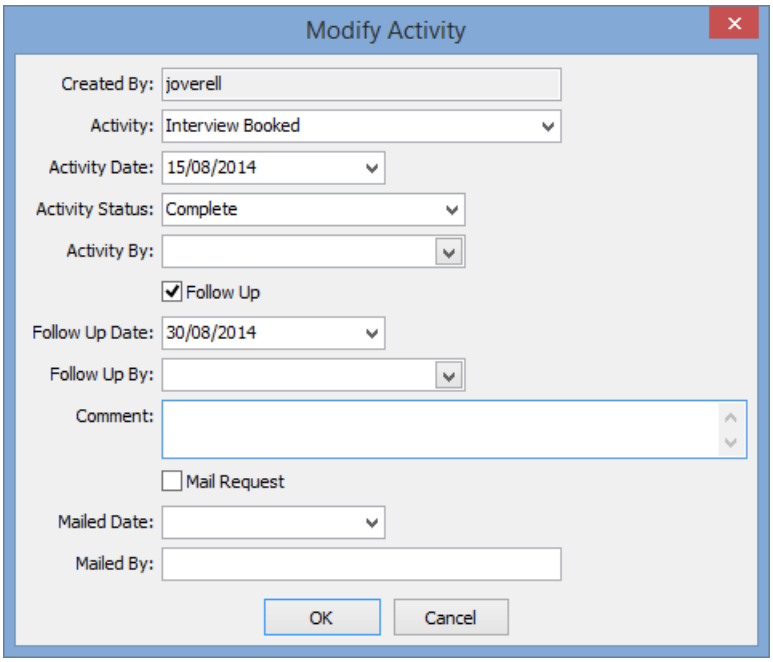
   The **Activity** tab of the **Future Student Maintenance** window is displayed.

2. Select the activity to modify.

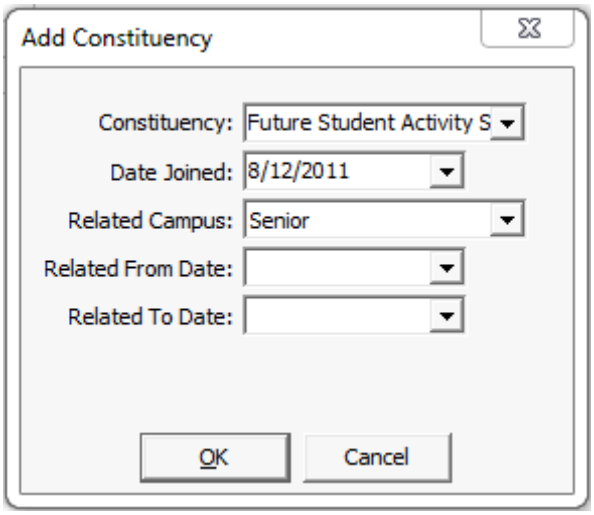
   Tip: Double click the required activity to modify the details.

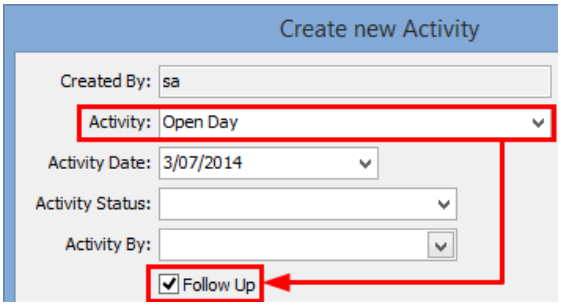
3. Click Modify... .

   The **Modify Activity** window is displayed.



Modify Activity window key fields

Field	Description
Created By	Person who created the activity. This is a read-only field.
Activity	Description of the activity. The available options are maintained in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual.
Activity Date	Date the activity is scheduled for.
Activity Status	Status of the activity. For example: • **Complete** • **Incomplete** • **Waiting for someone**. The available options are maintained in the **luActivityStatus** lookup table. See *luActivityStatus lookup table* in the System maintenance manual.
Activity By	Person in your organisation who is responsible for the activity. Valid values include all community members that belong to the **FSAS** constituency.  See *Adding a community member to a user-defined constituency* in the Community manual.

Field	Description
Follow Up	Indicates whether or not follow up is required. **Note**: The activity record is displayed in italics on the **Activity** tab if you select the **Follow Up** field. Activity | Date | Follow Up | F'Up Date *INTERVIEW* | *15/06/201* | *Yes* | *30/07/2014* *INTERVIEW* | *3/07/2014* | *Yes* | *5/08/2014* See the **Follow Up Date** field. When creating activities, the **Follow Up** field may be selected by default for the type of activity. This depends on the **FollowUpFlag** in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual. 
Follow Up Date / Follow Up By	Follow up date and person responsible for following up. The responsible person must be a member of the **FSAS** constituency to be listed. See the **Activity By** field. **Note:** The activity record is displayed in bold italics on the **Activity** tab if the **Follow Up Date** is in the past. Activity | Date | Follow Up | F'Up Date *INTERVIEW* | *15/06/201* | *Yes* | *30/07/2014*
Comment	Comments and information regarding follow up and mail requests. Use any comments with the **Mail Request** field to record either: • A request for information from the student. For example, they may want you to send out more information on the music program. • Information to be included in a mail merge letter to the student. For example, the time and room that you are meeting with the student and their parents or guardians.
Mail Request	Indicates whether or not: • mailed information is required • a letter is being sent using the mail merge feature of Microsoft Word. You can use a database query or a stored procedure to list all the people who have this flag set. For example, this can be used in mail merges with Microsoft Word. The **crspFutureActivityPrint** stored procedure has the advantage that, in addition to retrieving key activity data, it also updates fields to indicate when the letter was printed. See *Using stored procedures to retrieve Synergetic data* in the Extracting data manual.
Mailed Date / Mailed By	Date of the mailed communication and who mailed the item. These are set by a stored procedure when merging mail. See the **Mail Request** field.
Application	Enrolment application associated with the activity.

Future Student Maintenance - Source tab

Use the **Source** tab to maintain:

- Source of enquiry. This is where the person heard about your organisation. For example from friends, a newspaper advertisement or by living locally. If you maintain this information well, you can use it to target future advertising campaigns.
- Pre-entry comments. Use this to record any special skills the prospective student has.

Opening the Source tab

To open the **Source** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

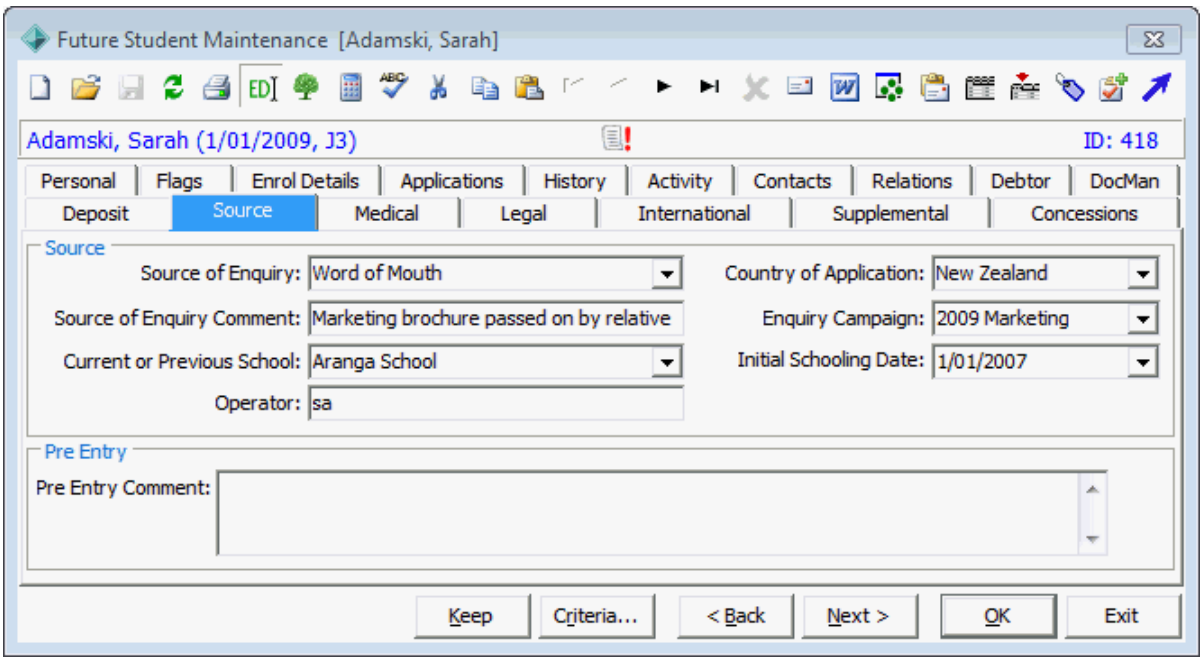
   The **Set Future Student Search Criteria** window is displayed.

   Tip: You can also access the future student functions by clicking

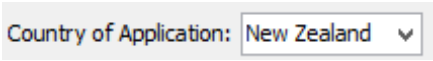
.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Source** tab.

   The **Source** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Source tab key fields

Field	Description
Source of Enquiry	How the person making the enquiry became aware of your organisation. Examples include: • Friends Living in Area • Local Newspaper Advertising • Parent is Past Student • Television Commercial. **Note**: Use the **luEnquirySource** lookup table to maintain the values. See *Maintaining lookup tables* in the System maintenance manual.
Country of Application	Country from which the application is received, if different from your organisation's. That is, overseas students.  **Note**: Use the **luCountry** lookup table to maintain the values. See *Maintaining lookup tables* in the System maintenance manual.
Source of Enquiry Comment	Any notes or comments. For example, 'Referred by the Smiths, who have three children currently at the school'.
Enquiry Campaign	Campaign that the enquiry is in response to. **Note**: Use the **luEnquiryCampaign** lookup table to maintain the values. See *luEnquiryCampaign lookup table* in the System maintenance manual.
Current or Previous School	Current or previous school attended by the future student, if applicable.
Initial Schooling Date	Usually the date when the student first attends your organisation. However for: • CEO schools, the date a student first studies in Australia • For NZ schools, the date when a student turns **5** years old.
Operator	User's login for the person who created the future student record.
Pre Entry Comment	Any additional information relevant to the future student's application. For example: • special skills the student has • keen interests.

Future Student Maintenance - Scholarships tab

Use the **Scholarships** tab to maintain scholarships applied for and awarded at your organisation.

> **Tip:** You can use this tab to maintain information about entrance exams and assessment tests in addition to scholarships and bursaries.

Opening the Scholarships tab

To open the **Scholarships** tab:

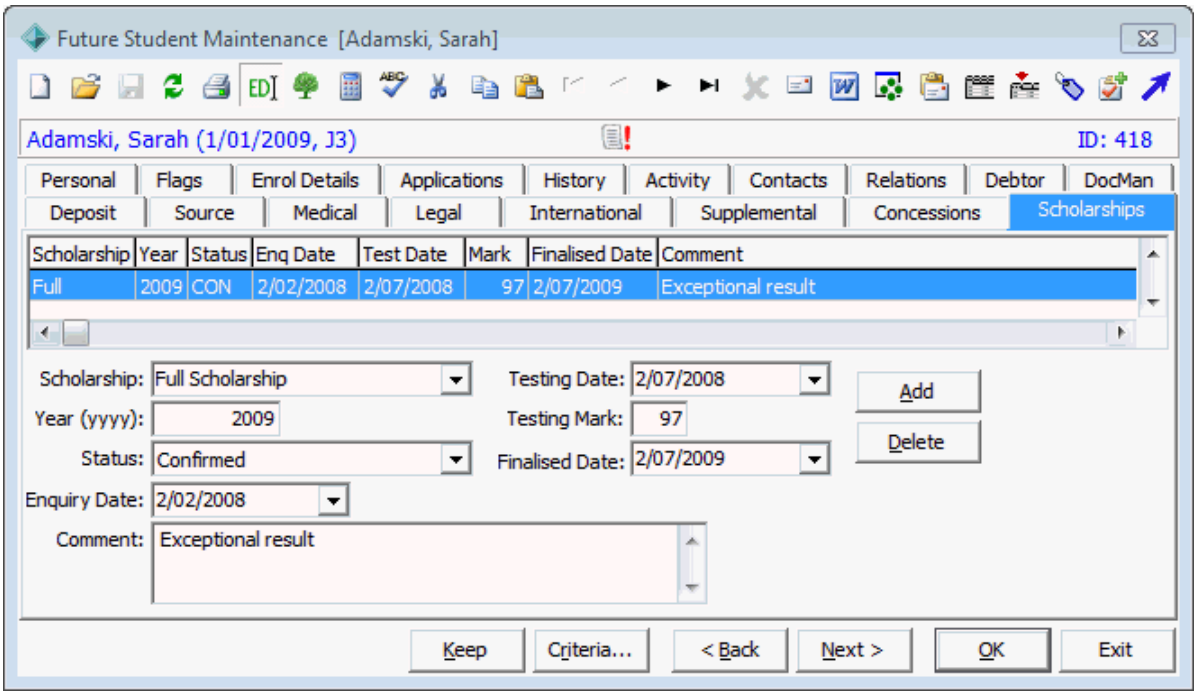
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Scholarships** tab.

   The **Scholarships** tab of the **Future Student Maintenance** window is displayed.

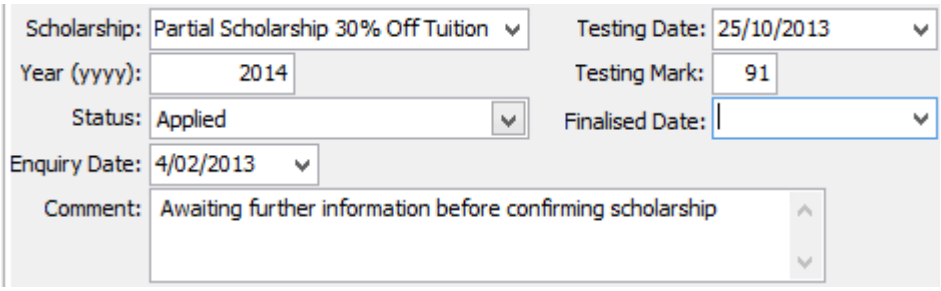


Future Student Maintenance - Scholarships tab key fields and buttons

Grid area fields

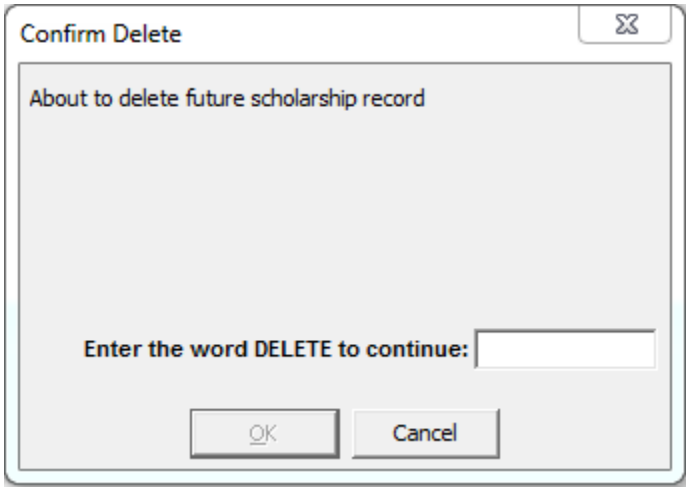
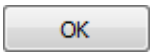
Field	Description
Scholarship	Name of the scholarship.
Year	Year the student applied for the scholarship.
Status	Status of the scholarship application. Typical values are: • Applied • Confirmed. A **SynergyMeaning** of **Confirmed** identifies scholarships that are confirmed. When future students are transferred to current students: • scholarship entries with a status of **Confirmed** are shown on the **Scholarships** tab when the **Current Scholarships** radio button is selected • any other scholarship entries can be viewed by selecting the **Scholarships Applied For** radio button. **Note:** Maintain the values in the **luScholarshipStatus** lookup table. See *luScholarshipStatus lookup table* in the System maintenance manual.
Enquiry Date	Date of the initial enquiry for the scholarship.
Test Date	Date the student was tested for the scholarship.
Mark	Result of the scholarship test.
Finalised Date	Date the student's scholarship application was finalised.
Comment	Any comments about the student's scholarship application.

Fields



Field	Description
Scholarship	Type of scholarship applied for or awarded. **Note:** Maintain the values in the **luScholarship** lookup table. See *luScholarship lookup table* in the System maintenance manual.
Testing Date	Date of the scholarship test.
Year	Year the scholarship was granted or applied for.
Testing Mark	Result of the scholarship test.
Status	Status of the scholarship application. Typical values are: • Applied • Confirmed. A **SynergyMeaning** of **Confirmed** identifies scholarships that are confirmed. When future students are transferred to current students: • scholarship entries with a status of **Confirmed** are shown on the **Scholarships** tab when the **Current Scholarships** radio button is selected • any other scholarship entries can be viewed by selecting the **Scholarships Applied For** radio button. **Note:** Maintain the values in the **luScholarshipStatus** lookup table. See *luScholarshipStatus lookup table* in the System maintenance manual.
Finalised Date	Date that the scholarship application was finalised.
Enquiry Date	Date of the initial enquiry for the scholarship.
Comment	Any comments about the student's scholarship application.

Buttons

Button	Description
Add	Add a new scholarship record for the student. This adds a new row after the current row, and allows you to update the fields in the **Scholarship** area.
Delete	Delete the selected row.  Type **delete** and click  .

Future Student Maintenance - Deposit tab

Use the **Deposit** tab to:

- list enrolment deposit details
- check that entrance payments are complete for a student.

Deposits are normally created by finance staff as part of the cash receipts process. Deposits can be:

- application fees
- refundable deposits
- non-refundable entrance fees.

Note: Deposit information is extracted from your organisation's SynergyOne Finance database. You must have access to the SynergyOne Finance database to view the **Deposit** tab.

Opening the Deposit tab

To open the **Deposit** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

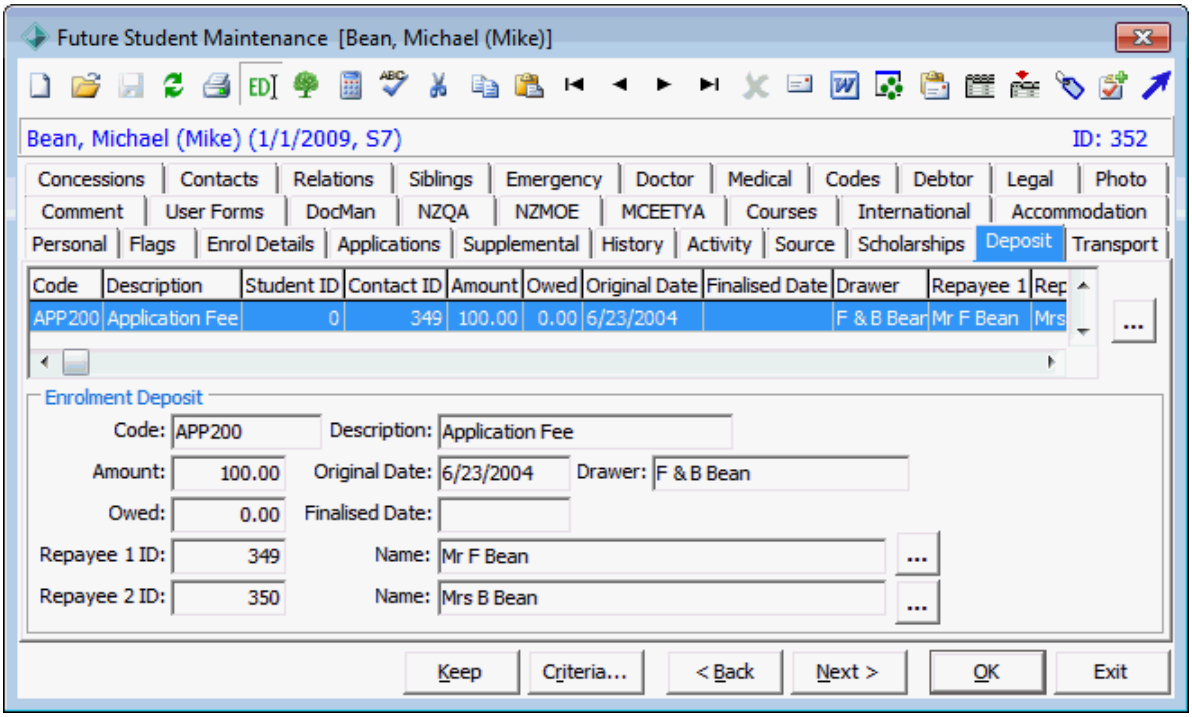
   The **Set Future Student Search Criteria** window is displayed.

   Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Deposit** tab.

   The **Deposit** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Deposit tab key fields and buttons

Grid area fields

Field	Description
Code	Code for the enrolment deposit.
Description	Description of the deposit.
Student ID	Synergetic ID of the student that the deposit was paid for.
Contact ID	Synergetic ID of the contact who paid the deposit.
Amount	Amount of the deposit.
Owed	Amount owing, if applicable.
Original Date	Date of the initial payment.
Finalised Date	Date the payment was finalised.
Drawer	Drawer named on the deposit cheque.
Repayee 1 / Repayee 2	ID of the repayees of the deposit.
Donate Deposit	Contact wants to donate the deposit to your organisation.
Fund	Bank account the deposit was made to.
Seq	Unique number identifying the deposit. This is automatically generated.

Grid area buttons

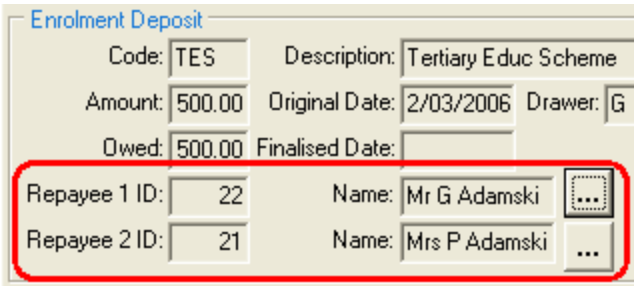
Button	Description
	Launch the **Enrolment Deposits Maintenance** window for the selected enrolment deposit. See *Maintaining enrolment deposits* in the Debtors manual.

Enrolment Deposit area fields and buttons

Fields

Field	Description
Code	Code for the enrolment deposit.
Description	Description of the deposit.
Amount	Amount of the deposit.
Original Date	Date of the initial payment.
Drawer	Drawer named on the deposit cheque.
Owed	Amount owing, if applicable.
Finalised Date	Date the payment was finalised.
Repayee 1 / Repayee 2	Details for the deposit refund.
Name	Repayees' names.

Buttons

Button	Description
...	Launch the **Community Maintenance** window for the selected repayee. See *Maintaining community members* in the Community manual. Click ... next to the repayee you need to view or maintain. 

Future Student Maintenance - Transport tab

Use the **Transport** tab to record how a future student intends to be transported to and from your organisation, where your organisation:

- is involved in the management of the transport
- has an interest in their transport arrangements.

Note: You can use this tab to charge for bus trips undertaken by students.

Information entered in the **Transport tab** of **Future Student Maintenance** is automatically transferred to the **Transport tab** of **Current Student Maintenance** when the student becomes a current student.

Opening the Transport tab

To open the **Transport** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

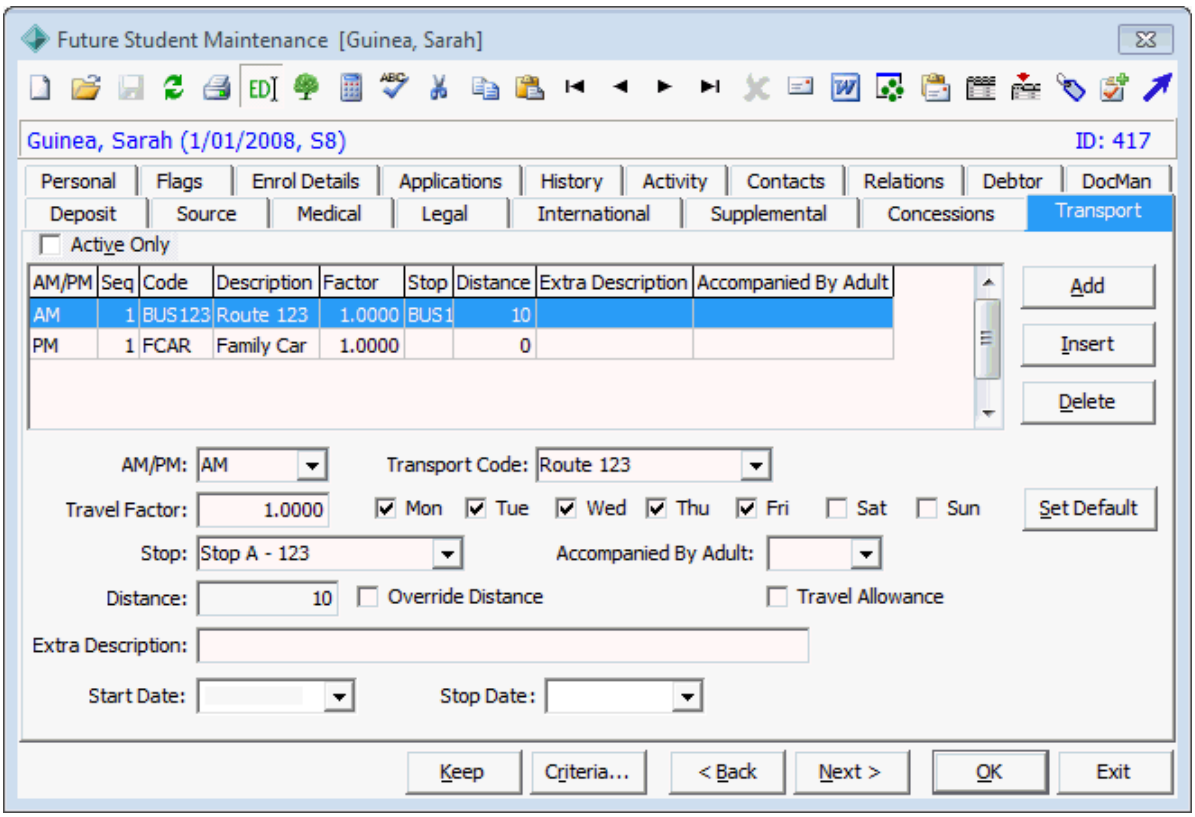
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Transport** tab.

   The **Transport** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Transport tab key fields and buttons

Grid area fields

Field	Description
AM/PM	Time the student travels. Values include: • AM • AM & PM • PM.
Seq	Unique identifier for the transport entry.
Code	Transport code for the transport used. This can be a: • specific bus route with stops defined • general transport mode, such as a taxi, private car and so on.
Description	Description for the transport code.
Factor	How frequently the student uses this method of travel. For example, if a student travels by bus to school only three days a week, a travel factor of 0.6 is entered in this field.
Stop	Bus stop where the student gets on or off.
Distance	Distance that the student has to travel to or from your organisation.
Extra Description	Any additional comments.
Accompanied by Adult	Displays either: • **Yes** if the student travels with an adult. • **No** if the student travels without an adult.
Start Date	Date the student started using this type of transport.
Stop Date	Date the student stopped using this type of transport.

Fields

Field	Description
Active Only	Select to only display transport records with a **Start Date** before the current date and a **Stop Date** after the current date.
AM/PM	Time the student travels. Values include: • AM • AM & PM • PM.
Transport Code	Transport code for the transport used. This can be a: • specific bus route with stops defined • general transport mode, such as a taxi, private car and so on. **Note:** The available values are defined in the **luTransport** lookup table. See *luTransport lookup table* in the System maintenance manual.

Field	Description
Travel Factor	How frequently the student uses this method of travel. For example, if a student travels by bus to school only three days a week, a travel factor of 0.6 is entered in this field. **Note:** Select the check boxes to specify the days when the student uses each form of transport. The travel factor and the transport code determine the amount the student is debited for travel. For example, if the selected transport method has a fee of $100 and a travel factor of 0.6 is entered, the student is debited $60. **Tip**: Set the **Travel Factor** to **zero** when the student no longer uses a travel method. This ensures that they are not charged. Use this field to: • record different travel factors and codes for students from split families • bill each parent.
Mon - Sun	Select the days that the student travels on arranged transport. You can also use the Set Default button.
Stop	Bus stop where the student gets on or off. **Note:** The available values are defined in the **luTransportStops** lookup table. See *luTransportStops lookup table* in the System maintenance manual.
Accompanied By Adult	Select: • **Yes** if the student travels with an adult. • **No** if the student travels without an adult.
Distance	Distance that the student has to travel to or from your organisation. **Note:** Use this field to determine the travel allowances applicable to the student. This value is linked to the value selected in the **Stop** field but it can be overwritten. See the **Stop** field.
Override Distance	Select to override the default distance in the **Distance** field, which is defined by the stop in the **Stop** field.
Travel Allowance	Select if the student has been given a travel allowance.
Start Date	Date the student started using this type of transport.
Stop Date	Date the student stopped using this type of transport.
Extra Description	Any additional comments. **Tip:** Use this field to record the distance the parent lives from your organisation, if your organisation applies and receives the conveyance allowance on behalf of the parents.
Start Date / Stop Date	Start and stop date for the transport record. **Note:** You can leave the **Start Date** and **Stop Date** fields blank to represent an indefinite date in the past or future.

Buttons

Button	Description
Add	Add a new form of transport to the student's record.
Insert	Insert a new row in the grid area.
Delete	Delete a form of transport from the student's record.
Set Default	Click to select all check boxes from Monday to Friday.

Future Student Maintenance - Courses tab

Use the **Courses** tab to maintain details of courses that the student is enrolled in.

> **Note:** Tertiary institutions often use courses while schools generally use classes. See the **Classes** tab.
> Classes can be grouped into courses if required, and can be used where a school offers external courses under various payment options.

You can:

- List courses a student is enrolled in.
- Review the summary of financial information for the courses.
- Maintain student course details.

See *Maintaining details of a future student's course* (on page 331).

Opening the Courses tab

To open the **Courses** tab:

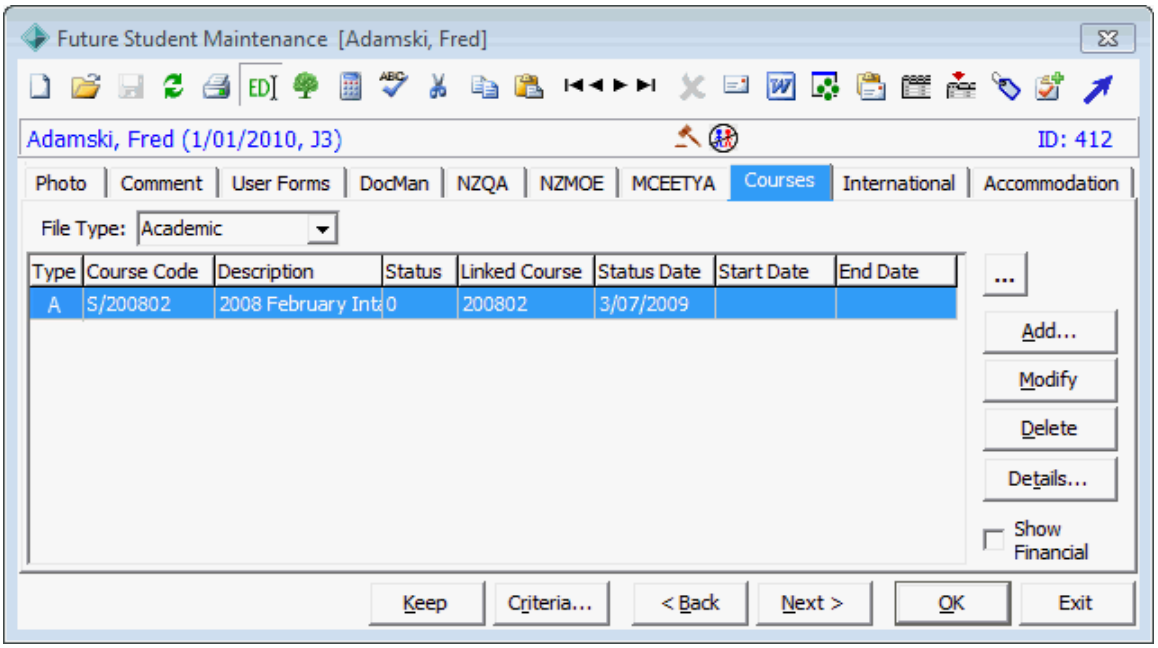
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Courses** tab.

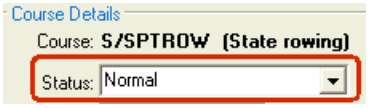
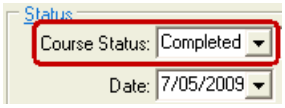
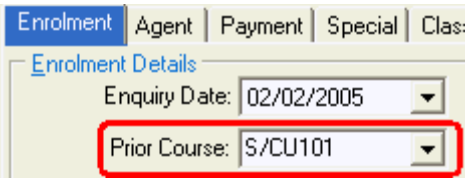
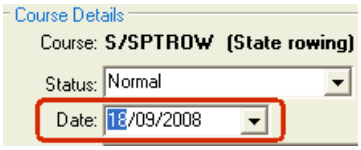
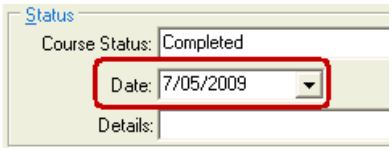
   The **Courses** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Courses tab key fields and buttons

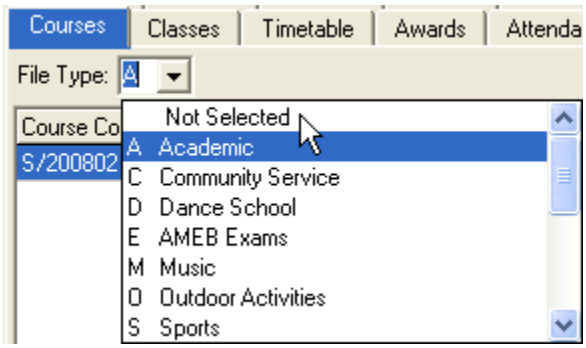
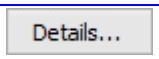
Grid area fields

The fields displayed depend on whether the **Show Financial** field is selected or not.

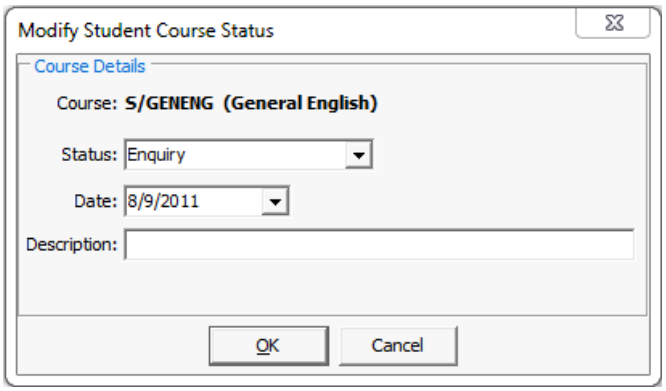
Field	Description
Type	File type for the course.
Course Code	Abbreviation for the course.
Description	Description of the course. This is populated from **Course Maintenance**.
Status	Current course status for the selected student. To maintain the status, either click: • Modify and update the **Status** field  • Details... and update the **Course Status** field on the **Enrolment** tab. 
Linked Course	Prior course that this course is linked to, if applicable. To maintain the status, click Details... and update the **Prior Course** field on the **Enrolment** tab. 
Status Date	Date the course status was updated. To maintain the date, either click: • Modify and update the **Date** field  • Details... and update the **Date** field on the **Enrolment** tab. 
Start Date	Start date of the course.
End Date	End date of the course.

Field	Description
Total Fees	Cost of the course. This field and the following three are only displayed if the **Show Financial** field is selected. See **Show Financial** below.
Charged	Total the student is charged for the course.
Paid	Amount paid for the course to date.
Owing	Amount owing for the course.

Fields

Field	Description
File Type	Filter based on the file type of the courses. See *File types* in the Introduction manual. Courses can be either academic or co-curricular. You can: • Do nothing to display academic courses (file type **A**) by default. • Select the **Not Selected** option, from the drop-down list, to display courses of all file types.  • Change the file type selection to view courses in other areas.
Show Financial	Also display financial details about the course. **Note:** Click  and click the **Payment** tab to view more financial details in the **Course Details Maintenance** window.

Buttons

Button	Description
...	Launch **Course Maintenance** for the selected course. See *Maintaining courses* in the Curriculum manual. **Tip:** You can double click on the selected course in the grid, to display the **Course Details Maintenance** window. See *Maintaining details of a future student's course* (on page 331).
Add...	Add a course being undertaken by the student. See *Maintaining details of a future student's course* (on page 331).
Modify	Modify the: • course status • date that the new status applies • description that applies to the student's course.  **Note:** Also available on the **Enrolment** tab of **Course Details Maintenance**. See *Course Details Maintenance - Enrolment tab*. **Tip:** You can double click on the selected course in the grid, to display the **Course Details Maintenance** window. See *Maintaining details of a future student's course* (on page 331).
Delete	Delete the highlighted course from the student's courses.
Details...	Maintain the course details for the selected student. See *Maintaining details of a future student's course* (on page 331).

Future Student Maintenance - Contacts tab

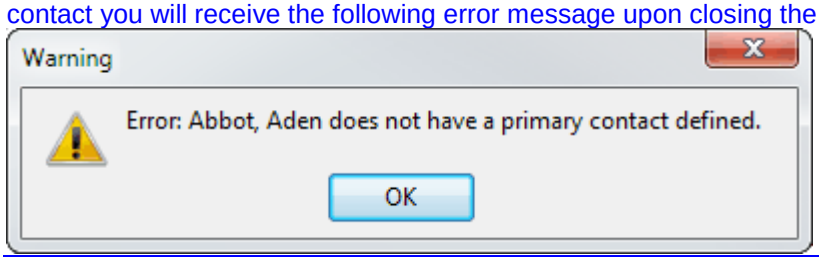
Use the **Contacts** tab to maintain contact details for primary and alternative contacts, particularly guardians and parents.

You can keep track of as many contacts for the student as you like. By default, Synergetic has three and we recommend that your organisation does not exceed nine.

SC1 contact

The **SC1** contact is the person or couple most important to the student, usually one or both of the student's natural parents. Synergetic uses the **SC1** contact to create a family structure, which is displayed on the **Siblings** tab. All students who share the same **SC1** contact are shown on the **Siblings** tab. See *SES (Socioeconomic status) parent extraction settings* in the System maintenance manual.

Note: Synergetic requires every student to have an **SC1** contact. If a student does not have an **SC1** contact you will receive the following error message upon closing the window.



If **Primary** is not selected, creating an **SC** contact who is:

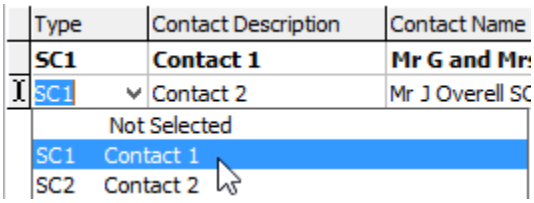
- a parent adds the **SC** contact and their partner to the **@PC** constituency
- **not** a parent, adds the **SC** contact and their partner to the **@SCOC** (student contact other contact) constituency.

Note: If **Primary** is selected, only the primary contact is added to a constituency. That is, if the student's contact has a spouse, the spouse does not receive the **@PC** or **@SCOC** constituency.

Creating an emergency contact adds the contact to the **@SCEC** constituency. See *Community Maintenance - Constits tab* in the Community manual.

Swapping contacts

You can easily swap contacts. For example, if you have a student with **SC1** and **SC2** contacts, you can change the **SC2** to **SC1** and then the **SC1** becomes **SC2**.



See *Swapping and shuffling contacts* (on page 167).

Opening the Contacts tab

To open the **Contacts** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

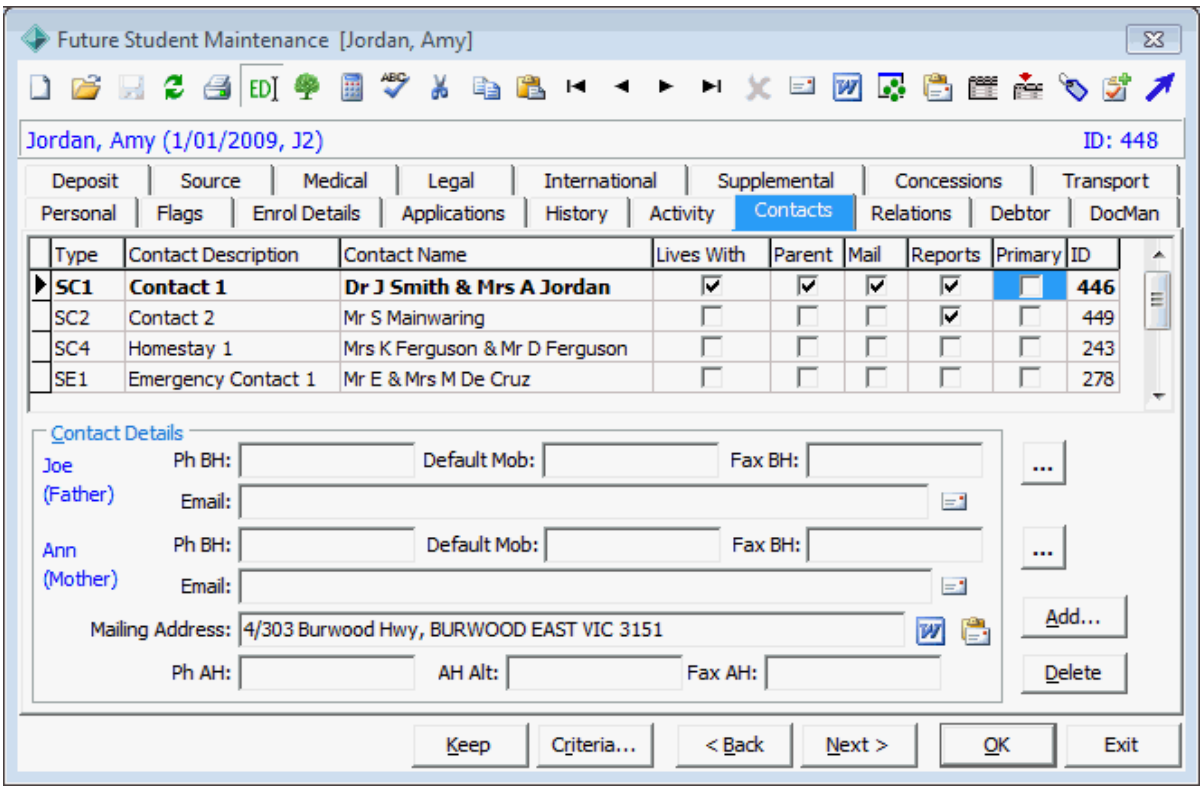
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Contacts** tab.

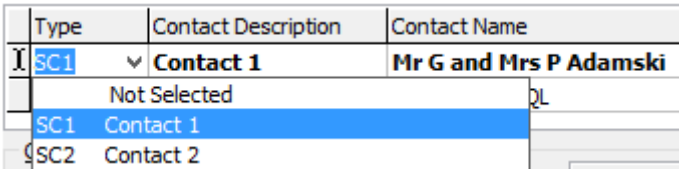
   The **Contacts** tab of the **Future Student Maintenance** window is displayed.



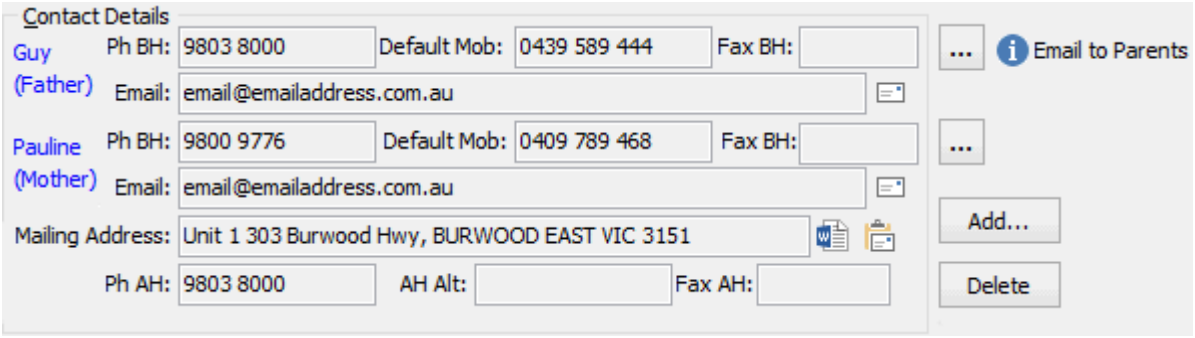
Future Student Maintenance - Contacts tab fields and buttons

Grid area fields

Also refer to the **Contact Details** area for details of how to maintain these fields.

Field	Description
Type	Type of contact. Typical values include: • **SC1**, **SC2** and so on • **SE1**, **SE2** and so on.  **Note:** Normally the **SC1** contact is a parent of the students, even if the child does not live with the parent; this is because the **SC1** contact is used to determine family position and sibling discounts.
Contact Description	Description of the contact. Values include: • **Contact 1**, **Contact 2** and so on • **Emergency Contact 1**, **Emergency Contact 2** and so on. **Note:** If a contact has more than one type of relationship with the student, each relationship is shown as a separate entry.
Contact Name	Contact's name.
Lives With	Select if the student lives with the contact. **Note:** In cases of shared custody, more than one contact can have the **Lives With** flag set. The first listed **Lives With** contact is used when extracting information from Synergetic for surveys that require a single address for a student (for example, DEST survey).
Parent	Select if the contact is a parent. **Note:** The parent contact is the person who is the parent from your organisation's perspective, not necessarily the natural parent. For example, if both parents are deceased and the uncle has custody and is as involved as a natural parent would be, then the uncle should be selected as the parent. Selecting this flag adds the contact to the **@PC** (parent) constituency. They become a member of the **@SCOC** constituency if not selected.
Mail	Select if the contact wants to receive mail from your organisation regarding this student.
Reports	Select if the contact wants to receive reports for this student.
Primary	Select if addressing this person only and not their spouse. **Note:** Use to suppress communication with a partner if they are not relevant from your organisation's perspective for this student. For example, a de-facto partner or non-natural parents.
ID	Synergetic ID of the community member.

Fields



Field	Description
Ph BH	Phone number during business hours for the selected: • contact • spouse, if applicable.
Default Mob	Default mobile phone number for the selected: • contact • spouse, if applicable.
Fax BH	Facsimile number during business hours for the selected: • contact • spouse, if applicable.
Email	Email address for the selected: • contact • spouse, if applicable.
Mailing Address	Mailing address for both the contact and their spouse.
Ph AH	Phone number after business hours.
AH Alt	Alternative phone number after business hours.
Fax AH	Facsimile number after business hours.

Buttons

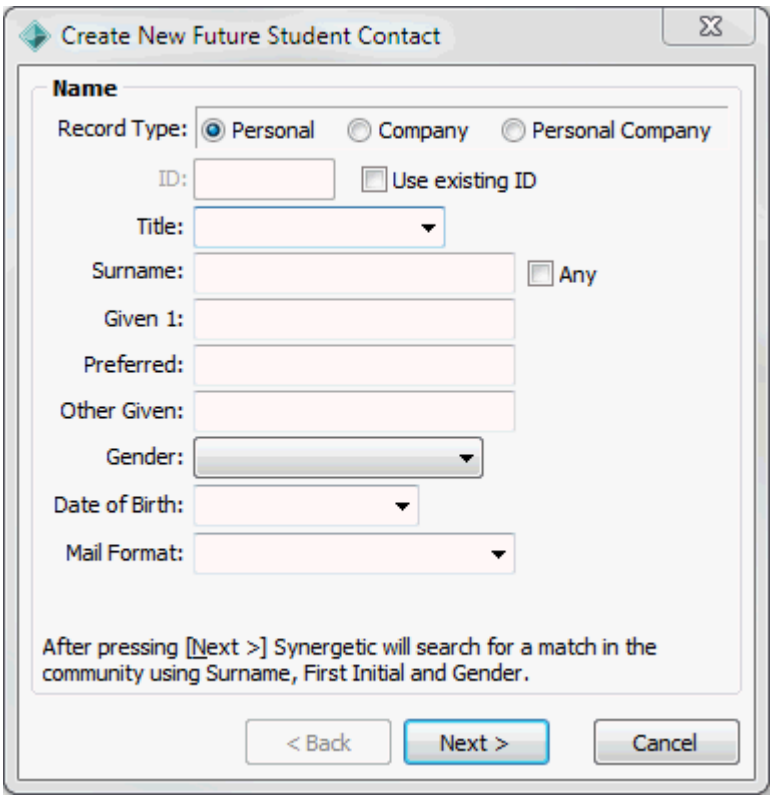
Button	Description
	Launch the **Community Maintenance** window for the selected contact. **Tip:** Click to refresh the information displayed after returning from **Community Maintenance**. For example, you can update the student's address by selecting the contact the student lives with and updating the address. See *Community Maintenance - Home Address tab* in the Community manual.
	Add a new contact for the student. See *Adding new contacts* (on page 164).
	Delete the selected contact.
	Send an email. See *Sending emails* in the Introduction manual.
	Compose a letter. See *Composing letters with Microsoft Word* in the Introduction manual.
	Copy the address details of the selected record to the Windows clipboard. Go to the Microsoft Windows application you are using and paste the address details into the document you are editing.

Adding new contacts

To add a new contact in **Future Student Maintenance**:

1. Open the **Contacts** tab of **Future Student Maintenance**. See *Future Student Maintenance - Contacts tab* (on page 159).
2. Click Add... .

   The **Create New Future Student Contact - Name** window is displayed.



New contacts can be **Personal**, **Company** or **Personal Company**. Select the appropriate radio button at the top of this window. The data input windows that follow depend on your choice of record type:

- **Personal** is for an individual person or couple.
- **Company** is for a company where the company is the primary contact. For example:
  Jackson Holdings
  Attn: Mr John Roberts
- **Personal Company** is for a company where a person is the primary contact. For example:
  Mrs Anne Johnson
  Salbut Enterprises

If you select **Company**, the windows that follow are similar but do not require any individual personal information. If the information you enter matches one or more members of the community database, Synergetic displays a window showing possible matches. You can either:

- Select a record from the grid and make them the student's contact.
- Create a new record. This creates a completely new member in the community database and puts them in the student contacts constituency.

The following windows are displayed after the name details window, depending on the selections made:

- Spouse details, if applicable. See *Spouse Name window* in the Community manual.
- Address details. See *Address window* in the Community manual.

Note: You can use **RAT** to match addresses with the Australia Post or New Zealand Post barcode databases. See *Maintaining postal addresses* in the System maintenance manual.

- Contact's phone and occupation details. See *Phone/Occupation window* in the Community manual.
- Contact details (see below).
- Select relationship (see below).

If there is already a community member matching the name/ID you entered, you are prompted on the next screen whether to use that person or create a new one.

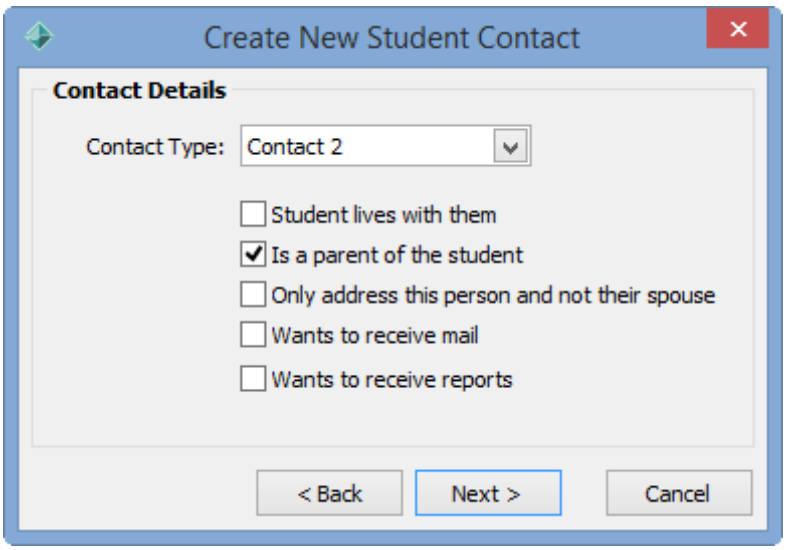
Completing the Contact Details window

To complete the **Contact Details** window:

1. Select the contact type.

Note: You cannot select a contact type that already exists for the student.

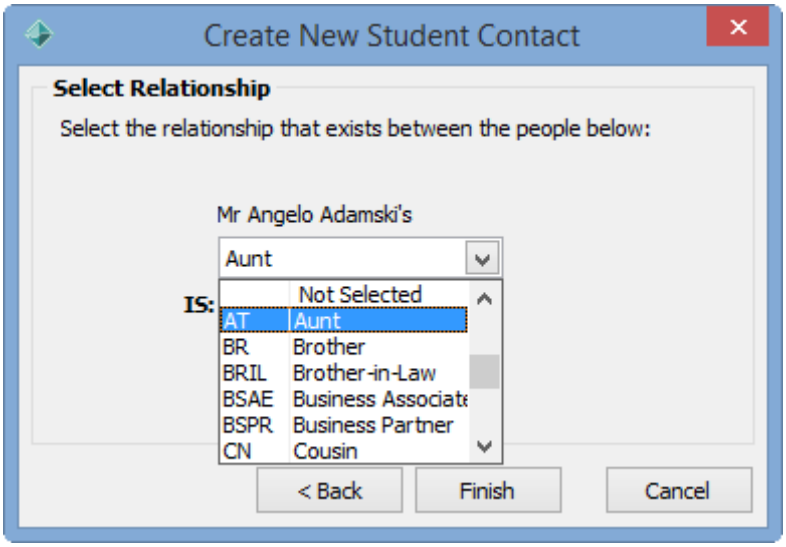
2. If required, select the appropriate checkboxes. For example, if the contact is a parent, select **Is a parent of the student**.



Completing the Select Relationship window

To complete the **Select Relationship** window:

1. Select the relationship between the two people.



Note: This window is only displayed the first time a particular person is added as the student's contact. For example, if a parent already exists as the **SC2** contact and you want to add them as the **SE1** contact, the **Select Relationship** window does not appear as their relationship has already been defined.

Note: See the key fields on the **Contacts** tab of **Future Student Maintenance**. See *Future Student Maintenance - Contacts tab* (on page 159).

2. Click Finish.

The contact details for the student are added.

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**. For example, relationships of **Mother** may be configured to be **Default**. Check the grid area **Relations** tab to override any inappropriate email or SMS settings for both members of the relationship.

Swapping and shuffling contacts

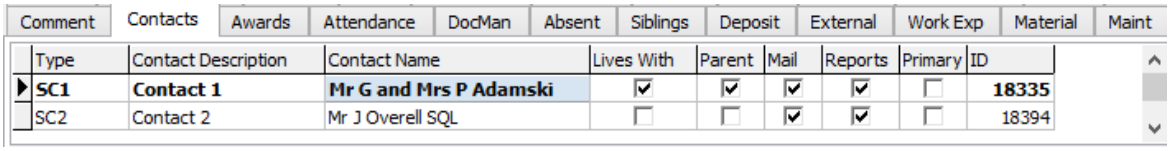
You can swap the contacts easily by changing a contact type to one that already exists; this forces a swap.

For example, if you have a student with **SC1** and **SC2** contacts, you can change the **SC2** to **SC1** and then the **SC1** becomes **SC2**.

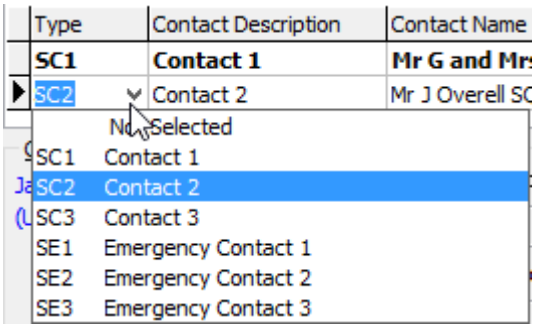
To swap the contacts of a student:

1. Open the **Contacts** tab of **Future Student Maintenance**. See *Future Student Maintenance - Contacts tab* (on page 159).

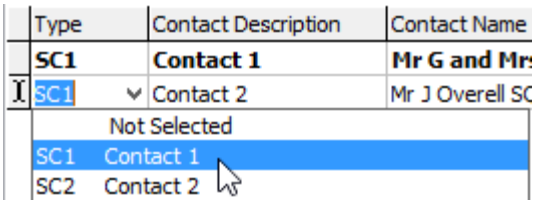
   The **Contacts** tab of the **Future Student Maintenance** window is displayed.



2. Select the **Type** field of the contact that you want to swap.



3. Select the new contact type. For example, select the **SC1** entry.



   The contacts are swapped.

Note: Any other entries are left unchanged.

4. Update the flags if required.

Future Student Maintenance - Relations tab

Use the **Relations** tab to:

- list family and guardianship relationships
- list the constituencies of the relations
- list the contact details of the relations
- maintain relationships
- manage communications with relations.

Note: Relationships represent how one member of the community relates to another. For example, a mother-daughter relationship. Constituencies define how community members relate to your organisation. For example, the community member may be a student, staff member or debtor. Constituencies can be system or user-defined.

Opening the Relations tab

To open the **Relations** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

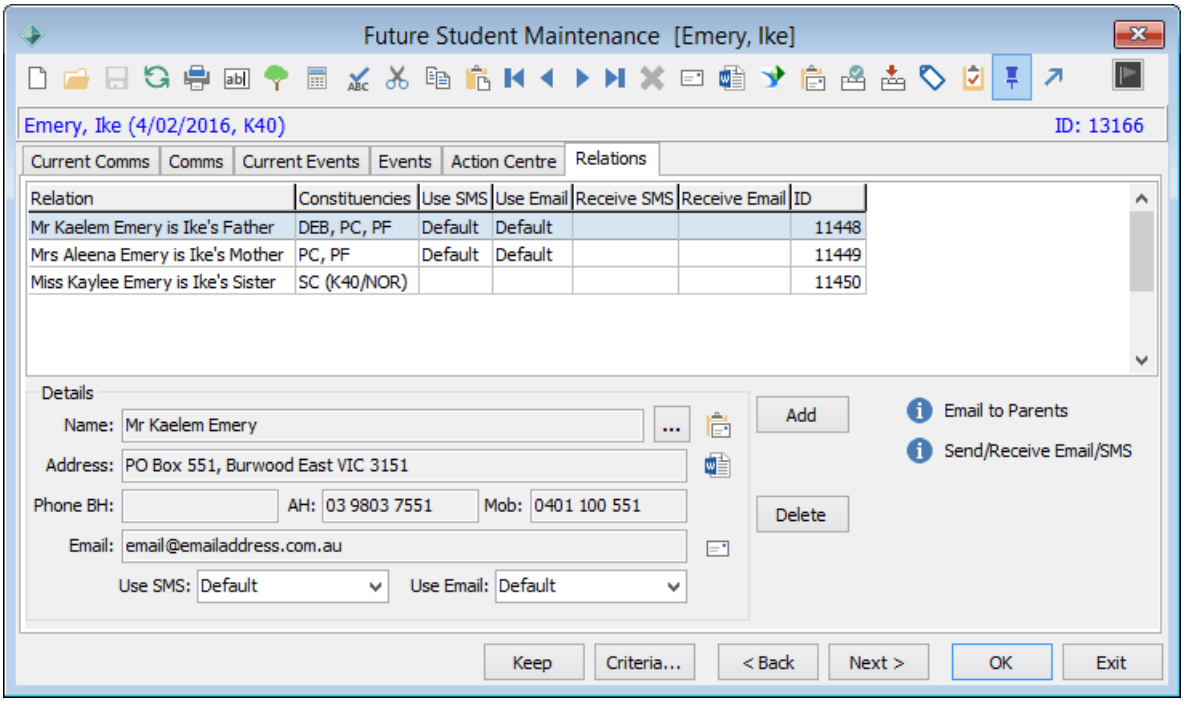
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

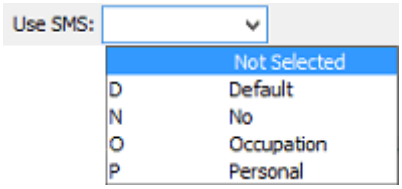
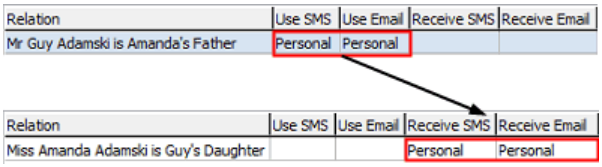
2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Relations** tab.

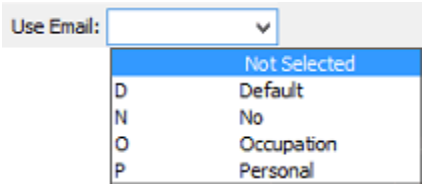
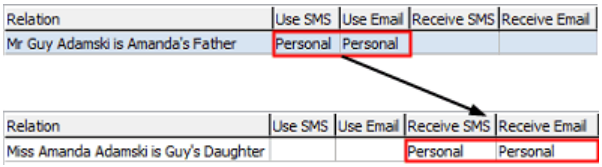
   The **Relations** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Relations tab key fields and buttons

Grid area fields

Field	Description
Relation	Relationship from the perspective of the student.
Constituencies	Constituencies that the relation belongs to. Constituencies that are displayed in: • UPPERCASE are Synergetic constituencies. For example, the **@DEB** constituency is displayed as **DEB** (debtor). • lowercase are user-defined constituencies. For example, the **counc** (school council) user-defined constituency is displayed as **counc**.
Use SMS	Whether the relation elects to receive SMS text messages from your organisation with regard to this person (**No**, if not), and if so which mobile phone number to use: • **Default** mobile • **Personal** mobile • **Occupation** mobile.
Use Email	Whether the relation elects to receive email messages from your organisation about this person (**No**, if not), and if so which email address to use: • **Default** email • **Personal** email • **Occupation** email. **Note:** Selecting **No** prevents sending emails from grids but not sending emails using **Communications Maintenance**.
Receive SMS	Relation's SMS contact (i.e. person that sends the relation SMSs) as defined in the **Use SMS** field.  For example, if Amanda Adamski has her father selected as a **Use SMS** contact his record will list Amanda as a **Receive SMS** contact. 

Field	Description
Receive Email	Relation's email contact (i.e. person who sends the relation emails) as defined in the **Use Email** field.  For example, if Amanda Adamski has her father selected as a **Use Email** contact his record will list Amanda as a **Receive Email** contact. 
ID	Synergetic ID of the relation.

Fields

The fields in the **Details** area correspond to the selected record in the grid area.

Field	Description
Name	Relation's name.
Address	Relation's address.
Phone BH	Relation's business hours telephone number.
Phone AH	Relation's after hour's telephone number.
Phone Mobile	Relation's mobile telephone number.
Email	Relation's email address.
Use SMS	Whether the relation elects to receive SMS text messages from your organisation with regard to this person (**No**, if not), and if so which mobile phone number to use: • **Default** mobile • **Personal** mobile • **Occupation** mobile.
Use Email	Whether the relation elects to receive email messages from your organisation about this person (**No**, if not), and if so which email address to use: • **Default** email • **Personal** email • **Occupation** email. **Note:** Selecting **No** prevents sending emails from grids but not sending emails using **Communications Maintenance**.

Buttons

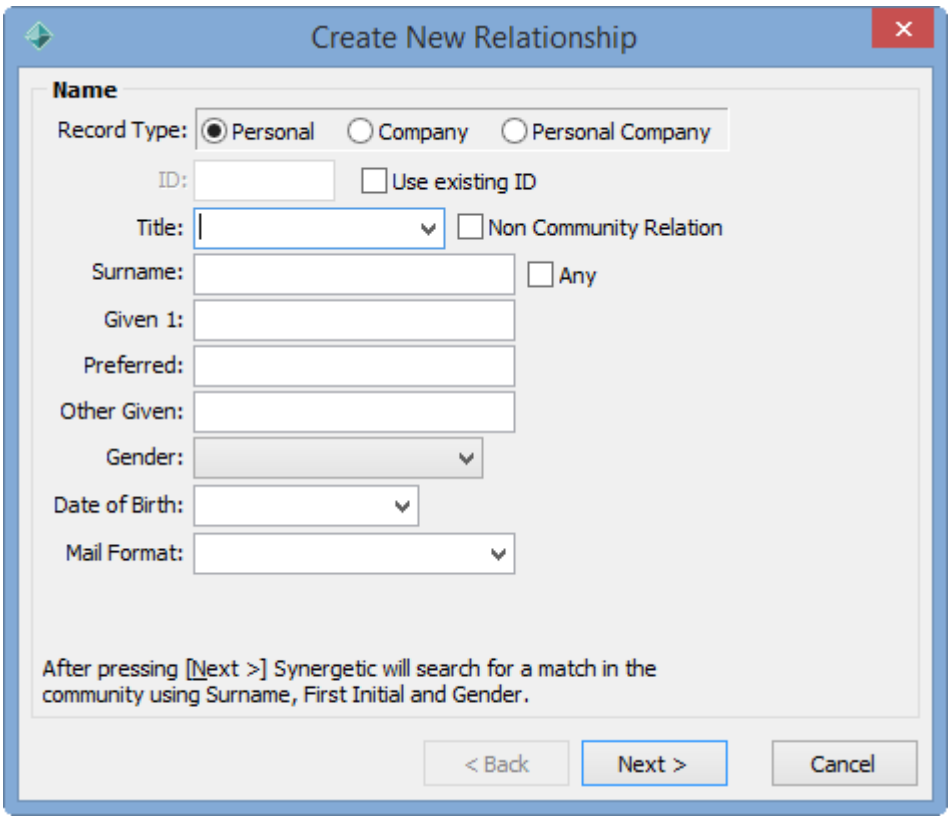
Button	Description
	Add a new relation for the student. See *Adding new relations* (on page 172).
	Delete the selected relationship. See *Deleting relationships* (on page 174).
	Copy the address details of the selected relation to the Windows clipboard. Go to the Microsoft Windows application you are using and paste the address details into the document you are editing.
	Compose a letter to the relation. See *Composing letters with Microsoft Word* in the Introduction manual.
	Send an email to the relation. See *Sending emails* in the Introduction manual.

Adding new relations

To add a new relation in **Future Student Maintenance**:

1. Open the **Relations** tab of **Future Student Maintenance**. See *Future Student Maintenance - Relations tab* (on page 168).
2. Click Add.

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



New contacts can be Personal, Company or Personal Company. Select the appropriate radio button at the top of this window. The data input windows that follow depend on your choice of record type:

- Personal is for an individual person or couple.
- Company is for a company where the company is the primary contact. For example:
  Jackson Holdings
  Attn: Mr John Roberts
- Personal Company is for a company where a person is the primary contact. For example:
  Mrs Anne Johnson
  Salbut Enterprises

If you select **Company**, the windows that follow are similar but do not require you to enter any individual personal information. If the information you enter matches one or more members of the community database, Synergetic displays a window showing possible matches. You can either:

- Select a record from the grid and make them the student's contact.
- Create a new record. This creates a completely new member in the community database and puts them in the student contacts constituency.

Note: You can create a relationship with a non-community member. To do this, select **Non Community Relation**. The relation receives an **ID** of **0** and does not exist in the community database.

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

- Spouse details, if applicable. See *Spouse Name window* in the Community manual.
- Address details. See *Address window* in the Community manual.

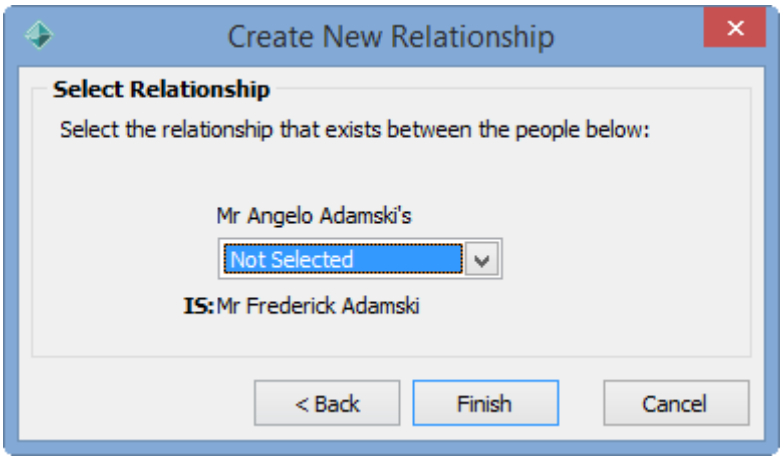
Note: You can use RAT to match addresses with the Australia Post or New Zealand Post barcode database. See *Maintaining postal addresses* in the System maintenance manual.

- Contact's phone and occupation details. See *Phone/Occupation window* in the Community manual.
- Relationship details (see below).

Completing the Select Relationships window

1. Select the relationship with the relation in the **Select Relationship** window.

Tip: If you add a new mother or father relationship and you already have a community member with the same natural mother **and** father as the record you are creating, Synergetic automatically creates a brother or sister relationship.



2. Click Finish.

The student's relation is added.

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**. For example, relationships of **Mother** may be configured to be **Default**. Check the grid area **Relations** tab to override any inappropriate email or SMS settings for both members of the relationship.

Deleting relationships

To delete a relationship in **Future Student Maintenance**:

1. Open the **Relations** tab of **Future Student Maintenance**. See *Future Student Maintenance - Relations tab* (on page 168).
2. Highlight the record to be deleted.
3. Click Delete.

   The **Confirm** window is displayed.

4. Click **Yes**.

Future Student Maintenance - Siblings tab

Use the **Siblings** tab to list siblings who:

- used to attend your organisation
- are currently attending
- are planning to attend in the future.

Use this tab to see how the student's family is defined in Synergetic. The relative order of this student in the family is based on birth date.

Note: Synergetic defines siblings as students who share the same primary contact (**SC1**), including current, future and past students.
Siblings affect the billing process if your organisation offers a sibling discount.

Opening the Siblings tab

To open the **Siblings** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

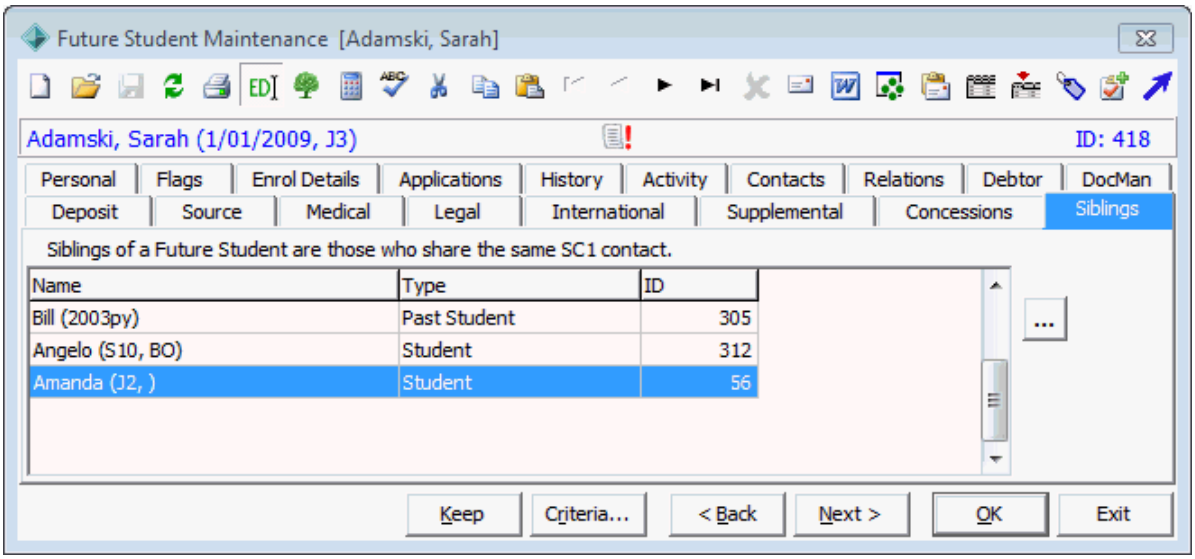
   The **Set Future Student Search Criteria** window is displayed.

   Tip: You can also access the future student functions by clicking

.

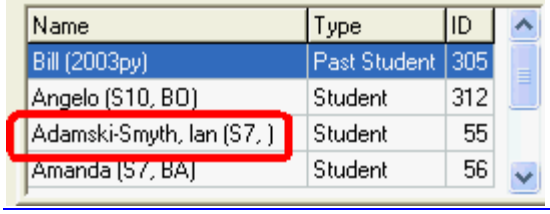
2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Siblings** tab.

   The **Siblings** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Siblings tab key fields and buttons

Grid area fields

Field	Description
Name	Sibling's name. **Note:** The sibling's surname is shown if it is different to the selected student. In the following example, Amanda Adamski's half-brother Ian Adamski-Smyth is listed on the **Siblings** tab. 
Type	Type of student, such as: • **Current Student** • **Future Student** • **Past Student**. **Note:** A sibling who is a future student continues to show as a **Future Student** in this field until their start date, even if they have already been transferred into the Current Students file area.
ID	Synergetic ID of the sibling.

Buttons

Button	Description
	For the selected sibling, launch their record in the corresponding maintenance function window: • **Current Student Maintenance** • **Future Student Maintenance** • **Past Student Maintenance**. **Tip:** Double click on the selected sibling to launch their record.

Future Student Maintenance - Emergency tab

Use the **Emergency** tab to maintain details of up to three people who can be contacted in the event of an emergency.

> **Tip:** You can maintain emergency contact details through the **Contacts** tab, using contact codes **SE1**-**SE3**. Use the **Contacts** tab if the emergency contact person is already in your organisation's database. For example, the parent of another student.

Opening the Emergency tab

To open the **Emergency** tab:

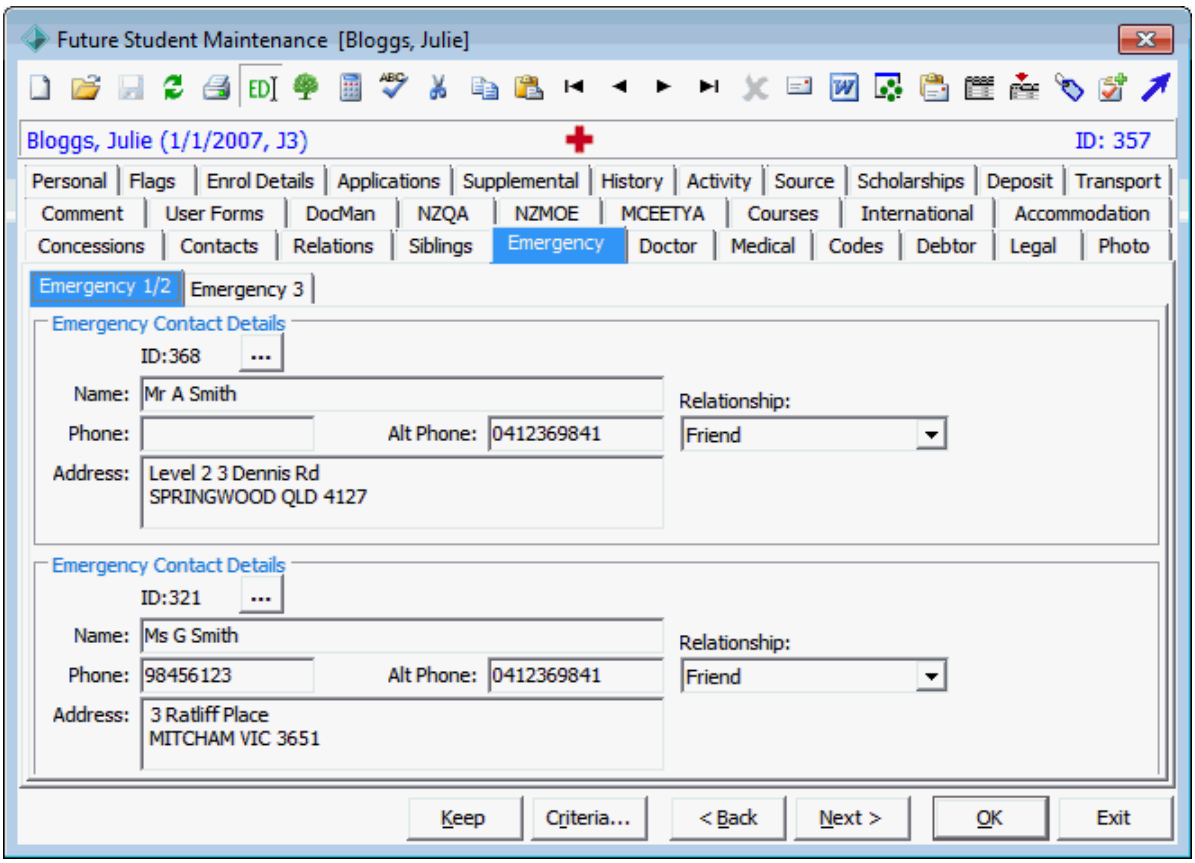
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Emergency** tab.

   The **Emergency** tab of the **Future Student Maintenance** window is displayed.



> **Tip:** You can record up to three emergency contacts - two on the **Emergency 1/2** sub-tab and a third on the **Emergency 3** sub-tab.

Future Student Maintenance - Emergency tab key fields and buttons

Fields

Field	Description
Name	Emergency contact's full name.
Phone	Emergency contact's telephone number.
Alt Phone	Alternative emergency contact telephone number.
Relationship	Emergency contact's relationship to the student. **Note:** Maintain the values in the **luRelationship** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Address	Emergency contact's address.

Buttons

Button	Description
	Launch the **Community Maintenance** window for the selected emergency contact. See *Maintaining community members* in the Community manual.

Future Student Maintenance - Doctor tab

Use the **Doctor** tab to maintain contact details for:

- the student's preferred doctor for medical attention
- an optional alternative doctor or a specialist for a medical condition.

Opening the Doctor tab

To open the **Doctor** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

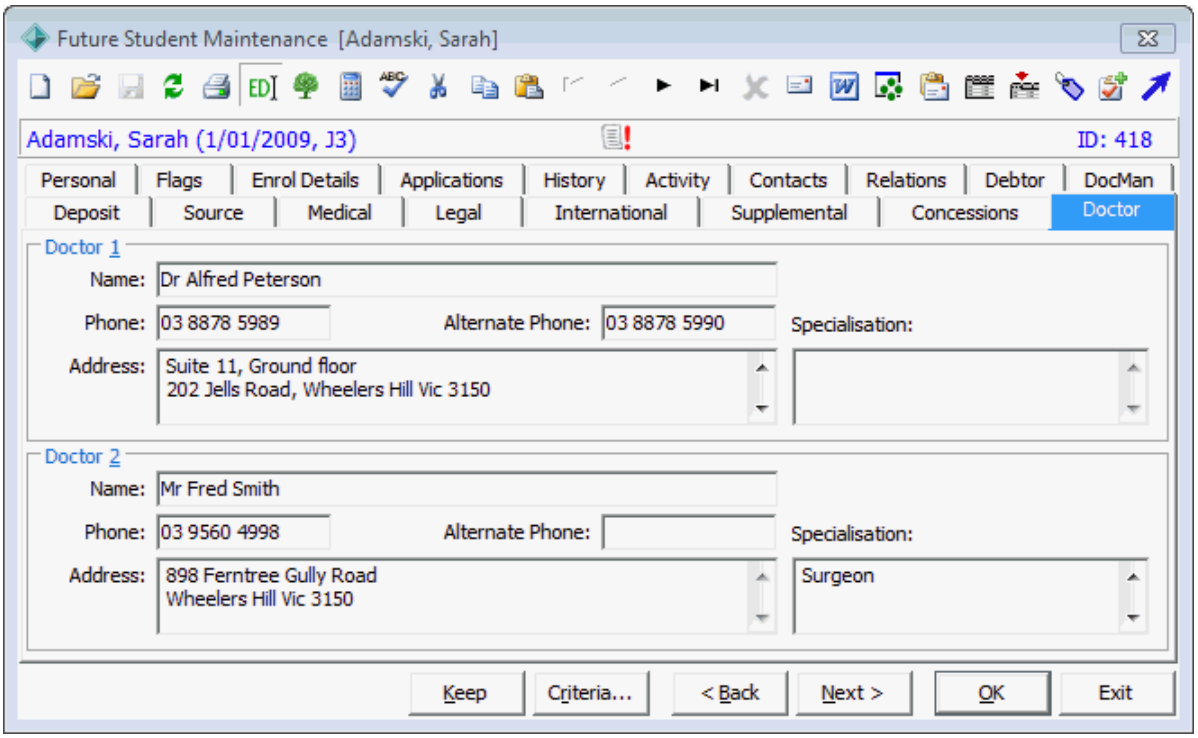
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Doctor** tab.

   The **Doctor** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Doctor tab key fields

Field	Description
Name	Doctor's name.
Phone	Doctor's telephone number.
Alternate Phone	Alternative telephone number for the doctor.
Address	Doctor's address.
Specialisation	Doctor's field of specialisation, if applicable.

Future Student Maintenance - Medical tab

Use the **Medical** tab to maintain:

- public medical alerts, for example a medical disability
- contact details for the person's dentist
- medical details and incidents.

Opening the Medical tab

To open the **Medical** tab:

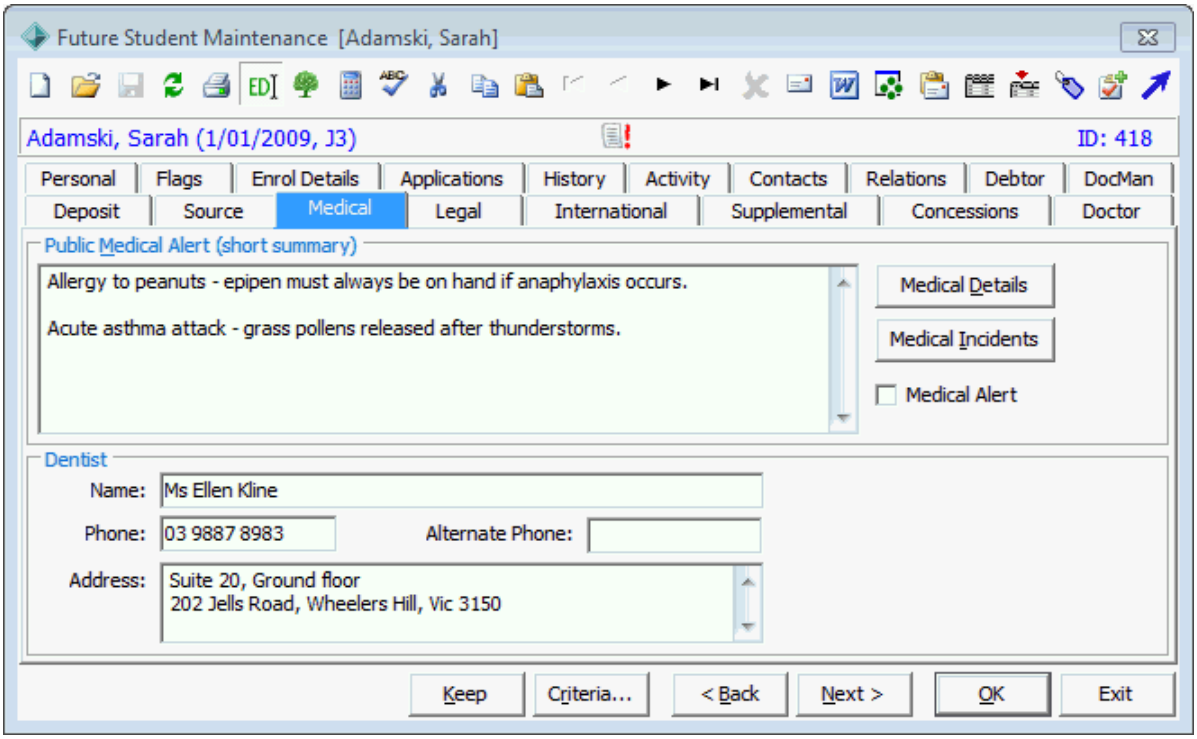
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

> **Tip:** You can also access the future student functions by clicking
>
> .

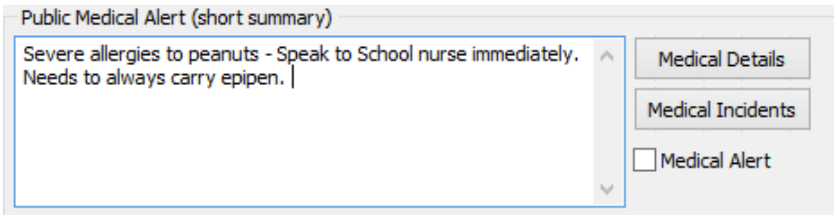
2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Medical** tab.

   The **Medical** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Medical tab key fields and buttons

Medical area fields

Field	Description
Public Medical Alert	Enter a summary of any medical information that needs to be known throughout your organisation, such as potentially life-threatening conditions including anaphylaxis, asthma and epilepsy.  **Tip:** When you are positioned in the field, you can click on the Synergetic toolbar to check the spelling of the text.
Medical Alert	Select to indicate that the student has a medical condition that staff members need to be alerted to. The medical alert icon is displayed on the **Student Maintenance** window. **Tip:** Click on the icon on the **Student Maintenance** window to go straight to the **Medical** tab.

Dentist area fields

Use the **Dentist** area to maintain the contact details for the student's dentist.

Field	Description
Name	Dentist's name.
Phone	Dentist's telephone number.
Alternate Phone	Alternative telephone number for the dentist.
Address	Dentist's address.

Medical area buttons

Button	Description
Medical Details	Maintain the details and medical history of the person. See *Maintaining medical details* in the Medical details manual.
Medical Incidents	Maintain the details of a particular medical incident involving the person. See *Medical Maintenance - Incidents tab* in the Medical details manual.

Future Student Maintenance - Codes tab

Use the **Codes** tab to maintain codes used to:

- cross link records back to previous systems used
- link to other database records used at your organisation.

Opening the Codes tab

To open the **Codes** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

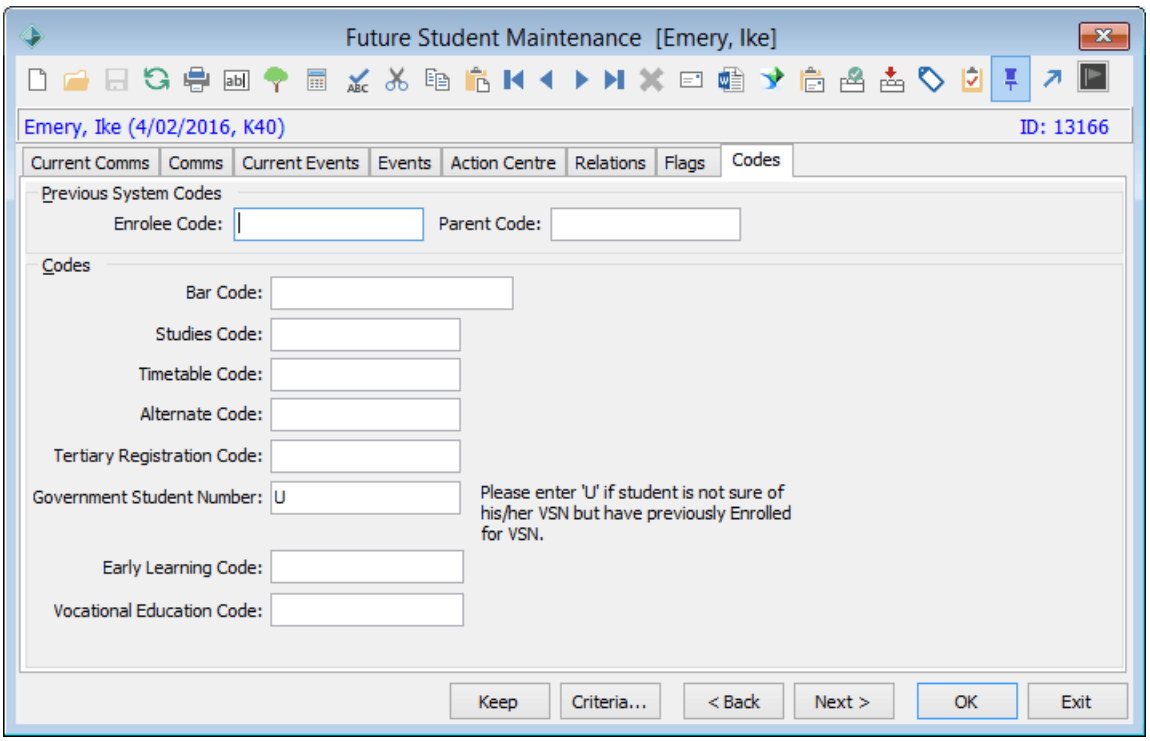
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

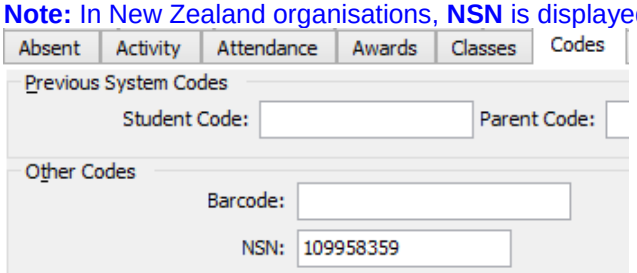
.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Codes** tab.

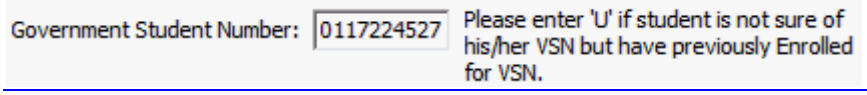
   The **Codes** tab of the **Future Student Maintenance** window is displayed.



Note: In New Zealand organisations, **NSN** is displayed instead of **Studies Code**.



Note: Government Student Number is only displayed for Victorian organisations.



Future Student Maintenance - Codes tab key fields

Previous System Codes area fields

Codes generated during the conversion from a previous system are for information purposes only.

Field	Description
Enrolee Code	Code for the enrolee in the system used before Synergetic.
Parent Code	Code for the parent or family in the system used before Synergetic.

Other Codes area fields

Codes are used to relate student records with external programs; if they need a different code to the Synergetic ID. Codes are optional depending on the external programs used at your organisation.

Field	Description
Bar Code	Code given to the student for barcoding programs in your organisation. For example in the library, the barcode may be based on the ID and a check digit.
Studies Code (Australia) / NSN (New Zealand)	Student's candidate number allocated by a government body responsible for higher secondary qualifications. For example, in Australia: • Curriculum Council in WA • BSSS in the ACT • and so on. The data can be imported from or exported to these external systems. See *Importing and exporting student data* in the Current students manual. In New Zealand, NSN is: • a record of learning number mandatory for all roll returns • allocated by the ENROL (electronic enrolment management system) program • for students: – participating in NCEA (National Certificate of Educational Achievement) – moving into tertiary education. See *Managing New Zealand student NSNs and identity details* in the Current students manual. **Tip:** Some organisations relabel this field to meet their needs in their jurisdiction. For example, **Learner ID**.
Timetable Code	Code used in external timetabling program, if required.
Alternate Code	Spare code field. Use as needed.
Tertiary Registration Code	Student's candidate number allocated by the government body responsible for tertiary entrance.

Field	Description
Government Student Number	Student number assigned to the student by the government. Type: • **N** if a new VSN (Victorian Student Number) is required • **U** if the student has a VSN but is unsure of the number • the VSN if known. **Note:** Currently used in the State of Victoria, Australia. Also known as VSN. **Note:** This field is automatically populated if you transfer a past or future student to current students and they already have a VSN.
Early Learning Code	Early Learning Code assigned to the student by the government.
Vocational Education Code	Vocational Education Code assigned to the student by the government.

Future Student Maintenance - Debtor tab

Use the **Debtor** tab to:

- change the debtor if the debtor is not the future student's primary contact (SC1)
- maintain parameters that determine how billing is undertaken for this future student and their family
- flag the future student's record so that tuition fees or charges are not automatically applied
- flag the future student's record as either full-fee or no student discount
- flag whether there are any tuition variations or special billing.

Note: Leave the **Debtor ID** set to zero if the debtor is **not** the primary contact. Also, note that the debtor is created when the student is transferred to current students and the **Debtor Bulk Additions** program is run.

Opening the Debtor tab

To open the **Debtor** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

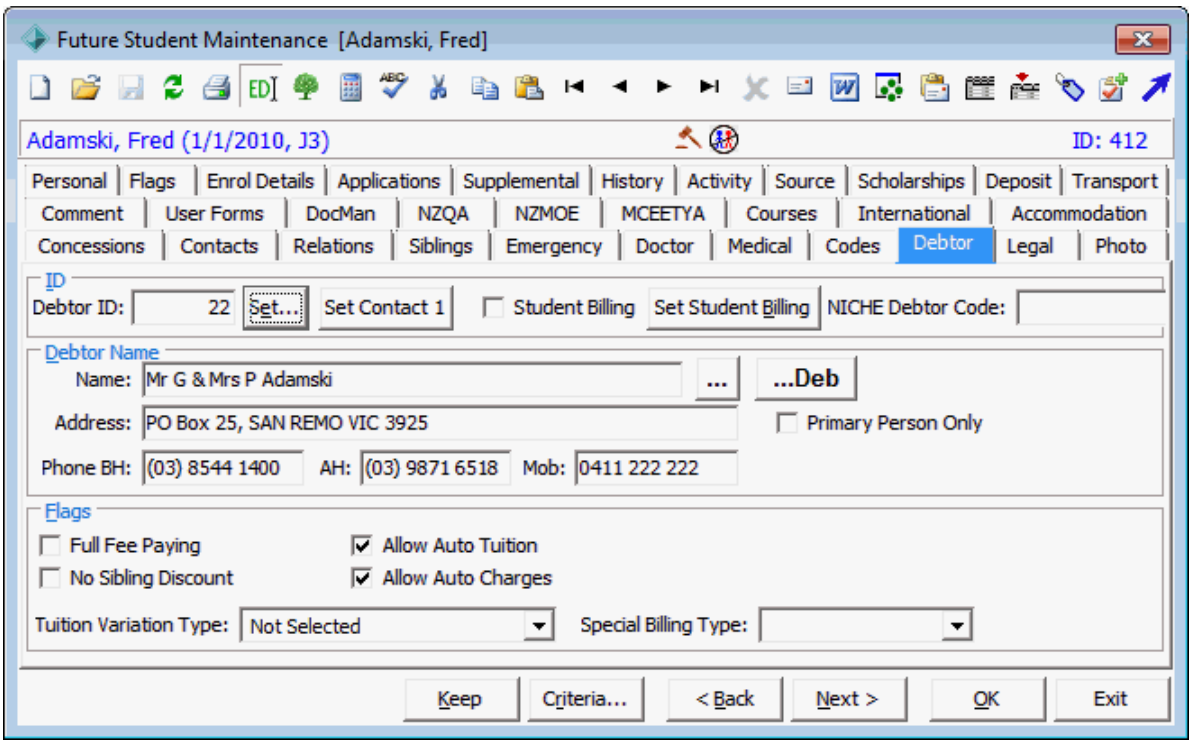
   The **Set Future Student Search Criteria** window is displayed.

   Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Debtor** tab.

   The **Debtor** tab of the **Future Student Maintenance** window is displayed.



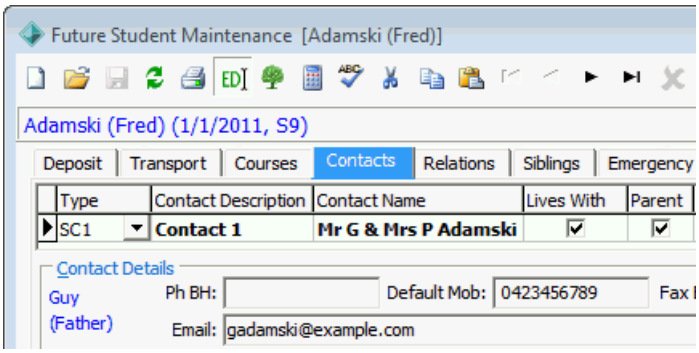
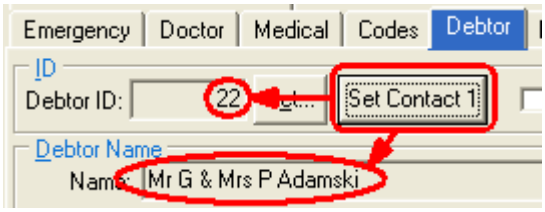
Future Student Maintenance - Debtor tab key fields and buttons

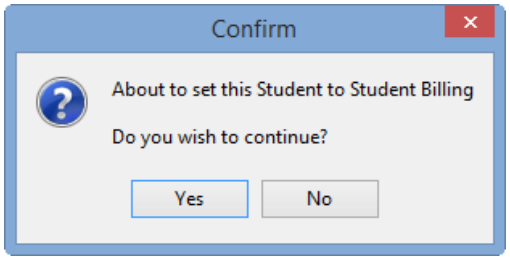
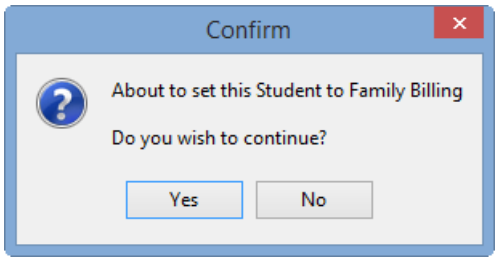
ID area fields and buttons

Fields

Field	Description
Debtor ID	Debtor's Synergetic ID. **Note:** The debtor for the student defaults to the primary contact.
Student Billing	Whether student billing or family billing applies to the student. The **Student Billing** field is: • selected by clicking Set Student Billing • cleared by clicking Set Family Billing. **Student Billing** Use student billing to create a different billing arrangement for each student. This is useful: • for blended families where more than one person is responsible for tuition fees • where separate statements are required for each student. The **Debtor ID** and **Student ID** are both used to define the debtor account, when either: • a charge is raised against the student • debtor bulk additions is run.
NICHE Debtor Code	Debtor code for this student if the debtor was set up in Synergetic's predecessor, NICHE.

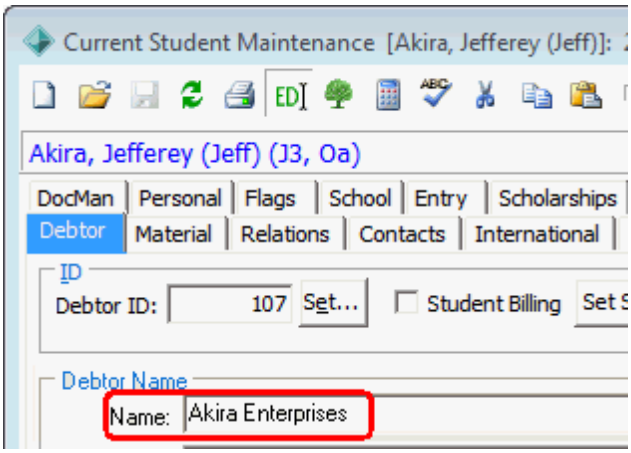
Buttons

Button	Description
Set...	Select a community member who is not the primary contact for the student. The **Debtor ID** and debtor details are updated based on the selected debtor. **Note:** Take note of the current debtor details before making changes. You cannot discard changes to the **Debtor ID**.
Set Contact 1	Set the **Debtor ID** field using the **SC1** contact specified on the **Contacts** tab. The **SC1** contact is usually the parent or guardian of a student. In the following example, Fred Adamski's **SC1** contact is **Mr G & Mrs P Adamski**.  When you click Set Contact 1, **Mr G & Mrs P Adamski** is set as Fred's debtor. 

Button	Description
Set Student Billing **or** Set Family Billing	You can select to bill by student or family. • Click **Set Student Billing** to set **Student Billing**. • Click **Set Family Billing** to clear **Student Billing**. **Setting student billing** To change from family billing to student billing: 1. Click **Set Student Billing**. The following dialog box is displayed.  2. Click Yes. The **Student Billing** field is selected. The button is changed to **Set Family Billing**. **Setting family billing** To change from student billing to family billing: 1. Click **Set Family Billing**. The following dialog box is displayed.  2. Click Yes. The **Student Billing** field is cleared. The button is changed to **Set Student Billing**.

Debtor Names area fields and buttons

Fields

Field	Description
Name	Debtor's name. The debtor's name can be overridden, if required. For example, the debtor may need the statements in their company name for tax purposes.  See *Overriding the debtor's name* in the Debtors manual. **Note**: If the debtor has not yet been created or you do not have permission to access the finance database then the community name is displayed.
Address	Debtor's address.
Phone BH	Debtor's business hour's telephone number.
AH	Debtor's after hour's telephone number.
Mob	Debtor's mobile telephone number.
Primary Person Only	Select to address mail to the primary person only. **Note:** You can maintain the **Address mail to primary person only** field on the **Debtor** tab in **Debtor Maintenance**. See *Debtor Maintenance - Debtor tab* in the Debtors manual. **Tip:** If the student's costs are paid by more than one debtor, select the debtor who pays the miscellaneous charges as the primary person, not the debtor who pays the tuition fees.

Buttons

Button	Description
...	Launch the **Community Maintenance** window for the selected debtor. See *Maintaining community members* in the Community manual.
...Deb	Launch the **Debtor Maintenance** window for the selected debtor. See *Maintaining debtors* in the Debtors manual.

Flags area fields

Field	Description
Full Fee Paying	Select if the student is paying full fees.
No Sibling Discount	Select if sibling discounts do **not** apply for this student. **Note:** Sibling discounts reduce tuition charges based on the family position.
Allow Auto Tuition	Clear to stop automatically applying tuition fees for the student. This feature may be needed if the debtor has paid in advance and those charges have already been applied.
Allow Auto Charges	Clear to stop automatically applying automatic charges for the student. The student is put in the **Not to be charged** grid of Auto Charges, with ***No Auto*** beside the entry. You can then choose to include them at that point. See *Automatic Tuition* in the Debtors manual.
Tuition Variation Type	Type of debtor to include or exclude from the auto tuition run, if required. For example, students paying full fees generally receive a different charge than other students. If a tuition variation is defined on any student records, these students become part of their own billing group for automatic charges. For NZ MOE roll returns, a **Tuition Variation Type** is defined for either: • an international fee-paying student (**FF** student type) • a NZAID (NZ Agency for International Development) student (**FE** student type) who is being charged for tuition for: – the academic year – a proportion of the year for which the student is enrolled. For details on student types, see *Future Student Maintenance - NZMOE tab* (on page 215).
Special Billing Type	Code used for special billing. For example, **New Students**. **Note:** You can start a special auto tuition based on this flag, which can then be cleared automatically. This feature is typically used by organisations that bill significantly in advance.

Future Student Maintenance - Legal tab

Use the **Legal** tab to record:

- legal separations
- court orders
- that the privacy policy has been agreed to.

Opening the Legal tab

To open the **Legal** tab:

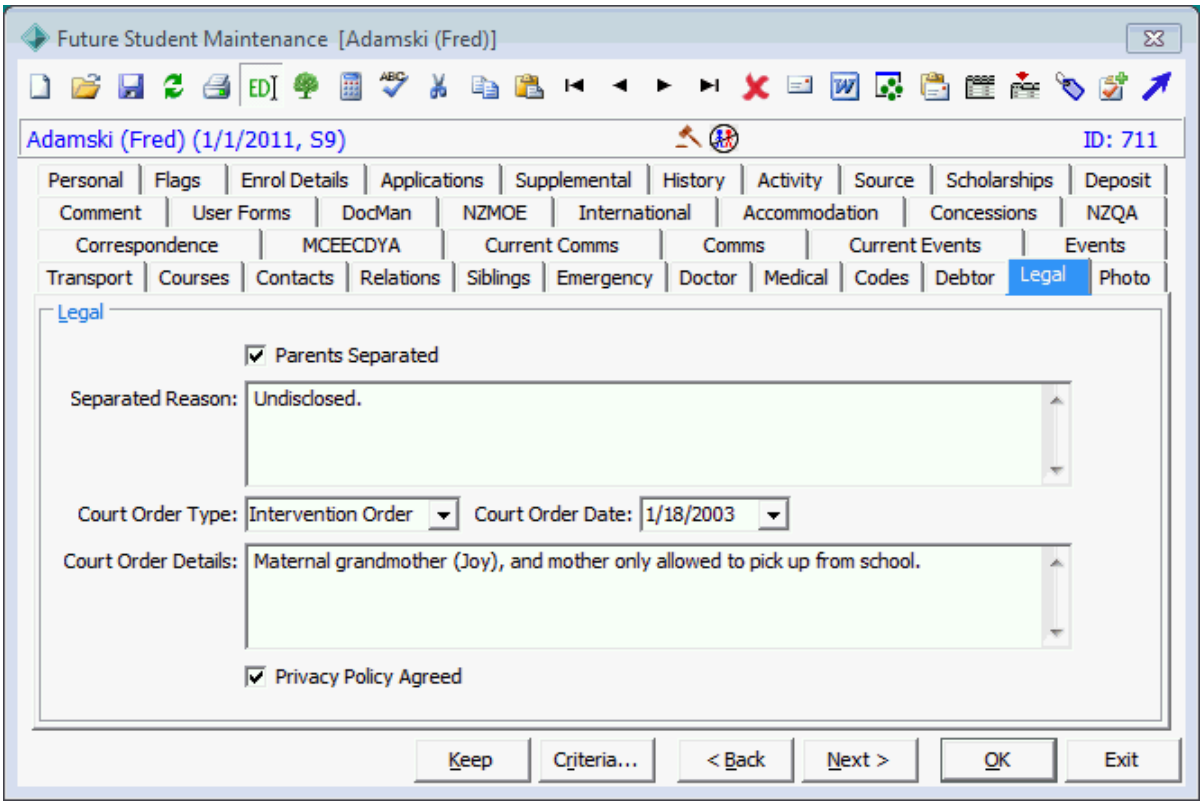
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Legal** tab.

   The **Legal** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Legal tab key fields

Field	Description
Parents Separated	Select if the student's parents have separated. The icon is displayed on the **Student Maintenance** window. **Tip:** Click the icon on the **Student Maintenance** window to go straight to the **Legal** tab.
Separated Reason	Reason for the separation.
Court Order Type	Type of court order in force, if applicable. Typical values include: • **Intervention Order** • **Restraining Order**. The icon is displayed on the **Student Maintenance** window. **Tip:** Click the icon on the **Student Maintenance** window to go straight to the **Legal** tab. **Note:** Maintain the values in the **luCourtOrderType** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Court Order Date	Date the court order came into operation.
Court Order Details	Record additional information as required.
Privacy Policy Agreed	Select to indicate that the student's parents or guardians have read and agreed to conform to your organisation's privacy policy.

Future Student Maintenance - Photo tab

Use the **Photo** tab to:

- view the most recent photo of the future student
- review the details of when the photo was updated
- flag any permissions received to use the photo in your organisation's external communications.

Note: See *Managing student and staff photos* in the System maintenance manual.

Opening the Photo tab

To open the **Photo** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

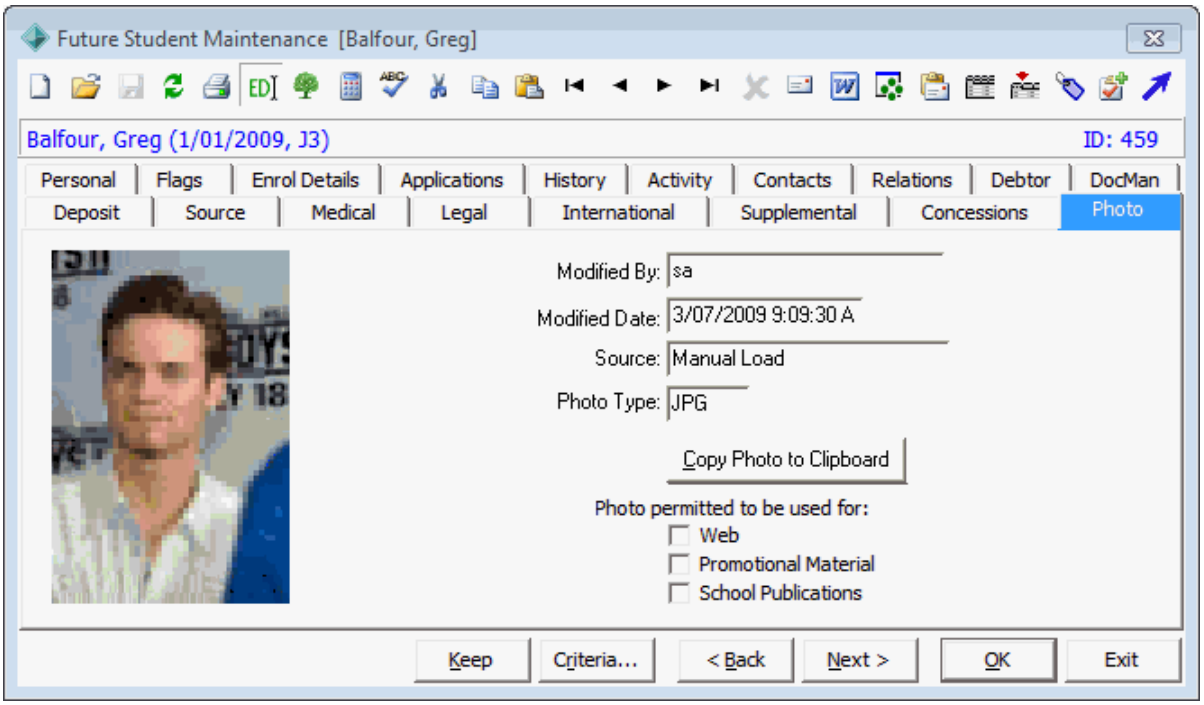
   The **Set Future Student Search Criteria** window is displayed.

   Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Photo** tab.

   The **Photo** tab of the **Future Student Maintenance** window is displayed.

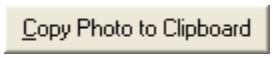


Future Student Maintenance - Photo tab key fields and buttons

Fields

Field	Description
Modified By	User ID of the person who last modified the photo.
Modified Date	Date the photo was last modified. **Note:** If you define document classifications in the **luDocumentClassification** lookup table, changes to photos are recorded as a history record on the **DocMan** tab. See *Maintaining lookup tables* in the System maintenance manual.
Source	Source of the photo.
Photo Type	Type of photo file. For example, **JPG** or **GIF** file extensions.
Web	Select if the student's parent or guardian has given permission for the photo to be displayed on your organisation's public web site.
Promotional Material	Select if the student's parent or guardian has given permission for the photo to be included in promotional material such as promotional displays in public areas.
School Publications	Select if the student's parent or guardian has given permission for the photo to be included in your organisation's publications sent to a wide group of recipients.

Buttons

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

Future Student Maintenance - Comment tab

Use the **Comment** tab to:

- flag that there are important comments that staff should be aware of
- maintain the comments
- show an audit record of who created and maintained the comments.

Opening the Comment tab

To open the **Comment** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

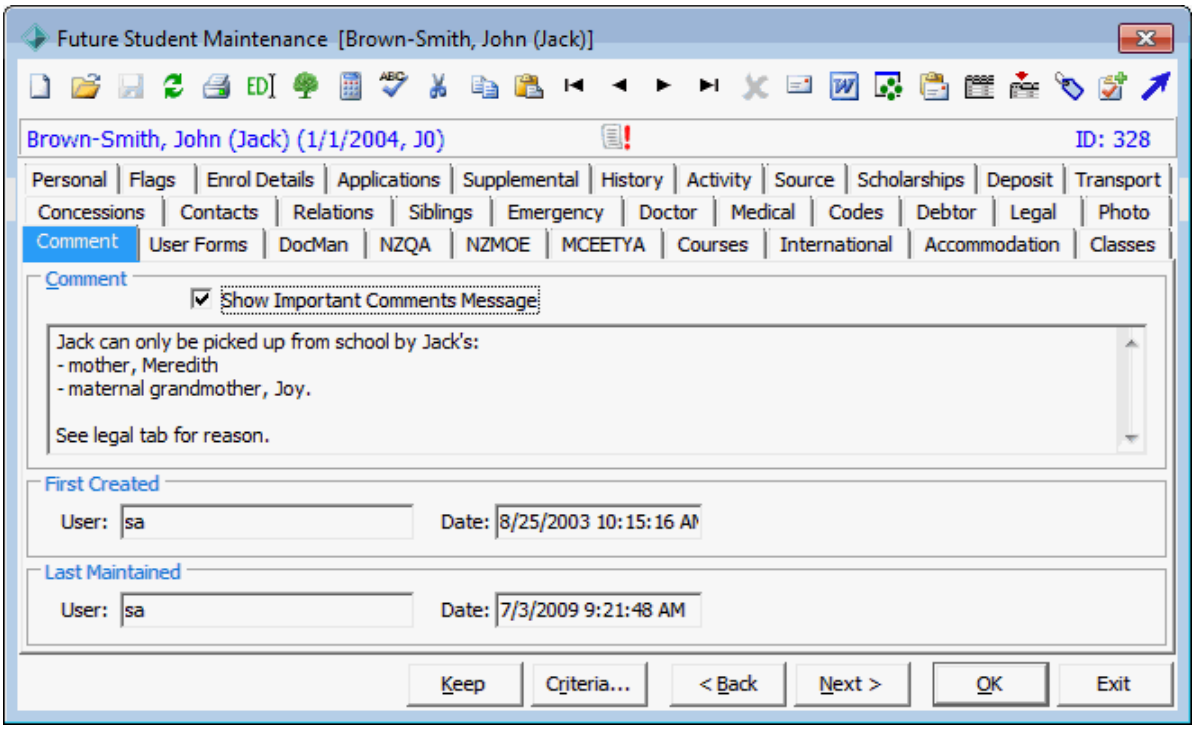
   The **Set Future Student Search Criteria** window is displayed.

   Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Comment** tab.

   The **Comment** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Comment tab key fields

Field	Description
Show Important Comments Message	Select to indicate that there are comments on the student's record. The icon is displayed on the **Student Maintenance** window. **Tip:** Click the icon on the **Student Maintenance** window to go straight to the **Comment** tab. **Note:** A system beep may also warn of important comments.
Comment	Comments about the student. For example, 'Parents separated: student spends alternate weeks with each parent'.

Future Student 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:

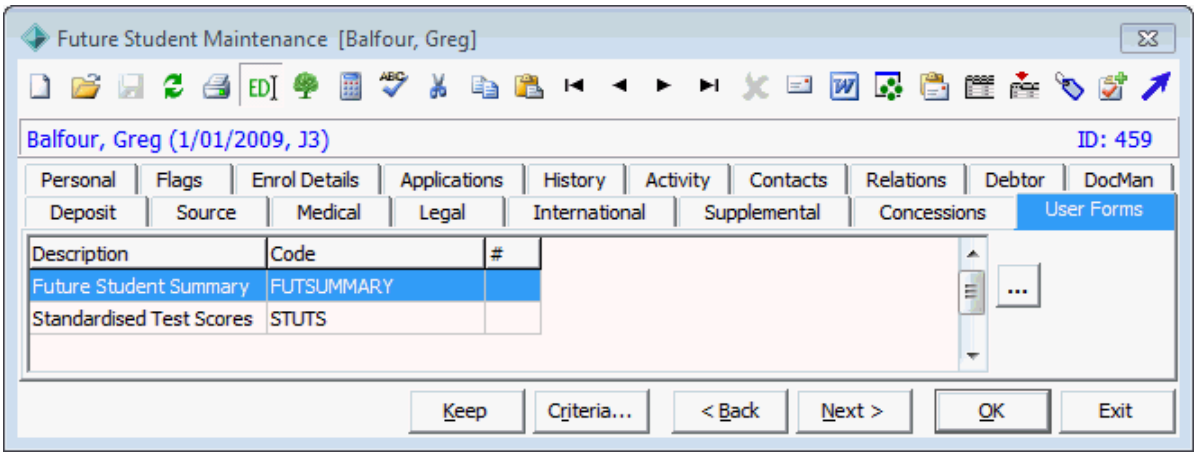
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking Future.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **User Forms** tab.

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



Future Student 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.

Future Student Maintenance - DocMan tab

Use the **DocMan** tab to add documents, spreadsheets and pictures, such as:

- an offer letter
- a scanned birth certificate
- scanned reports.

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

Opening the DocMan tab

To open the **DocMan** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

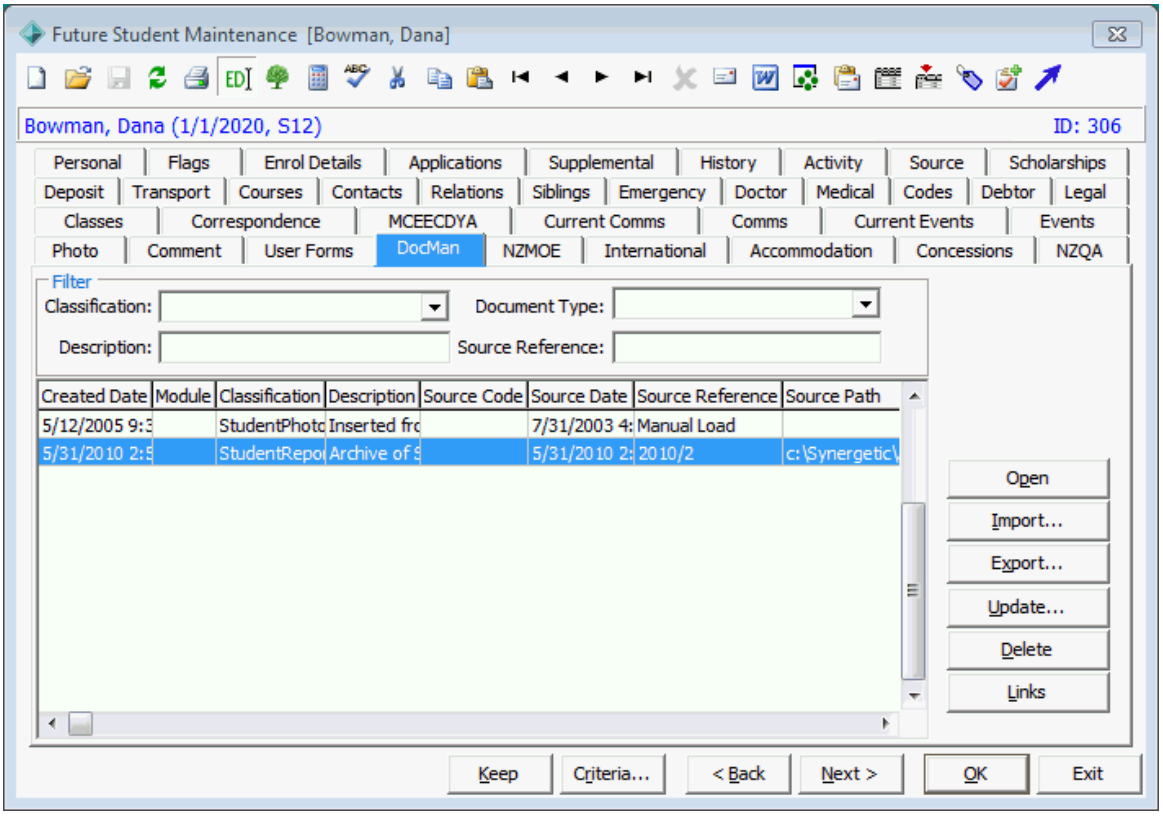
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **DocMan** tab.

   The **DocMan** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - DocMan tab key fields and buttons

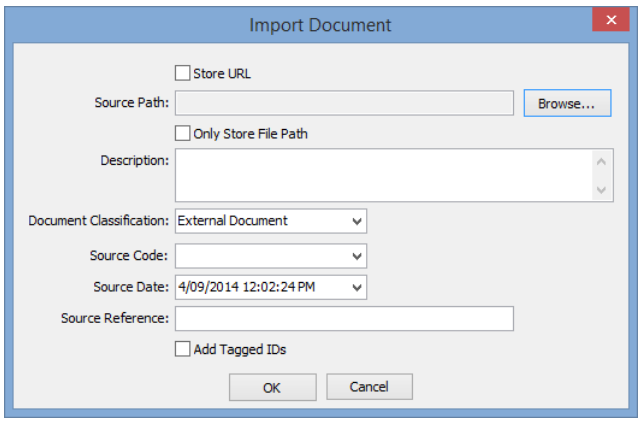
Fields

Field	Description
Classification	Classification of the documents to be displayed. Access to documents can be restricted based on user security levels. Select the classification from the drop-down list to filter the documents displayed.
Document Type	Type of document. For example: • Microsoft Word Document • JPG Photo • Adobe Acrobat File • Microsoft Excel Spreadsheet. **Note:** The document types set up are those that are used at your organisation. Select the type of document from the drop-down list to filter the documents displayed.
Description	Filter the documents to those which have the typed words in the description.
Source Reference	Filter the documents to those which have the typed words in the source reference.

Grid area fields

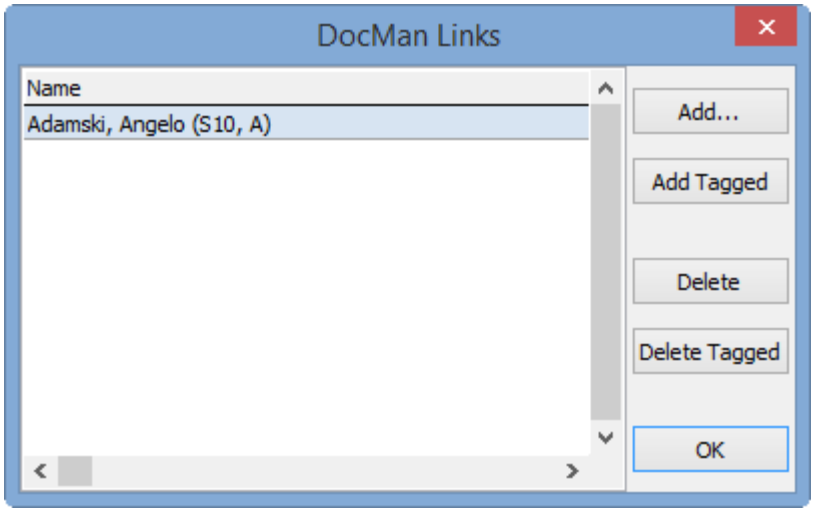
Field	Description
Created Date	Date and time the document, spreadsheet or picture was imported into Synergetic.
Classification	Classification of the document. Classifications are maintained in the **luDocumentClassification** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Description	Short description of the document.
Source Code	Source of the document. Typical examples include: • Archive • Magazine • Newspaper • School Photo • Website. Document sources are maintained in the **luDocumentSourceCode** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Source Date	Date the document was published or received.
Source Reference	Cross-reference to the source. For example the name, issue date and page of a newspaper where the student's photograph appeared.
Source Path	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.
Type	Type of document. Typical examples include: • DOC, DOCX (Microsoft Word document) • JPG (photo using the Joint Photographic Experts Group format) • PDF (Adobe Acrobat file) • XLS, XLSX (Microsoft Excel spreadsheet). Document types are maintained in the **luDocumentType** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Seq	Unique number identifying the document.

Buttons

Button	Description
Open	Open the highlighted document in the appropriate application to view the document. For example, a community member's record includes a Microsoft Word document in the **DocMan** tab. Click Open to open the document in Microsoft Word.
Import ...	Import a document, spreadsheet, picture or link an external web page. See: • *Linking documents using a tag list* in the Introduction manual • *Importing one or more documents* (on page 206) • *Updating existing documents* (on page 211). 
Export...	Export a document, spreadsheet or picture. To copy a document, spreadsheet or picture from the Synergetic database and save it in a Windows folder: 1. Click Export.... 2. Browse for the folder. 3. Click Save.
Update ...	Open the highlighted document on the **DocMan** tab and update the information about the document. **Note:** You cannot update fields if the document is a photo loaded using **Photo Maintenance**.
Delete	Delete the highlighted document from the **DocMan** tab. **Note:** 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.

Button	Description
Links	Maintain the community members linked to the document, spreadsheet or photo. You can: • view the community members who share a link to the document • link a document to: – one or more community members – community members in the current tag list. • remove the link to the: – highlighted community member – community members in the current tag list. See **DocMan Links window key buttons** below.

DocMan Links window key buttons



Button	Description
Add...	Add a community member to share the document. See *Sharing a document with other community members* in the Introduction manual.
Add Tagged	Add the document to the **DocMan** tab for each of the community members contained in the current tag list.
Delete	Remove the document from the **DocMan** tab of the highlighted community member.
Delete Tagged	Remove the document from the **DocMan** tab of all community members in the current tag list.

Importing one or more documents

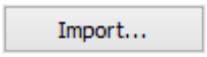
You can import one or more documents and either:

- link to the documents on a file server
- embed them in the Synergetic database.

You can import the documents and attach them to either the:

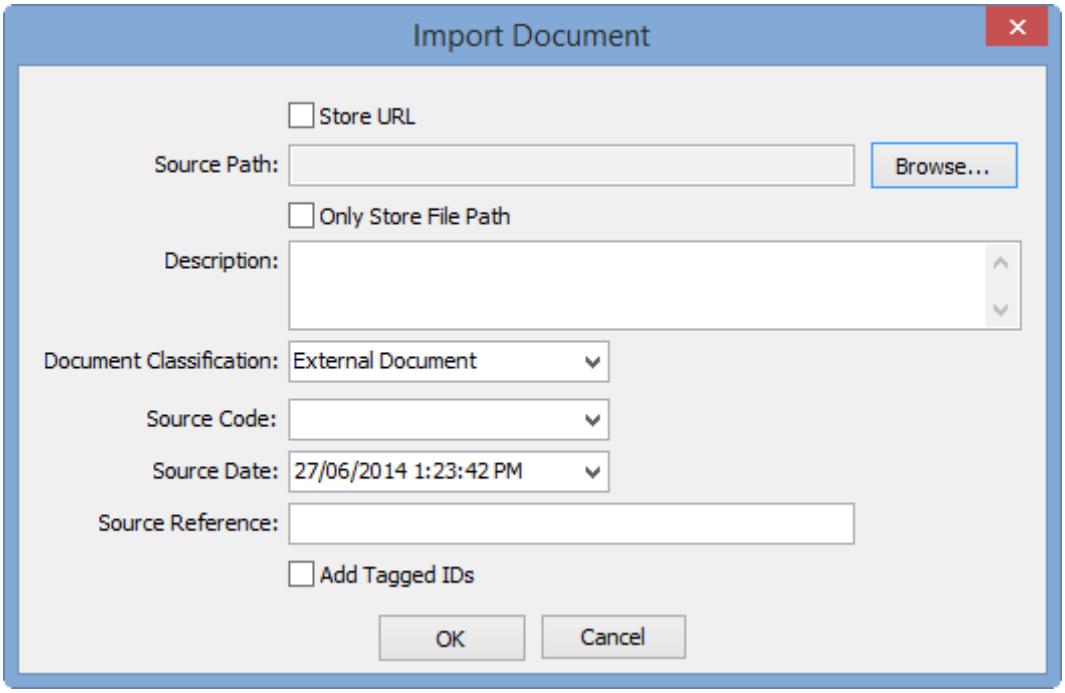
- Selected community member, such as a student or a staff member, as described below.
- Community members who have been tagged earlier. See *Linking documents using a tag list* in the Introduction manual.

To import one or more documents into Synergetic and attach them to the selected community member:

1. Click 

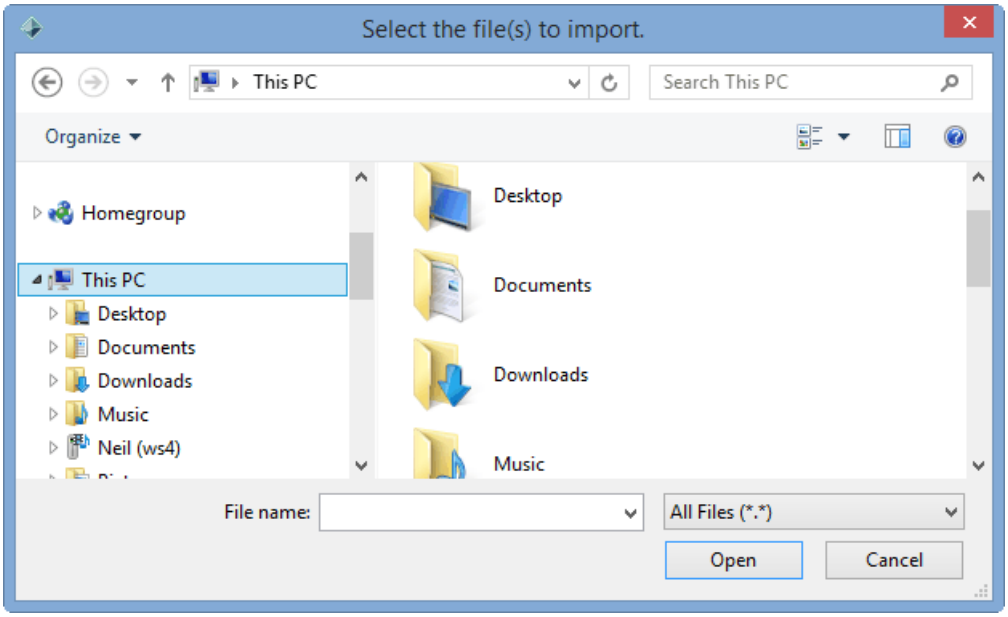
on the **DocMan** tab.

   The **Import Document** window is displayed.



2. Click Browse....

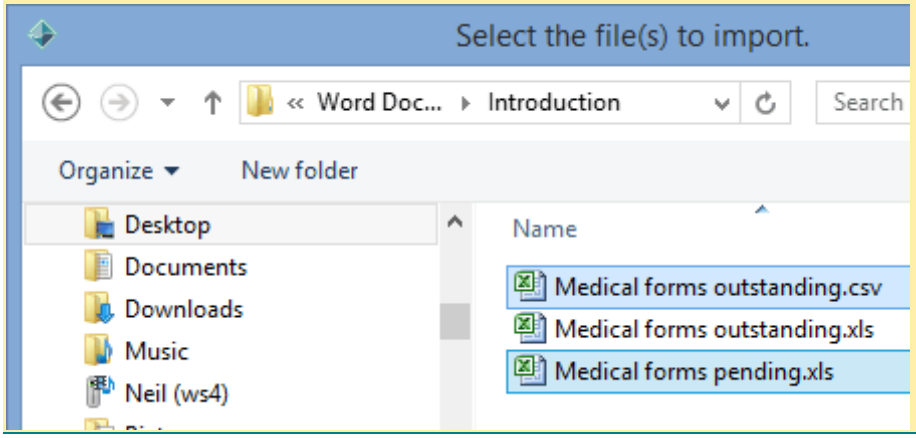
   A window is displayed, similar to the example below.



3. Locate the document, spreadsheet or photo you want to import.

Tip: If you are linking to the document, type the server and directory into the **File name** field using a UNC format. See the **Only Store File Path** field description below.

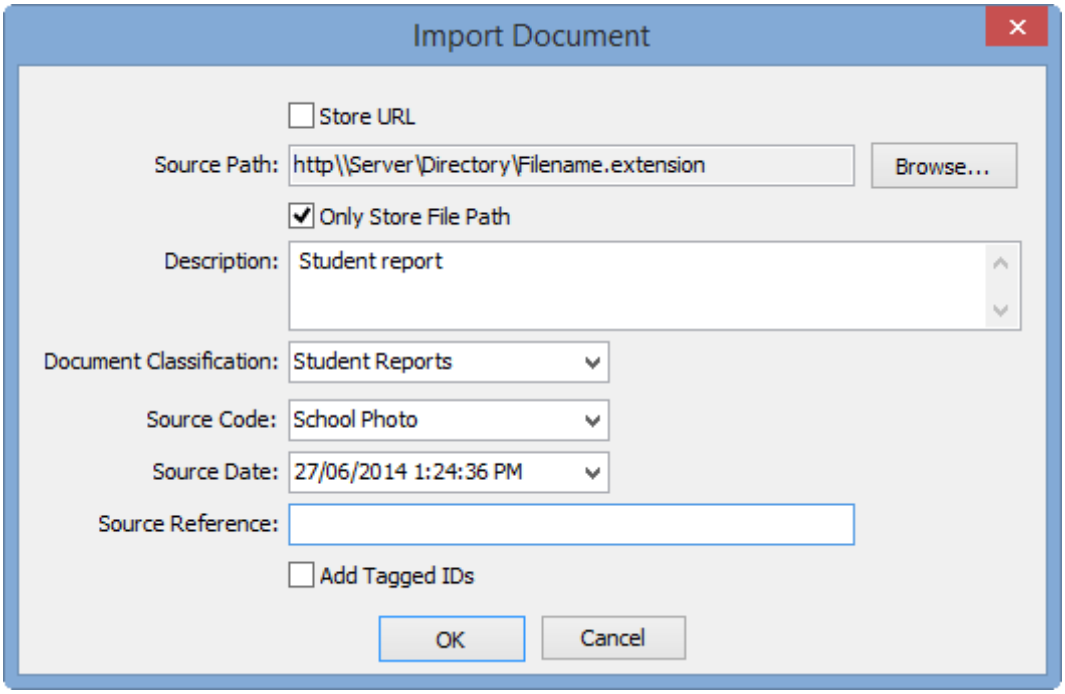
Tip: You can select multiple files by holding down the **Ctrl** key and clicking each file in turn. By importing several files together, you assign them the same grid information. For example, **Classification**.

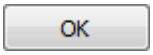


4. Click Open.

   The **Source Path** field is updated with the selected file names.

5. Either:
   - select the **Only Store File Path** field to *link* to the document on the server
   - clear the **Only Store File Path** field to *embed* the document in the Synergetic database.
6. Type in a **Description** for the document.
7. Select a **Document Classification**.
8. Update any other selections, if required.



9. Click 

.

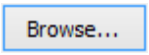
The documents, or their links, are added to the community member's available documents.

Created Date	Classification	Description	Source Code	Source Date	Source Reference
26/10/2005 8:09:21 PM	StudentPhoto	Inserted from Photos		26/10/2005	Manual Load
21/08/2008 9:32:48 AM	StudentNotes	Student Excel files	Archive	21/08/2008	
21/08/2008 9:32:48 AM	StudentNotes	Student Excel files	Archive	21/08/2008	
21/08/2008 9:32:48 AM	StudentNotes	Student Excel files	Archive	21/08/2008	
21/08/2008 9:32:48 AM	StudentNotes	Student Excel files	Archive	21/08/2008	

Note: In the example shown above, multiple files were selected during step **3**. An entry is added for each document in turn, along with the common details entered.

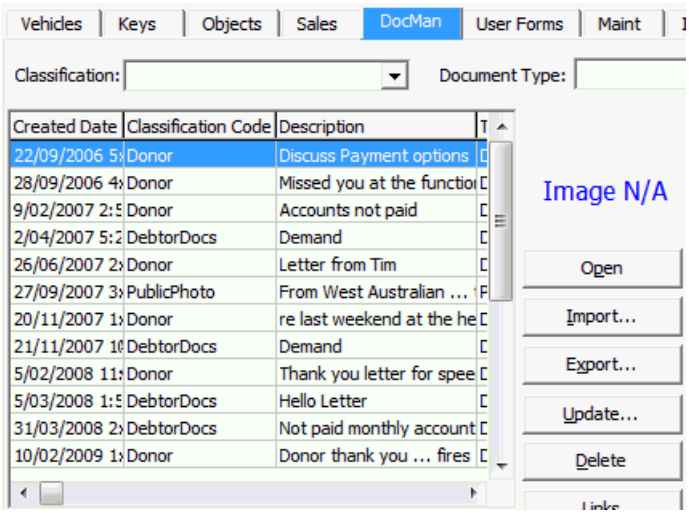
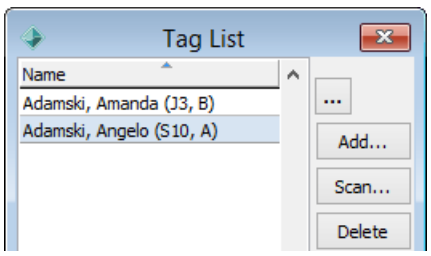
Import Document window key fields and buttons

Fields

Field	Description
Store URL	Select to enter a URL into the **Source Path** instead of a directory path.
Source Path	Directory path of the source document, the document name and its file extension if linked to a document on a file server or PC. This field is not editable and is populated after you click  and locate the file.
Only Store File Path	Clear this field to *embed* the document in the Synergetic database. The advantage is that you do not need to be concerned about the path of source documents but it does increase the size of the database. Select this field to *link* the document using the **Source Path**. The advantage is that it minimises the size of the Synergetic database but it can introduce problems locating files if users: • add files from local drives • do not specify the server correctly • move files after you have imported them. If you select this field, it is recommended that you specify the **Source Path** using a UNC (Universal Naming Convention) format: **\\Server\Directory\File name.Extension** where: • **\\Server** is the server name using a UNC format • **\Directory** is the directory path on the specified server • **File name** is the name of the document to be imported • **Extension** is the file extension of the document, such as **.doc** for a Microsoft Word document.
Description	Meaningful description for the document.
Document Classification	Classification of the document. Document classifications are maintained in the **luDocumentClassification** lookup table. See *luDocumentClassification lookup table* in the System maintenance manual.
Source Code	Source of the item. Typical examples include: • Archive • Magazine • Newspaper • School Photo. Document sources are maintained in the **luDocumentSourceCode** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Source Date	Date that the source document was created. For example, if you are importing a historical picture you might specify the date when the picture was taken. This defaults to the current date and time for new entries.

Field	Description
Source Reference	Cross-reference to the source. For example the name, issue date and page of a newspaper where the photograph appeared.
Add Tagged ID's	Select to add the document to all of the tagged community records. See *Linking documents using a tag list* in the Introduction manual.

Buttons

Button	Description
Browse...	Browse for the document. When you locate and select the document, the **Source Path** field is updated. You may need to change the **Source Path** to a UNC format, so that a file server is specified. See the **Only Store File Path** field description above. **Note:** A UNC format allows other people to easily access the document on the server. In contrast, a document cannot be found if you mapped to the file server (say, **N:** drive) differently to other people (say, **Z:** drive).
OK	Import the document and embed or link to either: • the **selected** community member, student or staff member depending on the maintenance function being used  • the **tagged** community members, students or staff members depending on the maintenance function being used. 
Cancel	Cancel importing the document.

Updating existing documents

You can modify the details for an imported document or replace the document itself.

If you imported several files at once, this results in multiple entries; one for each document. You can:

- Modify the details. For example, you may want to edit each entry to distinguish the entry from the others.
- Replace the document. As each entry is associated with one document, you can only replace one document at a time.

Created Date	Classification	Description	Source Code	Source Date	Source Reference
26/10/2005 8:09:21 PM	StudentPhoto	Inserted from Photos		26/10/2005	Manual Load
21/08/2008 9:32:48 AM	StudentNotes	Student Excel files	Archive	21/08/2008	
21/08/2008 9:32:48 AM	StudentNotes	Student Excel files	Archive	21/08/2008	
21/08/2008 9:32:48 AM	StudentNotes	Student Excel files	Archive	21/08/2008	
21/08/2008 9:32:48 AM	StudentNotes	Student Excel files	Archive	21/08/2008	

Also see:

- *Importing one or more documents* (on page 206)
- *Linking documents using a tag list* in the Introduction manual.

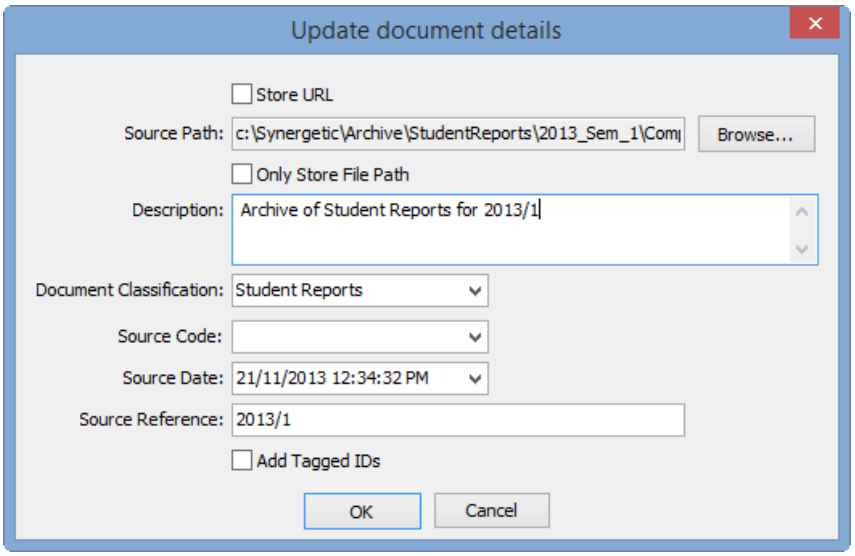
Note: You cannot update fields if the document is a photo loaded using **Photo Maintenance**.

To replace a document and update its details:

1. Click

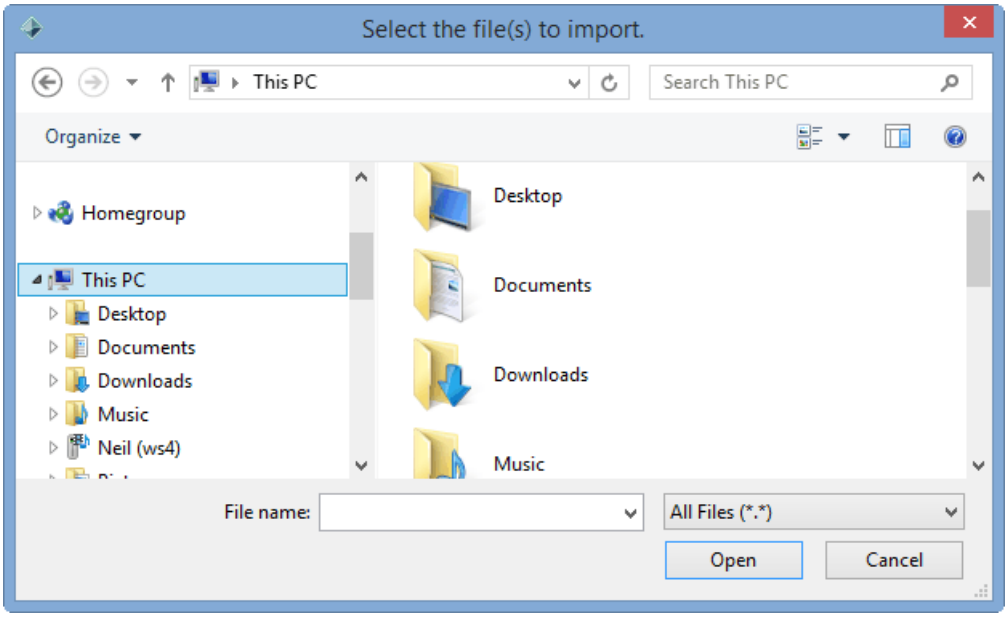
on the **DocMan** tab.

   The **Update document details** window is displayed.



2. Click Browse....

   A window is displayed, similar to the example below.



3. Locate the document, spreadsheet or photo you want to replace the existing document with.

Tip: If you are linking to the document, type the server and directory into the **File name** field using a UNC format. See the **Only Store File Path** field description below.

4. Click Open.

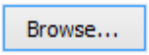
   The **Source Path** field is updated with the details of the server, directory and file name.

5. Either:
   - select the **Only Store File Path** field to *link* to the document on the server
   - clear the **Only Store File Path** field to *embed* the document in the Synergetic database.
6. Update the **Description** for the document, if required.
7. Update the **Document Classification**, if required.
8. Update any other selections, if required.
9. Click OK.

   The document, or its link, and the details are updated.

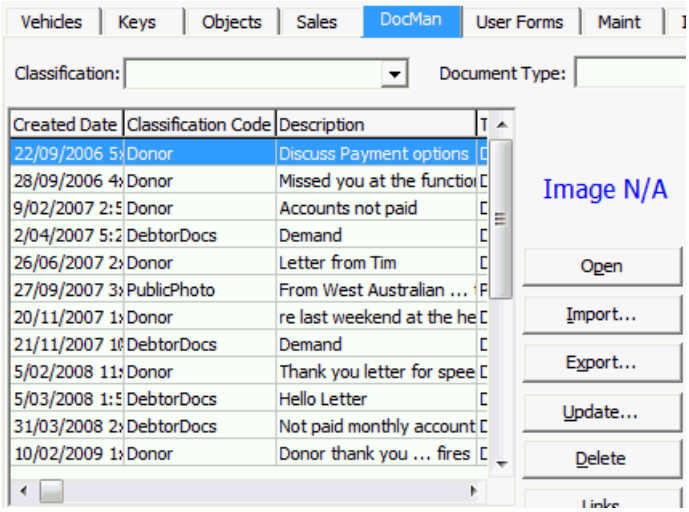
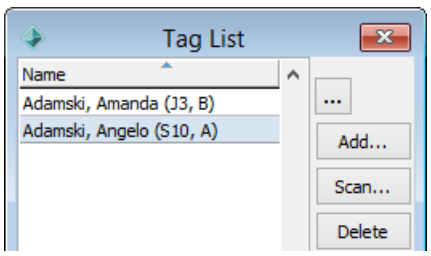
Update Document Details window key fields and buttons

Fields

Field	Description
Store URL	Select to enter a URL into the **Source Path** instead of a directory path.
Source Path	Directory path of the source document, the document name and its file extension if linked to a document on a file server or PC. This field is not editable and is populated after you click  and locate the file.
Only Store File Path	Clear this field to *embed* the document in the Synergetic database. The advantage is that you do not need to be concerned about the path of source documents but it does increase the size of the database. Select this field to *link* the document using the **Source Path**. The advantage is that it minimises the size of the Synergetic database but it can introduce problems locating files if users: • add files from local drives • do not specify the server correctly • move files after you have imported them. If you select this field, it is recommended that you specify the **Source Path** using a UNC (Universal Naming Convention) format: **\\Server\Directory\File name.Extension** where: • **\\Server** is the server name using a UNC format • **\Directory** is the directory path on the specified server • **File name** is the name of the document to be imported • **Extension** is the file extension of the document, such as **.doc** for a Microsoft Word document.
Description	Meaningful description for the document.
Document Classification	Classification of the document. Document classifications are maintained in the **luDocumentClassification** lookup table. See *luDocumentClassification lookup table* in the System maintenance manual.
Source Code	Source of the item. Typical examples include: • Archive • Magazine • Newspaper • School Photo. Document sources are maintained in the **luDocumentSourceCode** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Source Date	Date that the source document was created. For example, if you are importing a historical picture you might specify the date when the picture was taken. This defaults to the current date and time for new entries.

Field	Description
Source Reference	Cross-reference to the source. For example the name, issue date and page of a newspaper where the photograph appeared.
Add Tagged ID's	Select to add the document to all of the tagged community records. See *Linking documents using a tag list* in the Introduction manual.

Buttons

Button	Description
Browse...	Browse for the document. When you locate and select the document, the **Source Path** field is updated. You may need to change the **Source Path** to a UNC format, so that a file server is specified. See the **Only Store File Path** field description above. **Note:** A UNC format allows other people to easily access the document on the server. In contrast, a document cannot be found if you mapped to the file server (say, **N:** drive) differently to other people (say, **Z:** drive).
OK	Import the document and embed or link to either: • the **selected** community member, student or staff member depending on the maintenance function being used  • the **tagged** community members, students or staff members depending on the maintenance function being used. 
Cancel	Cancel importing the document.

Future Student Maintenance - NZMOE tab

New Zealand organisations use the **NZMOE** tab to update settings required by NZ MOE. Once students are enrolled, the:

- fields are used to generate:
  - roll return reports
  - the MOE file sent to the NZ MOE web service.
- buttons are available to:
  - retrieve new NSNs
  - check existing NSNs and student identity data.

Contact details provided to the NZ MOE are also used by Youth Services to identify and contact at-risk young people.

See *Managing New Zealand student NSNs and identity details* in the Current students manual.

Tip: If your organisation is not in New Zealand, you can still use the **NZMOE** tab for internal purposes. See *ShowNZMOETabIfNotNZ configuration setting* in the System Maintenance manual.

Opening the NZMOE tab

To open the **NZMOE** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

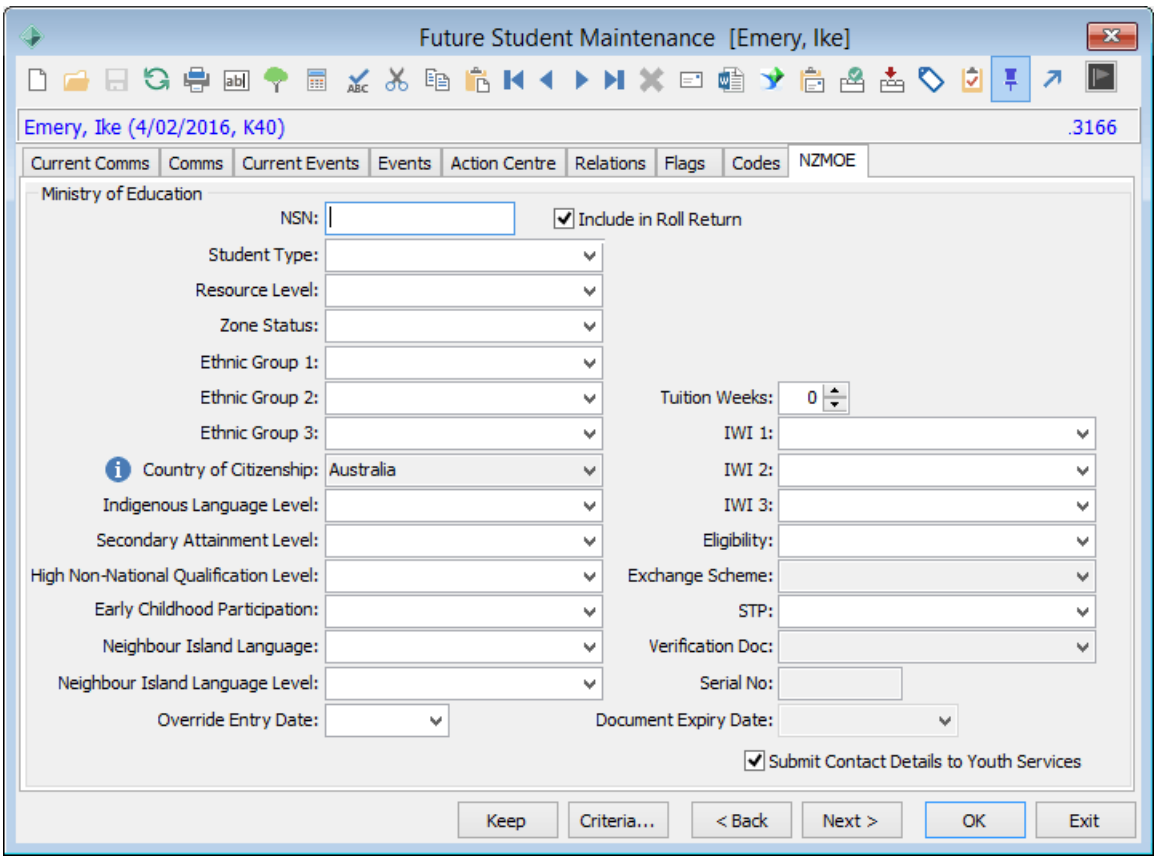
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **NZMOE** tab.

   The **NZMOE** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - NZMOE tab key fields and buttons

Fields

Field	Description
NSN	National Student Number. The NSN allows the unique identification of students and is: • a record of learning number • allocated using the ENROL system • mandatory for all students.
Include in Roll Return	Select to include the student in the roll return. Clearing the checkbox will: • exclude the student from the roll return • print a warning on the roll returns errors and warnings report created during NZMOE Import/Export. See *Import/Export Student Data - MOE tab*. **Note:** This field is typically used to exclude exchange students from the roll return where the students are paired with domestic students involved in the same exchange.
Student Type	Type of student for funding purposes. The NZ MOE uses this information to prepare staff resourcing plans. Students can only be allocated to one code, even though they may belong to more than one group. To allocate a student type, start at the top of the list and work down. Use the first code that applies to this student. For details, see *Student type* in the in the Roll returns manual.
Resource Level	Level of resources required for students identified in the Ongoing and Reviewable Resourcing Scheme (ORRS). The default value is **Non-ORRS**. Students may be classified as **ORRS-High Level** or **ORRS-Very High Level** and require additional resourcing. Because of this additional resourcing, the roll return validation can be different than normal.
Zone Status	Indicates whether a full-time regular domestic student, adult student or returning adult student resides inside or outside of the school zone at the date of their first attendance at your organisation. For details, see *Zone status* in the Roll returns manual.
Ethnic Group 1 / **Ethnic Group 2 /** **Ethnic Group 3**	Ethnic group or groups that a student identifies with. The fields allow a student, parent or guardian to nominate up to three ethnic groups. The NZ MOE encourages schools to allow students to self-identify or be identified by their parents or guardians as belonging to more than one ethnic group. There should be no duplicate codes in **Ethnic Group 1**, **2** or **3**. For details, see *Ethnic group* in the Roll returns manual.

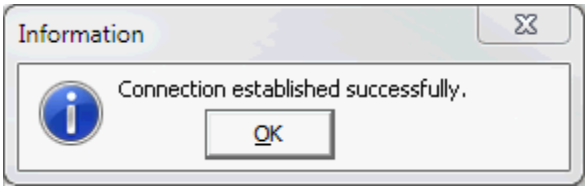
Field	Description
Country of Citizenship	Country of citizenship of the student, as determined from their birth certificate, passport, citizenship documentation or Immigration Service documentation. For details, see *Country of citizenship* in the Roll returns manual. This field is maintained on the **International** tab. See *Future Student Maintenance - International tab* (on page 222). **Tip**: Click the ! icon to switch to the **International** tab.
Indigenous Language Level	Highest level of Maori language learning the student is involved in. To allocate a code to an individual student, start at the top of the list and work down. Use the first code that applies to the student. For details, see *Indigenous language level* in the Roll returns manual.
Secondary Attainment Level	Highest secondary school attainment for school leavers enrolled in the NCEA/NQF (National Qualifications Framework). This is used to measure the academic performance of students in year 9 and above when they leave school. This field is required for secondary students and adult students who are permanently leaving the NZ schooling sector. For details, see *NQF qualification codes* in the Roll returns manual.
High Non-National Qualification Level	Highest secondary school attainment for school leavers enrolled in the **non-**NQF. This is used to measure the academic performance of students in year 9 and above when they leave school. If students have at least partial attainment of a non-NQF qualification, at any year level, but not met the full requirements they should be coded with attainment at the level below. This field is required for regular and adult students who are permanently leaving the NZ schooling sector. For details, see *Non-NQF qualification codes* in the Roll returns manual.
Early Childhood Participation	Identifies whether year one students attended any form of Early Childhood Education on a regular basis prior to starting school. For details, see *Participation in early childhood education* in the Roll returns manual.
Neighbour Island Language	Particular Pacific Island language in which immersion (in the Pacific Language only) or bilingual (both a specified Pacific Language and English) education is provided. For details, see *Neighbour Island language* in the Roll returns manual.
Neighbour Island Language Level	Highest level of Pacific language learning the student is involved in. To allocate a code to an individual student, start at the top of the list and work down. Use the first code that applies to this student. For details, see *Neighbour Island language level* in the Roll returns manual.
Override Entry Date	Date the student started primary school. This field is used to avoid reporting errors caused by students starting at your organisation before they were five years old. For example, if the student was enrolled at preschool with your organisation. **Note:** This field overrides the **Initial Schooling Date** field to supply the *First Schooling date* for NZMOE roll returns. See *Current Student Maintenance - Entry tab* in the Roll returns manual.

Field	Description
Tuition Weeks	Total number of weeks in the academic year that a student is enrolled for academic tuition, if they are an: • international fee-paying student (**FF**) • NZAID student (**FE**). For example, if a student enrols for **two** terms of study and each school term consists of **10** weeks then **Tuition Weeks** = **20**. It does not matter if the student is part-time or full-time. This is used to calculate the International Student Levy for an international student. Also, see *Setting up tuition fees for international and full-fee students* in the Roll returns manual.
IWI 1 **IWI 2** **IWI 3**	Iwi affiliation or affiliations that a student holds. The fields allow a student, parent or guardian to nominate up to three Iwi affiliations. See *Indigenous groups (Iwi affiliations)* in the Roll returns manual. At least one Iwi is required for **IWI 1**, if Māori has been selected in **Ethnic Group** (see above) and the student was enrolled after 1st January 2003. This includes a student transferring from another school. **IWI 2** and **IWI 3** are optional.
Eligibility	List of the possible criteria used to determine the eligibility status of a student for enrolment and funding purposes. This is used to determine if the student qualifies for funding purposes as either: • a domestic student (codes 100-185, 500-888) • an international fee-paying student (codes 200, 300) • international fee-exempt student (code 400). See *Eligibility criteria* in the Roll returns manual.
Exchange Scheme	Type of exchange scheme or agreement an exchange student belongs to. The NZ Ministry of Education needs to identify which exchange scheme the student is affiliated with to confirm that the student is part of a government approved scheme or agreement. For more details, see *Exchange scheme* in the Roll returns manual. **Note:** This field is read-only if the student's **Eligibility** does not require an **Exchange Scheme**.
STP	Whether a student attends a Secondary tertiary programme. These students: • attend: – your organisation on a part-time basis with an FTE (full-time equivalent) as low as **0.0** – another educational institution for training • are: – aged under 19 – in year level 11, 12 or 13 at your organisation – considered regular students – unique because they can be part-time and aged under 16.

Field	Description
Verification Doc	Type of document provided by the parent or guardian when the student is enrolled at the school. The document which is used by the school to verify the student's name, date of birth and eligibility status in accordance with Education Circular 2007/1. Only one verification document is required. See *Verification document* in the Roll returns manual.
Serial No	Serial number on the document used to verify the student's eligibility status. The format of the field depends upon the type of document used for verification. This provides proof that the documentation has been witnessed by the school administrator.
Document Expiry Date	Expiry date of the document specified in the **Verification Doc** field for all students except with an **Eligibility** of: • NZ citizen • NZ resident • Australian citizen. **Note:** It is recommended that this is entered for all students as it is used for arrival uploads in ENROL.
Submit Contact Details to Youth Services	Select to submit additional contact details, such as the contact information for the **Parent 1** and **Parent 2** relations, to the New Zealand government's Youth Services. Clear the field to suppress the additional contact information when requested by the student or caregiver.

Buttons

Button	Description
!	Switch to the **International** tab to edit the student's **Country of Citizenship**. See *Future Student Maintenance - International tab* (on page 222). See **Country of Citizenship** above.
Get/check NSN	You can: • retrieve a student's NSN from the ENROL database and update Synergetic with the value • confirm that a student's NSN is correct in Synergetic • view the differences in the student's identity details between Synergetic and ENROL • determine whether a new record needs to be entered into ENROL. See *Managing New Zealand student NSNs and identity details* in the Current students manual. ENROL is a central register of student enrolments developed by the NZ Ministry of Education for schools to use via the web.

Button	Description
Test Connection	Test the connection with the NZ MOE web service. The following dialog is displayed if the connection is successful.  If not successful, check the configuration. See: • *NZMOE eReturn window* • *SMS data exchange set up and configuration* in the Roll returns manual.
Go to ENROL front page	Open the NZ MOE web service using your web browser for the selected student, based on the **URL** field. The URL (Universal Resource Locator or web address) is populated when the student's NSN is retrieved or checked. For an example, see *Updating student identity details in both Synergetic and ENROL programs* in the Current students manual.
Configure...	View or update the data exchange configuration. Data exchange is used for: • sending the .MOE file to the NZ Ministry of Education during the roll returns process • checking or getting student NSNs for individual students from the ENROL web site. See *NZMOE eReturn window* in the Roll returns manual.
Print Report...	Print the results of sessions where student: • NSNs have been retrieved or checked • identity details have been checked. See *Printing ENROL Get/Check NSN reports* in the Current students manual.

Future Student Maintenance - International tab

Use the **International** tab to:

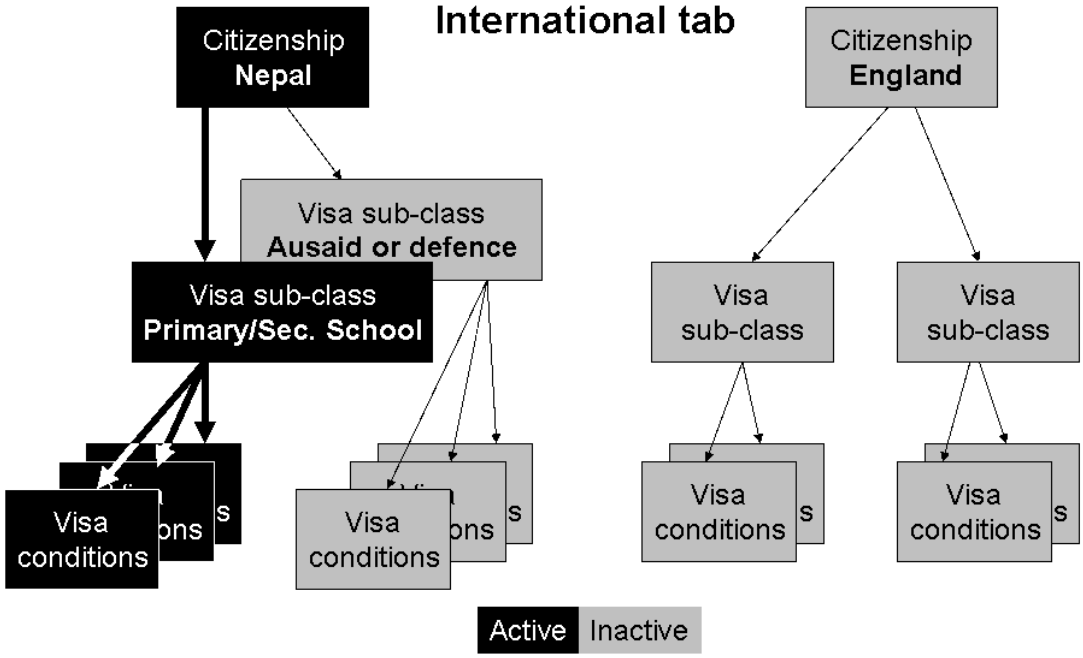
- record citizenship, passport and visa details
- set which citizenship or visa subclass is active at present.

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:

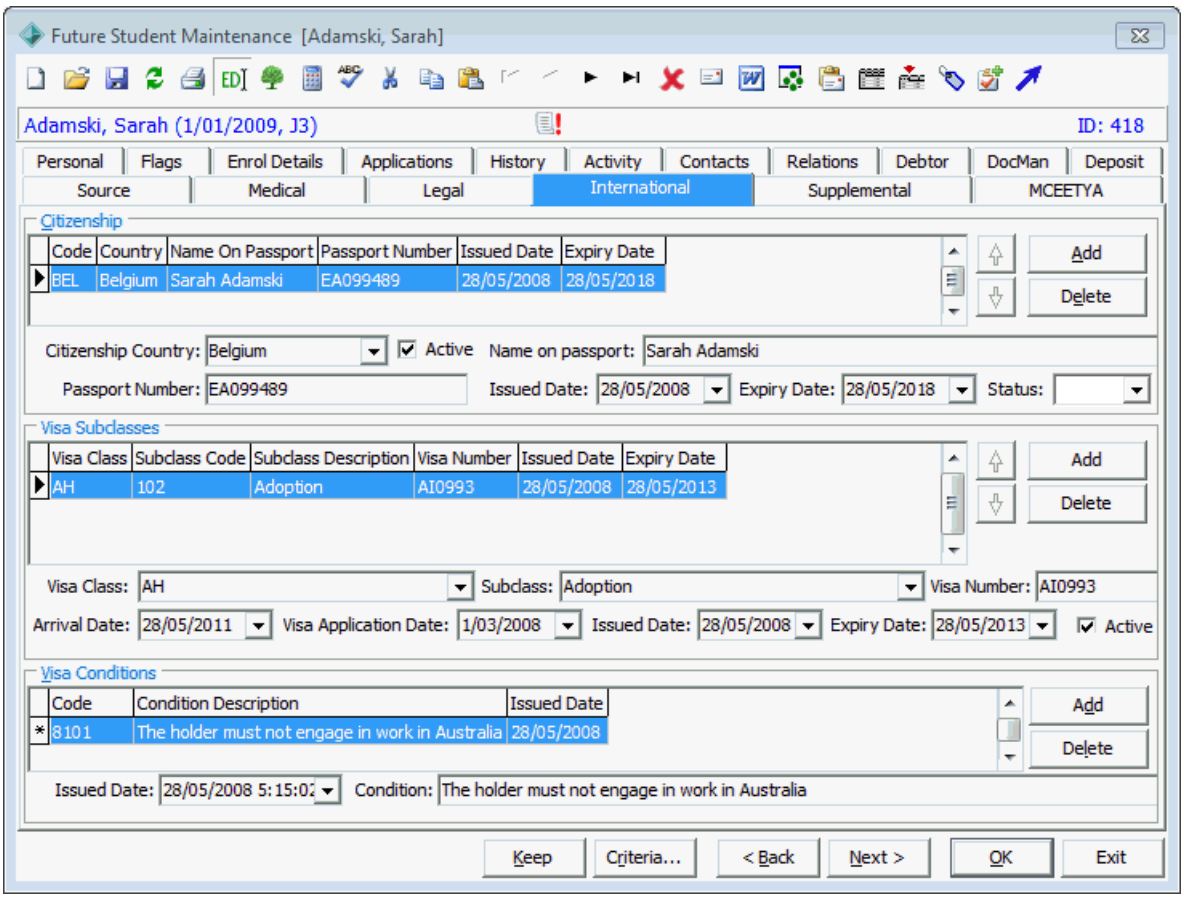
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

> **Tip:** You can also access the future student functions by clicking
>
> .

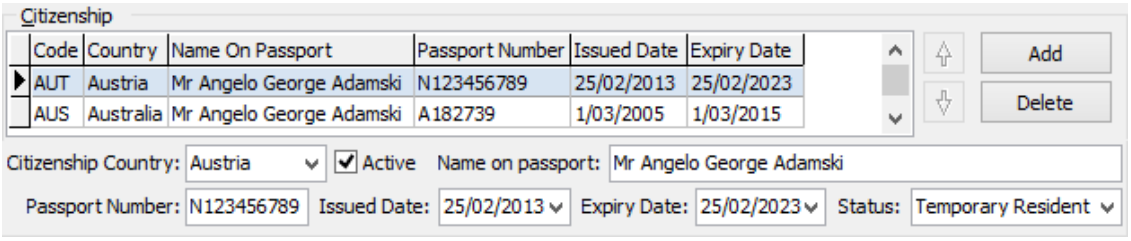
2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **International** tab.

   The **International** tab of the **Future Student Maintenance** window is displayed.



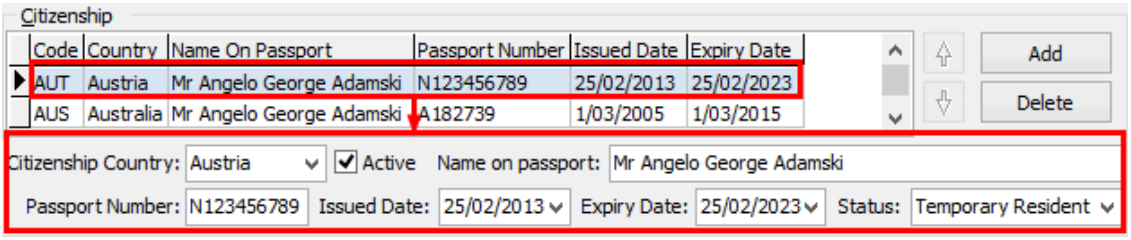
Future Student Maintenance - International tab key fields and buttons

Citizenship area fields and buttons

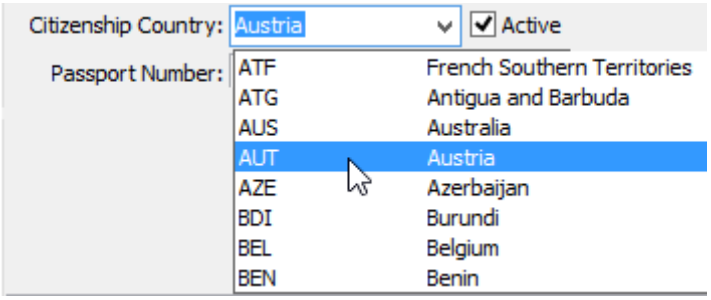


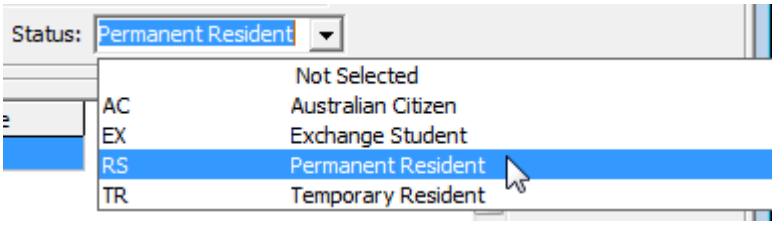
Grid area fields

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

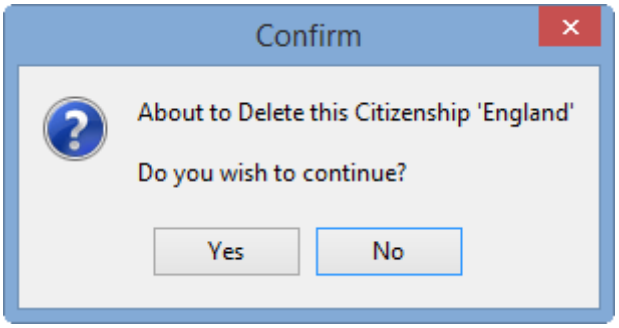


Fields

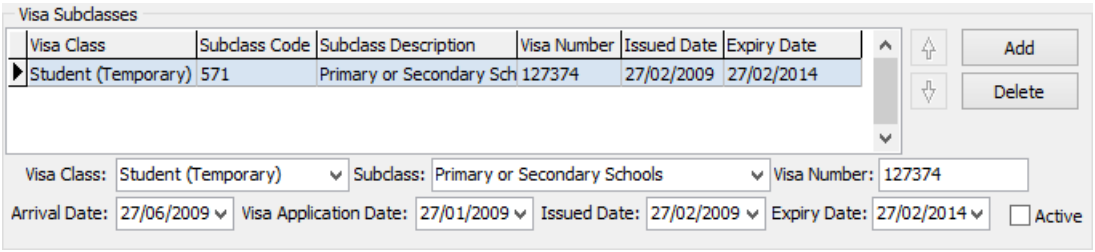
Field	Description
Citizenship Country	Country of citizenship that applies to the passport. Select the required value from the drop-down list. 
Primary	Whether the citizenship record is the primary citizenship for your organisation's purposes. The field is automatically selected if the record is the first citizenship record. Only one citizenship record can be the primary record. Click the button to move a record to the first position and make it the Primary citizenship.
Name on Passport	Name as it appears on the passport.
Passport Number	Number of the passport.
Issued Date	Date the passport was issued.
Expiry Date	Date the passport expires.

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

Buttons

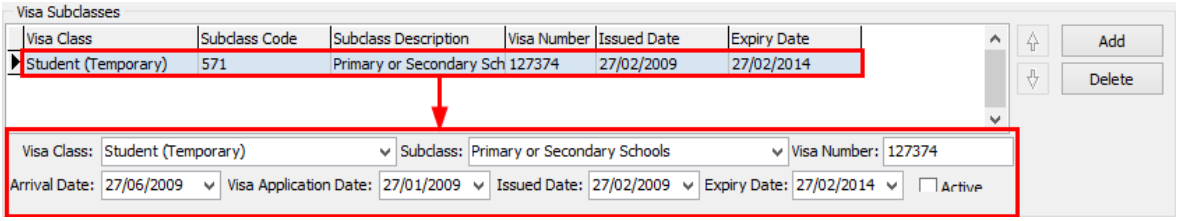
Button	Description
	Move the current record up one place in the list. If the record is moved to the top of the list, the **Active** flag is automatically set.
	Move the current record down one place in the list. If the record is moved from the top of the list, the **Active** flag is automatically cleared.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

Visa Subclasses area fields and buttons

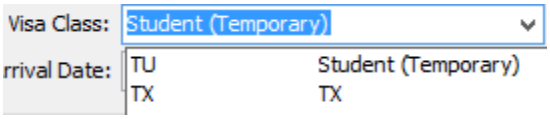
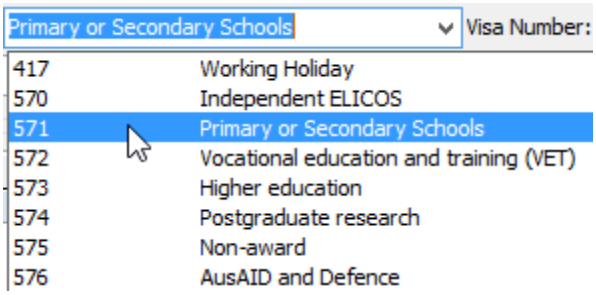


Grid area fields

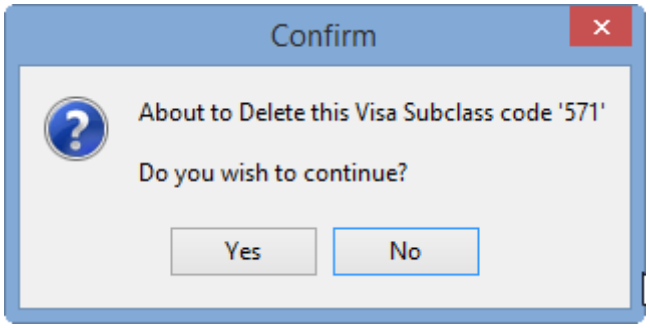
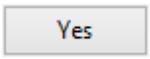
The values of the selected record correspond to the fields below.



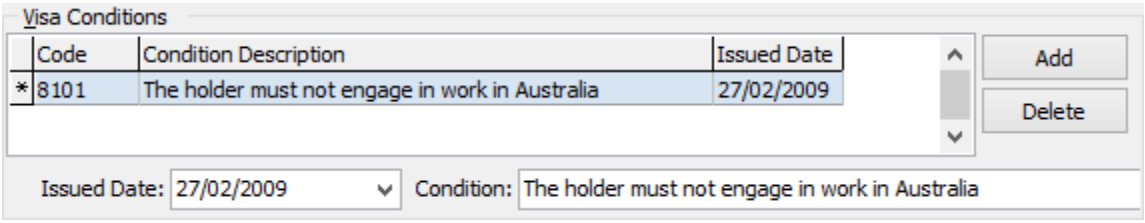
Fields

Field	Description
Visa Class	Class of visa provided by the Government department. Select the required value from the drop-down list. 
Subclass Code	Code and description of visa subclass that applies. Select the required value from the drop-down list. 
Visa Number	Number assigned.
Arrival Date	Date the community member arrived in the country.
Visa Application Date	Date the application was provided to the Government department.
Issued Date	Date the visa was issued.
Expiry Date	Date the visa expires.
Active	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

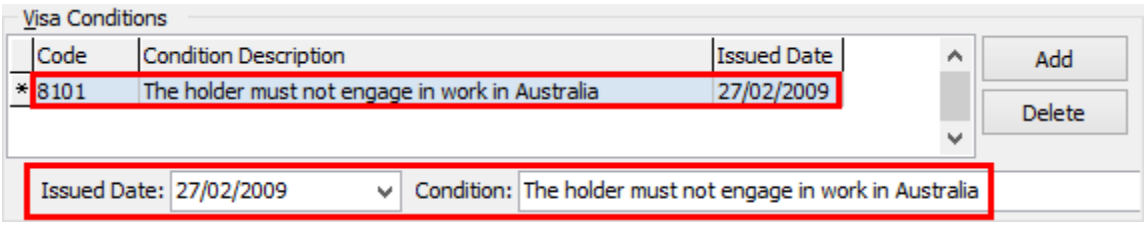
Button	Description
	Move the current record up one place in the list. If the record is moved to the top of the list, the **Active** flag is automatically set.
	Move the current record down one place in the list. If the record is moved from the top of the list, the **Active** flag is automatically cleared.
	Add a new row and edit the values. See the **Fields** section above.
	Delete the selected row. The following dialog is displayed.  Click  to delete the visa subclass record, along with its conditions.

Visa Conditions area fields and buttons



Grid area fields

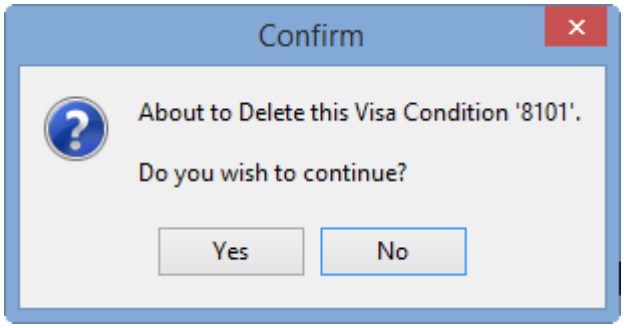
The values of the selected record correspond to the fields below.



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 **Code**.

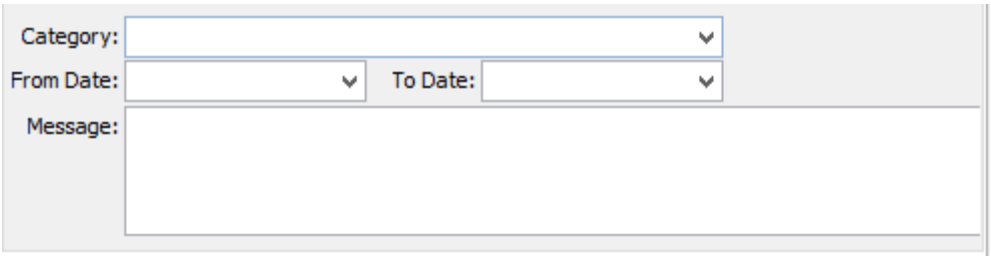
Buttons

Button	Description
Add	Add a new row and edit the values. See the **Fields** section above.
Delete	Delete the selected row. The following dialog is displayed.  Click Yes to delete the visa condition.

Future Student Maintenance - Alerts tab

Use the **Alerts** tab to add time-based alerts that are displayed when the student is selected in **Future Student Maintenance**, **Current Student Maintenance** or **Student Results Maintenance**. The alert is only displayed during the period entered on the **Alerts** tab.

In the following example Chris Aaron has had an alert added because he has been suffering from anxiety. The alert is only displayed during the period entered.



Note: The alert is displayed each time the student is selected. If the **Do not show alert again this session** field is selected, the alert does not display again until **Future Student Maintenance** is closed.

Opening the Alerts tab

To open the **Alerts** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

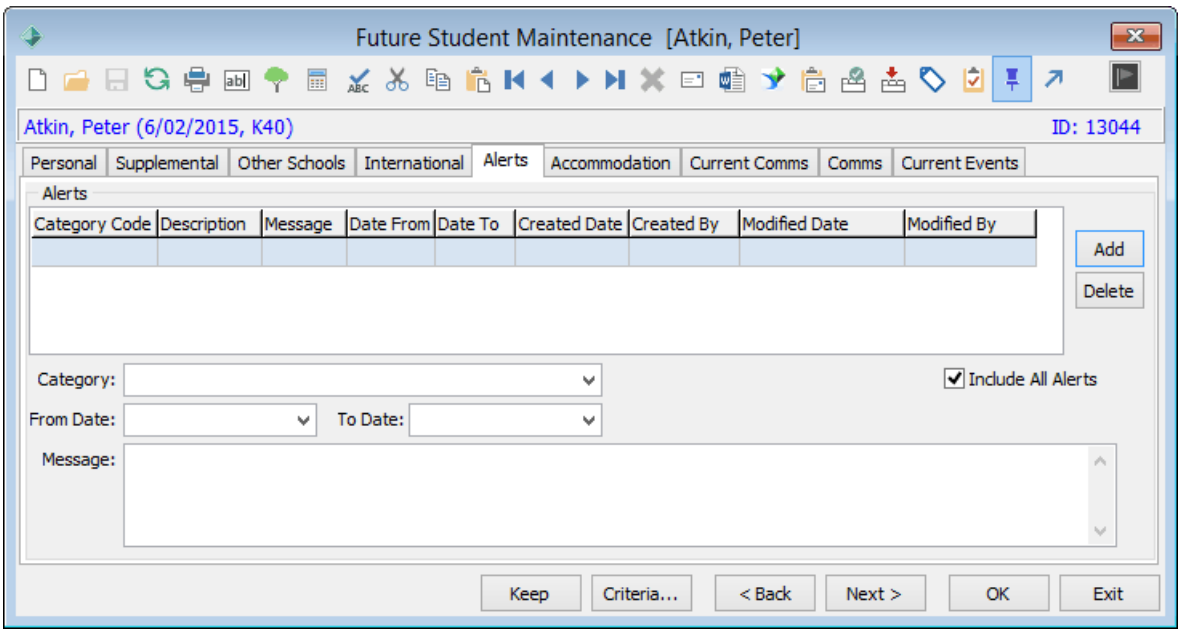
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Alerts** tab.

   The **Alerts** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Alerts tab key fields and buttons

The grid area fields correspond to the fields for the selected record.

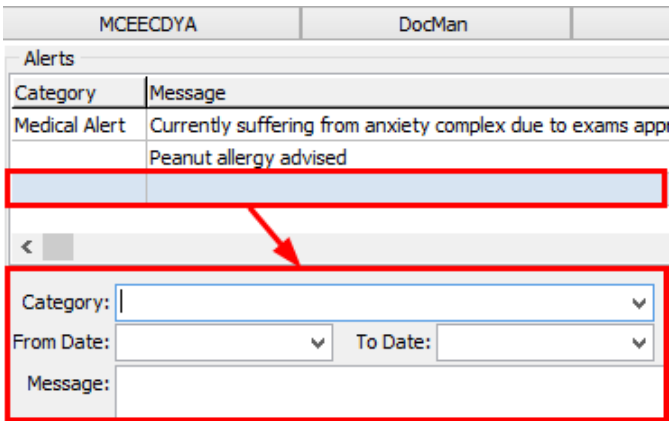
Fields

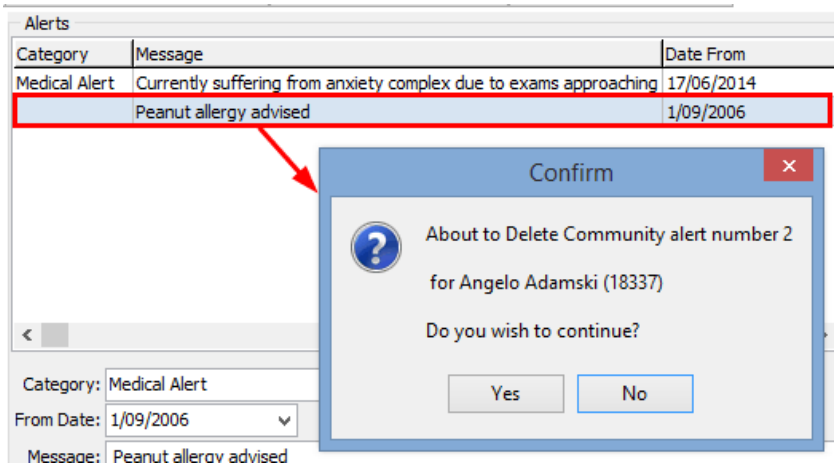
Field	Description
Category	Category used at your organisation for this type of alert.
From Date	Date from which the alert is displayed.
To Date	Date from which the alert is no longer displayed.
Message	Message displayed on the **Alerts** dialog window.
Include All Alerts	Check to display all alerts. If unchecked only current alerts are displayed.

Grid area fields

Field	Description
Category Code	Category code used at your organisation for this type of alert.
Description	Description of the category.
Message	Message displayed on the **Alerts** dialog window.
Date From	Date from which the alert is displayed.
Date To	Date from which the alert is no longer displayed.
Created Date/ Created By	The date the alert was created and the creator of the alert. This field is updated automatically.
Modified Date/ Modified By	The date the alert was last modified and the person who modified the alert. This field is updated automatically.

Buttons

Button	Description
Add	Inserts a new row in the grid area. Update the corresponding fields in the area below, as shown in the example. 

Button	Description
Delete	Delete the selected row. In the example below, the **Confirm** dialog window is displayed for the selected alert.  Click Yes to confirm the deletion.

Future Student Maintenance - Accommodation tab

The **Accommodation** tab of **Future Student Maintenance**:

- Is used to manage:
  - bookings with accommodation suppliers, such as hostels
  - bookings with one of a student's contacts, such as a relative or an individual providing home stay services.
- Makes use of **Object Maintenance**. For additional information, see the *Objects* manual.

Before beginning, see *Accommodation objects* (on page 234).

Follow your organisation's policy for vetting organisations and individuals that provide accommodation services to your students.

How to:

- Book accommodation with accommodation suppliers, such as hostels and home stays. See *Booking accommodation with accommodation suppliers* (on page 239).
- Edit an existing accommodation booking. See *Editing accommodation bookings* (on page 244).
- Delete an existing accommodation booking. See *Deleting accommodation bookings* (on page 246).
- Nominate contacts the student *could* stay with. See *Linking contacts that a student could stay with* (on page 253).
- Book accommodation with one of the nominated contacts. See *Booking accommodation with a student's contact* (on page 259).
- Delete a nominated contact, along with any bookings. See *Deleting a linked accommodation record* (on page 262).

What you can do:

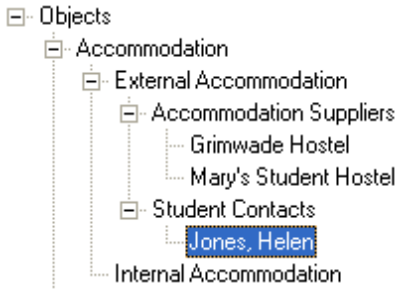
What you can do...	See...
• Book accommodation with accommodation suppliers, such as hostels and home stays. • Edit an existing accommodation booking. • Delete bookings.	*Future Student Maintenance - Accommodation tab - Accommodation sub-tab* (on page 236)
• Nominate contacts the student *could* stay with. • Book accommodation with one of the nominated contacts. • Delete a nominated contact, along with any bookings.	*Future Student Maintenance - Accommodation tab - Contacts sub-tab* (on page 248)

Accommodation objects

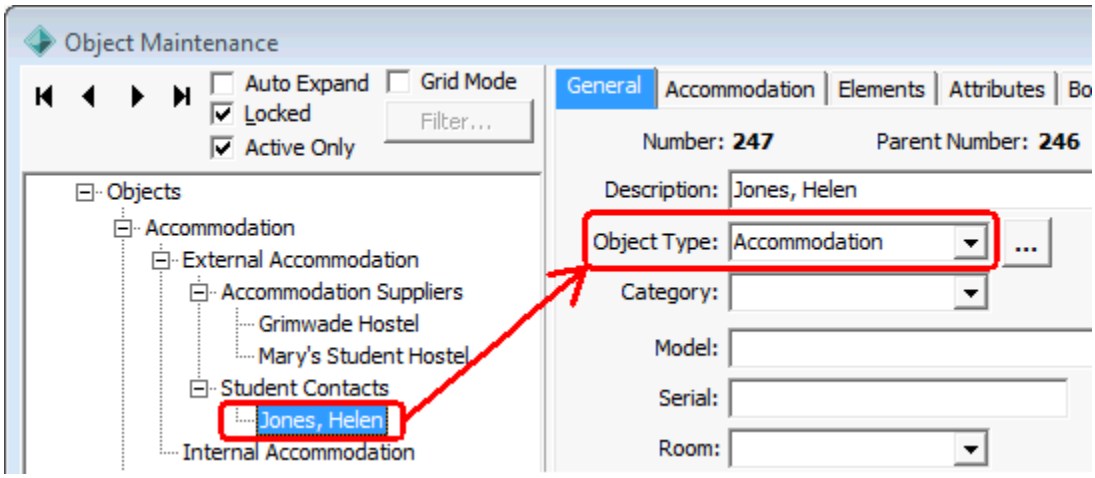
Set up an object hierarchy that suits your organisation. See the *Objects* manual for more details.

Hierarchy used in the examples

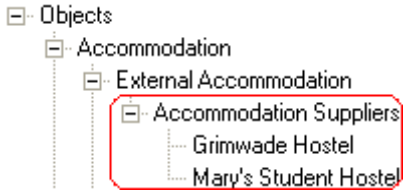
The following object hierarchy has been created to use with the examples in this section.



Each object in the hierarchy is an accommodation object. That is, each object has an **Object Type** of **Accommodation**, as shown in the example below. See *Object Maintenance - General tab* in the Objects manual.



External accommodation supplier objects, such as **Grimwade Hostel**, are set up below the **Accommodation Suppliers** object. Accommodation suppliers can have several students booked at once.



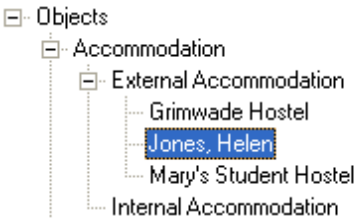
Student contact objects, such as **Jones, Helen**, are set up using the **Contacts** sub-tab. These are used to link a student's accommodation needs to one of their contacts, if required. Student contacts can only have one student booked at a time. See *Future Student Maintenance - Accommodation tab - Contacts sub-tab* (on page 248).

Alternative hierarchy

Alternatively, you may choose to reduce branching to **External Accommodation**, rather than having the two extra categories:

- **Accommodation Suppliers**
- **Student Contacts**.

Accommodation supplier objects are mixed in with student contact objects, as shown in the example below. This may not be an issue at your organisation.



Future Student Maintenance - Accommodation tab - Accommodation sub-tab

Use the **Accommodation** sub-tab to:

- Book accommodation with accommodation suppliers, such as hostels and home stays. See *Booking accommodation with accommodation suppliers* (on page 239).
- Edit an existing accommodation booking. See *Editing accommodation bookings* (on page 244).
- Delete an existing accommodation booking. See *Deleting accommodation bookings* (on page 246).

You can also use this sub-tab to book accommodation with one of the student's contacts. However, it is preferable to use the **Contacts** sub-tab to avoid confusion. See *Future Student Maintenance - Accommodation tab - Contacts sub-tab* (on page 248).

Opening the Accommodation tab

To open the **Accommodation** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

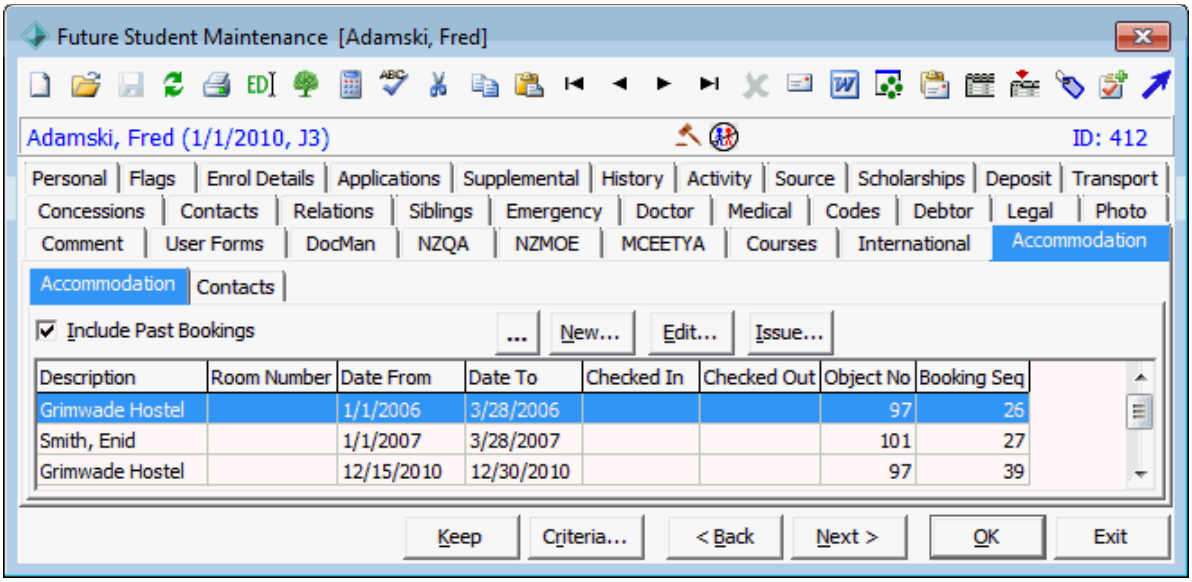
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Accommodation** tab.

   The **Accommodation** sub-tab of the **Accommodation** tab of the **Future Student Maintenance** window is displayed.



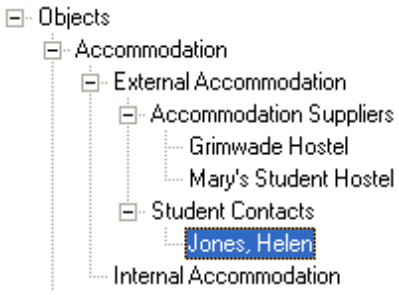
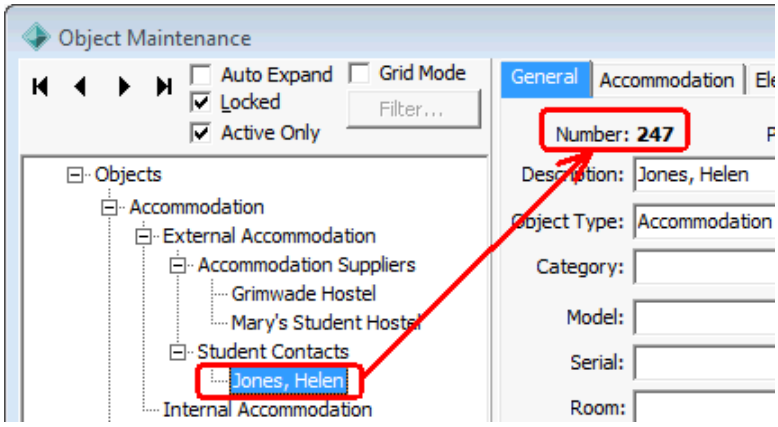
Future Student Maintenance - Accommodation tab - Accommodation sub-tab key fields and buttons

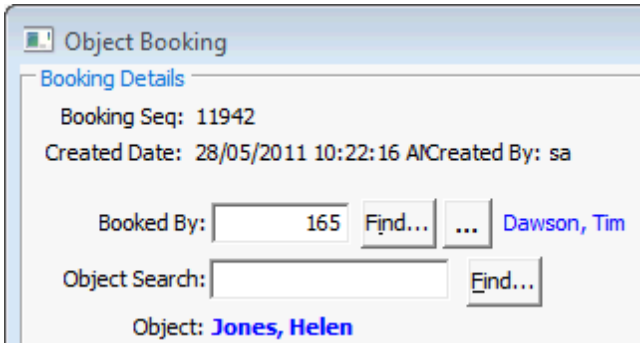
Fields

Field	Description
Include Past Bookings	Either: • select this field to show past bookings as well as current bookings • clear this field to exclude them.

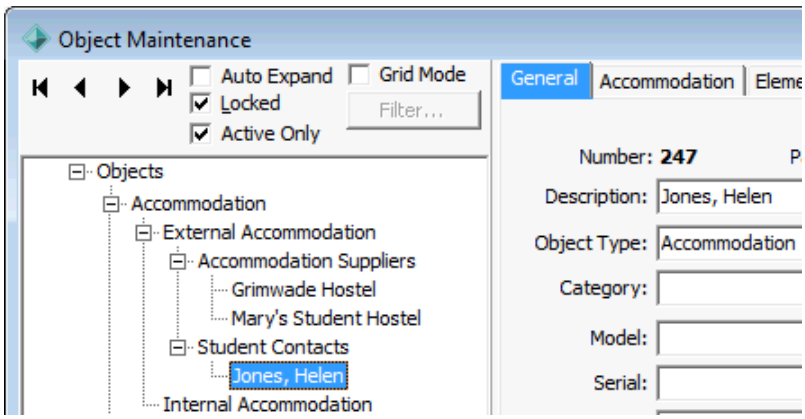
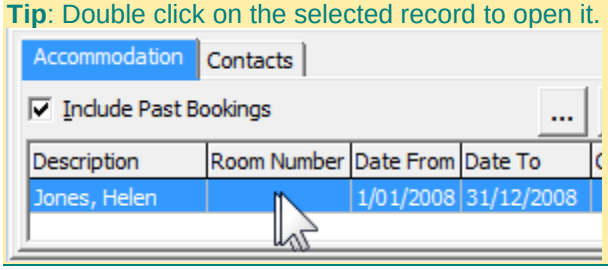
Grid area fields

Description	Room Number	Date From	Date To	Checked In	Checked Out	Object No	Booking Seq
Jones, Hele		1/1/2006	3/28/200			94	17
Jones, Hele		6/16/2009	6/17/200			94	25

Field	Description
Description	Name of the accommodation supplier or contact *object* that the student is booked to stay with. The accommodation objects can be viewed in the object hierarchy. In the following example: • Two hostels have been set up. See *Accommodation objects* (on page 234). • A student's contact object has been set up using the **Contacts** sub-tab. See *Future Student Maintenance - Accommodation tab - Contacts sub-tab* (on page 248). 
Room Number	Student's room number for the accommodation booking.
Date From / Date To	Date range for the accommodation booking.
Checked In / Checked Out	Dates that the student checked in and out on.
Object No	Object number of the accommodation object selected. This value comes from the **General** tab of **Object Maintenance**. In the following example, the object number for the **Jones, Helen** accommodation object is highlighted. 

Field	Description
Booking Seq	Booking number. This value comes from the **Object Booking** window. In the following example, the **Booking Seq** field is highlighted. 

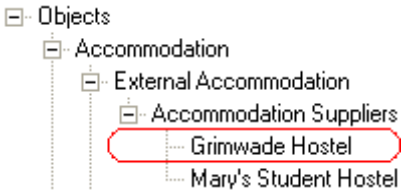
Buttons

Button	Description
...	Open the accommodation record in **Object Maintenance**.  See *Maintaining objects* in the Objects manual. **Tip**: Double click on the selected record to open it. 
New...	Create a new accommodation booking. See *Booking accommodation with accommodation suppliers* (on page 239).
Edit...	Edit or delete an existing accommodation booking. See: • *Editing accommodation bookings* (on page 244) • *Deleting accommodation bookings* (on page 246).
Issue...	Not applicable for accommodation.

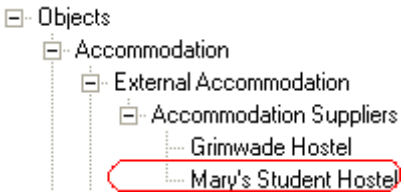
Booking accommodation with accommodation suppliers

You can book accommodation with an accommodation supplier such as a:

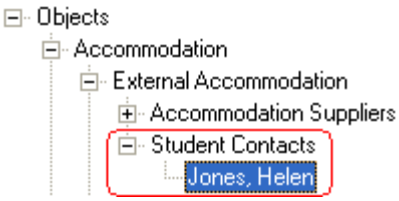
- student hostel



- person who provides home stay services to two or more students.

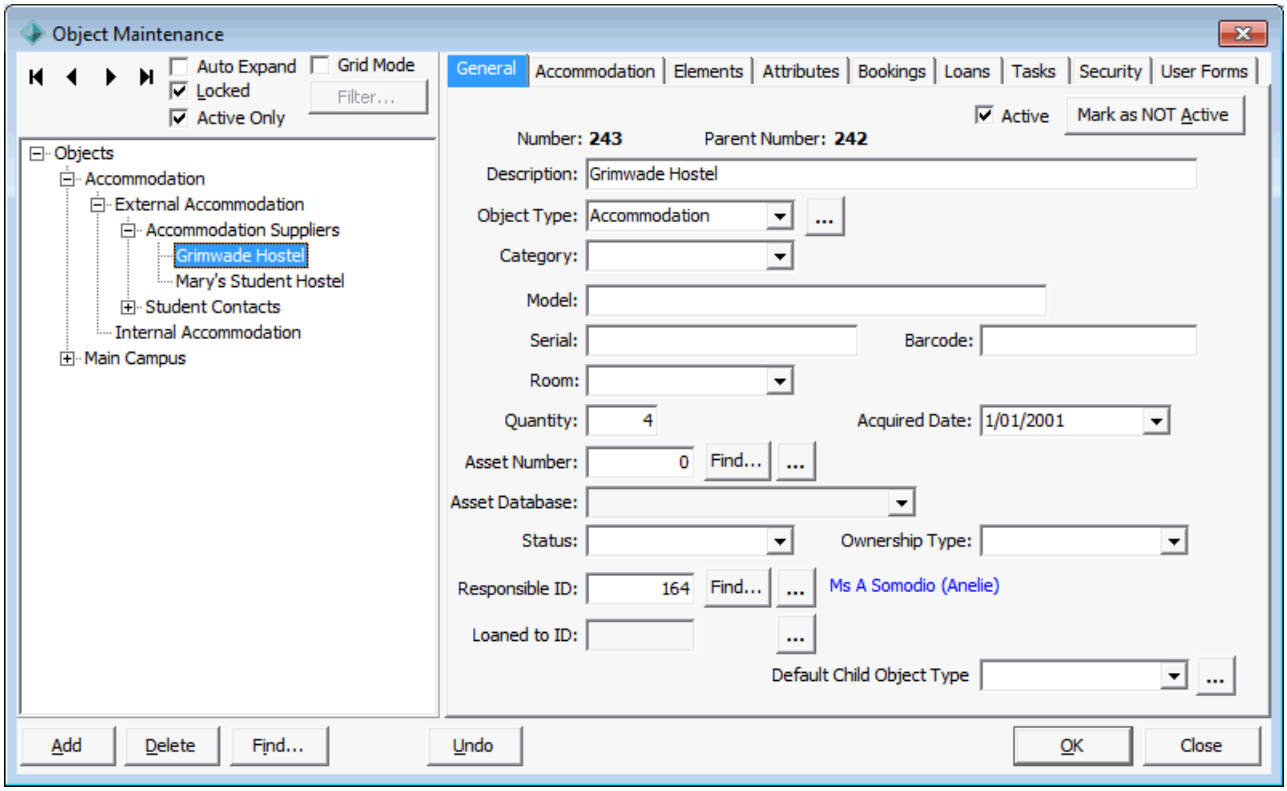


For students staying with one of their contacts, see *Future Student Maintenance - Accommodation tab - Contacts sub-tab* (on page 248).



Setting up an accommodation supplier

Create an accommodation supplier object using **Object Maintenance**. See *Maintaining objects* in the Objects manual. Details need to be updated on the **General** and **Accommodation** tabs.

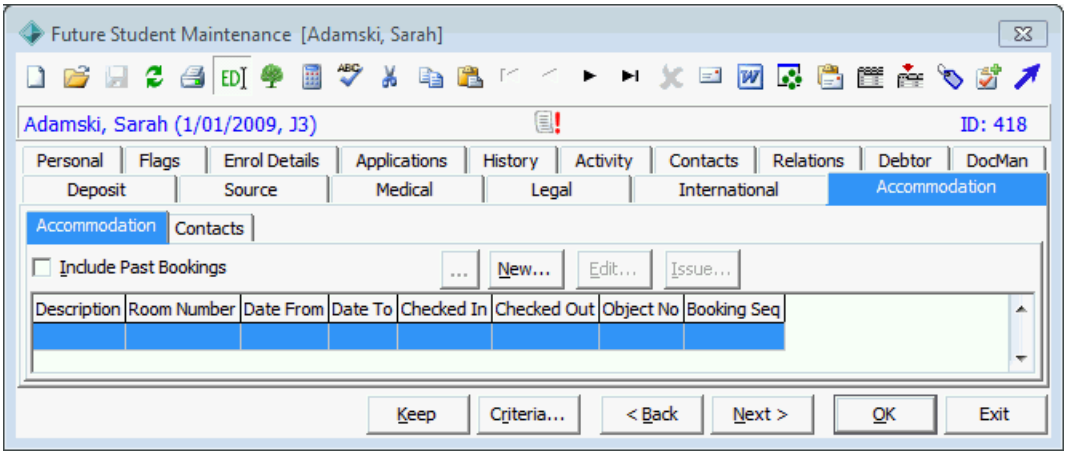


Booking accommodation

To book accommodation with an accommodation supplier:

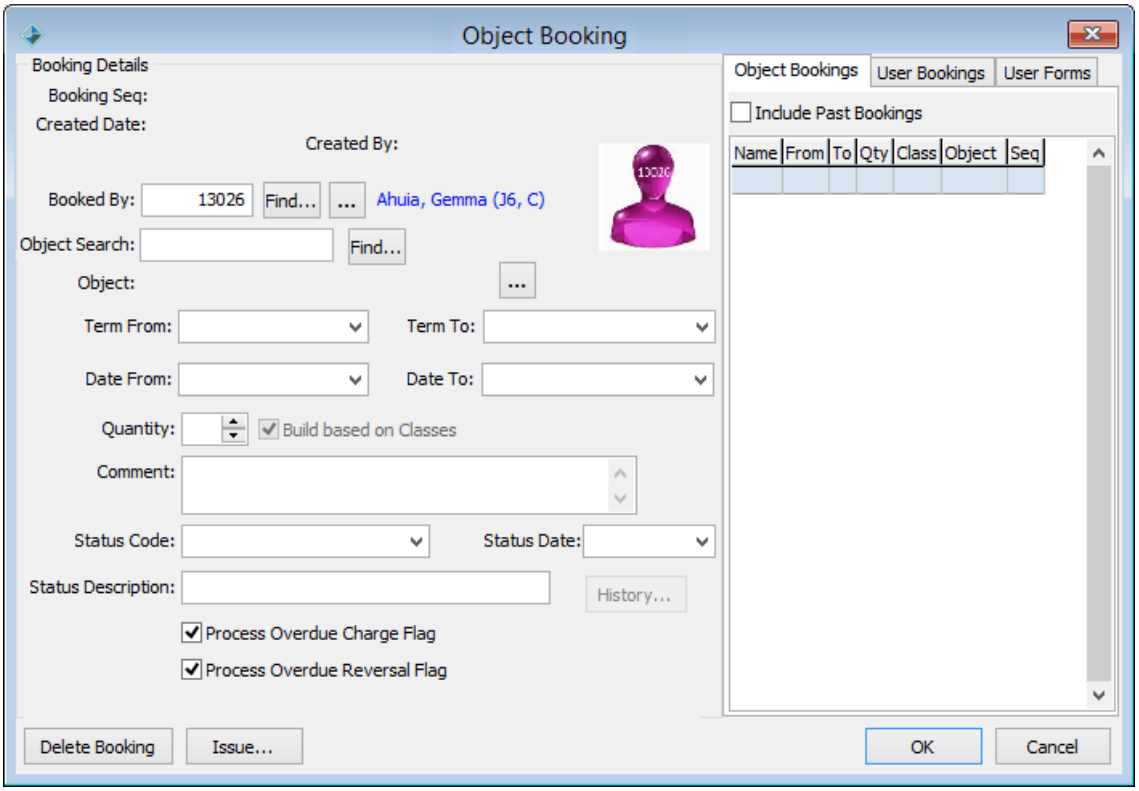
1. Open the **Accommodation** sub-tab. See *Future Student Maintenance - Accommodation tab - Accommodation sub-tab* (on page 236).

   The **Accommodation** sub-tab of the **Accommodation** tab of **Future Student Maintenance** is displayed.



2. Click New... .

   The **Object Booking** window is displayed.



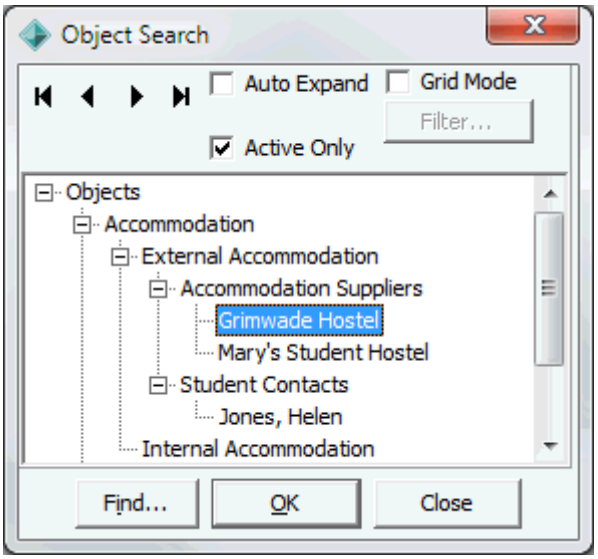
Note: Select the **Process Overdue Charge Flag** to add charges for overdue loans or **Process Overdue Reversal Flag** to reverse any incorrectly charged fees.

Note: The labels for **Semester** can be **Term**, **Report No** or **Half-Term** based on your setup. See *Student File Semester Maintenance - File Semester tab* in the Curriculum manual.

3. Click Find... .

   The **Object Search** window is displayed.

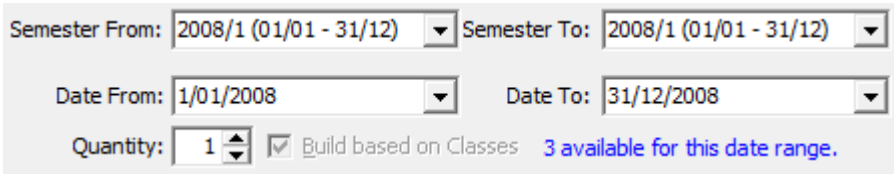
4. Navigate to the accommodation supplier's object and select it.



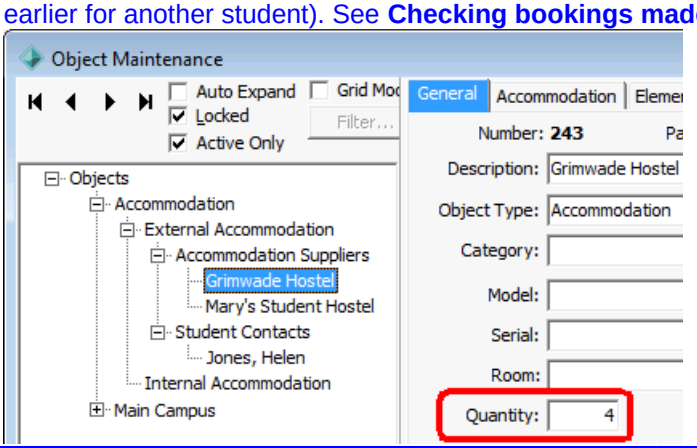
5. Click OK .

   The **Object** field is updated with the supplier's object name.

6. Complete the date range of the accommodation.

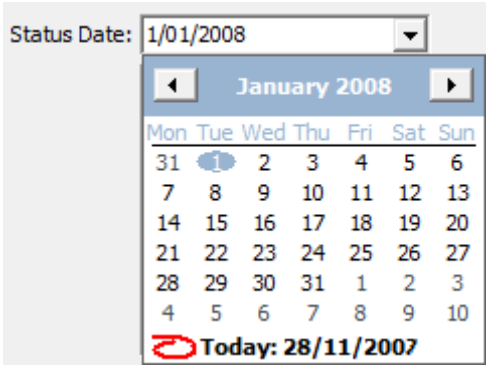


Note: The quantity available (**3 available for this date range**) depends on how many students the hostel can cater for (**4**, as shown below) less any bookings already made (**1** booking was added earlier for another student). See **Checking bookings made** below.

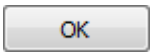


7. Select the **Status Code** from the drop-down list.

8. Update the **Status Date** field, if required.



9. Update any other relevant fields.

10. Click 

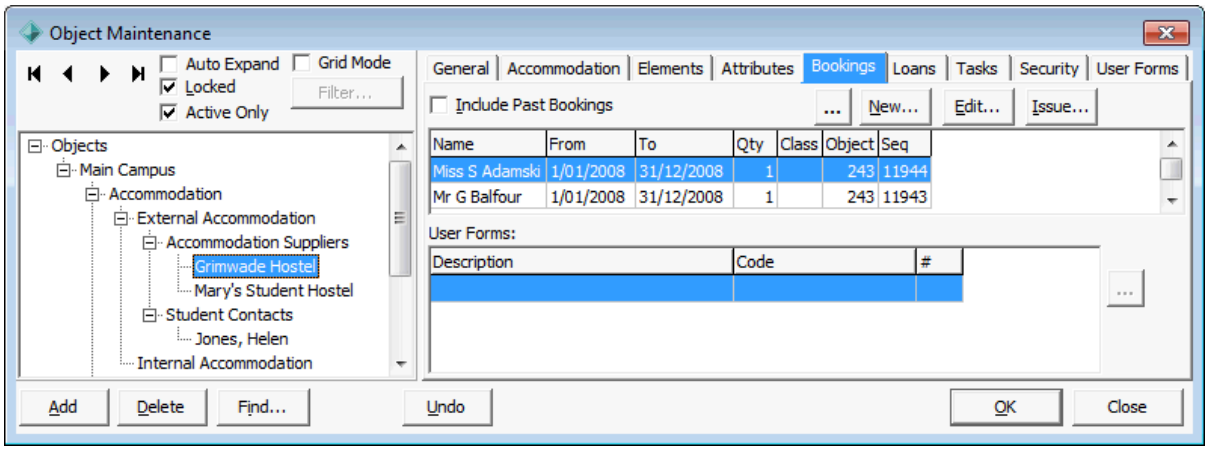
.

The booking is saved.

Checking bookings made

You can check the bookings for an accommodation supplier on the **Bookings** tab of **Object Maintenance**. See *Object Maintenance - Bookings tab* in the Objects manual.

In the following example, two bookings have been added for **Grimwade Hostel**.



Editing accommodation bookings

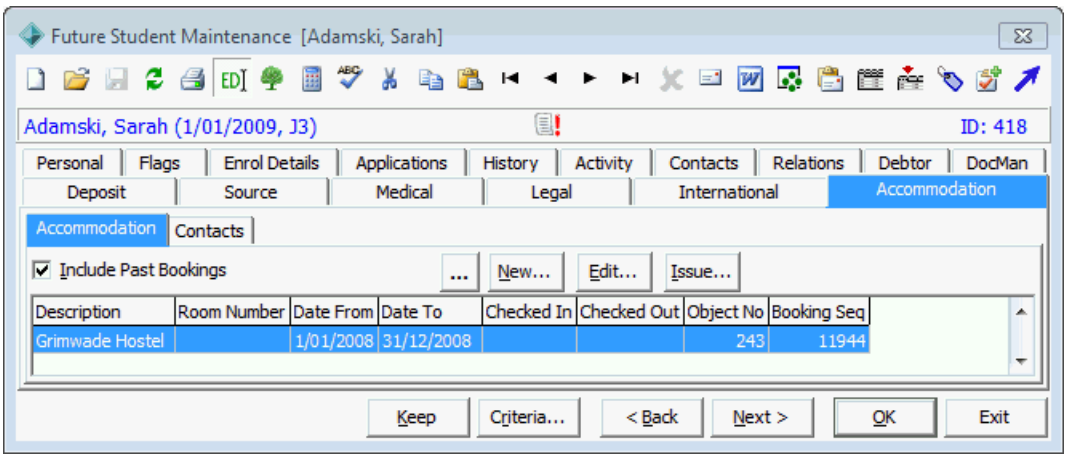
You can edit a student's accommodation booking. For example, the:

- start and finish dates may have changed
- status may have changed.

To edit the details of a student's accommodation booking:

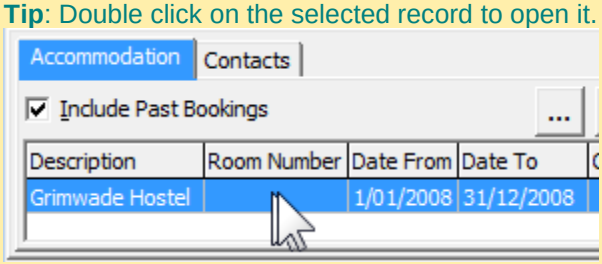
1. Open the **Accommodation** sub-tab. See *Future Student Maintenance - Accommodation tab - Accommodation sub-tab* (on page 236).

   The **Accommodation** sub-tab of the **Accommodation** tab of the **Future Student Maintenance** is displayed.



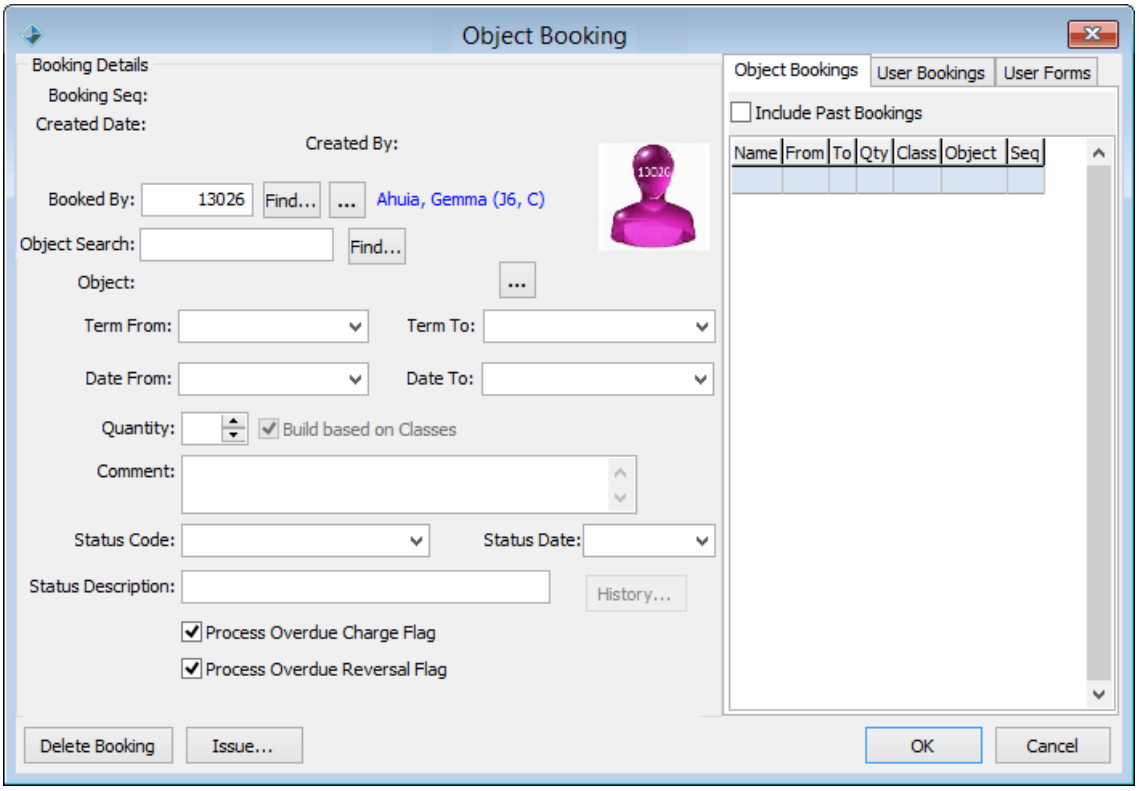
2. Select the **Include Past Bookings** field, if required.
3. Select the booking.

Tip: Double click on the selected record to open it.



4. Click Edit...

   The **Object Booking** window is displayed.



Note: Select the **Process Overdue Charge Flag** to add charges for overdue loans or **Process Overdue Reversal Flag** to reverse any incorrectly charged fees.

Note: The labels for **Semester** can be **Term**, **Report No** or **Half-Term** based on your setup. See *Student File Semester Maintenance - File Semester tab* in the Curriculum manual.

5. Edit the booking details.

6. Click OK.

   The accommodation booking details are saved.

Deleting accommodation bookings

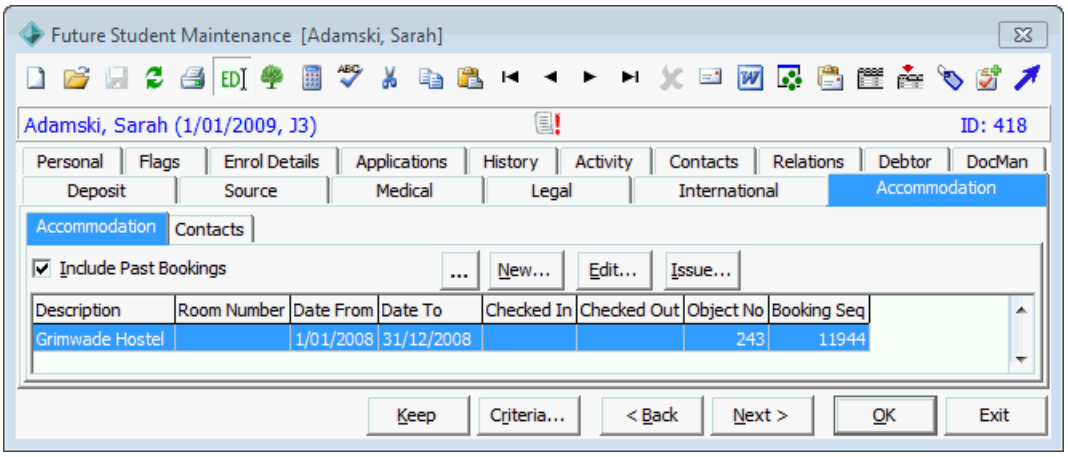
You can delete an accommodation booking for either:

- An accommodation service provider, such as a hostel.
- An individual, such as the student's relation or a home stay provider (who takes in one student at a time). However, if you want to delete the booking **and** the contact accommodation record, see *Deleting a linked accommodation record* (on page 262).

To delete a student's accommodation booking:

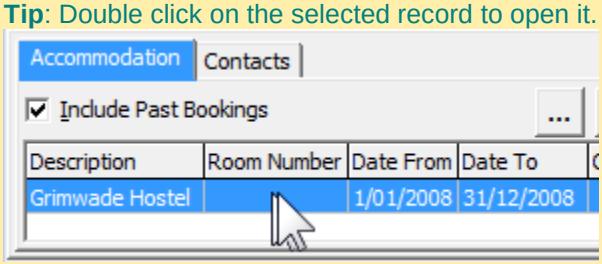
1. Open the **Accommodation** sub-tab. See *Future Student Maintenance - Accommodation tab - Accommodation sub-tab* (on page 236).

   The **Accommodation** sub-tab of the **Accommodation** tab of the **Future Student Maintenance** is displayed.



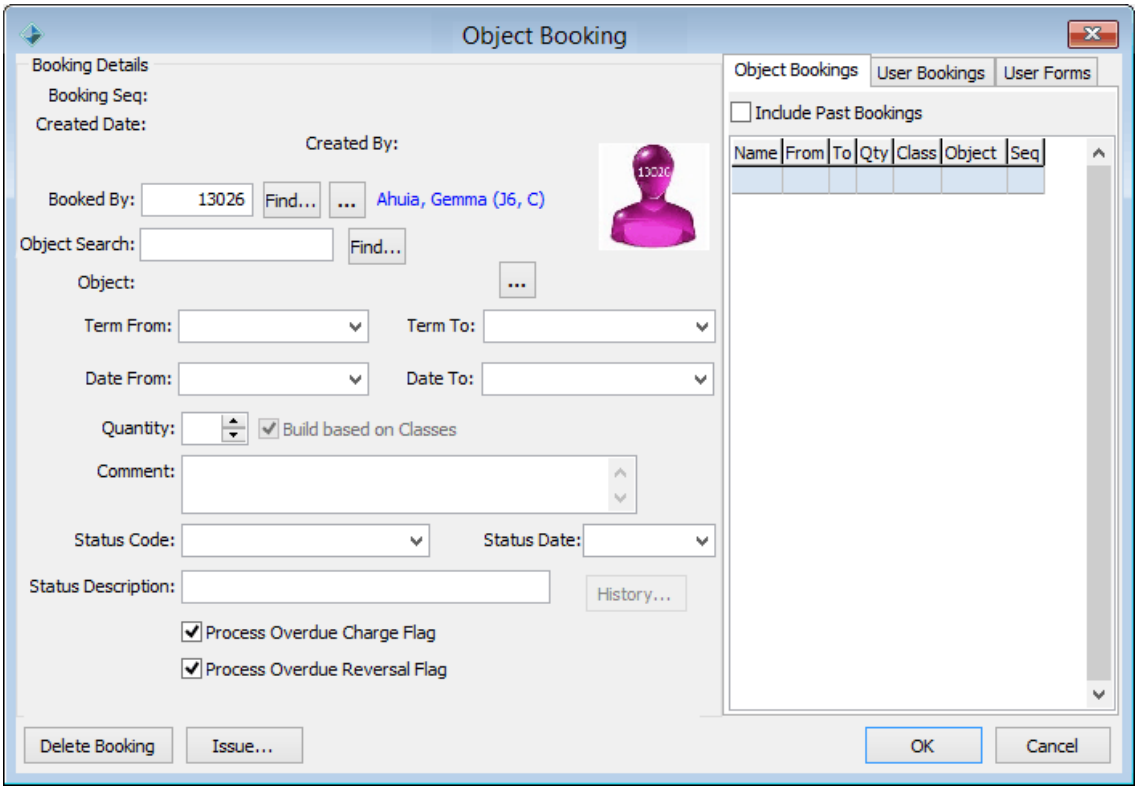
2. Select the **Include Past Bookings** field, if required.
3. Select the booking.

Tip: Double click on the selected record to open it.



4. Click Edit....

The **Object Booking** window is displayed.

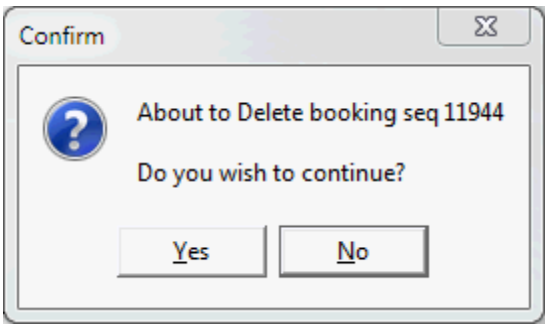


Note: Select the **Process Overdue Charge Flag** to add charges for overdue loans or **Process Overdue Reversal Flag** to reverse any incorrectly charged fees.

Note: The labels for **Semester** can be **Term**, **Report No** or **Half-Term** based on your setup. See *Student File Semester Maintenance - File Semester tab* in the Curriculum manual.

5. Click Delete Booking.

The following dialog window is displayed.



6. Click Yes.

The accommodation booking is deleted.

Future Student Maintenance - Accommodation tab - Contacts sub-tab

Use the **Contacts** sub-tab to:

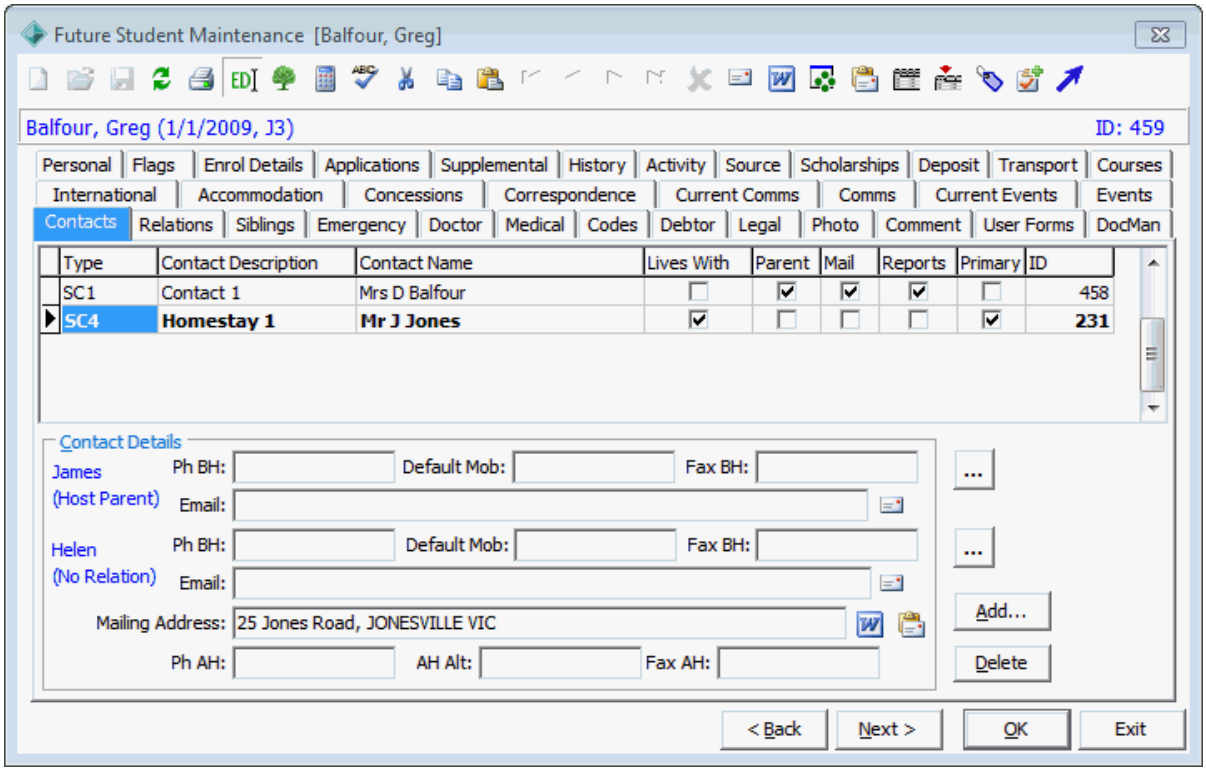
- Nominate contacts the student *could* stay with. See *Linking contacts that a student could stay with* (on page 253).
- Book accommodation with one of the nominated contacts. See *Booking accommodation with a student's contact* (on page 259).
- Delete a nominated contact, along with any bookings. See *Deleting a linked accommodation record* (on page 262).

Available contacts

You can nominate who a student *could* stay with, based on the student's contacts that are specified on the **Contacts** tab of Future Student Maintenance. See *Future Student Maintenance - Contacts tab* (on page 159).

Contacts are useful because key information is already set up, such as telephone numbers and addresses.

In the following example, Greg Balfour is staying with Mr and Mrs Jones. The limitation of the **Lives With** flag is that there is no accompanying information about the home stay, such as when Greg is staying with them.



Opening the Future Student Maintenance - Accommodation tab - Contacts sub-tab

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

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

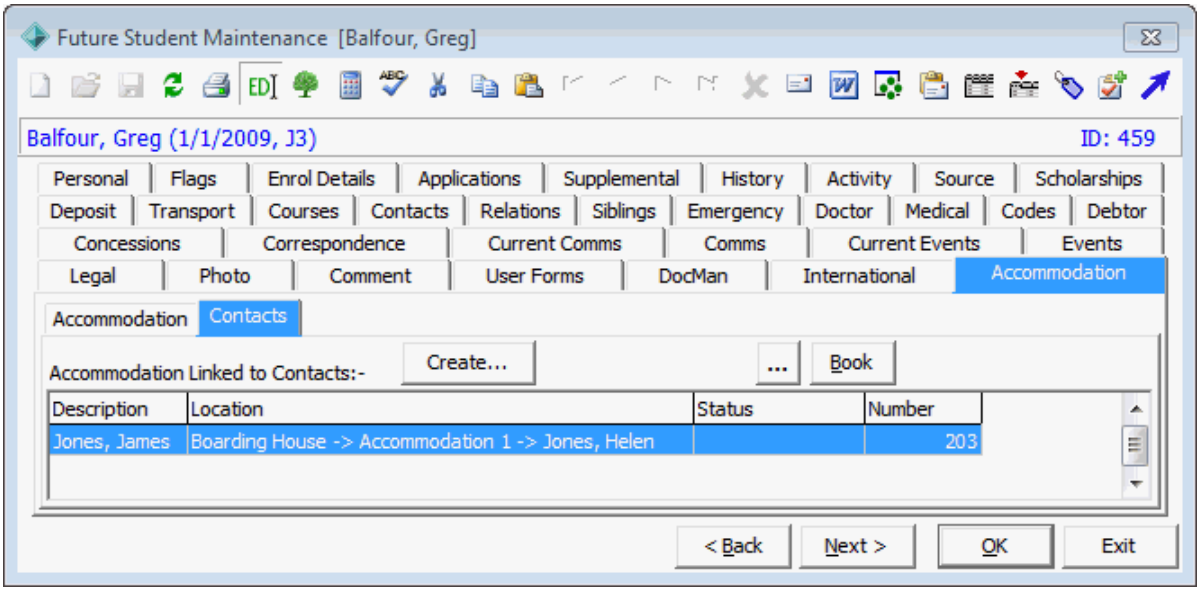
> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Accommodation** tab.

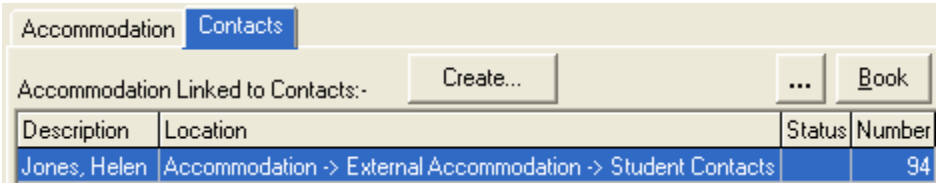
   The **Accommodation** sub-tab of the **Future Student Maintenance** window is displayed.

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

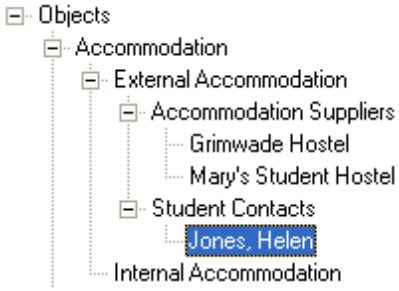
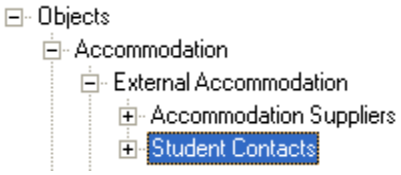
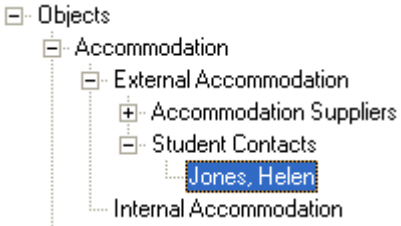
   The **Contacts** sub-tab of the **Accommodation** tab of the **Future Student Maintenance** window is displayed.

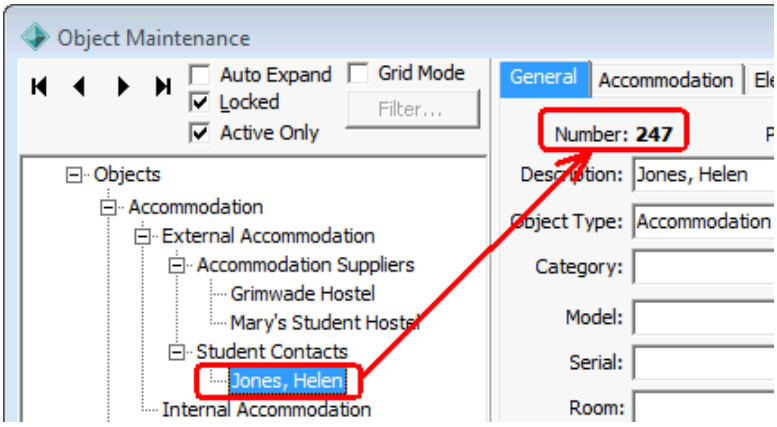


Future Student Maintenance - Accommodation tab - Contacts sub-tab key fields and buttons

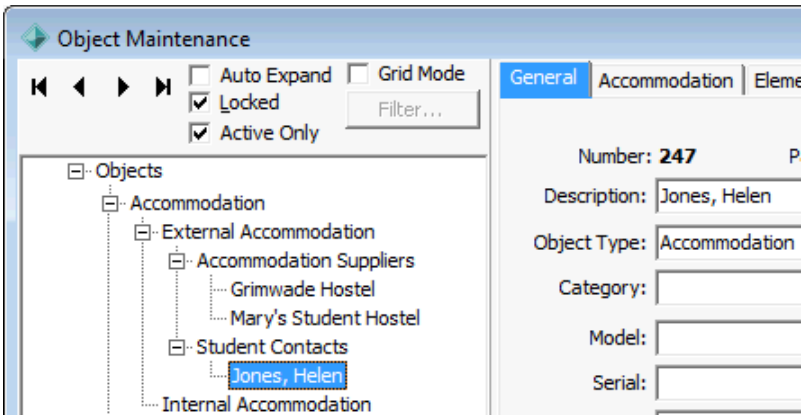
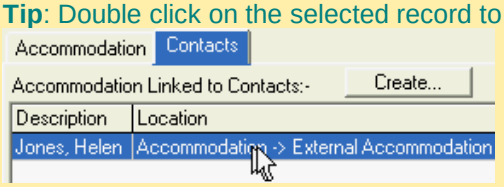


Grid area fields

Field	Description
Description	Name of the contact that the student either: • *could* stay with • *is* booked to stay with. Defaults to the following format: **Surname, First Name**. **Note**: The contacts are sorted alphabetically. We recommend you develop your own naming standards, if you do not use the default format. 
Location	Location of the parent of the contact's accommodation object. For example, **Accommodation -> External Accommodation -> Student Contacts** has been set up as the parent object of all student contacts.  **Student Contacts** is the parent object of the **Helen Jones** accommodation record. 
Status	Status code from the booking. The status codes are maintained in the **luObjectBookingStatus** lookup table. See *luObjectBookingStatus lookup table* in the System maintenance manual.

Field	Description
Number	Object number of the accommodation object selected. This value comes from the **General** tab of **Object Maintenance**. In the following example, the object number for the **Jones, Helen** accommodation object is highlighted. 

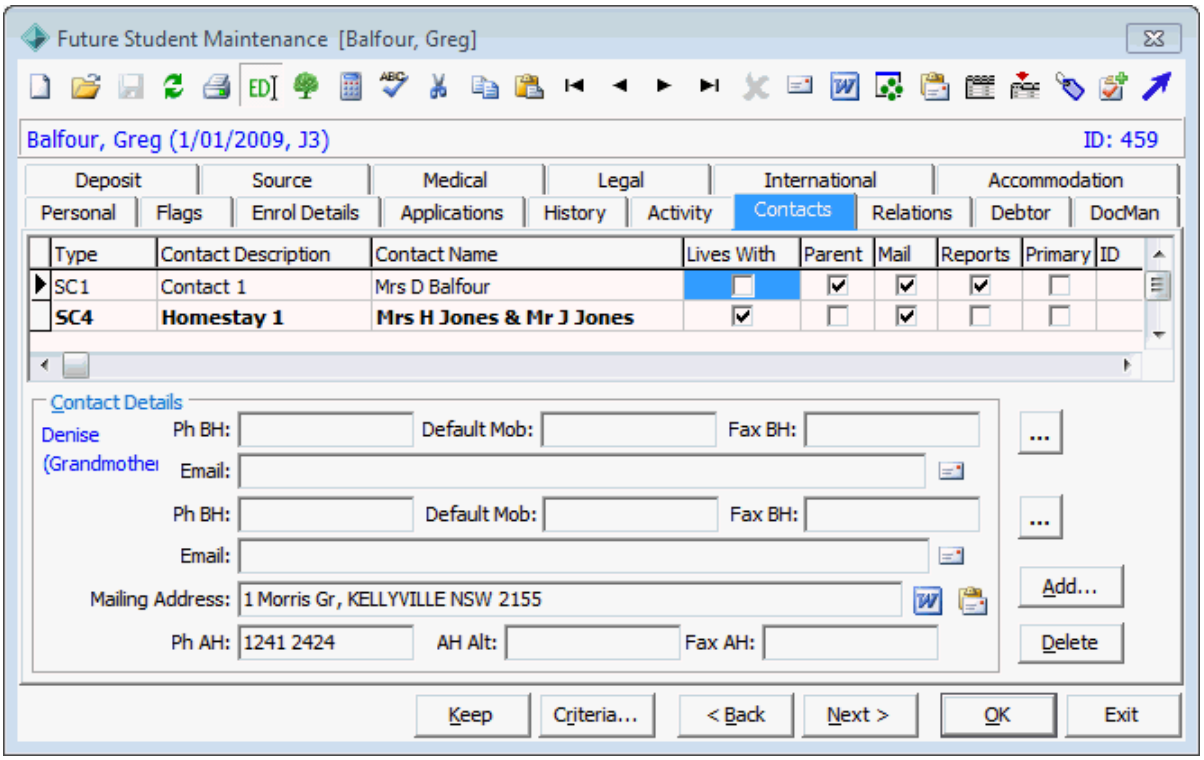
Buttons

Button	Description
Create...	Nominate contacts the student *could* stay with. See *Linking contacts that a student could stay with* (on page 253).
...	Open the accommodation record for the contact in **Object Maintenance**.  See *Maintaining objects* in the Objects manual. **Tip**: Double click on the selected record to open it. 
Book	Book the student's accommodation with the selected contact. See *Booking accommodation with a student's contact* (on page 259). **Note**: First create an accommodation record. See the Create... button above.

Linking contacts that a student could stay with

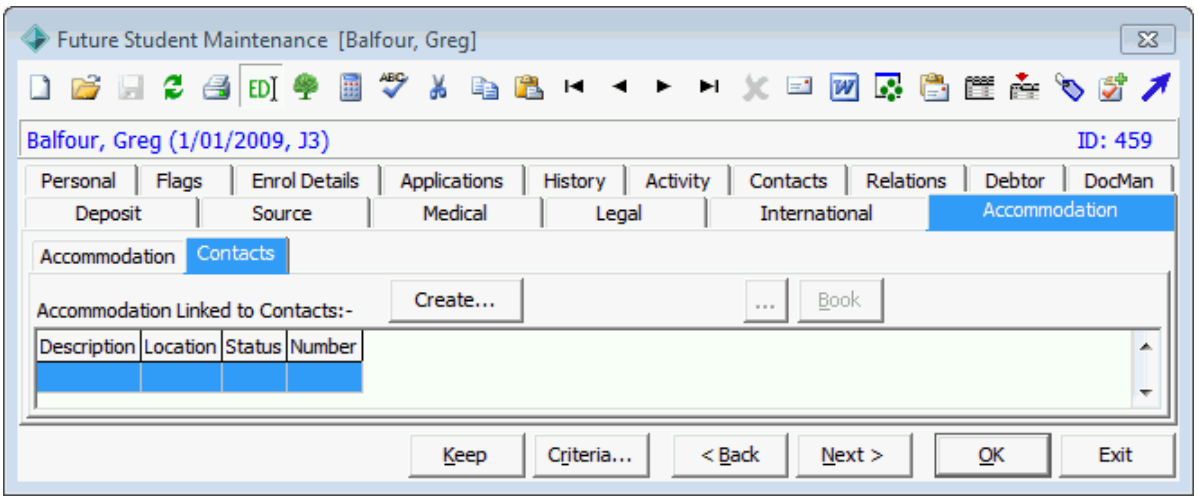
To link to a contact that a student *could* stay with:

1. First, make sure that a **homestay** contact is added to the **Contacts** tab of **Future Students Maintenance**. See *Future Student Maintenance - Contacts tab* (on page 159).



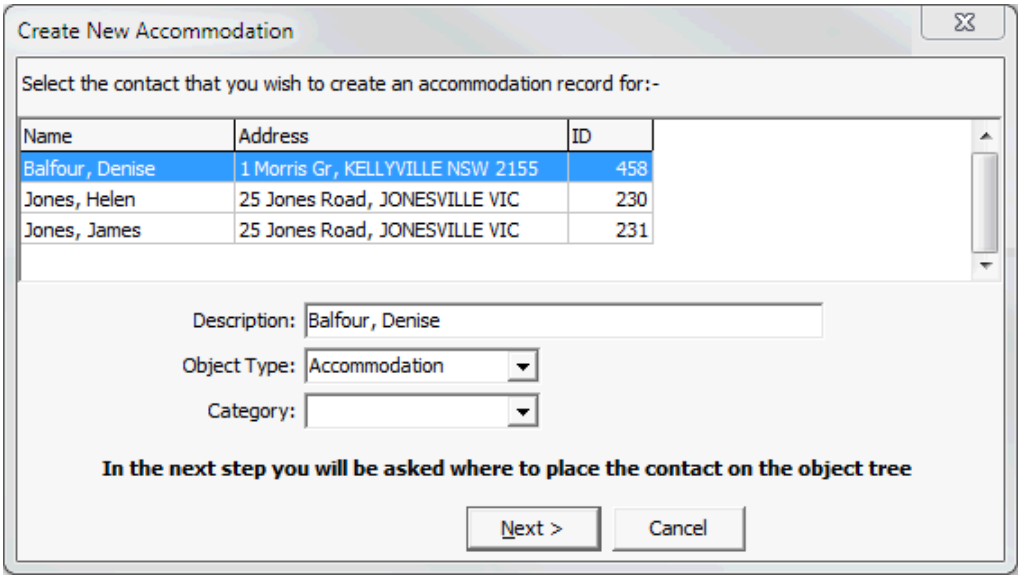
2. Open the **Contacts** sub-tab of the **Accommodation** tab of **Future Student Maintenance**. See *Future Student Maintenance - Accommodation tab - Contacts sub-tab* (on page 248).

   The **Contacts** sub-tab of the **Accommodation** tab of **Future Student Maintenance** is displayed.

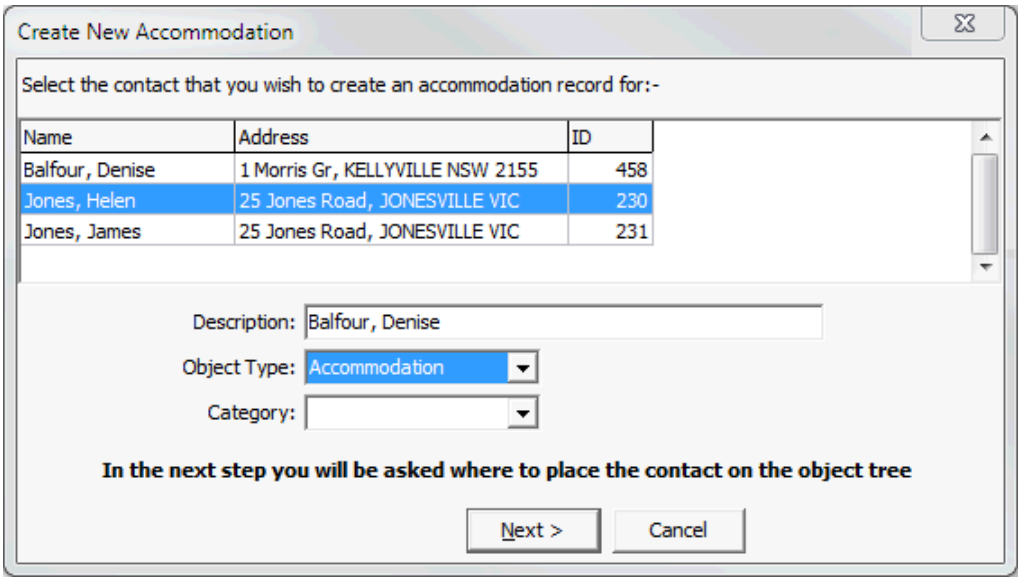


3. Click Create... .

   The **Create New Accommodation** window is displayed.



4. Select the contact who the student *could* stay with.
5. Select **Accommodation** from the **Object Type** drop-down list, if required.

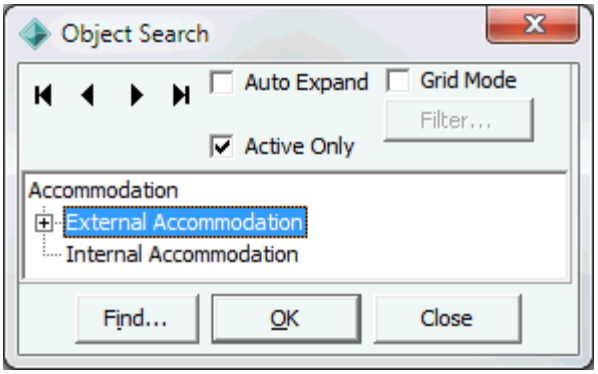


Note: See the field and button descriptions below.

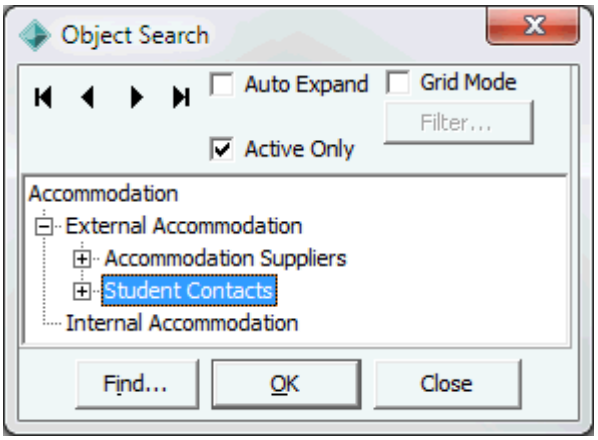
6. Select the **Category** field, if required.

7. Click Next >.

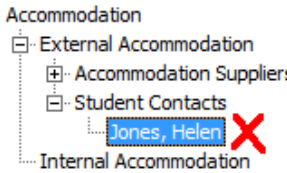
   The **Object Search** window is displayed.



8. Navigate to the required parent object and select it.

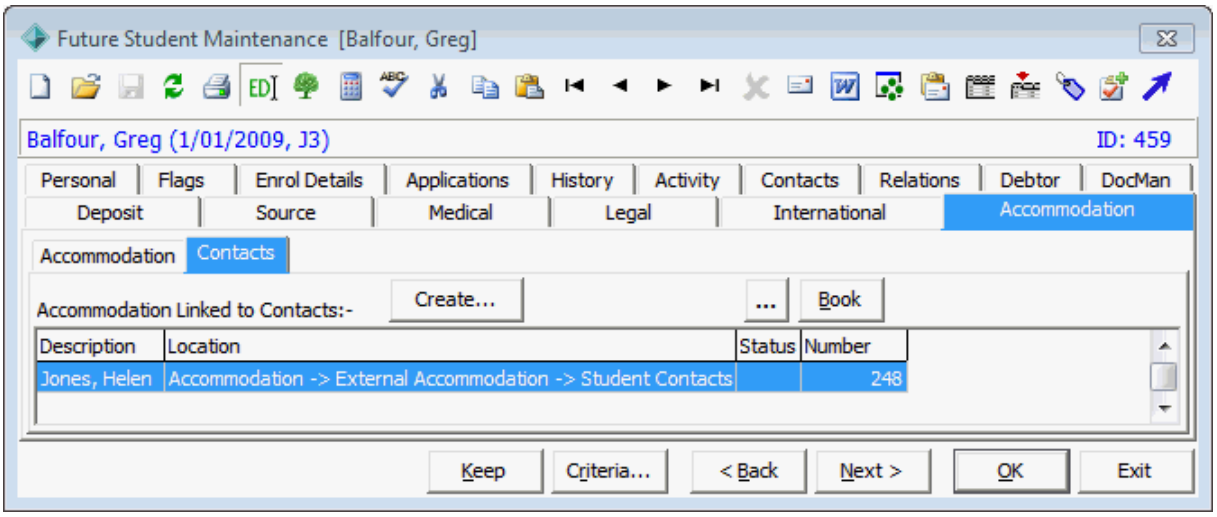


Note: In the example, you link to the **Student Contacts** object not its child object.



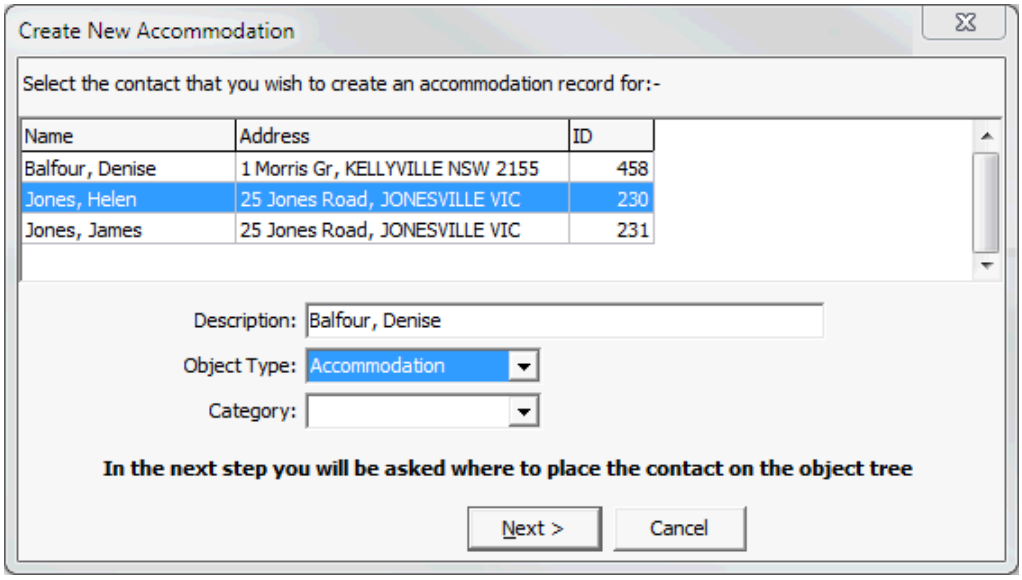
9. Click OK.

   A new entry is added to the **Contacts** sub-tab.



10. Click Book to book accommodation with the contact, if required. See *Booking accommodation with a student's contact* (on page 259).

Create New Accommodation window key fields and buttons



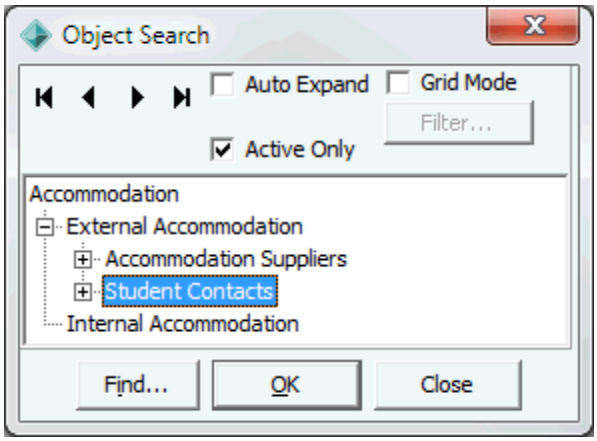
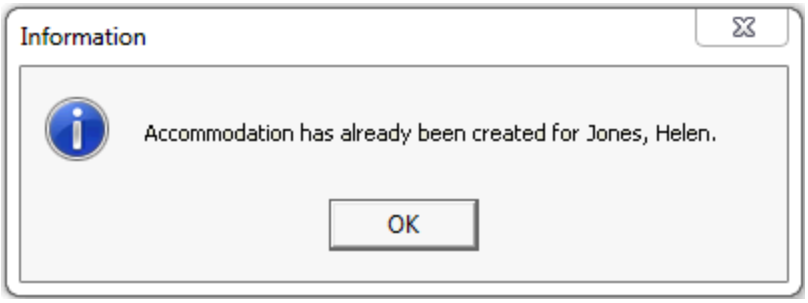
Grid area fields

Field	Description
Name	Name of the student's contact.
Address	Home address of the contact.
ID	Synergetic ID of the contact.

Fields

Field	Description
Description	Description of the contact's accommodation object. This is the name of the contact that the student either: • *could* stay with • *is* booked to stay with. Defaults to the following format: **Surname, First Name**. **Note**: We recommend you develop your own naming standards, if you do not use the default format.
Object Type	**Accommodation** object type or equivalent.
Category	Category to group the contact's accommodation object into.

Buttons

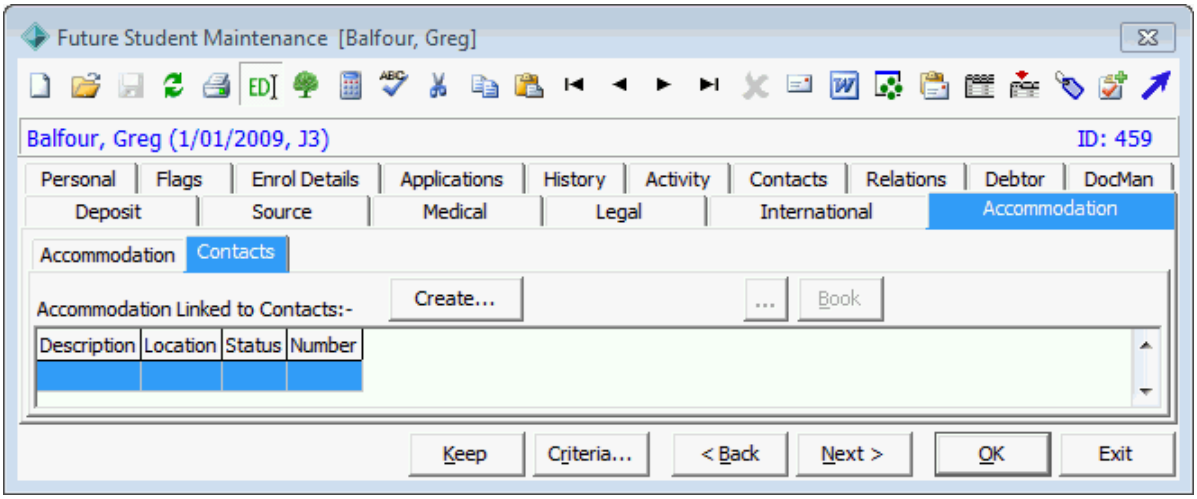
Button	Description
Next >	Display the **Object Search** window to select the parent object from the object hierarchy.  The following dialog window is displayed if you try to link to a contact, who has already been linked to another student.  **Tip:** Consider using the **Accommodation** sub-tab if you need to add several students to a home stay provider's accommodation object.

Booking accommodation with a student's contact

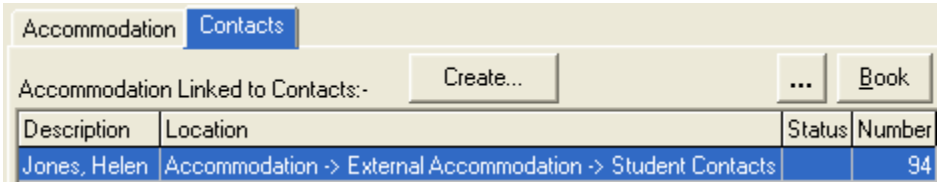
To book accommodation with a student's contact:

1. Open the **Contacts** sub-tab of the **Accommodation** tab of **Future Student Maintenance**. See *Future Student Maintenance - Accommodation tab - Contacts sub-tab* (on page 248).

   The **Contacts** sub-tab of the **Accommodation** tab of **Future Student Maintenance** is displayed.

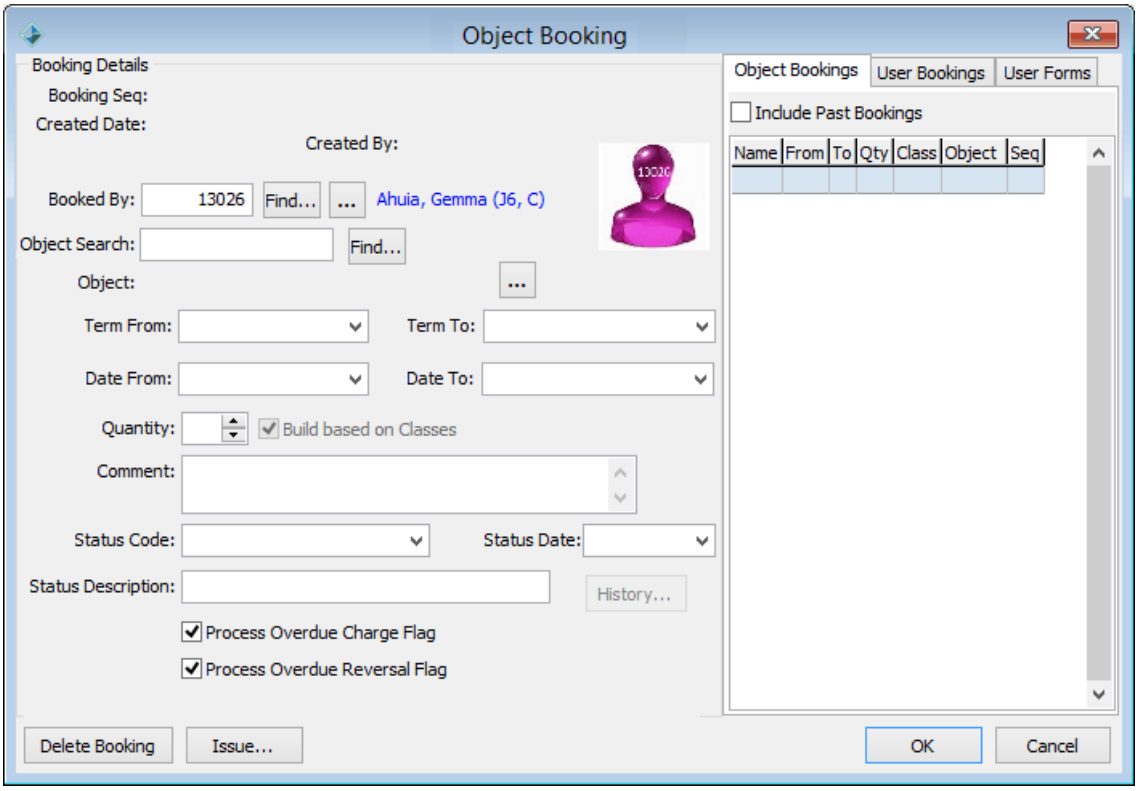


2. Click Create..., if the contact's object is not listed. See *Linking contacts that a student could stay with* (on page 253).



3. Click Book.

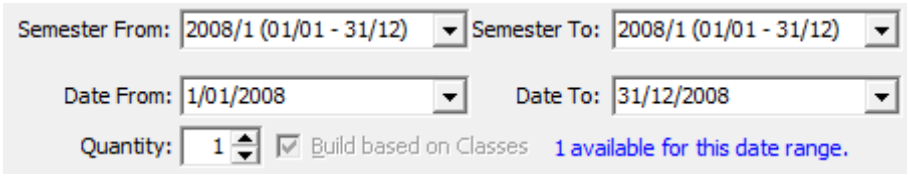
   The **Object Booking** window is displayed.



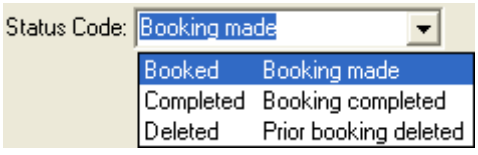
Note: Select the **Process Overdue Charge Flag** to add charges for overdue loans or **Process Overdue Reversal Flag** to reverse any incorrectly charged fees.

Note: The labels for **Semester** can be **Term**, **Report No** or **Half-Term** based on your setup. See *Student File Semester Maintenance - File Semester tab* in the Curriculum manual.

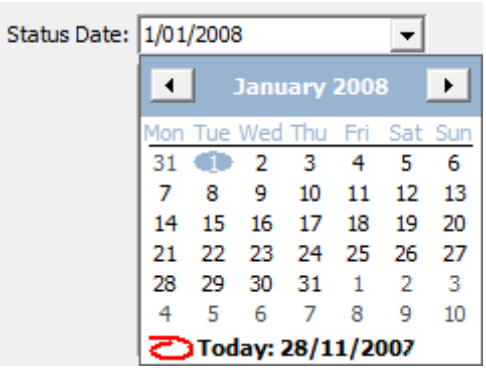
4. Complete the date range of the accommodation.



5. Select the **Status Code** from the drop-down list.



6. Update the **Status Date** field, if required.



7. Update any other relevant fields.

8. Click OK.

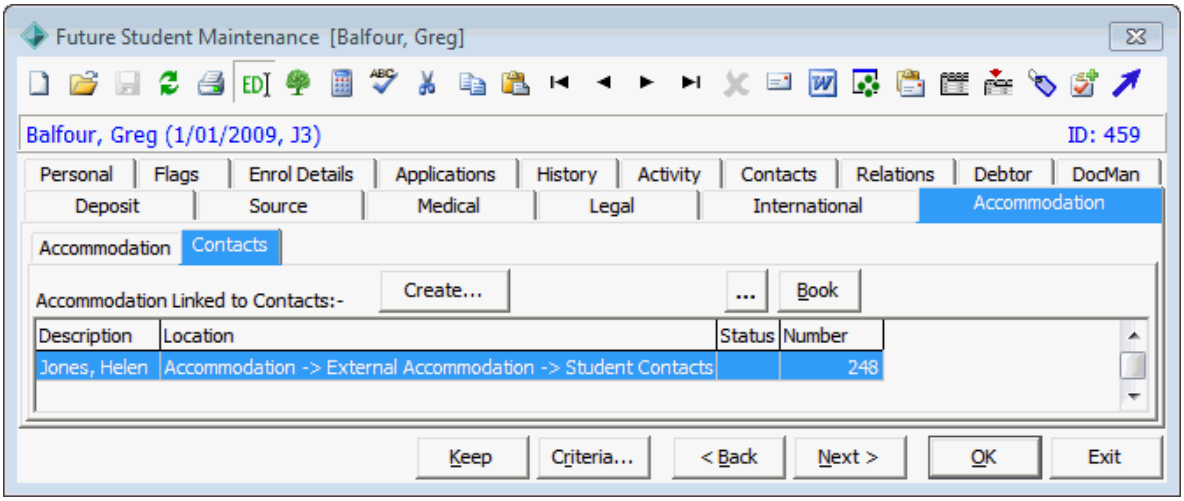
   The booking is saved.

Deleting a linked accommodation record

To delete a contact's accommodation record and any accompanying bookings:

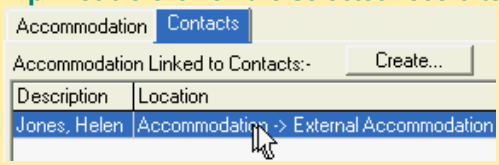
1. Open the **Contacts** sub-tab of the **Accommodation** tab of **Future Student Maintenance**. See *Future Student Maintenance - Accommodation tab - Contacts sub-tab* (on page 248).

   The **Contacts** sub-tab of the **Accommodation** tab of **Future Student Maintenance** is displayed.



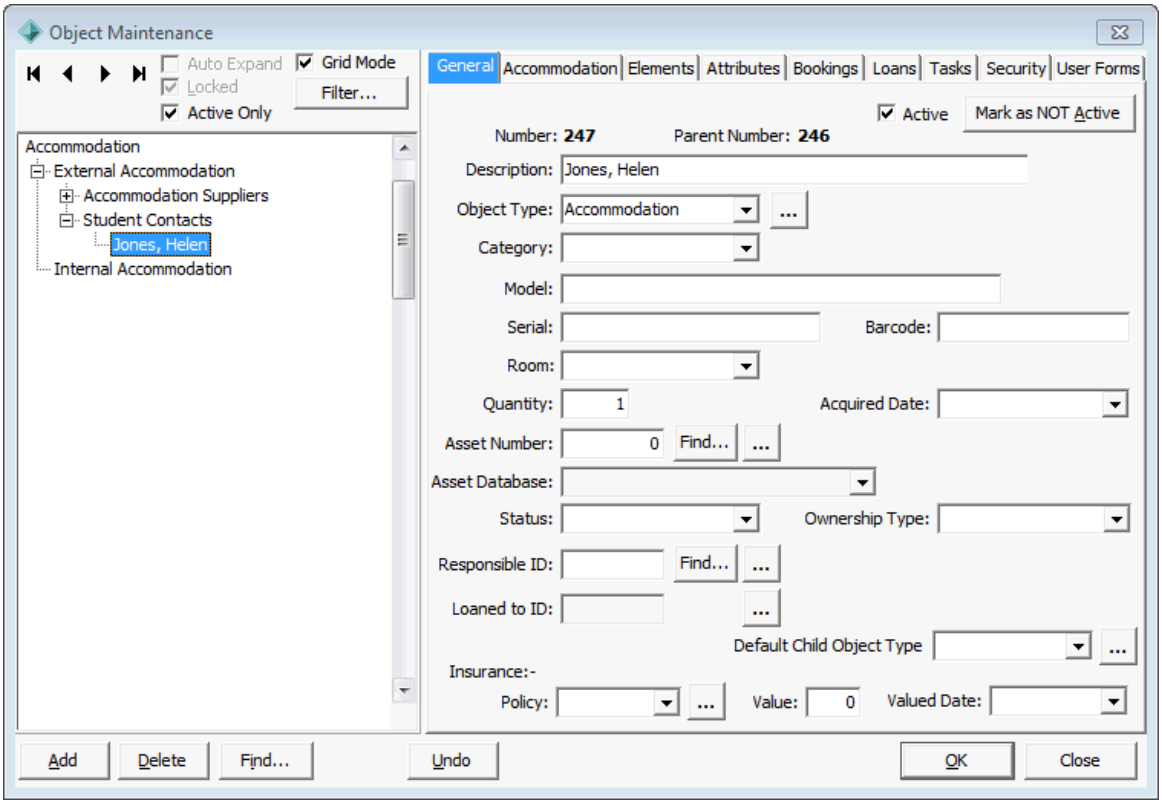
2. Select the booking.

Tip: Double click on the selected record to open it.



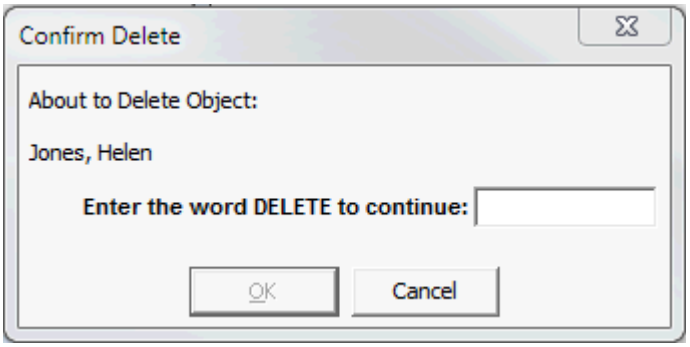
3. Click ... .

   The **General** tab of the **Object Maintenance** window is displayed.



4. Click Delete .

   The following dialog window is displayed.



5. Type **delete**.

6. Click OK .

   The contact's accommodation record is deleted, along with any bookings.

Future Student Maintenance - Concessions tab

Use the **Concessions** tab to maintain concessions and discounts that apply to the various fees generated by automatic tuition debtor functions. These will apply to the future student once they become a current student.

These fields have no effect while the student is a future student, and will only be actively used once the student is transferred into current students.

> **Tip:** Reverse all signs to apply charges. For example, a positive amount or a negative percentage signifies a charge.

Opening the Concessions tab

To open the **Concessions** tab:

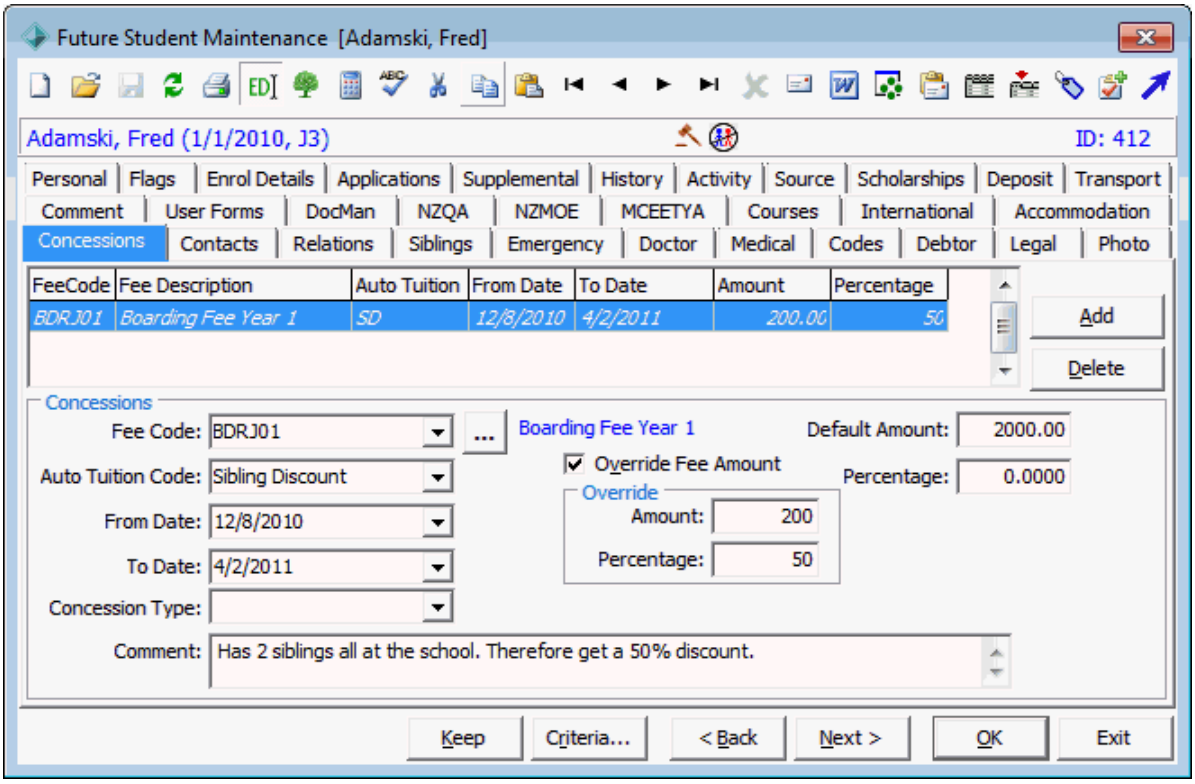
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

   > **Tip:** You can also access the future student functions by clicking
   >
   > .

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Concessions** tab.

   The **Concessions** tab of **Future Student Maintenance** is displayed.



Future Student Maintenance - Concessions tab key fields and buttons

Grid area fields

Field	Description
Fee Code	Code that the concession will be applied to.
Fee Description	Description of the fee being paid.
Auto Tuition	Code used during auto tuition runs. The code determines when the concession is applied amongst other fees and charges. **Note:** Concessions are not applied to manual debtor charges.
From Date	Start date of the concession, if required.
To Date	End date of the concession, if required.
Amount	Amount of the concession. This is the amount entered in the **Override** area **Amount** field.
Percentage	Percentage amount of the concession. This is the percentage entered in the **Override** area **Amount** field.

Note: the fields in this grid area reflect the values that are entered in the **Concessions** area.

Fields

Field	Description
Fee Code	Fee code for the fee the concession is applied to. **Note:** You can only use a fee code once for a student. Adjust the **from** and **to** dates if they re-qualify for a discount or concession; this ensures that the concession is applied against a specific fee.
Auto Tuition Code	Code used during auto tuition runs. The code determines when the concession will be applied amongst other fees and charges. **Note:** Concessions are not applied to manual debtor charges.
From Date	Start date of the concession, if required.
To Date	End date of the concession, if required. **Note:** Typically this is used for bursaries. If left blank, the concession applies indefinitely using the **From Date**.
Override Fee Amount	Select to override the fee **Amount** or **Percentage**.
Default Amount/Percentage	Default discount or concession amount or percentage.
Override Amount / Override Percentage	Either: • Enter a new amount to replace the **Default Amount** displayed. • Enter a new percentage to replace the **Default Percentage** displayed. This replaces the previous amount. It is not a discount amount/percentage.
Concession Type	Type of discount or concession.
Comment	Any notes or comments regarding the discount or concession.

Buttons

Button	Description
Add	Add a new discount or concession.
Delete	Delete the highlighted discount or concession.
...	Launch the **Debtor Fee Maintenance** window for the selected fee code. See *Maintaining debtor fees* in the Debtors manual. **Tip:** Double click the selected fee in the **Concessions** grid area to launch **Debtor Fee Maintenance**.

Future Student Maintenance - NZQA tab

New Zealand organisations use the **NZQA** tab to maintain information required by NZQA (New Zealand Qualifications Authority).

Some fields displayed on this tab are maintained on other tabs.

Opening the NZQA tab

To open the **NZQA** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

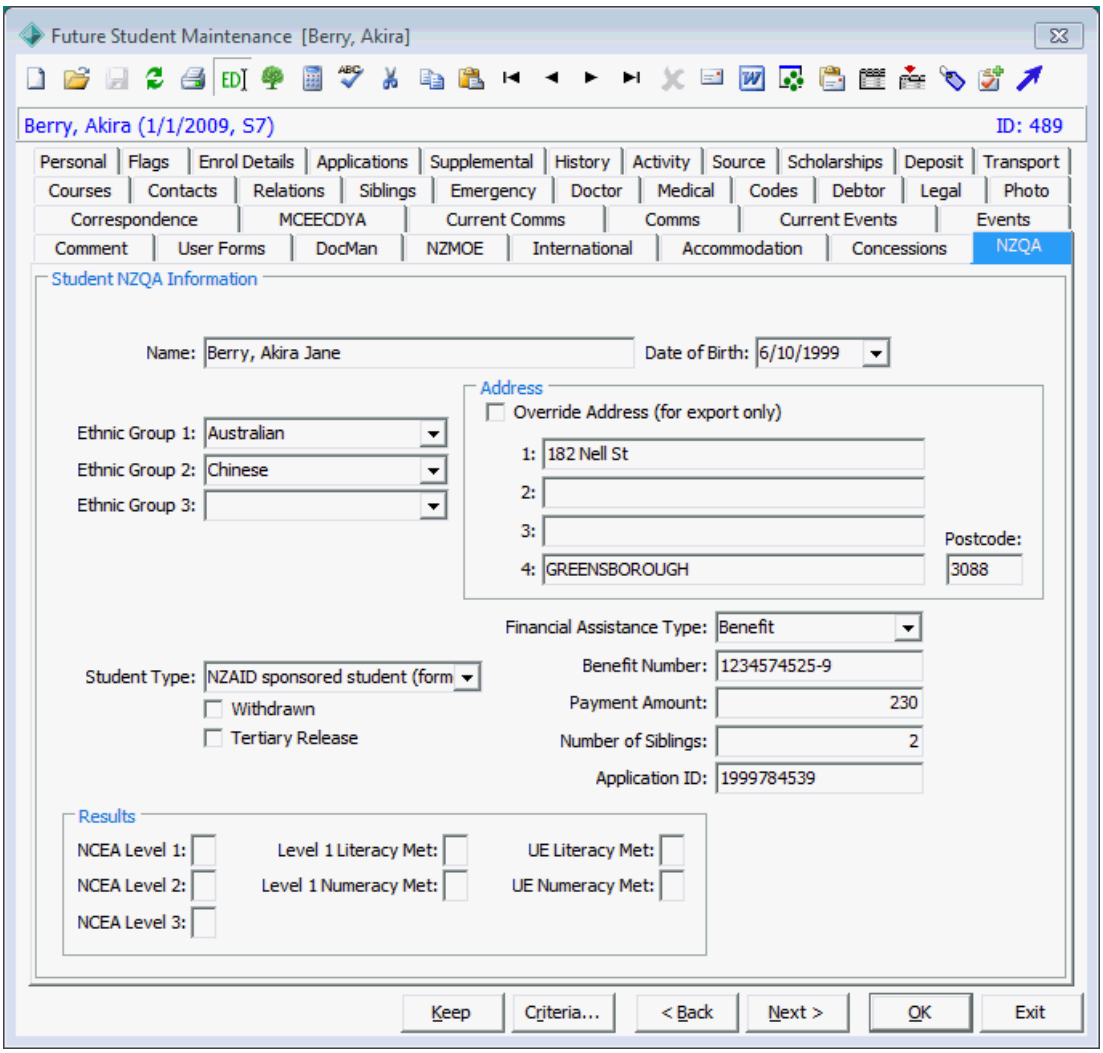
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **NZQA** tab.

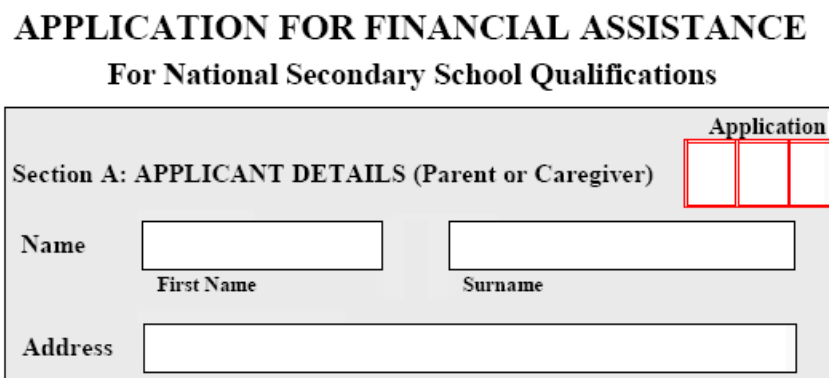
   The **NZQA** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - NZQA tab key fields

Field	Description
Name	Student's name, comprised of the **Surname** and **Given** names. These can be updated on the **Name** tab of **Community Maintenance**. See *Community Maintenance - Name tab* in the Community manual.
Date of Birth	Student's date of birth.
Ethnic Group 1 / Ethnic Group 2 / Ethnic Group 3	Ethnic group or groups that a student identifies with. The fields allow a student, parent or guardian to nominate up to three ethnic groups. The NZ MOE encourages schools to allow students to self-identify or be identified by their parents or guardians as belonging to more than one ethnic group. There should be no duplicate codes in **Ethnic Group 1**, **2** or **3**. For details, see *Ethnic group* in the Roll returns manual.
Override Address	Select to allow the entry of an address to be used for the export only. For example, you may need to override the address if the student's examination results need to be sent overseas.

Field	Description
Address	Student's address to which the results of the University Entrance, Bursaries and Scholarships examination are sent. Rural delivery addresses must include the box holder's name. Addresses should also include a town, city or district not just a suburb or a small locality. Please do not include **New Zealand** in the address. Students are encouraged to inform the Qualifications Authority in writing of any change of address. They should continue to do this until April in the following year, as the certificates are released at this time. The address details can either be: • Updated on the **Home Address** tab of **Community Maintenance**. See *Community Maintenance - Home Address tab* in the Community manual. • Overridden on this tab. See **Override Address** above.
Student Type	Type of student for funding purposes. The NZ MOE uses this information to prepare staff resourcing plans. Students can only be allocated to one code, even though they may belong to more than one group. To allocate a student type, start at the top of the list and work down. Use the first code that applies to this student. For details, see *Student type* in the in the Roll returns manual.
Withdrawn	Select to indicate that the student has withdrawn from the New Zealand National Secondary Schools Qualifications. Candidate withdrawals from a qualification, or from individual subjects, must be made by the Qualifications Authority's cut-off date. After the cut-off date, any subjects on a student's record appear on their results. This applies to: • NCEA Level 1 • Sixth Form Certificate • University Entrance, Bursaries and Scholarships. The principal's nominee should be aware of the provisions in the regulations that apply to the withdrawal of Bursary candidates who are not going to complete course prescription requirements. Any such withdrawals must be made by the cut-off date.

Field	Description
Tertiary Release	Select to allow the student's results to be released by the Qualifications Authority. In January of each year, the Qualifications Authority provides all New Zealand Universities and some other tertiary institutions with full sets of candidates' results from the University Entrance, Bursaries and Scholarships examination. Where requested Sixth Form Certificate results are also released. This enables the tertiary institutions to process pre-enrolments. Where this field is cleared, an application to a University or Polytechnic may encounter processing delays.
Financial Assistance Type	Type of assistance with the payment of entry fees for the New Zealand National Secondary Schools Qualifications. The field values are set in the **luStudentFinanceAssistType** lookup table. See *Maintaining lookup tables* in the System maintenance manual. The initial field values are: • **Not selected**. No financial assistance has been granted. • **Benefit**. This applies if the: – fee payer is receiving a Work and Income or Study Link benefit – joint family income would entitle the fee payer to receive a Community Services Card. • **Family**. This applies if there is more than one child undertaking these qualifications in the same year, irrespective of income. Financial assistance is not available for foreign students paying fees.
Benefit Number	Benefit number that is used on the **Application For Financial Assistance** for the New Zealand National Secondary Schools Qualifications. For example, either a: • Work and Income benefit • Study Link benefit.  APPLICATION FOR FINANCIAL ASSISTANCE For National Secondary School Qualifications Application Section A: APPLICANT DETAILS (Parent or Caregiver) Name First Name Surname Address Where financial assistance has been requested without a benefit number, the applications are processed as hardship applications.

Field	Description
Payment Amount	Amount payable for entry fees for the New Zealand National Secondary Schools Qualifications, for the selected student. For example, in 2007 the following amounts were applicable: <table><tr><th></th><th>Eligible for beneficiary or income based assistance</th><th>Not eligible for beneficiary or income based assistance</th></tr><tr><td>One child who is a candidate</td><td>$20.00</td><td>Full fees ($75.00 for NQF and 3 Scholarship subjects)</td></tr><tr><td>More than one child who are candidates</td><td>A maximum of $30.00 per family*.</td><td>Where fees are payable for more than 1 candidate, a maximum of $100.00 per child and $200.00 per fee payer.</td></tr></table> Students are charged the full amount if: • An application has been declined. • An application was not received. • The benefit number was not originally supplied as required. Once the benefit number is supplied the fee can be reduced by NZQA.
Number of Siblings	Number of siblings that are sitting National Secondary Schools Qualifications in the same year as the selected student. This affects the amount payable to the family. See **Payment Amount** above.
Application ID	Identification number of the application.

Results area fields

Field	Description
NCEA Levels	NCEA is part of the New Zealand National Qualifications Framework. See the *National Certificates of Educational Achievement* (*http://www.nzqa.govt.nz/qualifications-standards/qualifications/ncea/*) web site. There are three levels of NCEA certificate, depending on the standard achieved by the student.
Level 1 Literacy Met	Indicates whether the student has met the literacy standard for NCEA level 1.
Level 1 Numeracy Met	Indicates whether the student has met the numeracy standard for NCEA level 1.
UE Literacy Met	Indicates whether the student has met the literacy standard for University.
UE Numeracy Met	Indicates whether the student has met the numeracy standard for University.

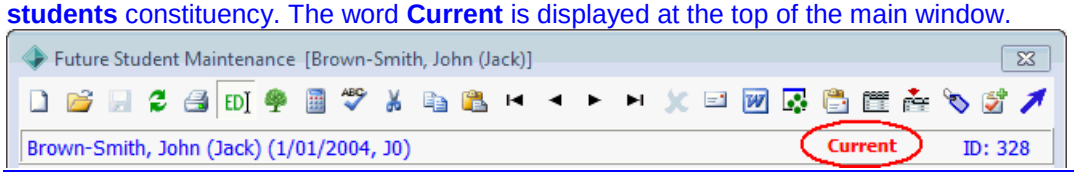
Future Student Maintenance - Classes tab

Use the **Classes** tab to maintain academic and co-curricular classes the student is enrolled in at your organisation.

For academic classes, either:

- import this information through the timetable import program
- use **Class Maintenance** to add, view and edit class information.

Note: The **Classes** tab is only displayed if the student has been transferred to the **Current students** constituency. The word **Current** is displayed at the top of the main window.



Opening the Classes tab

To open the **Classes** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

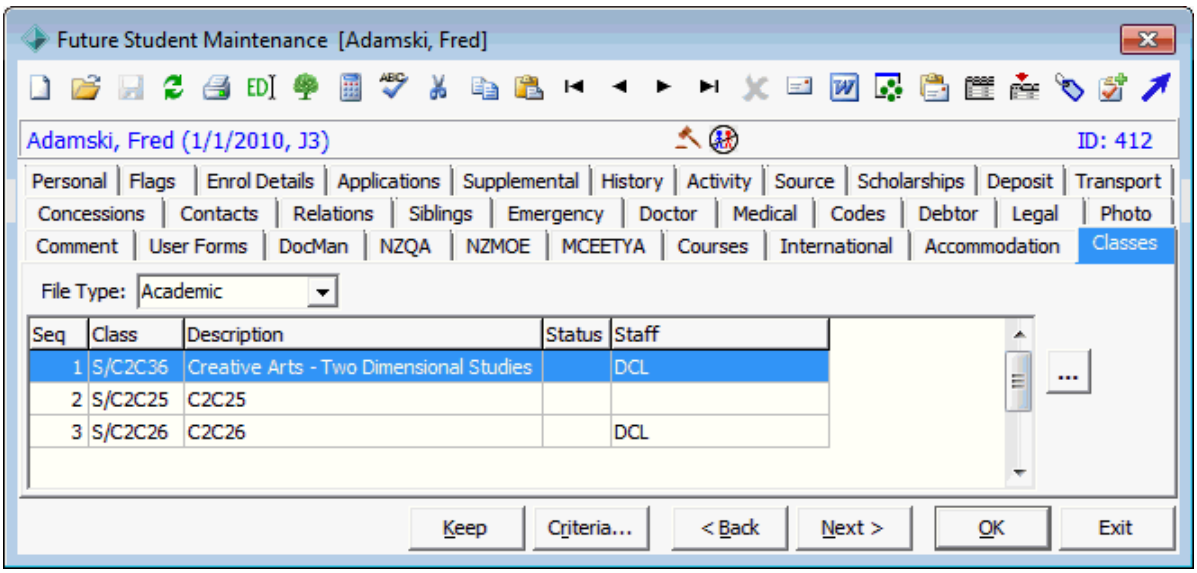
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Classes** tab.

   The **Classes** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Classes tab key fields and buttons

Fields

Field	Description
File Type	Type of class. For example: • academic classes • music classes • sport • and so on. **Tip:** Set the **File Type** to blank to show all types of classes for the student.

Class grid area

Field	Description
Class	Class code.
Description	Class description. **Note:** The description is obtained automatically from the **Class Maintenance** module.
Status	Whether the student has completed the requirements for the class. **Note:** This field is normally used for external study or co-curricular classes. It can also be used for charging purposes. See *Making adjustments for students not attending classes* in the Debtors manual.
Staff	Staff code for the staff member taking the class.

Buttons

Button	Description
	Launch the **Class Maintenance** window for the selected class. You can view or update teacher, student or timetable details for the class. This is useful for viewing a list of students in the class. See *Maintaining classes* in the Assessments and reports manual.

Future Student 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 > Future Students > Future Student Maintenance** from the main menu.

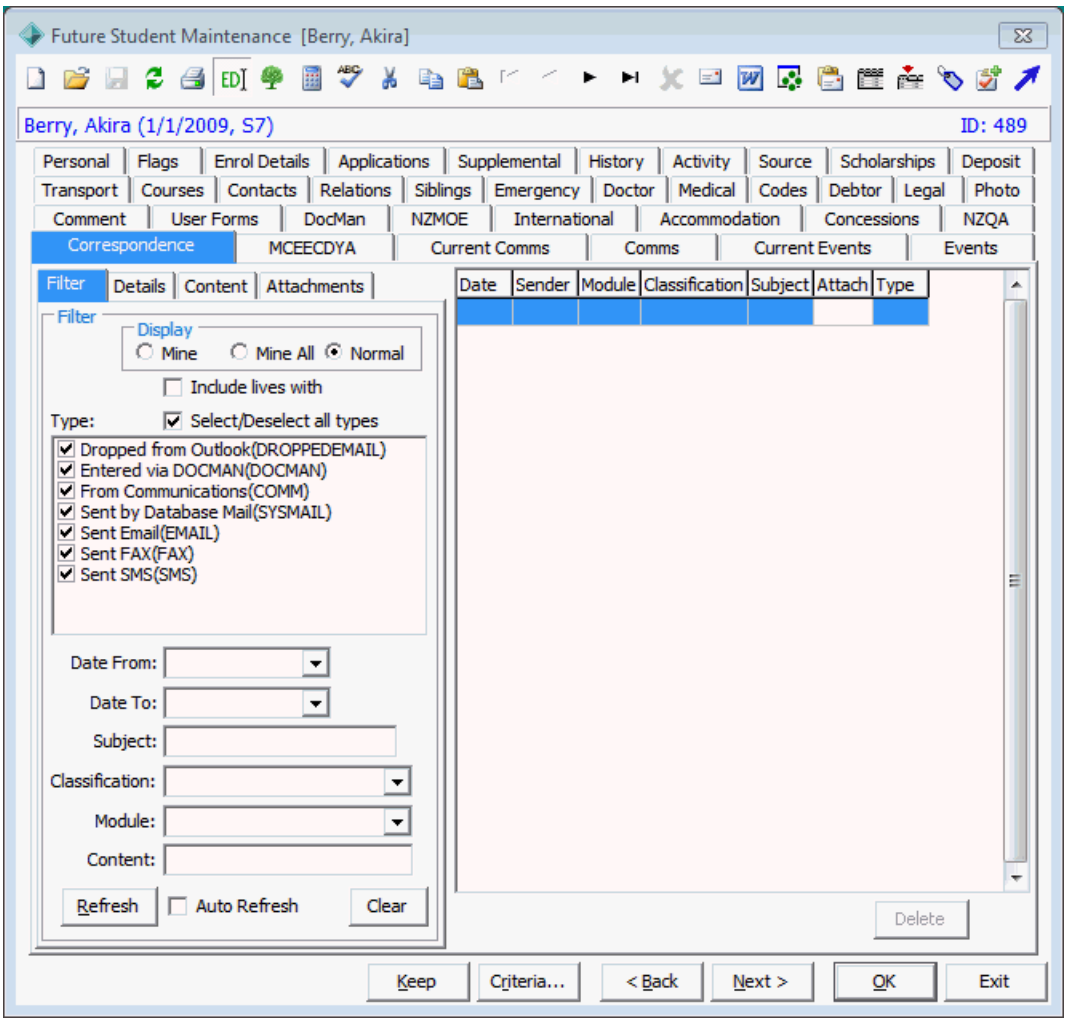
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

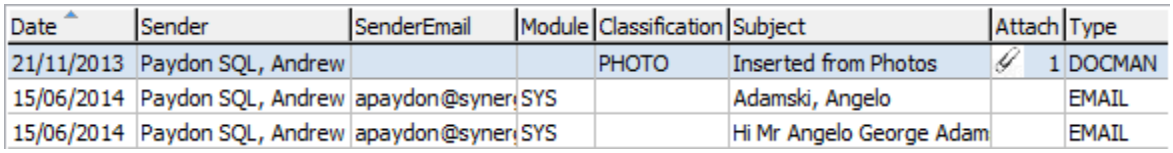
2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Correspondence** tab.

   The **Correspondence** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Correspondence tab key fields and buttons

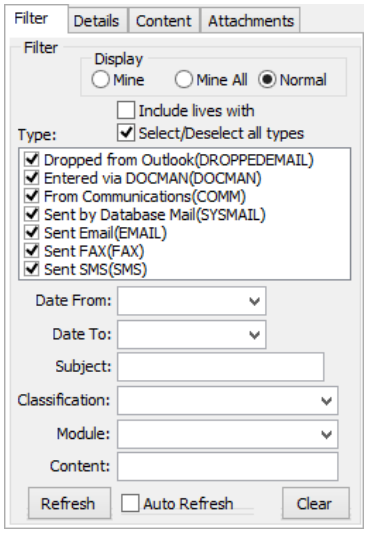
Grid area fields



Date	Sender	SenderEmail	Module	Classification	Subject	Attach	Type
21/11/2013	Paydon SQL, Andrew			PHOTO	Inserted from Photos	1	DOCMAN
15/06/2014	Paydon SQL, Andrew	apaydon@syner	SYS		Adamski, Angelo		EMAIL
15/06/2014	Paydon SQL, Andrew	apaydon@syner	SYS		Hi Mr Angelo George Adam		EMAIL

Field	Description
Date	Date the correspondence was added.
Sender	Name of the community member who sent the correspondence. **Note:** This field is only displayed if the **Display - Normal** filter field is selected.
SenderEmail	Email of the sender.
Receiver	Name of the community member who received the correspondence. **Note:** This field is only displayed if the **Display - Mine All** filter field is selected.
Module	Module the correspondence originated from. For example: • **SYS**, for emails and SMS messages sent from Synergetic. • **EXTERNAL** for emails imported from Microsoft Outlook.
Classification	Classification of the document if the record is from DocMan. See *luDocumentClassification lookup table* in the System maintenance manual.
Subject	If the document is: • an email, this is the subject line of the correspondence • a document from DocMan, this is the document description.
Attach	Number of attachments an email correspondence has.
Type	Type of correspondence. For example, email, document, SMS.

Filter sub-tab fields and buttons



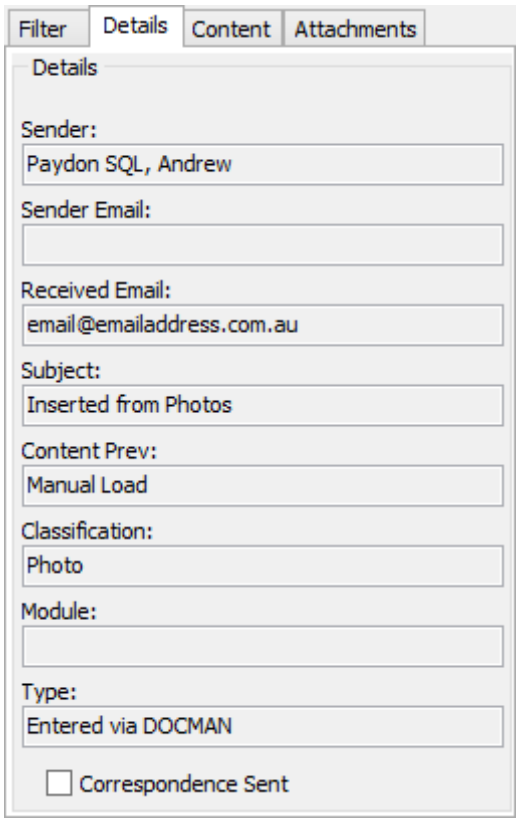
Fields

Field	Description
Display	Select to display: • **Mine** - correspondence you have sent to the community member • **Mine All** - all correspondence you have sent • **Normal** - all correspondence sent to this community member.
Include lives with	Include correspondence sent to people the community member lives with.
Select/Deselect all types	Select or clear this field to select or clear all **Type** fields.
Type	Filter the correspondence grid by the type of correspondence. For example, email or SMS. Cleared correspondence types are not displayed.
Date From	View correspondence sent or imported on or after this date.
Date To	View correspondence sent or imported on or before this date.
Subject	View correspondence that includes these words in the subject line.
Classification	View correspondence of the specified classification.
Module	View correspondence created by the specified Synergetic module. For example, debtor statements generated by the debtor module.
Content	View correspondence that includes these words in the content.
Auto Refresh	Select to automatically refresh the grid when the filter fields are changed.

Buttons

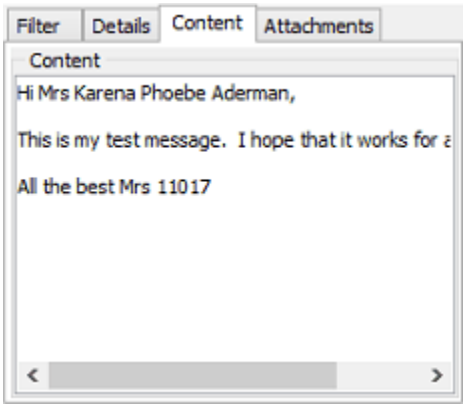
Button	Description
	Refresh the grid if you have changed the filter field selections.
	Clear the filter field selections.

Details sub-tab fields



Field	Description
Sender	Name of the community member who sent the correspondence.
Sender Email	Email of the person who sent the correspondence.
Received Email	Email address the email correspondence was sent to.
Subject	If the document is: • an email, this is the subject line of the correspondence • a document from DocMan, this is the document description.
Content Prev	Brief preview of the content of the correspondence.
Classification	Classification of the correspondence. For example, Photo, Payroll, etc.
Module	Module the correspondence originated from. For example: • **SYS**, for emails and SMS messages sent from Synergetic. • **EXTERNAL** for emails imported from Microsoft Outlook.
Type	Type of the correspondence. For example, SMS, Sent email, etc.
Correspondence Sent	If selected, the correspondence was sent to the receiver email.

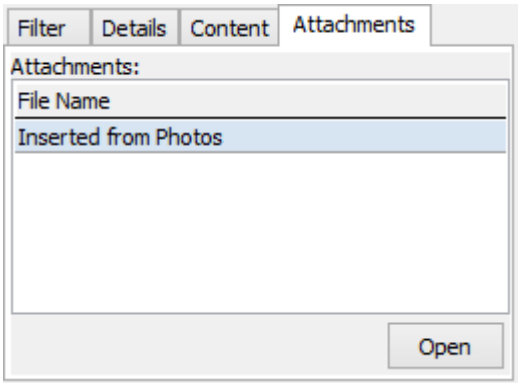
Content sub-tab fields



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'**.

Attachments sub-tab fields and buttons



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

Buttons

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

Common Buttons

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

Future Student Maintenance - MCEECDYA tab

Australian schools use the **MCEECDYA** tab to maintain information about:

- students
- parents or guardians

for MCEECDYA (Australian Ministerial Council on Education, Early Childhood Development and Youth Affairs) requirements.

The **MCEECDYA** tab is comprised of three sub-tabs:

- **Student** sub-tab. See below for more details.
- **Parent 1** sub-tab. See *Future Student Maintenance - MCEECDYA tab - Parent 1 sub-tab* (on page 284).
- **Parent 2** sub-tab. See *Future Student Maintenance - MCEECDYA tab - Parent 2 sub-tab* (on page 287).

Note: The **Parent 1** and **Parent 2** sub-tabs have identical fields. Enter the parent or guardian details on the sub-tabs.

Opening the MCEECDYA tab

To open the **MCEECDYA** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

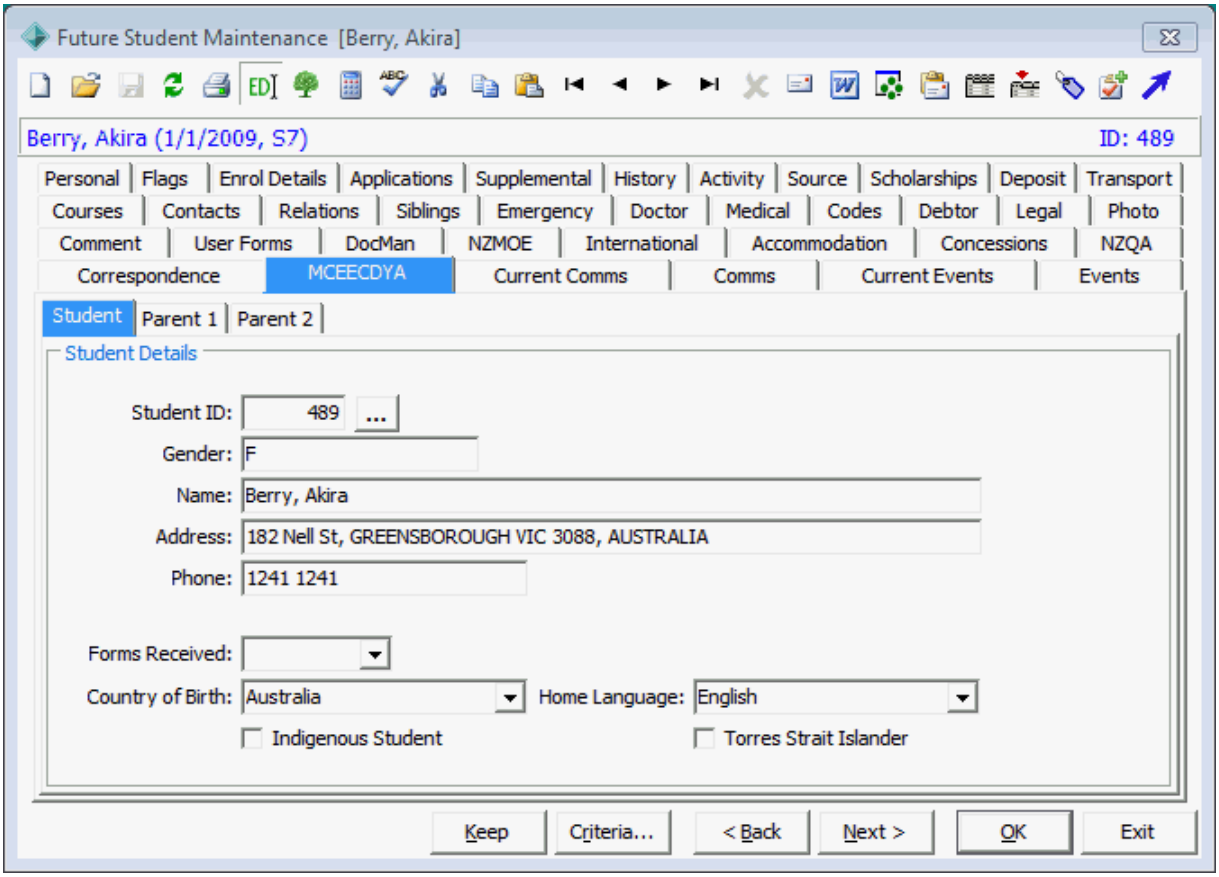
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

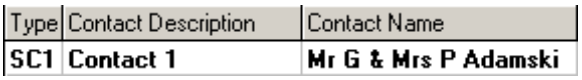
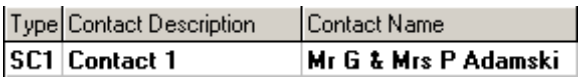
.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **MCEECDYA** tab.

   The **Student** sub-tab of the **MCEECDYA** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - MCEECDYA tab - Student sub-tab key fields

Field	Description
Student ID	Synergetic ID of the student.
Gender	Gender of the student. This field is updated on the **Personal** tab. See *Future Student Maintenance - Personal tab* (on page 99).
Name	Student's name in the format **last name, first name**.
Address	Student's address. This is derived from the home address of the student's **SC1** contact. To update the address: 1. Locate the student's **SC1** contact on the **Contacts** tab. See *Future Student Maintenance - Contacts tab* (on page 159).  2. Click to launch into **Community Maintenance**. 3. Update the address on the **Home Address** tab. See *Community Maintenance - Home Address tab* in the Community manual. **Note: Silent Address** is displayed in the **Address** field of the **MCEECDYA** tab if the **Silent Address** field is selected on the **Home Address** tab of Community Maintenance.
Phone	Student's home phone. This is derived from the home phone of the student's **SC1** contact. To update the phone number: 1. Locate the student's **SC1** contact on the **Contacts** tab. See *Future Student Maintenance - Contacts tab* (on page 159).  2. Click to launch into **Community Maintenance**. 3. Update the phone number on the **Phone** tab. See *Community Maintenance - Phone tab* in the Community manual.
Forms Received	Date that the MCEECDYA forms were received from the parents or guardians.
Country of Birth	Student's country of birth. **Note**: Maintain the values in the **luCountry** lookup table. New Zealand schools, see *Country of citizenship* in the Roll returns manual.
Home Language	Language used by the student at home, if different to the principal language used at your organisation. **Note**: Maintain the values in the **luLanguage** lookup table. New Zealand schools, see *Neighbour island language* in the Roll returns manual.

Field	Description
Indigenous Student	Select if the student is defined as an indigenous student.
Torres Strait Islander	Select if the student is defined as a Torres Strait islander.

Future Student Maintenance - MCEECDYA tab - Parent 1 sub-tab

Use the **Parent 1** sub-tab of the **MCEECDYA** tab to update information about a primary parent or guardian for MCEECDYA requirements.

Also, see:

- the **Student** sub-tab of the Future Student Maintenance - MCEECDYA tab (on page 280)
- *Future Student Maintenance - MCEECDYA tab - Parent 2 sub-tab* (on page 287).

Opening the Parent 1 sub-tab

To open the **Parent 1** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

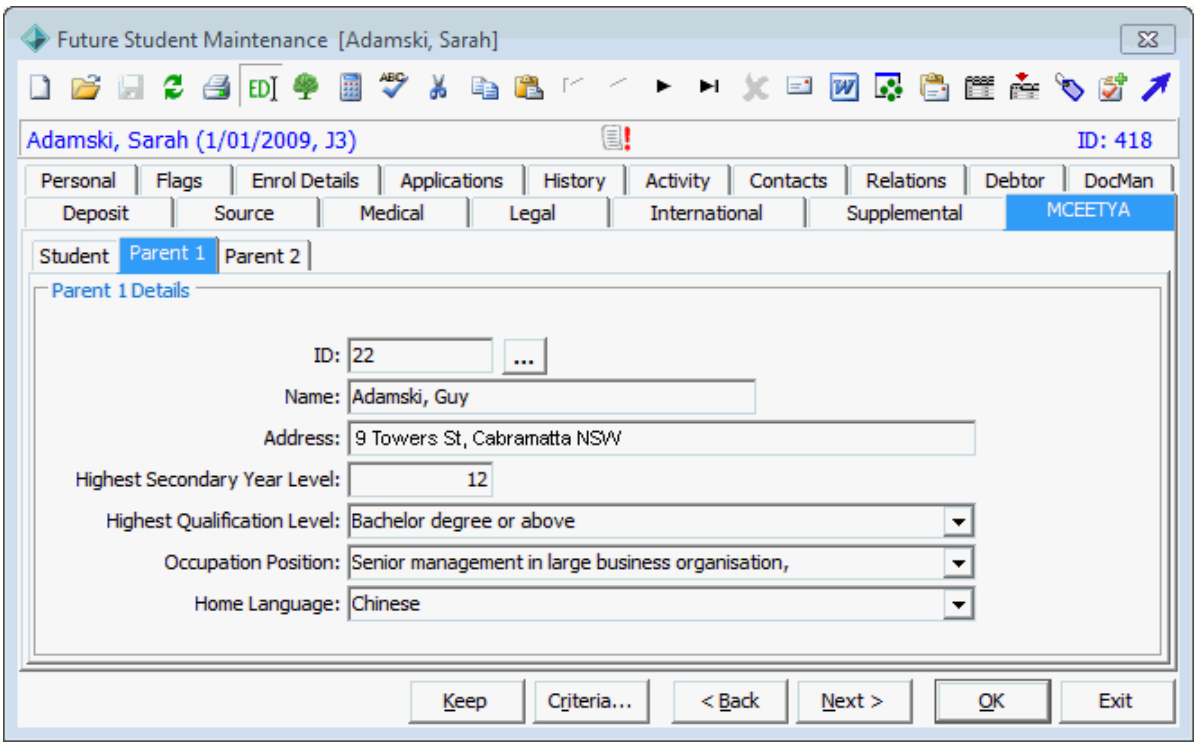
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

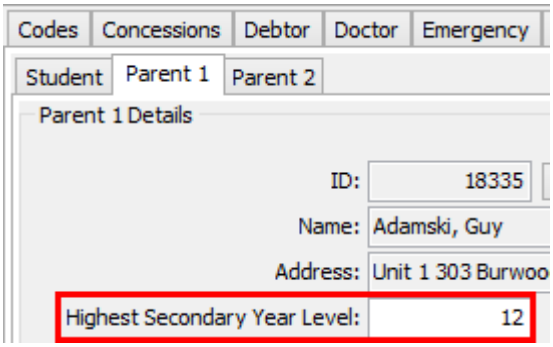
2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **MCEECDYA** tab.
4. Click the **Parent 1** sub-tab.

   The **Parent 1** sub-tab of the **MCEECDYA** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - MCEECDYA tab - Parent 1 sub-tab key fields and buttons

Fields

Field	Description
ID	Synergetic ID of the parent or guardian displayed.
Name	Parent or guardian's name in the format **last name, first name**.
Address	Parent or guardian's address. To update the address: 1. Click ... to launch into **Community Maintenance** for the parent or guardian. 2. Update the address on the **Home Address** tab. See *Community Maintenance - Home Address tab* in the Community manual. **Note: Silent Address** is displayed in the **Address** field of the **MCEECDYA** tab if the **Silent Address** field is selected on the **Home Address** tab of Community Maintenance.
Highest Secondary Year Level	Highest secondary level that the parent or guardian has attended. By default, the MCEECDYA export converts this to the appropriate MCEECDYA level for the corresponding year level. See *Import/Export Student Data - MCEECDYA tab* in the Current students manual.  Some organisations may have entered the MCEECDYA level instead. If this is the case for your organisation, you can set the **ParentYearLevelNoConvert** configuration setting so that the MCEECDYA levels are used from the data entered in this field. See *ParentYearLevelNoConvert configuration setting* in the System maintenance manual.
Highest Qualification Level	Highest qualification level that the parent or guardian is currently holding. **Note:** The values for this field are derived from the **luQualificationLevel** lookup table values for the MCEECDYA external system type. See *Loading lookup tables for external systems* in the System maintenance manual.
Occupation Position	Occupation or position that the parent or guardian is currently holding. **Note:** The values for this field are derived from the **luOccupationPosition** lookup table values for the MCEECDYA external system type. See *Loading lookup tables for external systems* in the System maintenance manual.

Field	Description
Home Language	Main language other than English. This field can also be updated on the **Other** tab of **Community Maintenance**, for the current community member. See *Future Student Maintenance - Personal tab* (on page 99). **Note:** The values for this field are derived from the **luLanguage** lookup table values for the MCEECDYA external system type. See *Loading lookup tables for external systems* in the System maintenance manual.

Buttons

Button	Description
	Launch into **Community Maintenance** for the parent or guardian. See *Maintaining community members* in the Community manual.

Future Student Maintenance - MCEECDYA tab - Parent 2 sub-tab

Use the **Parent 2** sub-tab of the **MCEECDYA** tab to update information about a primary parent or guardian for MCEECDYA requirements.

Also, see:

- the **Student** sub-tab of the Future Student Maintenance - MCEECDYA tab (on page 280)
- *Future Student Maintenance - MCEECDYA tab - Parent 1 sub-tab* (on page 284).

Opening the Parent 2 sub-tab

To open the **Parent 2** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

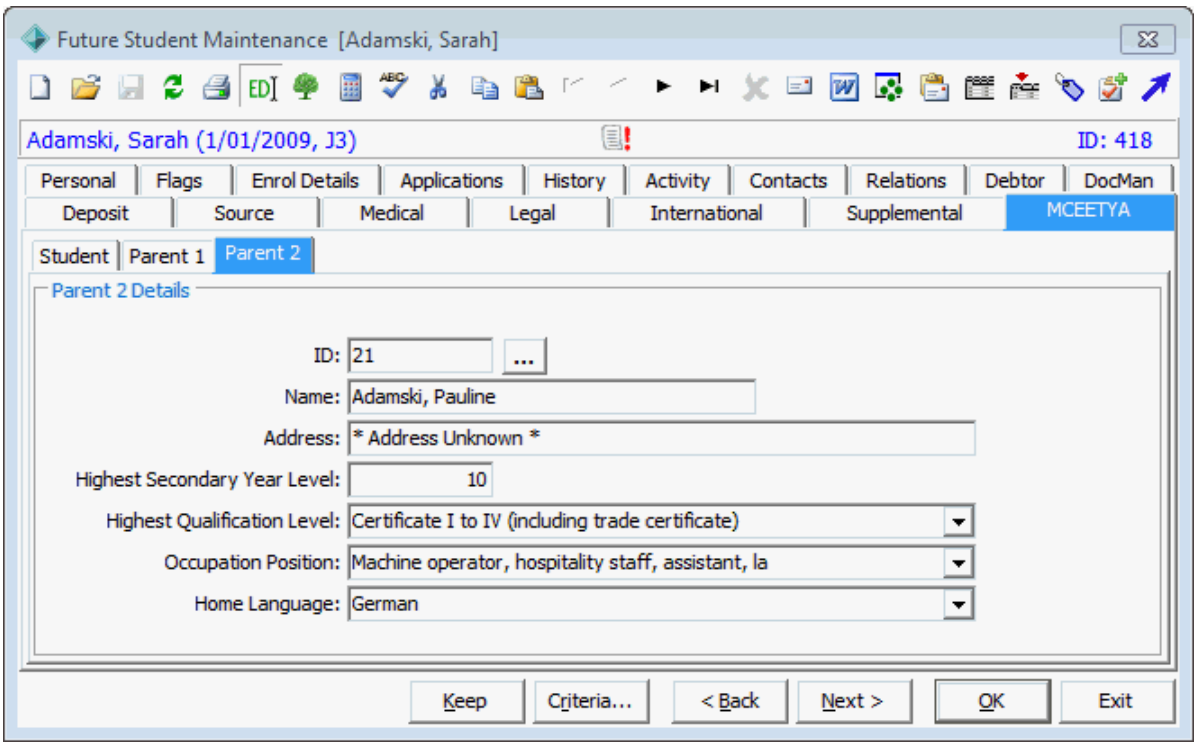
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

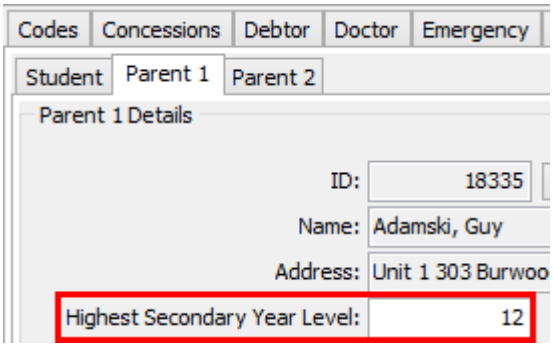
2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **MCEECDYA** tab.
4. Click the **Parent 2** sub-tab.

   The **Parent 2** sub-tab of the **MCEECDYA** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - MCEECDYA tab - Parent 2 sub-tab key fields and buttons

Fields

Field	Description
ID	Synergetic ID of the parent or guardian displayed.
Name	Parent or guardian's name in the format **last name, first name**.
Address	Parent or guardian's address. To update the address: 1. Click ... to launch into **Community Maintenance** for the parent or guardian. 2. Update the address on the **Home Address** tab. See *Community Maintenance - Home Address tab* in the Community manual. **Note: Silent Address** is displayed in the **Address** field of the **MCEECDYA** tab if the **Silent Address** field is selected on the **Home Address** tab of Community Maintenance.
Highest Secondary Year Level	Highest secondary level that the parent or guardian has attended. By default, the MCEECDYA export converts this to the appropriate MCEECDYA level for the corresponding year level. See *Import/Export Student Data - MCEECDYA tab* in the Current students manual.  Some organisations may have entered the MCEECDYA level instead. If this is the case for your organisation, you can set the **ParentYearLevelNoConvert** configuration setting so that the MCEECDYA levels are used from the data entered in this field. See *ParentYearLevelNoConvert configuration setting* in the System maintenance manual.
Highest Qualification Level	Highest qualification level that the parent or guardian is currently holding. **Note:** The values for this field are derived from the **luQualificationLevel** lookup table values for the MCEECDYA external system type. See *Loading lookup tables for external systems* in the System maintenance manual.
Occupation Position	Occupation or position that the parent or guardian is currently holding. **Note:** The values for this field are derived from the **luOccupationPosition** lookup table values for the MCEECDYA external system type. See *Loading lookup tables for external systems* in the System maintenance manual.

Field	Description
Home Language	Main language other than English. This field can also be updated on the **Other** tab of **Community Maintenance**, for the current community member. See *Future Student Maintenance - Personal tab* (on page 99). **Note:** The values for this field are derived from the **luLanguage** lookup table values for the MCEECDYA external system type. See *Loading lookup tables for external systems* in the System maintenance manual.

Buttons

Button	Description
...	Launch into **Community Maintenance** for the parent or guardian. See *Maintaining community members* in the Community manual.

Future Student Maintenance - Current Comms tab

Use the **Current Comms** tab to:

- Maintain communications with future students that have yet to be sent using the **Communications** sub-tab, as outlined below.
- Maintain notification methods for the future student using the **Notification Methods** sub-tab. See *Maintaining notification methods* in the Community manual.

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

- *Maintaining communications* in the Development manual
- *Future Student Maintenance - Comms tab* (on page 293).

Opening the Current Comms tab

To open the **Current Comms** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

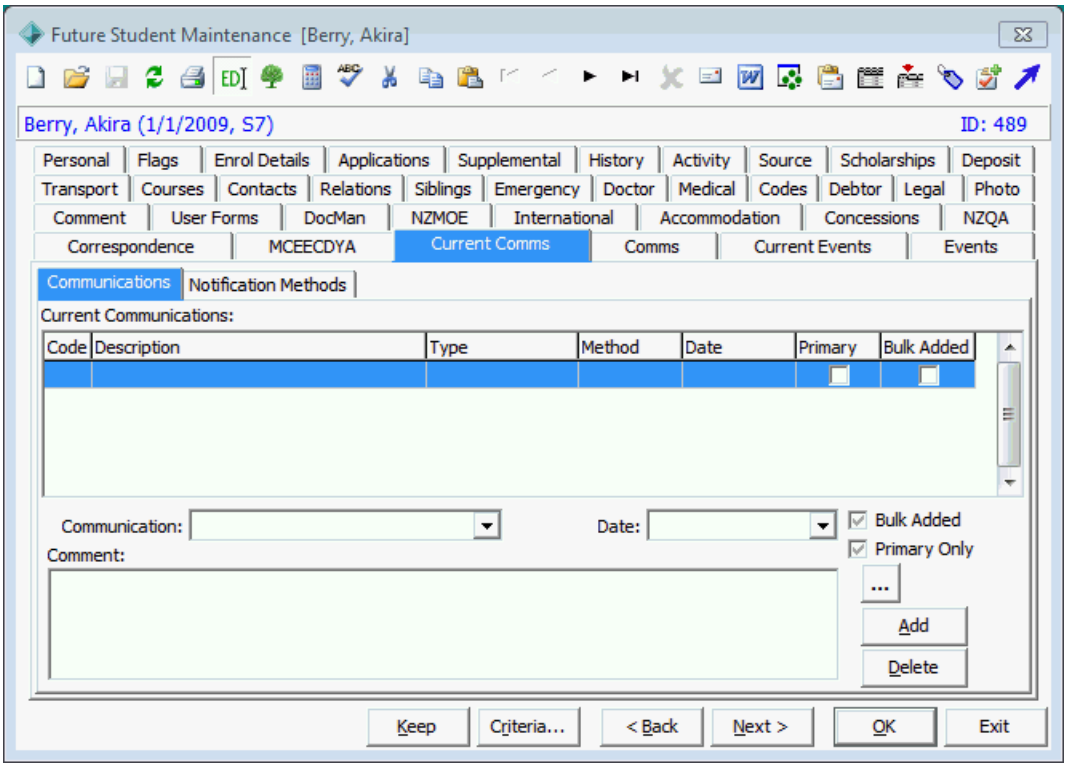
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Current Comms** tab.

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



Future Student Maintenance - Current Comms tab key fields and buttons

Communication sub-tab fields and buttons

Current Communications grid area fields

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

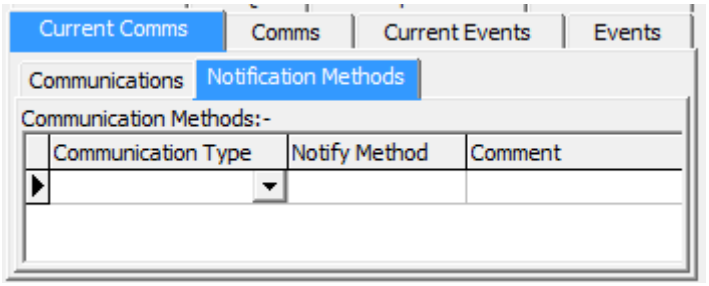
Fields

Field	Description
Communication	Select the communication sent.
Date	Date and time of the communication.
Bulk Added	Flag is selected if the communication has been added in bulk.
Primary Only	Select to include the primary attendee only. **Note:** This field is not editable. The default is to include the attendee and their spouse, if they have one.
Comment	Optional comments about the communication to the recipient.

Buttons

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

Notification Methods sub-tab fields and buttons



Grid area fields

Field	Description
Communication Type	Type of communication.
Notify Method	Method used to send the communication or whether **no** notification is required. For example, you might communicate by: • email • mail • SMS (text) messages • and so on.
Comment	Any comment on the notification method or communication type.

Buttons

Button	Description
...	Launch into **Communications Types Maintenance**. See *Maintaining communication types* in the Development manual.
Add	Add a new row then input the details of the communication.
Delete	Delete the highlighted communication.

Future Student Maintenance - Comms tab

Use the **Comms** tab to maintain communications that have been sent to future students.

Opening the Comms tab

To open the **Comms** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

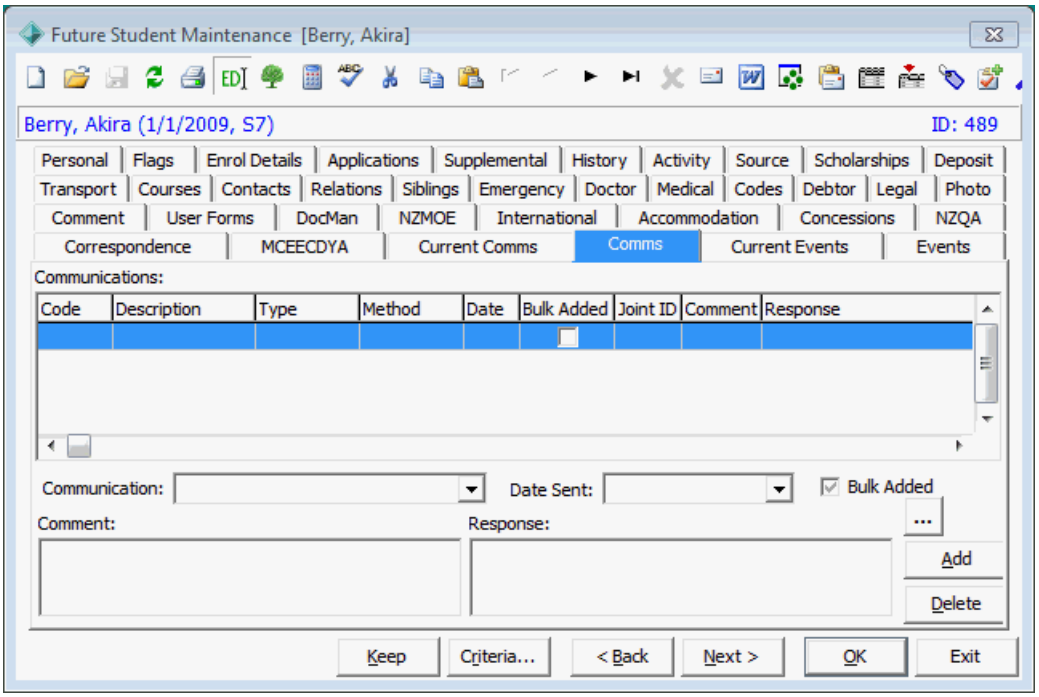
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Comms** tab.

   The **Comms** tab of the **Future Student Maintenance** window is displayed.

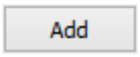


Future Student Maintenance - Comms tab key fields and buttons

Fields

Field	Description
Code	Unique code used to identify the communication. See *Maintaining communications* in the Development manual.
Description	Description of the communication. The **Communication** field is displayed as the **Description** field in the grid area.
Type	Type of communication. For example, newsletter or event reminder.
Method	Way the communication is to be sent. For example, posted or by email.
Date / Date Sent	Date and time of the communication.
Bulk Added	Flag is selected if the communication has been added in bulk.
Comment	Optional comments about the communication.
Response	Response of the future student to the communication sent.

Buttons

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

Future Student Maintenance - Current Events tab

Use the **Current Events** tab to:

- Review the events that the future student 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 tab* in the Development manual.

What you can do:

What you can do…	See…
Enter the event details for the future student 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.	*Future Student Maintenance - Current Events tab - Details sub-tab* (on page 296)
Record the details of any guests attending the event.	*Future Student Maintenance - Current Events tab - Guests sub-tab* (on page 302)

Future Student Maintenance - Current Events tab - Details sub-tab

Use the **Details** sub-tab of the **Current Events** tab to enter the event details for the future student 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 *Future Student Maintenance - Current Events tab - Guests sub-tab* (on page 302).

Opening the Details sub-tab

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

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

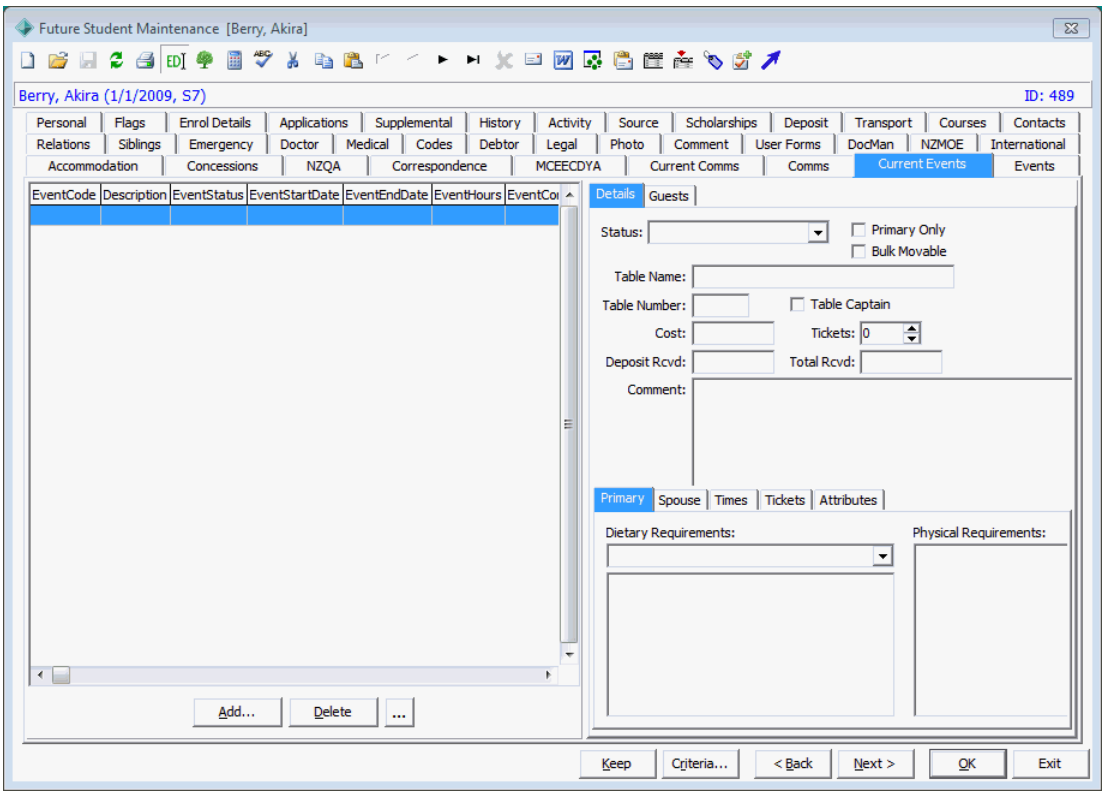
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

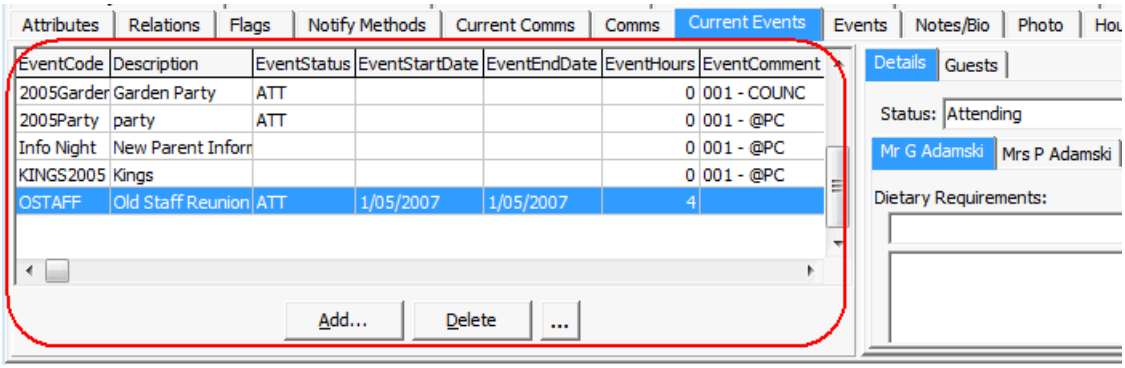
2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Current Events** tab.

   The **Details** sub-tab of the **Current Events** tab of **Future Student Maintenance** is displayed.



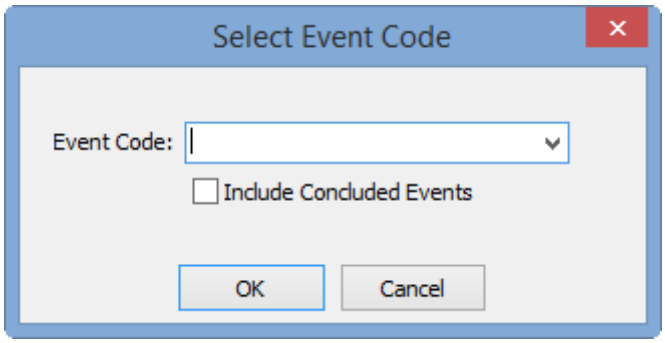
Future Student Maintenance - Current Events tab - Details sub-tab key fields and buttons

Grid area fields



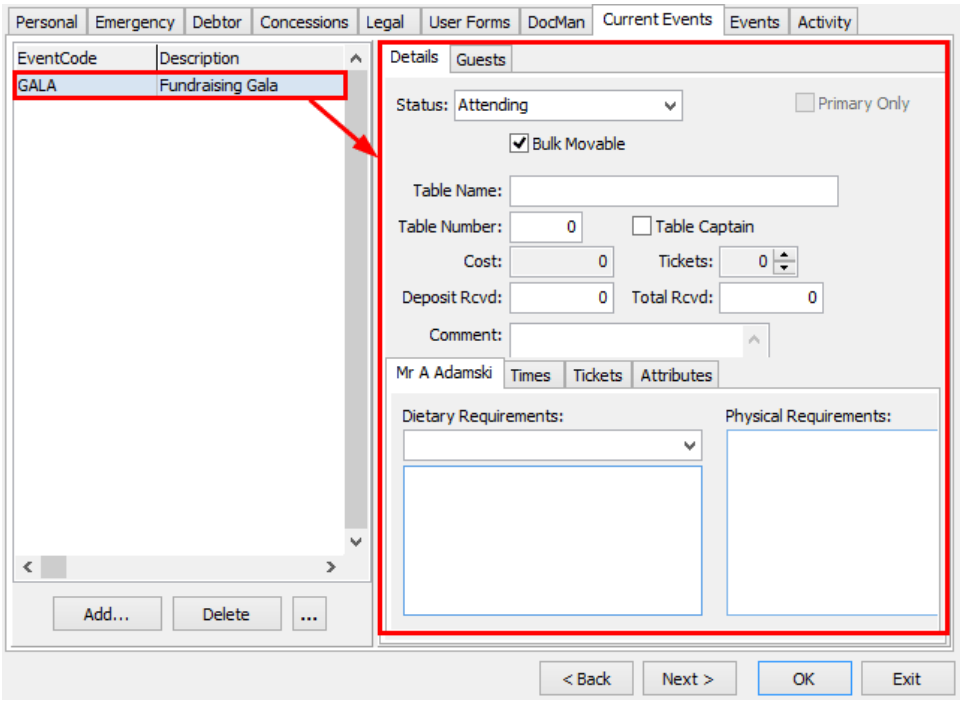
Field	Description
EventCode	Code referring to the event.
Description	Description of the event.
EventStatus	Status of attendance for the selected person.
EventStartDate	Start date of attendance for the selected person, if different to the start date of the event.
EventEndDate	End date of attendance for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

Grid area buttons

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

Fields

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

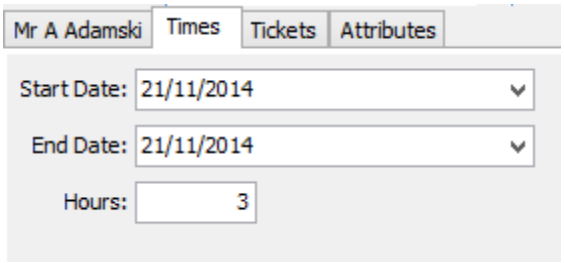


Field	Description
Status	Status of the attendee. For example, whether attending or unable to attend.
Primary Only	Select to include the primary attendee only. **Note:** This field is not editable. The default is to include the attendee and their spouse, if they have one.
Bulk Movable	If selected, this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

<Community member name> sub-sub-tab fields

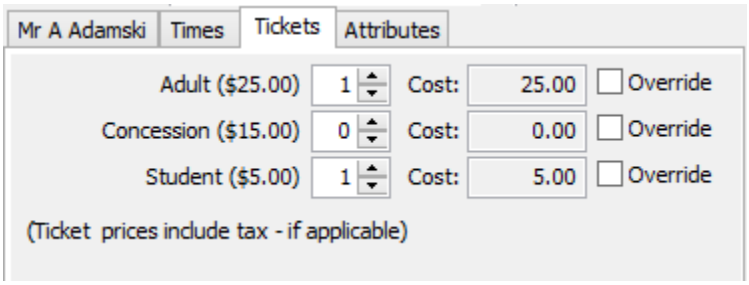
Field	Description
Dietary Requirements	List any special dietary requirements for the selected person. For example, the primary person may be a vegetarian while their partner may be a vegan.
Physical Requirements	List any requirements to cater for particular physical needs. For example, wheelchair access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

Times sub-sub-tab fields



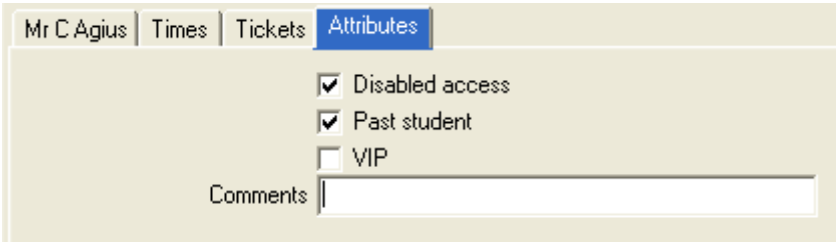
Field	Description
Start Date	Date if the starting date of the person's attendance is different from the event's starting date. For example, an event can cover several days but the person only attends for part of the event.
End Date	Date the person finishes attending the event, if this is different from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

Tickets sub-sub-tab fields



Field	Description
Ticket type	Lists all the types of tickets available for this event. For example: • Adult • Student • Concession. The ticket types are defined using the **Attributes** tab of the **Events Maintenance** window. See *Events Maintenance - Attributes tab* in the Development manual.
Cost	Cost of each type of ticket. The costs are defined using the **Attributes** tab of the **Events Maintenance** window. See *Events Maintenance - Attributes tab* in the Development manual.
Override	Select to override the ticket price. For example, offer a discount to this particular attendee.

Attributes sub-sub-sub-tab fields



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.

Future Student 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 *Future Student Maintenance - Current Events tab - Details sub-tab* (on page 296).

Opening the Guests sub-tab

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

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

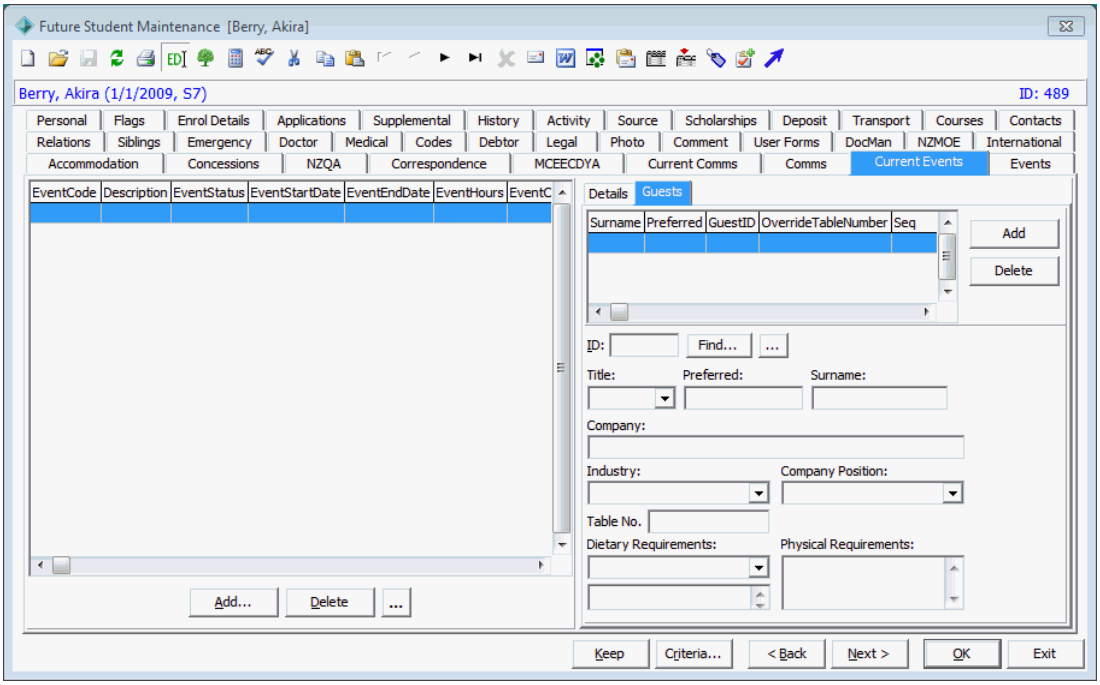
   The **Set Future Student Search Criteria** window is displayed.

> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Current Events** tab.

   The **Details** sub-tab of the **Current Events** tab of **Future Student Maintenance** is displayed.
4. Click the **Guests** sub-tab.

   The **Guests** sub-tab of the **Current Events** tab of **Future Student Maintenance** is displayed.



Future Student Maintenance - Current Events tab - Guests sub-tab key fields and buttons

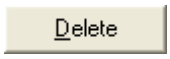
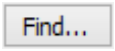
Grid area

Field	Description
Surname	Last name of the guest.
Preferred	Preferred (first) name of the guest.
GuestID	Synergetic ID of the guest, if they are found in the Synergetic database. This field is blank if you have typed in the **Surname** and **Preferred** fields for a guest not listed in Synergetic.
OverrideTableNumber	The table of the guest, if different from the primary person invited.
Seq	Sequence number of the guest, automatically generated by Synergetic.
sqlcEmail	Email address of the person or couple invited.
sqlcMobilePhone	Mobile phone of the person or couple invited.

Fields

Field	Description
ID	Guest's Synergetic ID number, if applicable.
Title	Guest's title.
Preferred	Guest's preferred name.
Surname	Guest's surname.
Company	Guest's company name, if applicable.
Email	Guest's email address.
Mobile	Guest's mobile phone number.
Industry	Guest's industry, if applicable.
Company Position	Guest's position in the company.
Table No.	Guest's table number.
Dietary Requirements	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.
Physical Requirements	List any requirements to cater for particular physical needs. For example, wheelchair access is required.

Buttons

Buttons	Description
	Add a new guest to the student's record.
	Delete a guest from the student's record.
	**Launch the Enter the details to find the guest** window to select the guest's Synergetic ID number.
	Launch the **Occupation** tab of **Community Maintenance** for the selected community member.

Future Student Maintenance - Events tab

Use the **Events** tab to view events that the past student has attended in the past.

Also, see:

- *Events Maintenance - Past Attendees tab* in the Development manual to maintain the group of people that attended the event in the past.
- *Development Maintenance - Current Events tab* in the Development manual to maintain events that are still current.

Opening the Events tab

To open the **Events** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

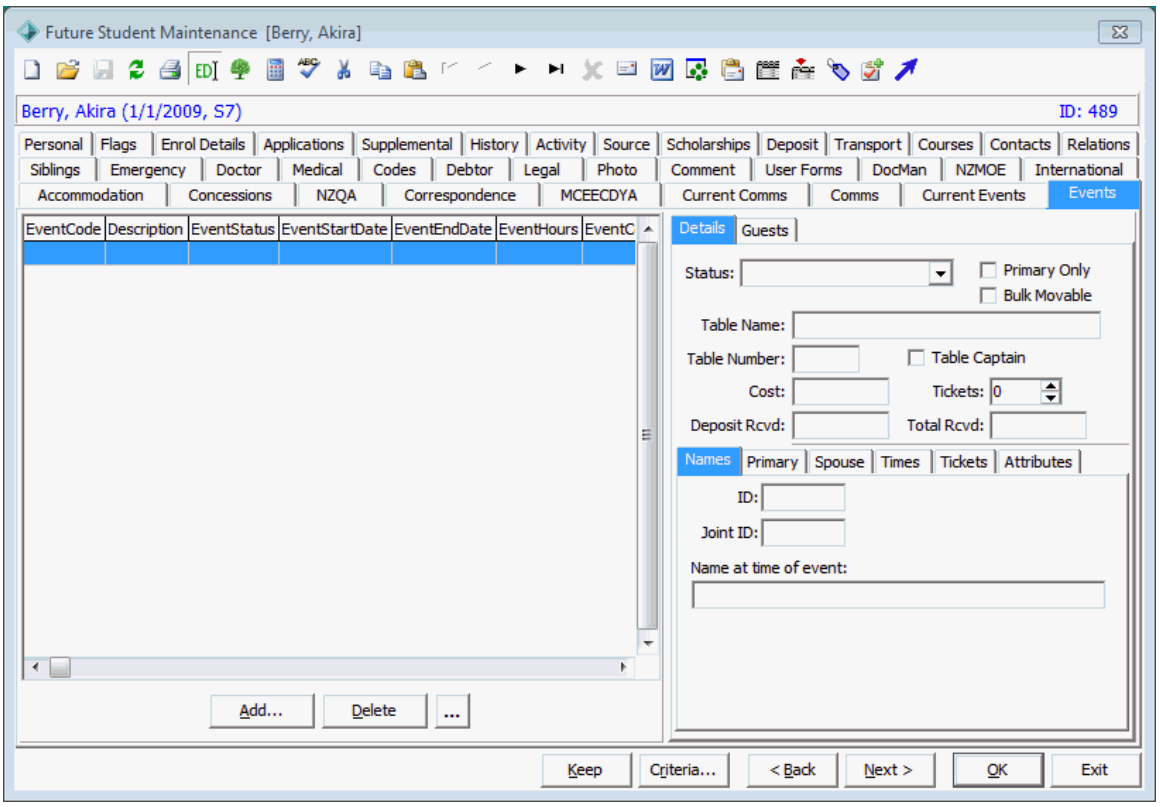
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Events** tab.

   The **Events** tab of the **Future Student Maintenance** window is displayed.



Future Student Maintenance - Events tab key fields and buttons

Fields

The fields and buttons on this tab are almost identical to those on the **Current Events** tab. See:

- *Future Student Maintenance - Current Events tab - Details sub-tab* (on page 296)
- *Future Student Maintenance - Current Events tab - Guests sub-tab* (on page 302).

Fields unique to this tab include:

Field	Description
ID	Synergetic ID of the primary person invited.
Joint ID	Community member's joint Synergetic ID number, if applicable.
Name at time of event	Name of the attendee at the time the event was held. This defaults to their mail name.

Buttons

Button	Description
	Launch into **Events Maintenance**. See *Maintaining events* in the Development manual.
	Add a new row and then type in the details of the event attended in the past.
	Delete the highlighted event.

Future Student Maintenance - Action Centre tab

Use the **Action Centre** tab to link view action centre tasks or notifications linked to the selected community member.

Tip: Click the **Action Centre** icon to quickly navigate to the **Action Centre** tab to view items linked to the currently selected community member.

Opening the Action Centre 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

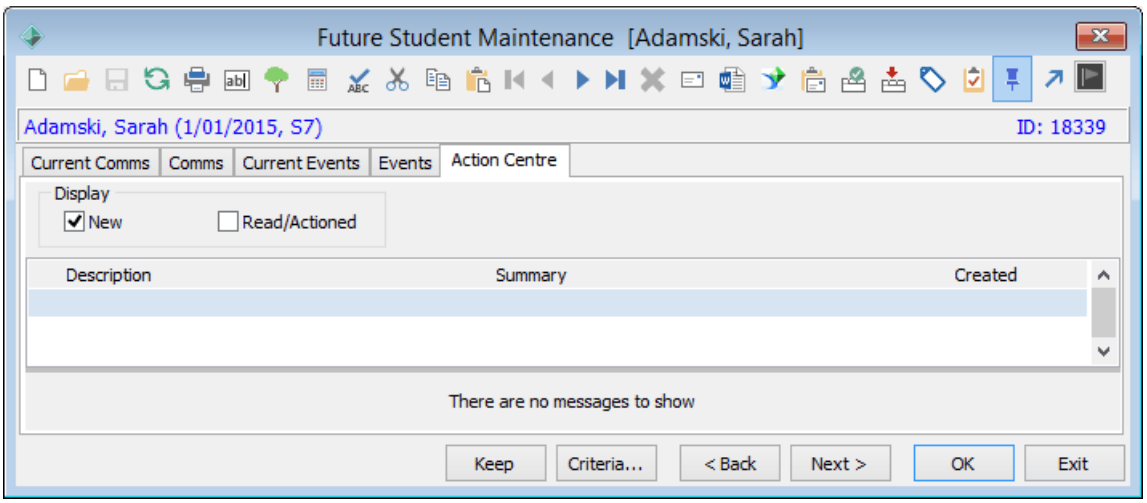
.

2. Search for the community member. See *Searching for community members*.

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

3. Click the **Action Centre** tab.

   The **Action Centre** tab of **Future Student Maintenance** is displayed.



Current Student Maintenance - Action Centre tab key fields and buttons

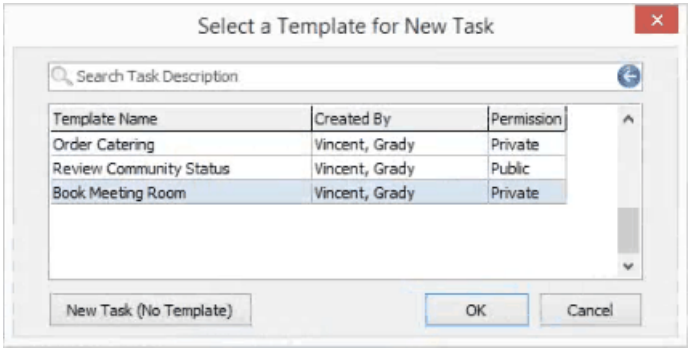
Fields

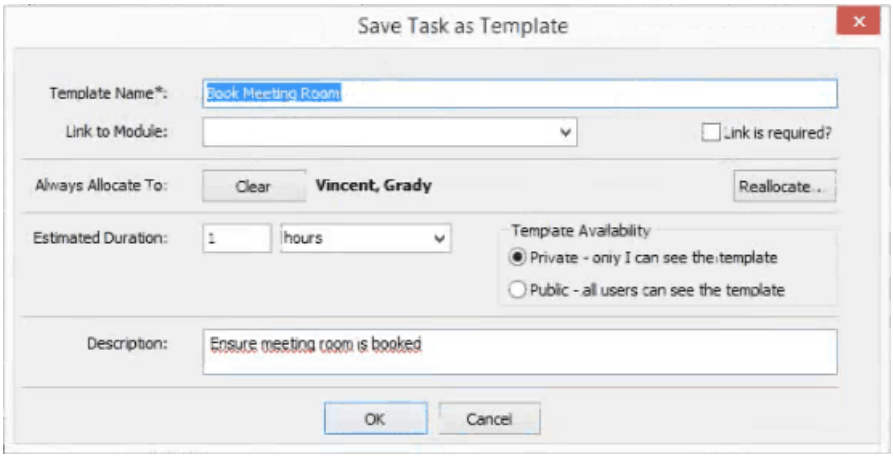
Field	Description
New	Select to view new notifications.
Read/Actioned	Select to view read or actioned notifications.
Dependent task	Tasks to be completed before the task selected in the main grid area can be started.
Linked to Community	Community member linked to the task.
Allocated To	Community member allocated to complete the task. **Note:** Clicking Start automatically allocates the community ID linked to the current Synergetic user. Click Reallocate... to assign to another community member.

Grid area fields

Field	Description
Description	Description of the Action Centre notification.
Summary	Summary of the Action Centre notification.
Created	Creation date of the Action Centre notification.

Buttons

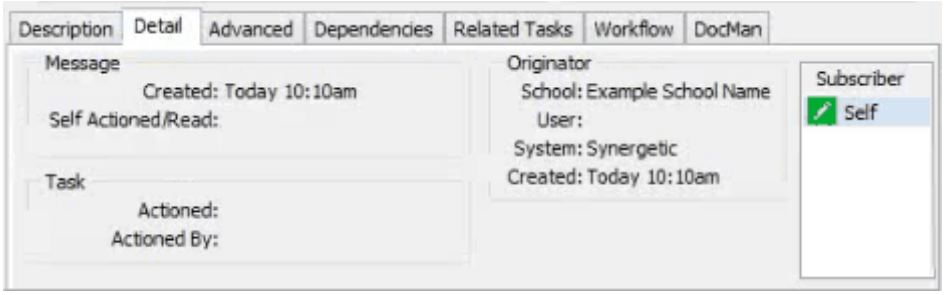
Field	Description
...	Launch **Community Maintenance** window for the displayed record.
Remove	Remove the selected task.
Reallocate...	Reallocate the task to a different community member.
Add Sub Task	Launch the **Select a Template for New Task** window to add a sub-task to the task currently selected in the grid area. See *Managing tasks* in the Introduction manual. 
Start	Start the selected task. **Note:** Clicking Start automatically allocates the community ID linked to the current Synergetic user. Click Reallocate... to assign to another community member.

Field	Description
Complete	Mark the selected task as complete.
Save Task as Template	Launch the **Save Task as Template** window to save the current task as a template to be used for future tasks. See *Managing tasks* in the Introduction manual. 

Description sub-tab fields

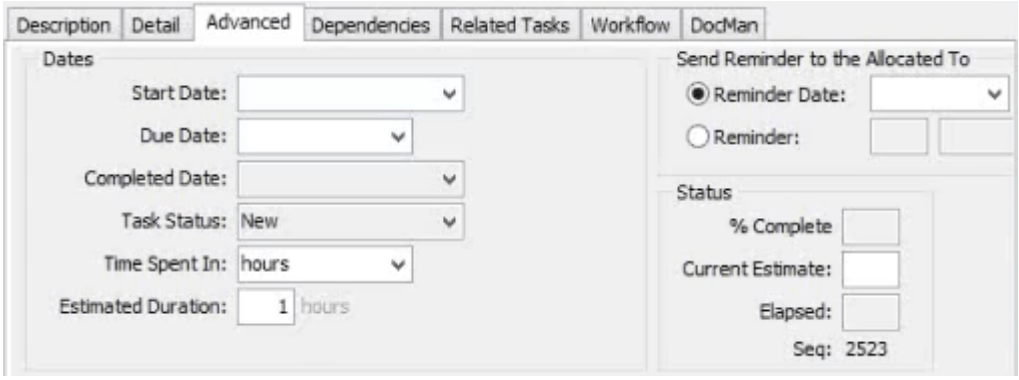
Enter a description of the action centre task in the comment field.

Detail sub-tab fields



Field	Description
Created	Date the task was created.
Self Actioned/Read	Whether the task has been self-actioned or read.
Actioned	Whether the task has been actioned.
Actioned By	Community member that actioned the task.
School	Name of the originating organisation.
User	Synergetic user that created the task.
System	Synergetic program used to create the task.
Created	Date the task was created.
Subscriber	List of users that are subscribed or allocated to this task.

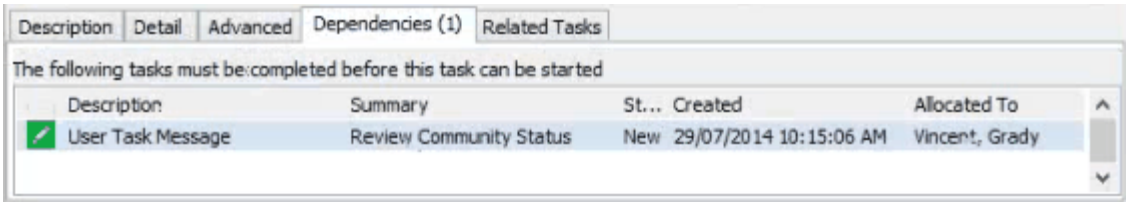
Advanced sub-tab fields



Field	Description
Start Date	Start date for the task.
Due Date	Due date for the task.
Completed Date	Date the task was completed.
Task Status	Status of the task.
Time Spent In	Unit of time to be used for the task.
Estimated Duration	Estimated time required to complete the task. **Note:** Use the **Time Spent In** field to determine the unit of time.
Reminder Date	Select a date for the Action Centre to display a reminder relating to the currently selected task.
Reminder	Select a date for the Action Centre to display a reminder relating to the currently selected task.
% Complete	Percentage of the task completed.
Current Estimate	Estimated time required to complete the task.
Elapsed	Units of time elapsed.
Seq	Unique identifier for the task.

Dependencies sub-tab fields

The **Dependencies** sub-tab displays tasks that must be completed before the task selected in the main grid area can be started.

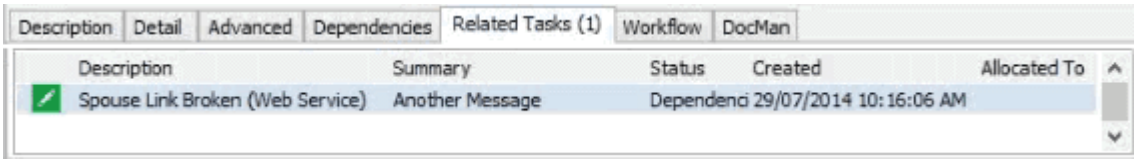


Field	Description
Description	Description of the task.
Summary	Summary of the task.
Status	Status of the task.
Created	Creation date of the task.

Field	Description
Allocated To	Community member allocated to complete the task. **Note:** Clicking Start automatically allocates the community ID linked to the current Synergetic user. Click Reallocate... to assign to another community member.

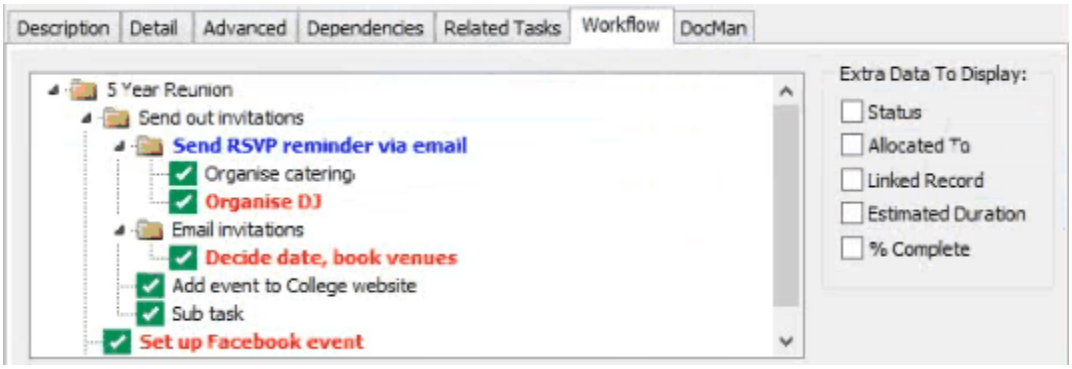
Related tasks sub-tab fields

The **Related tasks** sub-tab displays tasks related to the task selected in the main grid area



Workflow sub-tab fields

The **Workflow** sub-tab displays for full workflow for the task selected in the main grid area.



Field	Description
Extra Data to Display	Select fields in this area this area to display extra information on the workflow. You can display: • statuses • allocations • linked records • estimated durations • % complete figures.

DocMan sub-tab fields

See the *Future Student Maintenance - DocMan tab* (on page 201) for details on the fields and buttons of this tab.

Future Student Maintenance - Other Schools tab

Use the **Other Schools** tab to keep track of what schools the student has applied for.

What you can do:

What you can do...	See...
You can view the schools a student has listed on their application form and the preferences for these schools.	*Future Student Maintenance - Other Schools tab - Preferences sub-tab* (on page 313)

Future Student Maintenance - Other Schools tab - Preferences sub-tab

Use the **Preferences** sub-tab to view and edit the schools and preferences a student has listed on their application form.

Opening the Preferences sub-tab

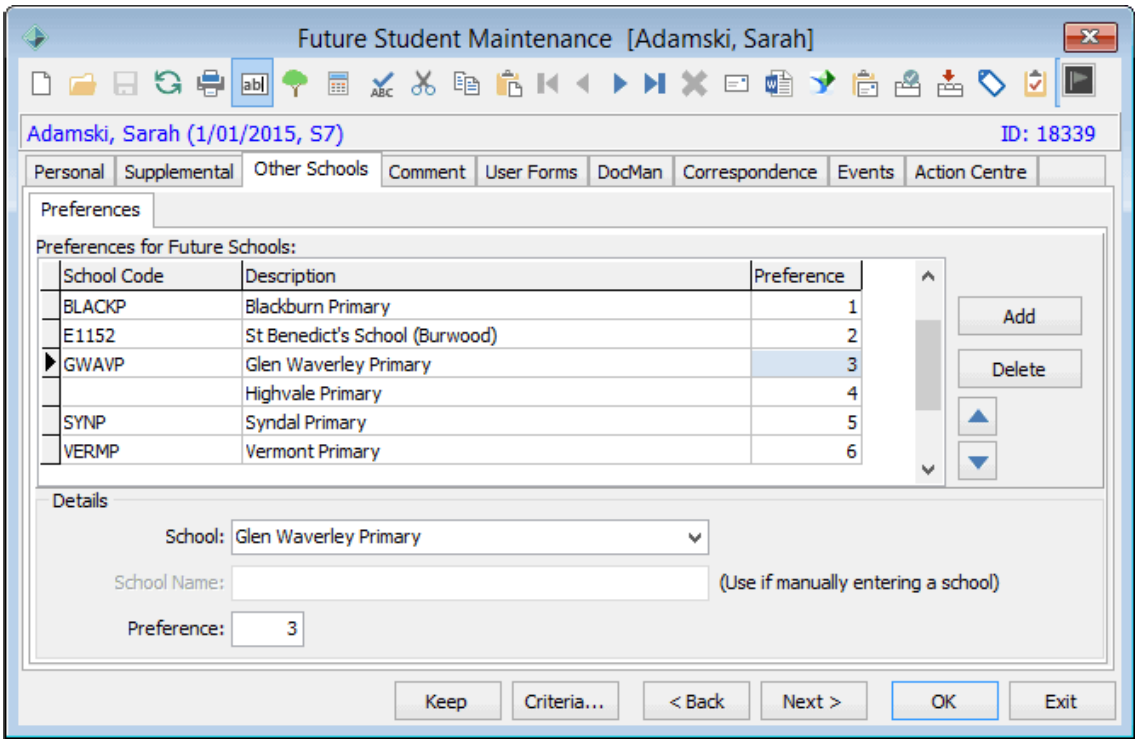
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the future student. See *Searching for future students* (on page 78).
3. Click the **Other Schools** tab.

   The **Preferences** sub-tab of the **Other Schools** tab of the **Future Student Maintenance** window is displayed.



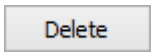
Future Student Maintenance - Other Schools tab - Preferences sub-tab key fields and buttons

Preferences for Future Schools fields and buttons

Grid Area Fields

Field	Description
School Code	Unique code identifying the school.
Description	School name.
Preference	The preference number of the school. The schools are listed in order of preference, with 1 being the student's preferred school.

Buttons

Button	Description
	Add a new school preference entry.
	Delete a school preference entry.
	Move a school up in the order of preferences.
	Move a school down in the order of preferences.

Details area

Fields

Field	Description
School	School name and code.
School Name	If no selection is made in the **School** field a school name is entered here.
Preference	The preference number of the school. The schools are listed in order of preference, with 1 being the student's preferred school.

Adding future student activity in bulk

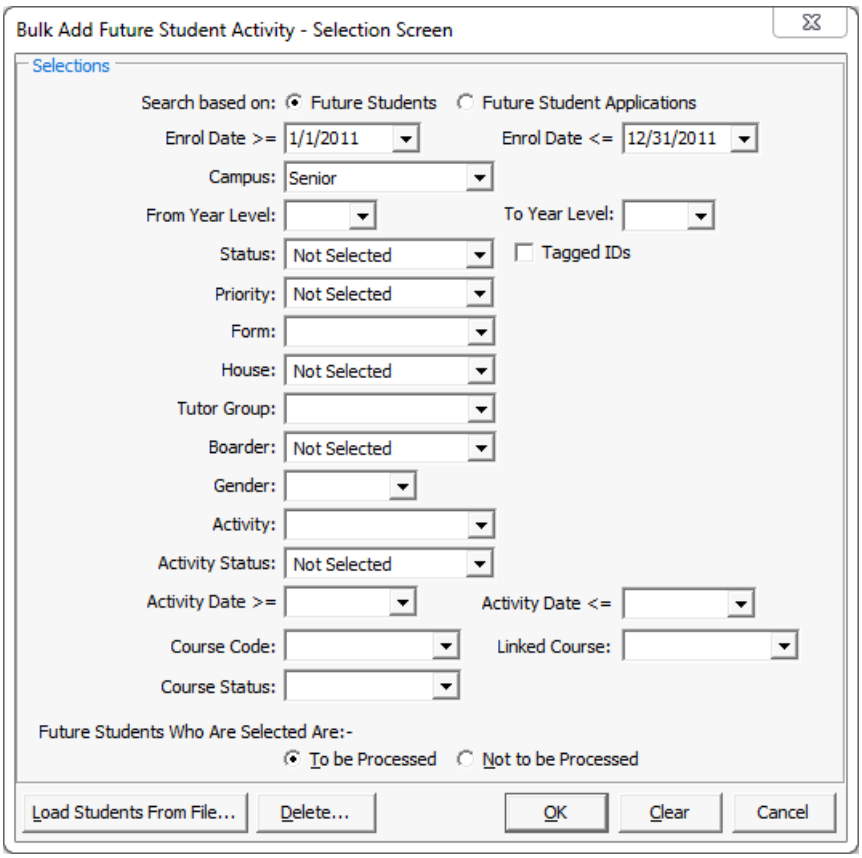
The **Future Student Activity** program is used to select a group of students from your organisation and process activities for them. This can be used when you invite a group to attend a school tour or offer places to a group of students.

This saves time because you can process activities for groups of students, rather than repetitively entering the same information for individual future students. See *Creating activities* (on page 136) for adding an activity for a future student.

Tip: You can also send mail merge letters to future students using stored procedures. The stored procedures can retrieve activity details for future students and record when letters were sent to the families. See *Using stored procedures to retrieve Synergetic data* in the Extracting data manual.

To process activities for several future students:

1. Using the **Bulk Add Future Student Activity - Selection Screen**, select the group of future students to process activities for. See *Selecting groups of students to process activities for* (on page 323).

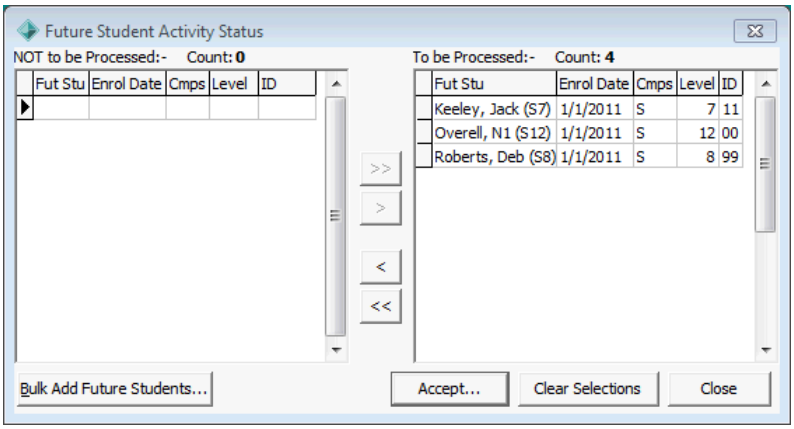


Tip: You may want to select a group of students, but exclude a small number. You will have the opportunity to exclude individual students in the next window.

Note: If you have the students you want to process in a tag list, select **Tagged IDs** on this window.

2. Click OK.

   The **Future Student Activity Status** window is displayed.



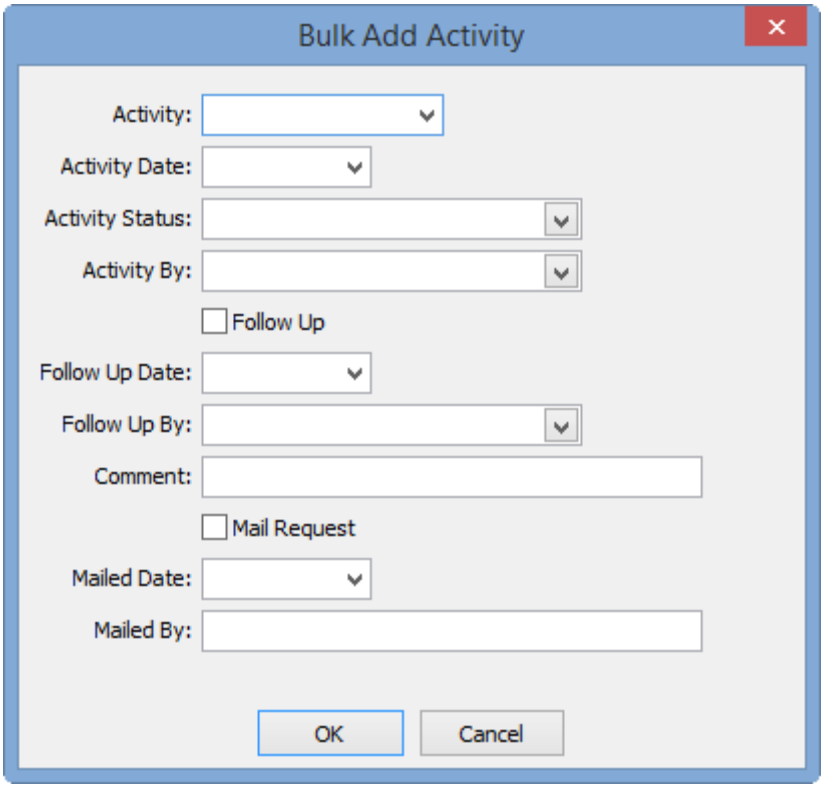
3. Exclude individual students from the group, if required. See *Manually selecting students to process activities for* (on page 328).
4. At this point, you can either:
   - create the activity for the students you have selected
   - return to the selection window to add more students to the list.
5. To add more students to the list, click Bulk Add Future Students....

   The **Bulk Add Future Student Activity - Selection Screen** window is redisplayed.
6. Repeat from step **1**, for each group of students to be selected for the activity.

Tip: If you want to add a small number of students to the list, you can select the large group that they belong to and select **Not to be processed**. The students you have selected are displayed in the Not to be processed pane of the **Future Student Activity Status** window. You can then select the individual students from the list and click > to include them in the list of students to be processed.

7. Once you have selected all the students to process, click Accept...

   The **Bulk Add Activity** window is displayed. See *Bulk Add Activity window* (on page 319).

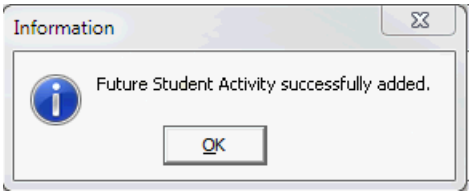


8. Add the activity details, including the activity, the activity date and the activity status.

   If required, add follow up details and mail request details.

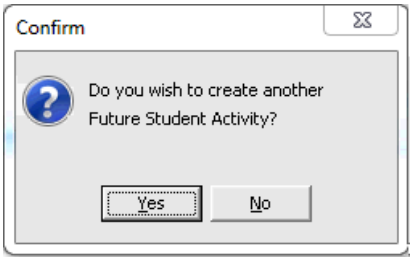
9. Click OK.

   The following dialog is displayed.



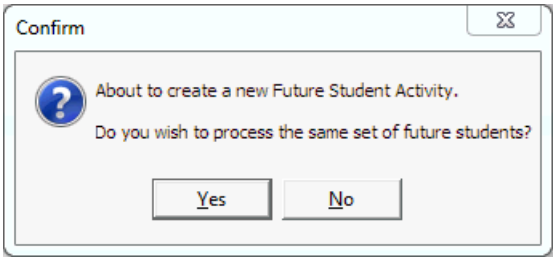
10. Click OK.

    The following dialog is displayed.



11. Either click:
    - No to close the **Bulk Add Future Students** window
    - Yes to add another activity.

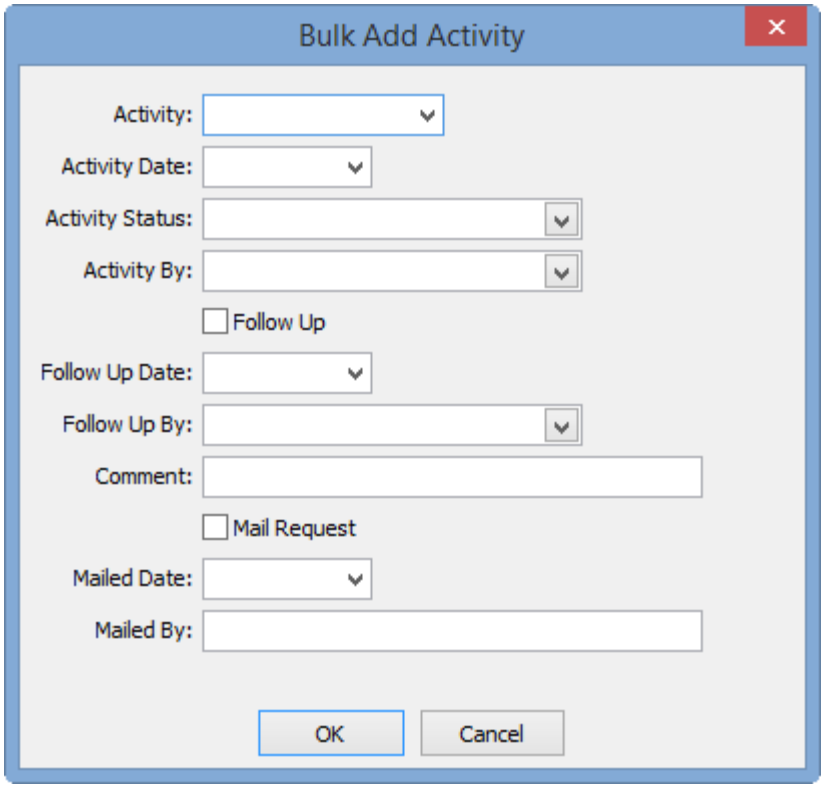
    If you click Yes, the following dialog is displayed.



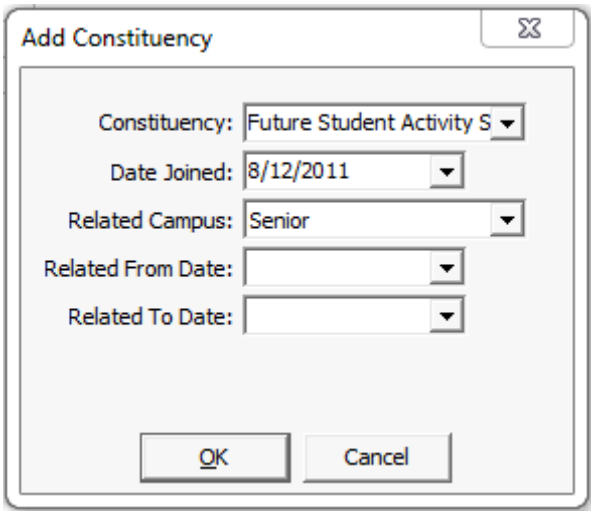
12. Either click:
    - Yes to add another activity for the same group of students.
    - No to select another group of students. Refer to *Selecting groups of students to process activities for* (on page 323).

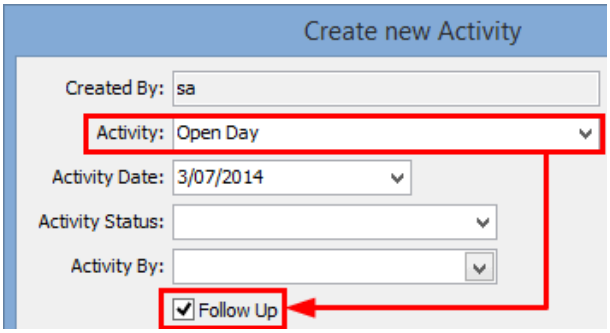
Bulk Add Activity window

Use the **Bulk Add Activity** window to add activities in bulk.



Bulk Add Activity window key fields

Field	Description
Activity	Description of the activity. The available options are maintained in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual.
Activity Date	Date the activity is scheduled for.
Activity Status	Status of the activity. For example: • **Complete** • **Incomplete** • **Waiting for someone**. The available options are maintained in the **luActivityStatus** lookup table. See *luActivityStatus lookup table* in the System maintenance manual.
Activity By	Person in your organisation who is responsible for the activity. Valid values include all community members that belong to the **FSAS** constituency.  See *Adding a community member to a user-defined constituency* in the Community manual.

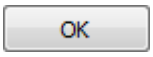
Field	Description
Follow Up	Indicates whether or not follow up is required. **Note**: The activity record is displayed in italics on the **Activity** tab if you select the **Follow Up** field. Activity | Date | Follow Up | F'Up Date *INTERVIEW* *15/06/201* *Yes* *30/07/2014* *INTERVIEW* *3/07/2014* *Yes* *5/08/2014* See the **Follow Up Date** field. When creating activities, the **Follow Up** field may be selected by default for the type of activity. This depends on the **FollowUpFlag** in the **luActivity** lookup table. See *luActivity lookup table* in the System maintenance manual. 
Follow Up Date / Follow Up By	Follow up date and person responsible for following up. The responsible person must be a member of the **FSAS** constituency to be listed. See the **Activity By** field. **Note:** The activity record is displayed in bold italics on the **Activity** tab if the **Follow Up Date** is in the past. Activity | Date | Follow Up | F'Up Date *INTERVIEW* *15/06/201* *Yes* *30/07/2014*
Comment	Comments and information regarding follow up and mail requests. Use any comments with the **Mail Request** field to record either: • A request for information from the student. For example, they may want you to send out more information on the music program. • Information to be included in a mail merge letter to the student. For example, the time and room that you are meeting with the student and their parents or guardians.
Mail Request	Indicates whether or not: • mailed information is required • a letter is being sent using the mail merge feature of Microsoft Word. You can use a database query or a stored procedure to list all the people who have this flag set. For example, this can be used in mail merges with Microsoft Word. The **crspFutureActivityPrint** stored procedure has the advantage that, in addition to retrieving key activity data, it also updates fields to indicate when the letter was printed. See *Using stored procedures to retrieve Synergetic data* in the Extracting data manual.
Mailed Date / Mailed By	Date of the mailed communication and who mailed the item. These are set by a stored procedure when merging mail. See the **Mail Request** field.

Deleting a future student activity bulk addition

If you have made an error when bulk adding activities, you can delete the bulk addition as follows:

1. Select **Module > Future Students > Future Student Activity Bulk Additions…**.
2. Click

on the bottom of the **Bulk Add Future Student Activity – Selection Screen**.

   The **Select Process Number** window is displayed.
3. Select the bulk activity you want to delete.
4. Click 

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Selecting groups of students to process activities for

You use the **Bulk Add Future Student Activity - Selection Screen** to select the group of students to process activities for.

Unlike most selection windows where you can only filter once to create a group, you can return to this window often and select more students to add to your existing group.

Opening Bulk Add Future Student Activity - Selection Screen

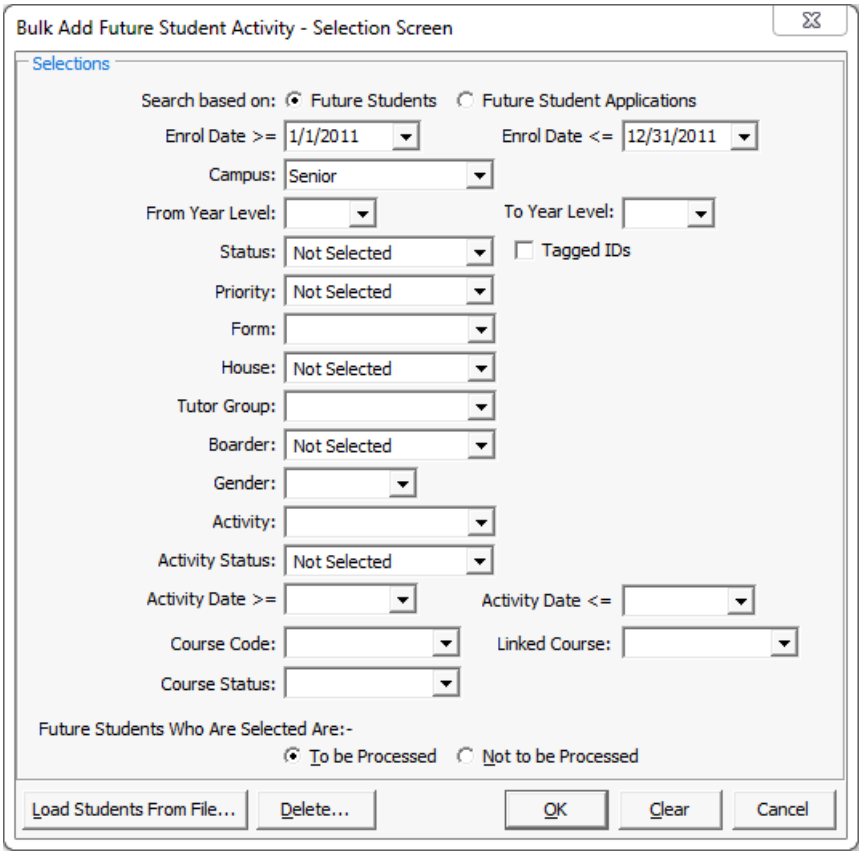
To open the **Future Student Activity Bulk Additions** window:

1. Select **Module > Future Students > Future Student Activity Bulk Additions** from the main menu.

   The **Bulk Add Future Student Activity - Selection Screen** window is displayed.

Tip: You can also access the future student functions by clicking

.

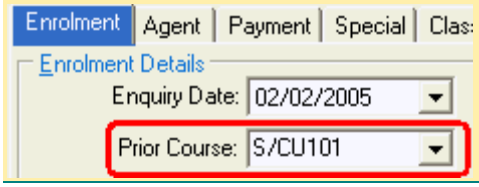


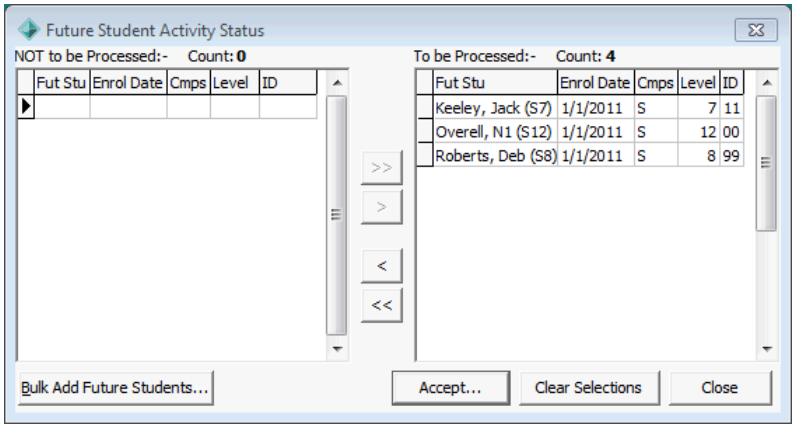
Bulk Add Future Student Activity - Selection Screen key fields and buttons

Fields

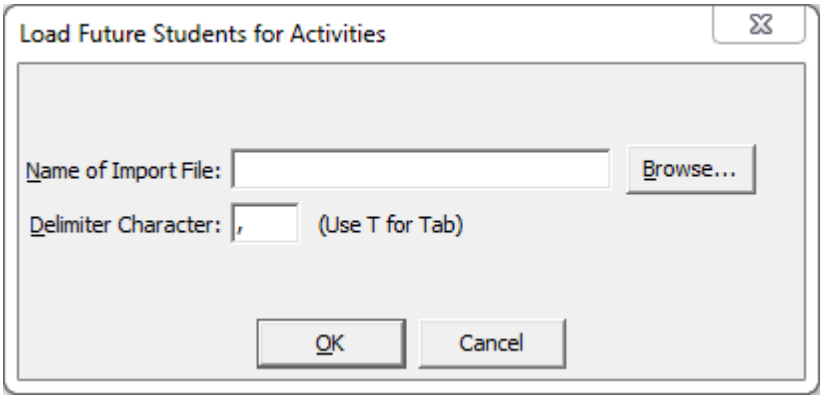
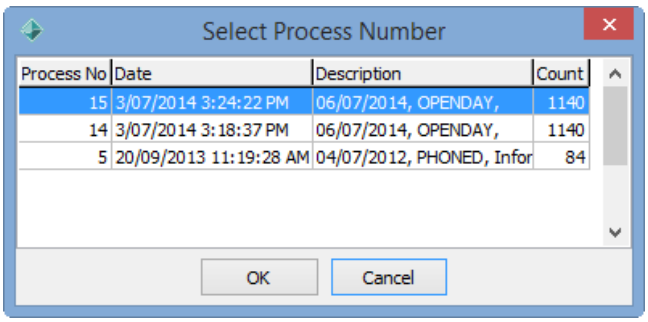
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Search based on</td><td>Search for either:
future students. This will only search for the default, or preferred application for the selected student(s) and enrolment date.
future student applications. This will search for all the applications made by the selected student(s).</td></tr>
<tr><td>Enrol Date >= /
Enrol Date <=</td><td>Date range for future student enrolments.</td></tr>
<tr><td>Campus</td><td>Campus where the future student will be enrolled.</td></tr>
<tr><td>From Year Level /
To Year Level</td><td>A range of year levels can be selected.
If you only want to select one year level then you must enter it in both the From Year Level and To Year Level fields.</td></tr>
<tr><td>Status</td><td>Status of the future student's application.
The typical default options are:
<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>A</td><td>Application made.</td></tr>
<tr><td>D</td><td>Deferred.</td></tr>
<tr><td>F</td><td>Finalised.</td></tr>
<tr><td>O</td><td>Deferred.</td></tr>
<tr><td>W</td><td>Waitlisted.</td></tr>
<tr><td>X</td><td>Cancelled by the applicant.</td></tr>
</table>
Note: Use the luFutureStatus lookup table to maintain entries. See luFutureStatus lookup table in the System maintenance manual.

Tip: You can create mail merge letters using the crspFutureStatusChangePrint stored procedure. See Printing mail merge letters using an existing document in the Extracting data manual. The luFutureStatus table is linked to the luFutureStatusMerge lookup table using its MergeCode. When a status is changed, its MergeCode is also changed as well. Any applications with this MergeCode are selected by the stored procedure.</td></tr>
<tr><td>Tagged IDs</td><td>Select to search for students with tagged IDs.</td></tr>
</table>

Field	Description
Priority	Priority the application has been assigned. Typical values include: • Existing Family • Sibling at School • Parent is Ex Student • Parent is Staff • Normal. **Note:** Maintain the values in the **luFuturePriority** lookup table. See *luFuturePriority lookup table* in the System maintenance manual.
Form	Form the future student has been assigned to.
House	House the future student has been assigned to.
Tutor Group	Tutor group the future student has been assigned to.
Boarder	Student's residential status. Typical values include: • Boarder • Day Student • Home Stay. **Note:** Maintain the values in the **luBorder** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
Gender	Gender of the future student.
Activity	Activity the future student or parent are involved in.
Activity Status	Student's status for this activity. Also see **Activity Date** below.
Activity Date >= **Activity Date <=**	Students with existing activities within the specified date range. For example, you can follow up with future students who attended the last open day.
Course Code	Abbreviation for the course.
Linked Course Code	Common course that feeder courses link to. For example, a main course may have a feeder course that starts earlier or later than the actual main course. The default value is its own course code. **Tip**: You can update the **Prior Course** field on the **Enrolment** tab of **Course Details Maintenance**. See *Course Details Maintenance - Enrolment tab*. 
Course Status	Status of the student's involvement in the course. For example, a status of **Finalised** is required before an agent can be paid commission for enrolling students in your course, if applicable.

Field	Description
Future Students Who are Selected Are	Either select future students who are: • To be processed. • Not to be processed. The selected students are put in either the left pane or the right pane of the **Future Student Activity Status** window. See *Manually selecting students to process activities for* (on page 328). 

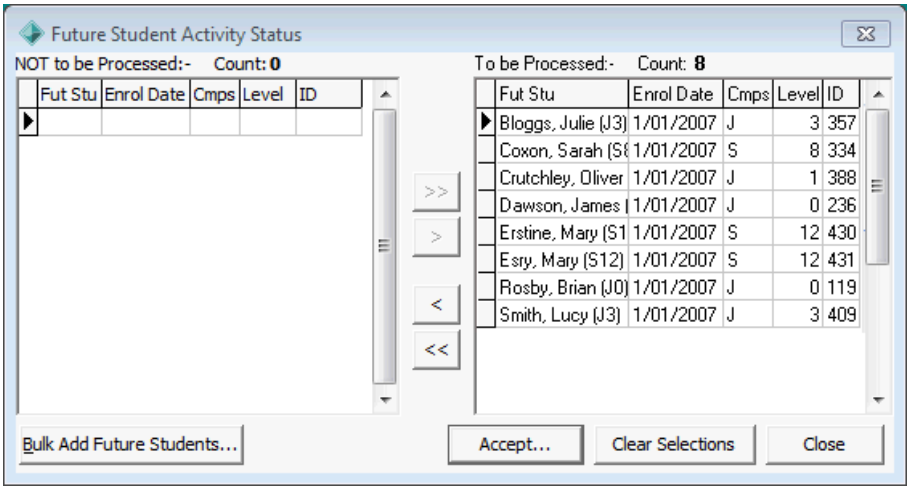
Buttons

Button	Description
Load Students From File...	Loads student details from a file. **Note:** The file must have the Synergetic ID number in the first column, with one student per row. Also, a separate file is needed for each different activity. For example, you might have a list of all the students that attended an open day. You could then load this file into Synergetic so that you can add activities for all the students that attended. The **Load Future Students for Activities** window is displayed. 
Delete...	Delete previous selection runs. The **Select Process Number** window is displayed. 

Manually selecting students to process activities for

After you have selected the group of students to process activities for, you can manually include or exclude students from the list. Also see *Selecting groups of students to process activities for* (on page 323).

Once you have selected a group of students to process an activity for, the **Future Student Activity Status** window is displayed.



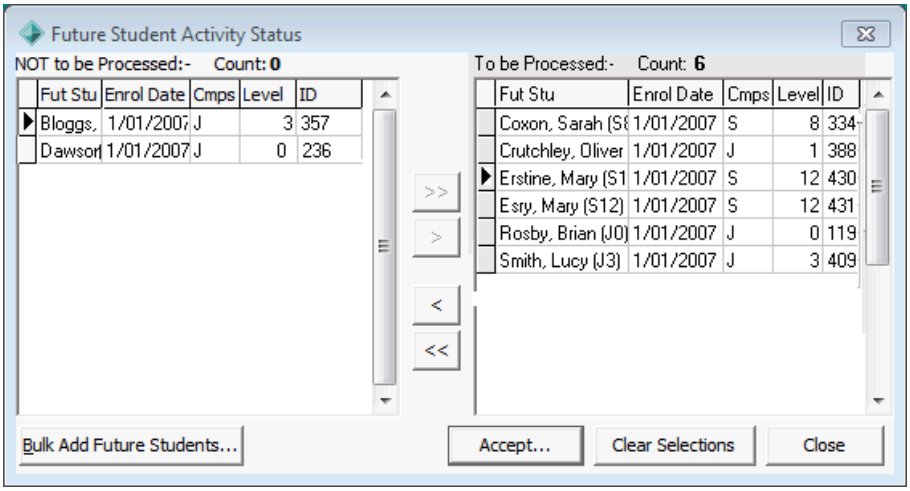
All the students you have selected appear in the right-hand pane. You can remove students that you do not want to add the activity to.

To do this:

1. Select the student or students to exclude from the activity.

> **Tip:** You can use the mouse and the normal Windows **Shift** and **Ctrl** keys to select multiple students. Hold down the **Shift** key and click on the first student you want to select. While still holding down the **Shift** key, click the last student. All students in between your two selections will be highlighted.
>
> Alternatively, you can hold down the **Ctrl** key while clicking on different students in the list to select or deselect them.

2. Click to move the selected students from the right-hand pane to the left-hand pane.



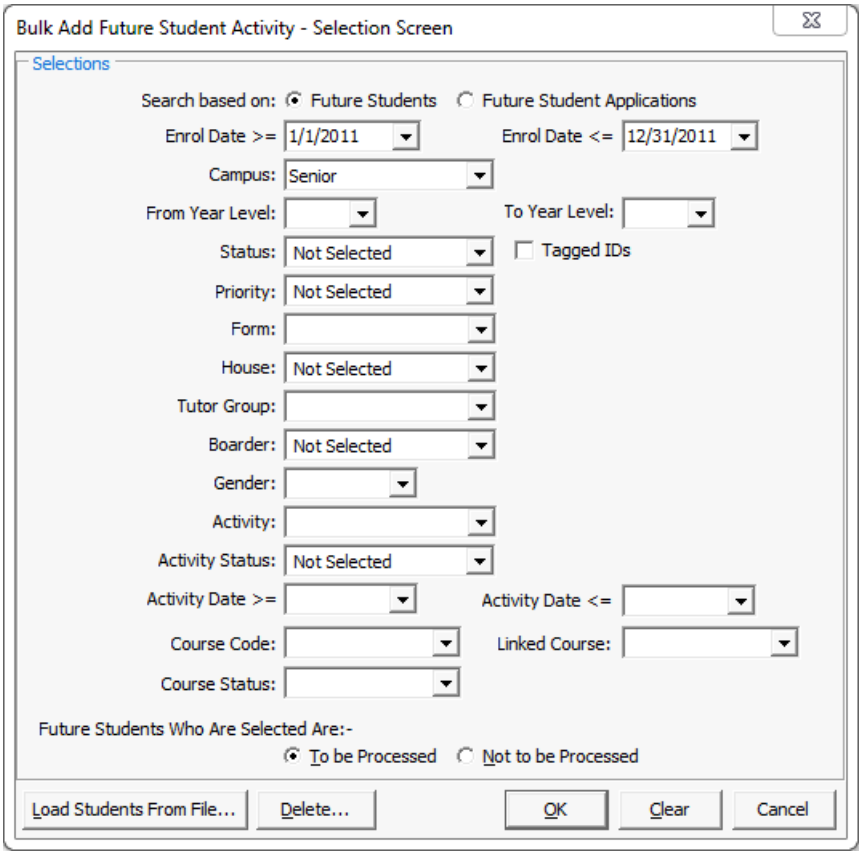
3. If you accidentally move a student that you should not have, you can move them back to the right-hand pane by selecting them and clicking [>].

Note: You can use [>>] and [<<] to move all students from one pane to the other.

4. Either:

   - Click [Accept...] to process activities for the selected future students.
   - Click [Bulk Add Future Students...] to add more students to the list. See *Selecting groups of students to process activities for* (on page 323).

   The **Bulk Add Activity** window is displayed.

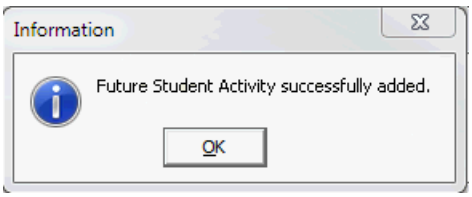


5. Add the activity details, including the activity, the activity date and the activity status.

   If required, add follow up details and mail request details.

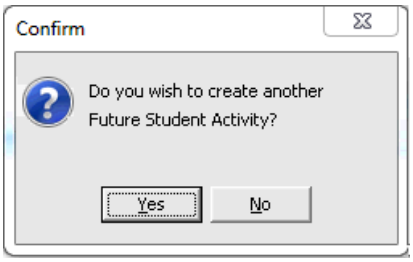
6. Click [OK].

   The following dialog is displayed.



7. Click OK.

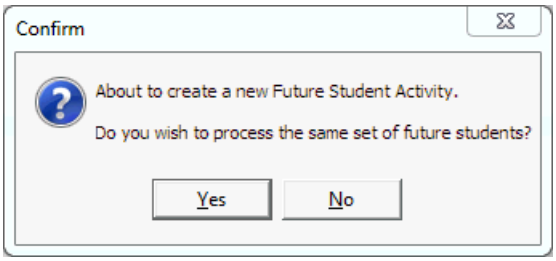
   The following dialog is displayed.



8. Either click:

   - No to close the **Bulk Add Future Students** window
   - Yes to add another activity.

   If you click Yes, the following dialog is displayed.



9. Either click:

   - Yes to add another activity for the same group of students.
   - No to select another group of students. Refer to *Selecting groups of students to process activities for* (on page 323).

Maintaining details of a future student's course

You can maintain details of external or internal courses that the future student has enquired about attending.

Courses are used:

- by tertiary institutions
- by correspondence schools
- where instalment charges are applied for courses.

Note: Most secondary schools do not use this feature. Consider the *Classes tab* (on page 272) of **Future Student Maintenance** instead. *Contact Synergetic Management Systems* if you are unsure whether your organisation should use the courses feature or not.

How to:

- Add a relationship to an agent. See *Adding agent relationships to students* (on page 344).
- Modify class details for the selected course. See *Modifying student class details* (on page 371).

What you can do:

What you can do…	See…
You can: • display students who are on a course arranged by an agent • select student course enrolments to match with an agent's invoice • authorise agent invoices • display agent invoices that have been authorised • reverse the authorisation of selected entries.	*Using the Agent Commission Schedule Maintenance window* (on page 350)
You can: • maintain the student's enrolment details for a course, including: – any prior courses – date the course was completed and whether a certificate was issued – status of the course at a given date, along with any details. • view their course status history.	*Course Details Maintenance - Enrolment tab* (on page 333)

What you can do…	See…
You can: • maintain relationships with a student's agents • nominate the agent who receives the commission, if the student has a relationship with more than one agent • maintain the nominated agent's: – control account, override rate and schedule, if commission is payable – commission alert, if required. • view the nominated agent's invoice details for the selected course and student.	*Course Details Maintenance - Agent tab* (on page 337)
View: • fees for the course • amount charged, paid to date and owing for the course • debtor's details and the overall amount owing • debtor's most recent payment details.	*Course Details Maintenance - Payment tab* (on page 360)
Maintain: • any special comments about the student's participation in the course • details of any deferral of their attendance.	*Course Details Maintenance - Special tab* (on page 364)
You can: • view classes the student is attending as part of the course • modify the student's class details • load default classes for the course from **Course Maintenance**.	*Course Details Maintenance - Classes tab* (on page 367)
You can: • view default fees that apply to the student enrolled in the course • change the amounts and charge dates that apply • view financial details, including what has been charged and is still owed by the debtor • add or delete fees from the student's course • reload the default fees.	*Course Details Maintenance - Charges tab* (on page 373)
You can open forms that have been created at your organisation.	*Course Details Maintenance - User Forms tab* (on page 379)

Course Details Maintenance - Enrolment tab

Use the **Enrolment** tab to:

- maintain the student's enrolment details for a course, including:
  - any prior courses
  - date the course was completed and whether a certificate was issued
  - status of the course at a given date, along with any details.
- view their course status history.

Opening the Enrolment tab

To open the **Enrolment** tab:

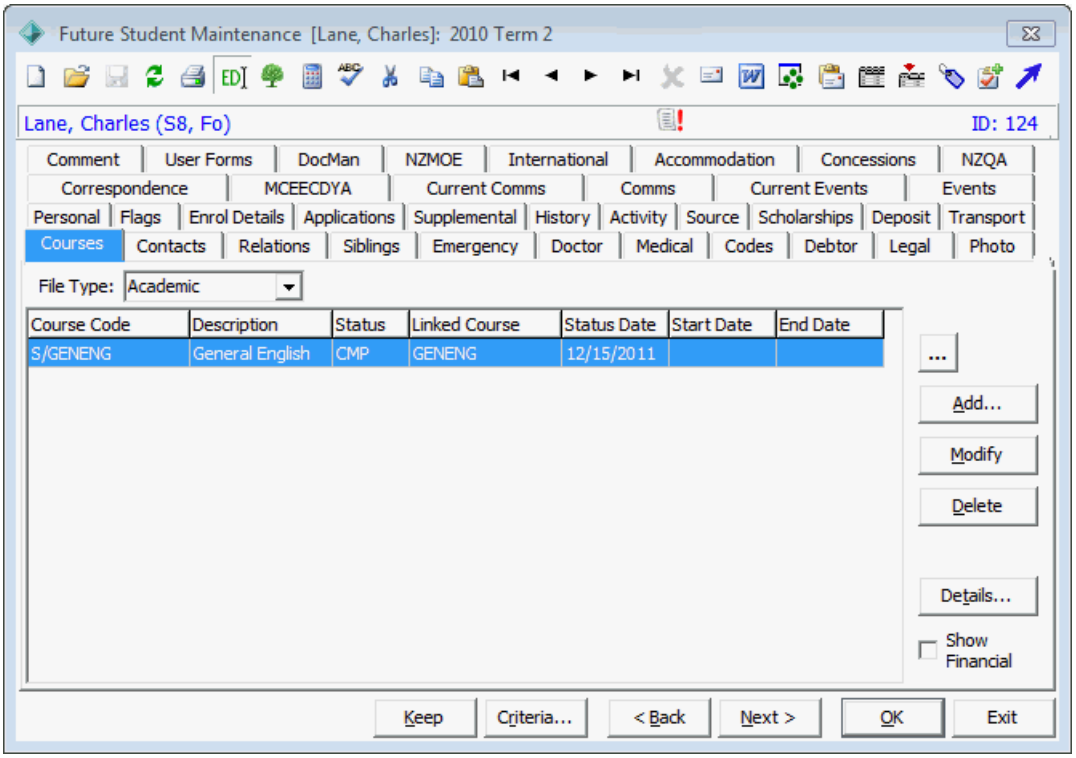
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

> **Tip:** You can also access the future student functions by clicking
>
> .

2. Select the future student. See *Searching for future students* (on page 78).
3. Open the **Courses** tab of the **Future Student Maintenance** window.

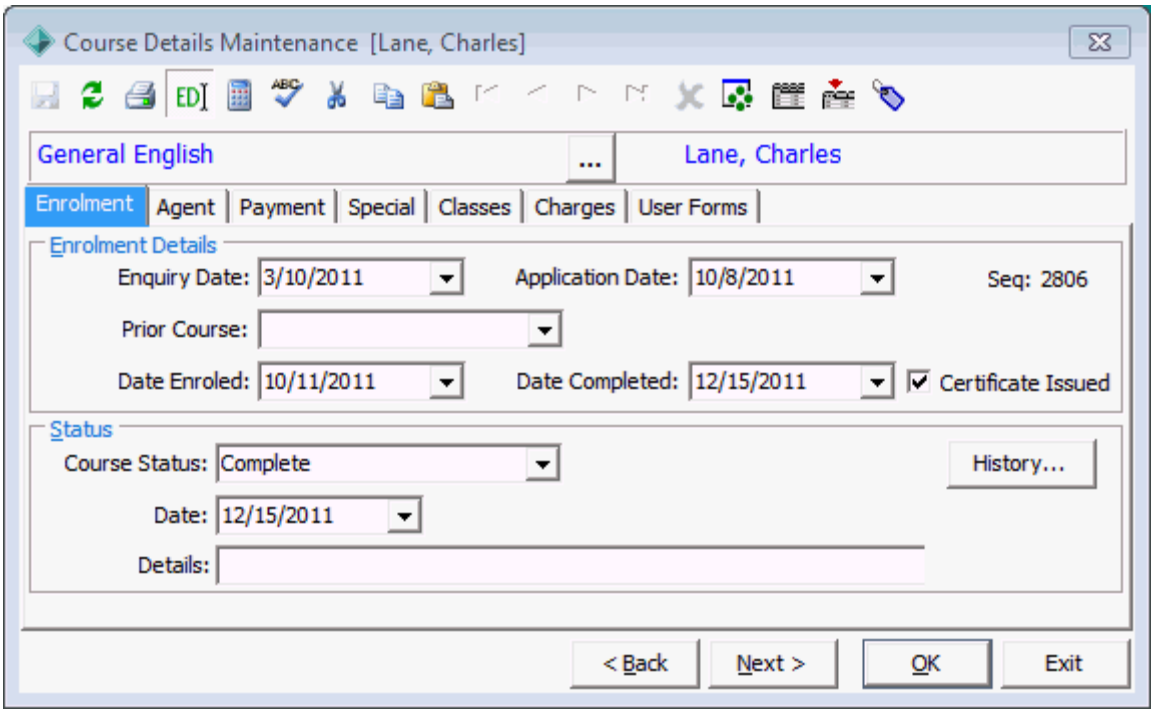
   The **Courses** tab of the **Future Student Maintenance** window is displayed.



4. Select the course to maintain.

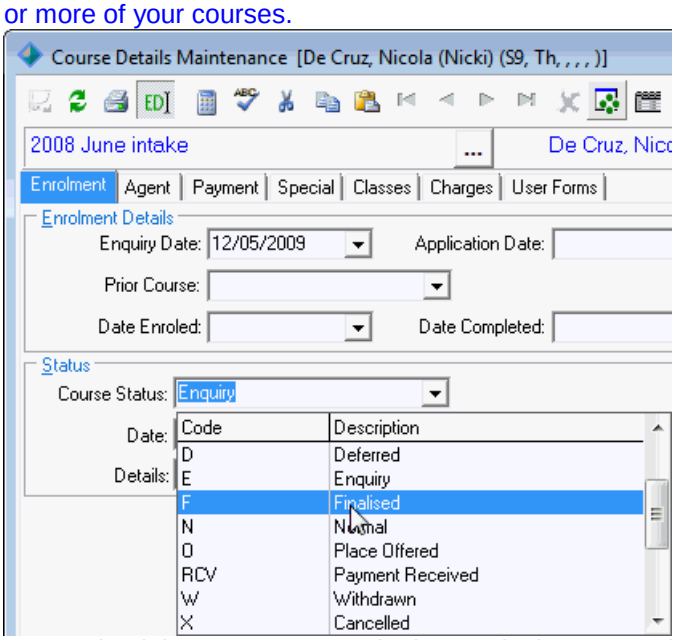
5. Click Details... .

The **Enrolment** tab of the **Course Details Maintenance** window is displayed.

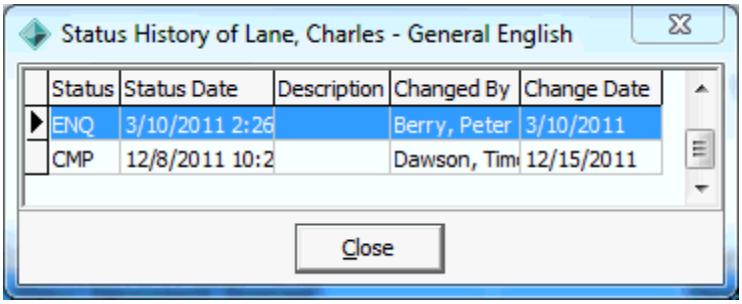


Course Details Maintenance - Enrolment tab key fields and buttons

Status area fields

Field	Description
Course Status	Specify the status of the student's attendance on the course. For example, the course may be marked **cancelled** or **completed**. **Note**: A status of **Finalised** is required before payment can be authorised to an agent for the student's enrolment in a course. In some organisations, agents get paid a commission for organising students to enrol in courses. For example, overseas students may be enrolled in one or more of your courses.  See *Maintaining course agents* in the Curriculum manual. Also see *luStudentCourseStatus lookup table* in the System maintenance manual.
Date	Date the status was updated.
Details	Additional comments. For example, a cancelled course may be credited to another course or refunded to the student.

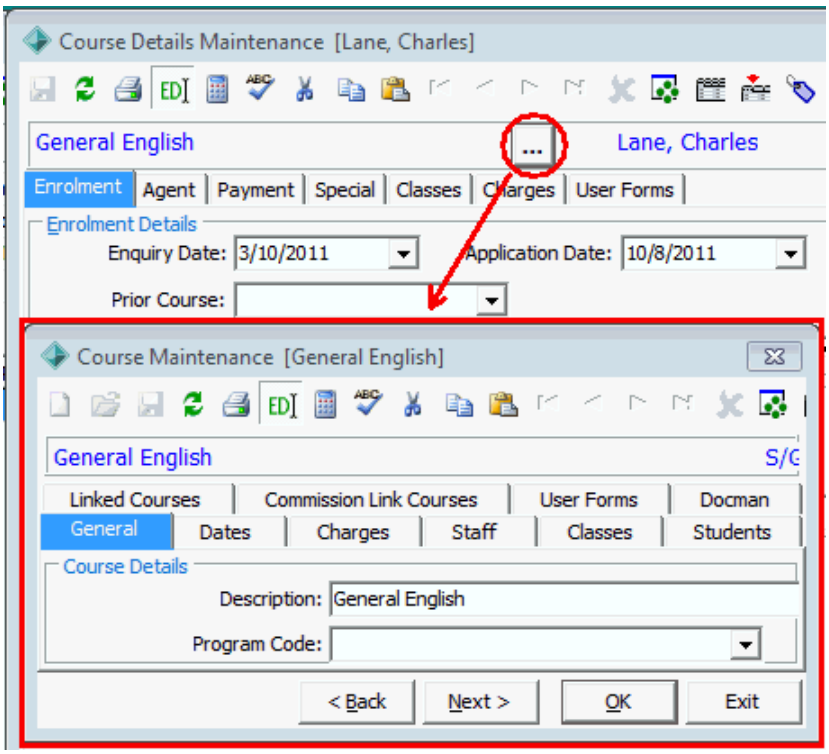
Status area buttons

Button	Description
History...	Display changes made to the status details for the student's course. 

Enrolment Details area fields

Field	Description
Enquiry Date	Date the student enquired about the course.
Application Date	Date the student applied for the course.
Prior Course	Prior course taken by the student.
Date Enrolled	Date the student enrolled in the course.
Date Completed	Date that the course was completed.
Certificate Issued	Select the field if a certificate was issued to the student for satisfactorily completing the course.

Common buttons

Button	Description
...	Launch into **Course Maintenance** for the current course. See *Maintaining courses* in the Curriculum manual. 

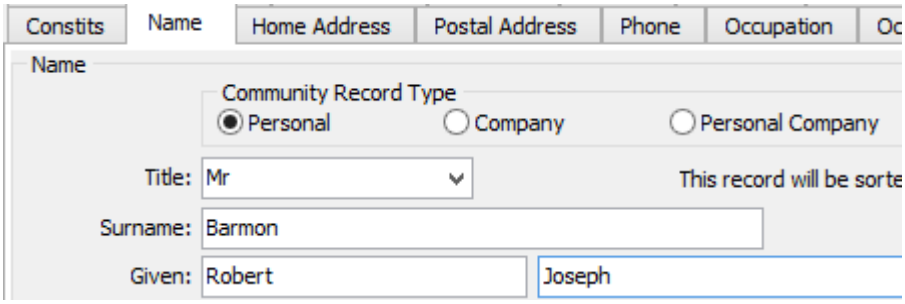
Course Details Maintenance - Agent tab

The **Agent** tab is used to:

- maintain relationships with a student's agents
- nominate the agent who receives the commission, if the student has a relationship with more than one agent
- maintain the nominated agent's:
  - control account, override rate and schedule, if commission is payable
  - commission alert, if required.
- view the nominated agent's invoice details for the selected course and student.

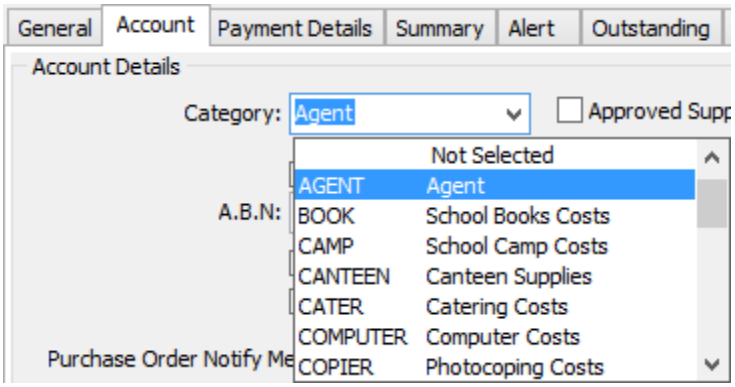
The agent is set up as a:

- Community member with any of the three community record types selected.



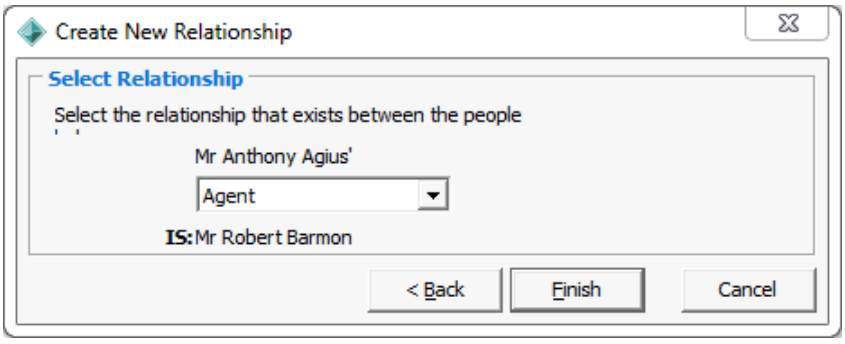
See *Maintaining community members* in the Community manual.

- Creditor in **Creditor Maintenance** with a **Category** of **Agent**.



See *Maintaining creditors*, *Creditor Maintenance - Account tab* in the Creditors manual.

- Relation of the student.



See the **Relation** tab of **Future Student Maintenance**. See *Future Student Maintenance - Relations tab* (on page 168).

Opening the Agent tab

To open the **Agent** tab:

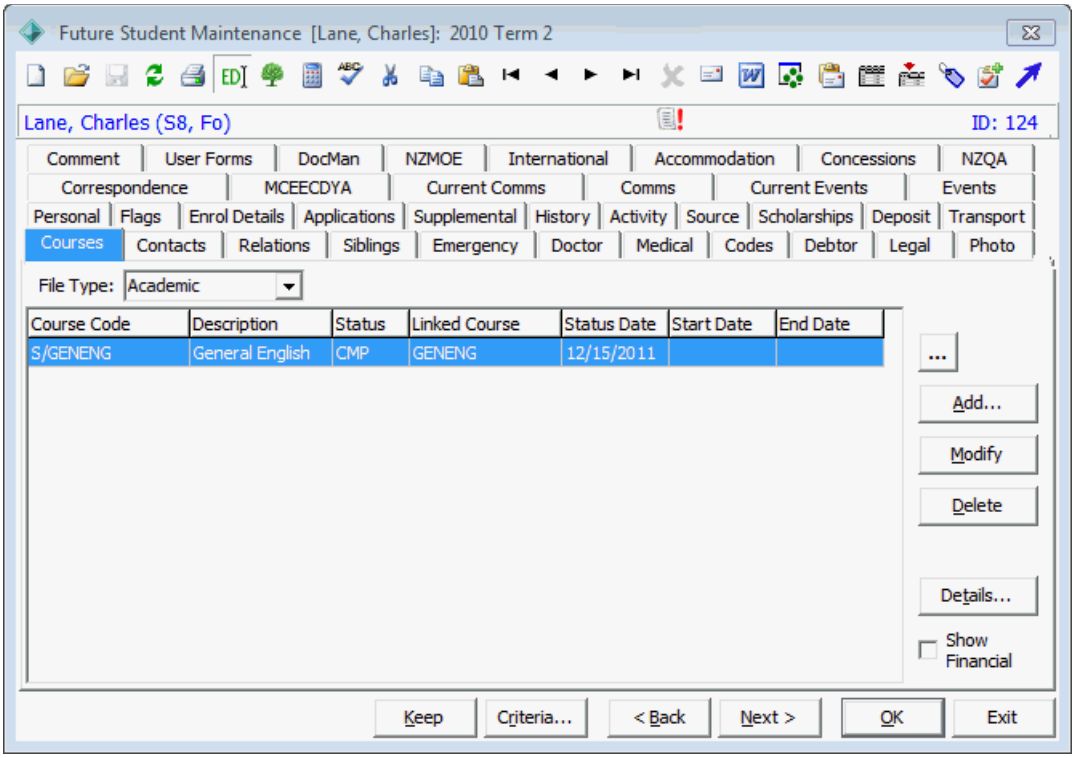
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking Future.

2. Select the future student. See *Searching for future students* (on page 78).
3. Open the **Courses** tab of the **Future Student Maintenance** window.

   The **Courses** tab of the **Future Student Maintenance** window is displayed.



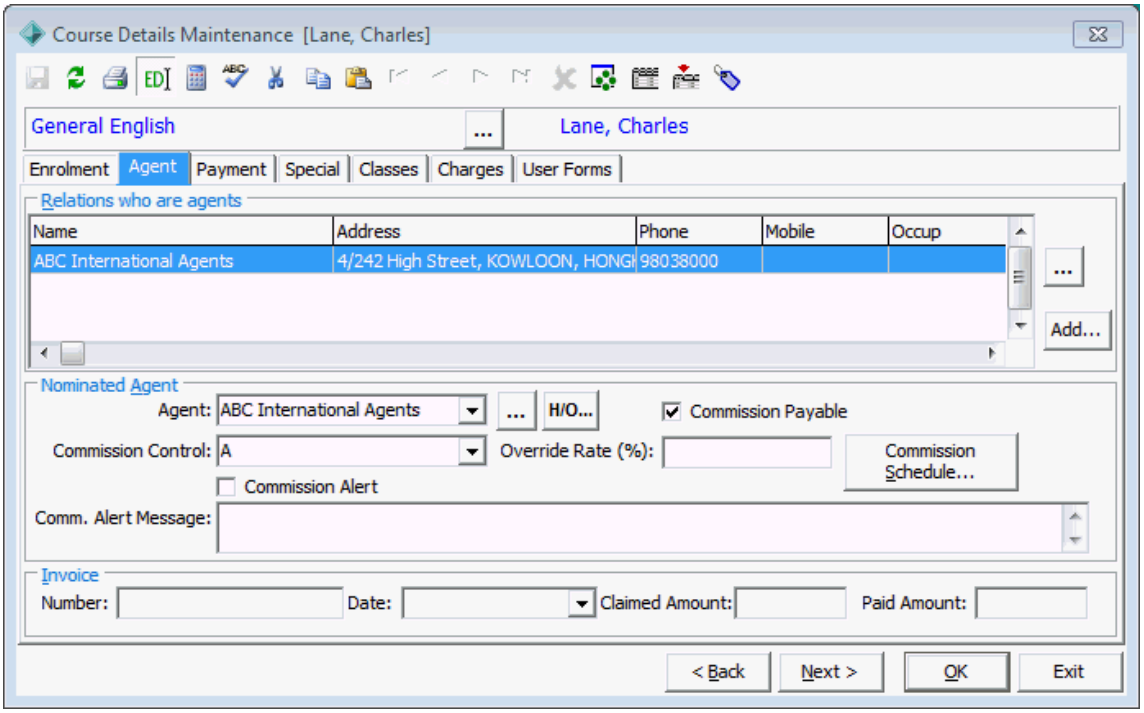
4. Select the course to maintain.

5. Click Details... .

   The **Enrolment** tab of the **Course Details Maintenance** window is displayed.

6. Click the **Agent** tab.

   The **Agent** tab of the **Course Details Maintenance** window is displayed.



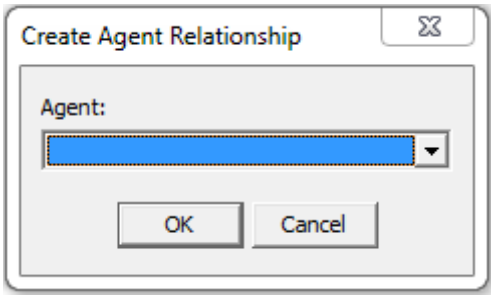
Course Details Maintenance - Agent tab key fields and buttons

Relations who are agents area fields and buttons

Grid area fields

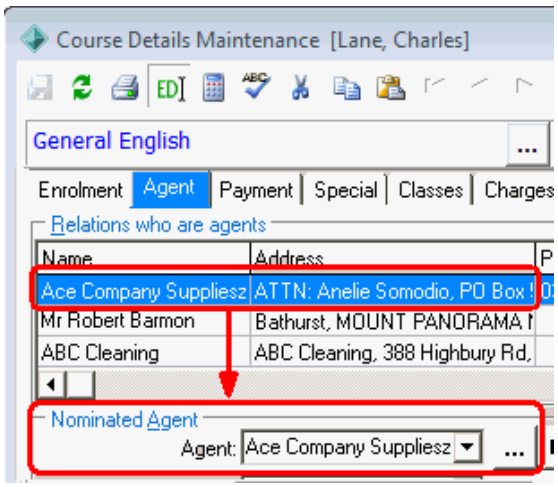
Field	Description
Name	Agent's name.
Address	Address details of the agent. Addresses and other details are maintained in **Community Maintenance**. See *Maintaining community members* in the Community manual.
Phone	Agent's home phone number.
Mobile	Agent's mobile phone number.
Occup	Agent's business phone number.

Buttons

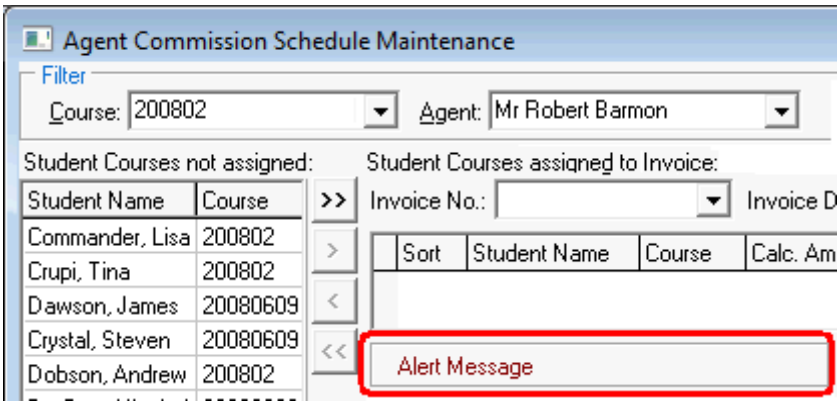
Button	Description
...	Launch into **Creditor Maintenance** for the selected agent. See *Maintaining creditors* in the Creditors manual.
Add...	Add an agent to the student's list of relations. See *Adding agent relationships to students* (on page 344). The **Create Agent Relationship** window is displayed.  Select the agent from the drop-down list and click OK. **Note**: The creditors shown have a **Category** of **Agent** set on the **Account** tab. See *Creditor Maintenance - Account tab* in the Creditors manual.

Nominated Agent area fields and buttons

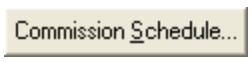
If there are several agents with relationships with the student, select the nominated agent. An invoice can be authorised when submitted by the nominated agent.



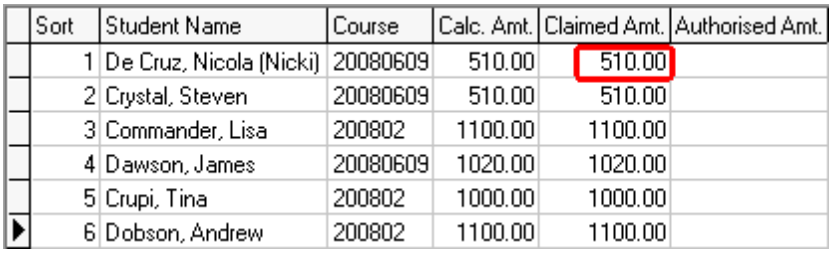
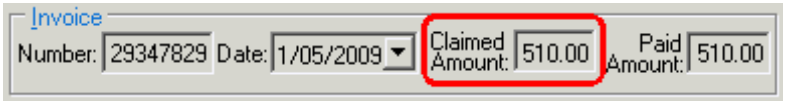
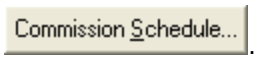
Fields

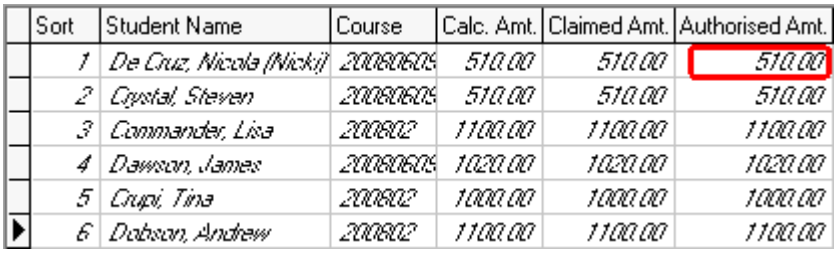
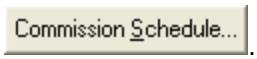
Field	Description
Agent	Select the agent who enrolled the student from the drop-down list. The available agents are listed in the **Relations who are agents** area.
Commission Payable	Clear this field if commission is not payable to the agent. By default this field is selected and commission is payable to the agent for enrolling the student in the course.
Commission Control	Commission rule that applies to the agent. This determines the default percentage commission paid to the agent.
Override Rate (%)	Override the percentage commission paid to the agent.
Commission Alert	Select to display an alert message on the **Agent Commission Schedule Maintenance** window. This is used to display relevant information when users are authorising invoices.  Clear this field if no alert message is required.
Comm. Alert Message	Text of the alert message appearing on the **Agent Commission Schedule Maintenance** window, if **Commission Alert** is selected.

Buttons

Button	Description
	Launch into **Creditor Maintenance** for the nominated agent. See *Maintaining creditors* in the Creditors manual.
	Launch into **Creditor Maintenance** for the head office creditor, if applicable for the nominated creditor. A head office creditor is used if the: • invoice is received from the linked creditor • payment is made to the head office creditor.
	Update the agent's commission schedule and invoices. See *Using the Agent Commission Schedule Maintenance window* (on page 350).

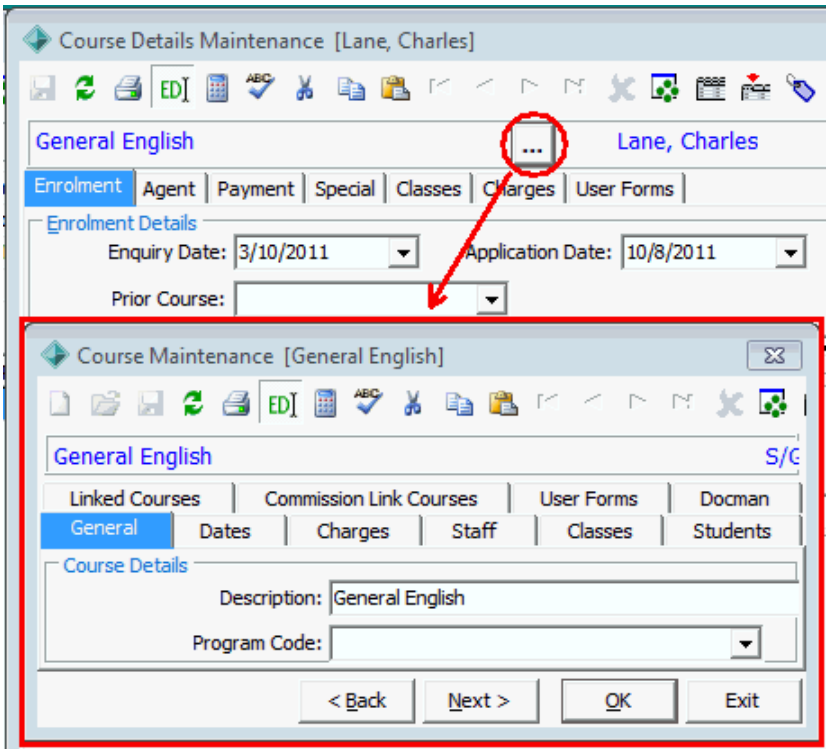
Invoice area fields

Field	Description
Number	Invoice number of the agent's invoice.
Date	Date of the agent's invoice.
Claimed Amount	Amount of commission claimed by the agent for enrolling the student in the course. In the following example, the claimed amount has been entered on the **Agent Commission Schedule Maintenance** window from the agent's invoice.  The highlighted figure from above is used for the **Claimed Amount** field.  See  .

Field	Description
Paid Amount	Amount of commission authorised to be paid to the agent. In the following example, the invoice has been approved on the **Agent Commission Schedule Maintenance** window.  The highlighted figure from above is used for the **Paid Amount** field. See  .

Sort	Student Name	Course	Calc. Amt.	Claimed Amt.	Authorised Amt.
1	De Cruz, Nicola (Nicki)	20080605	510.00	510.00	510.00
2	Crystal, Steven	20080605	510.00	510.00	510.00
3	Commander, Lisa	200802	1100.00	1100.00	1100.00
4	Dawson, James	20080605	1020.00	1020.00	1020.00
5	Crupi, Tina	200802	1000.00	1000.00	1000.00
6	Dobson, Andrew	200802	1100.00	1100.00	1100.00

Common buttons

Button	Description
...	Launch into **Course Maintenance** for the current course. See *Maintaining courses* in the Curriculum manual. 

Adding agent relationships to students

A relationship must exist before an agent can invoice for introducing the student to your organisation and enrolling them in one or more of your courses. There are two methods of adding a student-agent relationship:

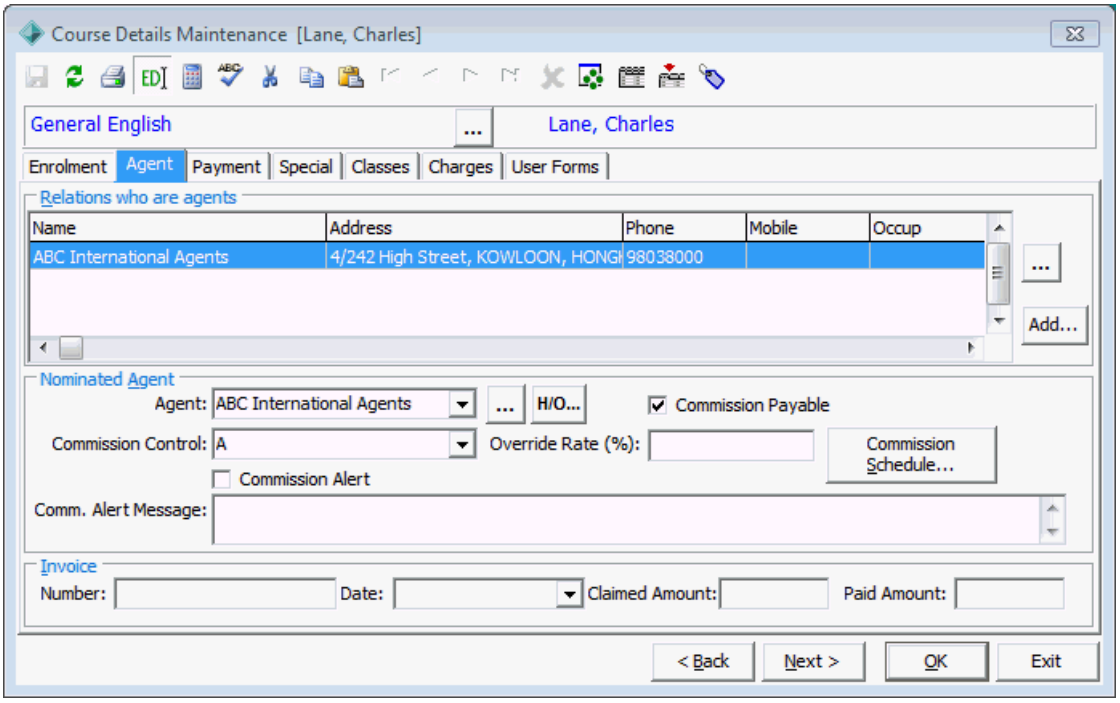
- **Agent** tab of **Course Details Maintenance**. This method has been added to speed up the process.
- **Relations** tab of **Future Student Maintenance**. This is the traditional method of adding a relationship.

Adding agent relationships using the Agent tab of Course Details Maintenance

To add a relationship from a future student to an agent, using the **Agent** tab:

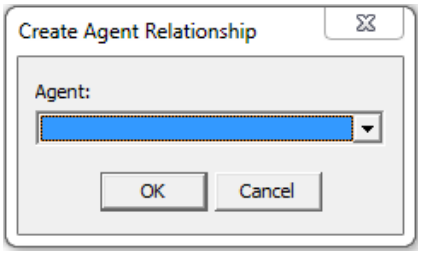
1. Open the **Agent** tab of the **Course Details Maintenance** window. See *Course Details Maintenance - Agent tab* (on page 337).

   The **Agent** tab of the **Course Details Maintenance** window is displayed.

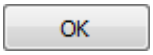


2. Click .

   The **Create Agent Relationship** window is displayed.



Note: The creditors shown have a **Category** of **Agent** set on the **Account** tab of **Creditor Maintenance**. See *Creditor Maintenance - Account tab* in the Creditors manual.

3. Select the agent from the drop-down list.
4. Click  .

   The relationship from the student to the agent is added.

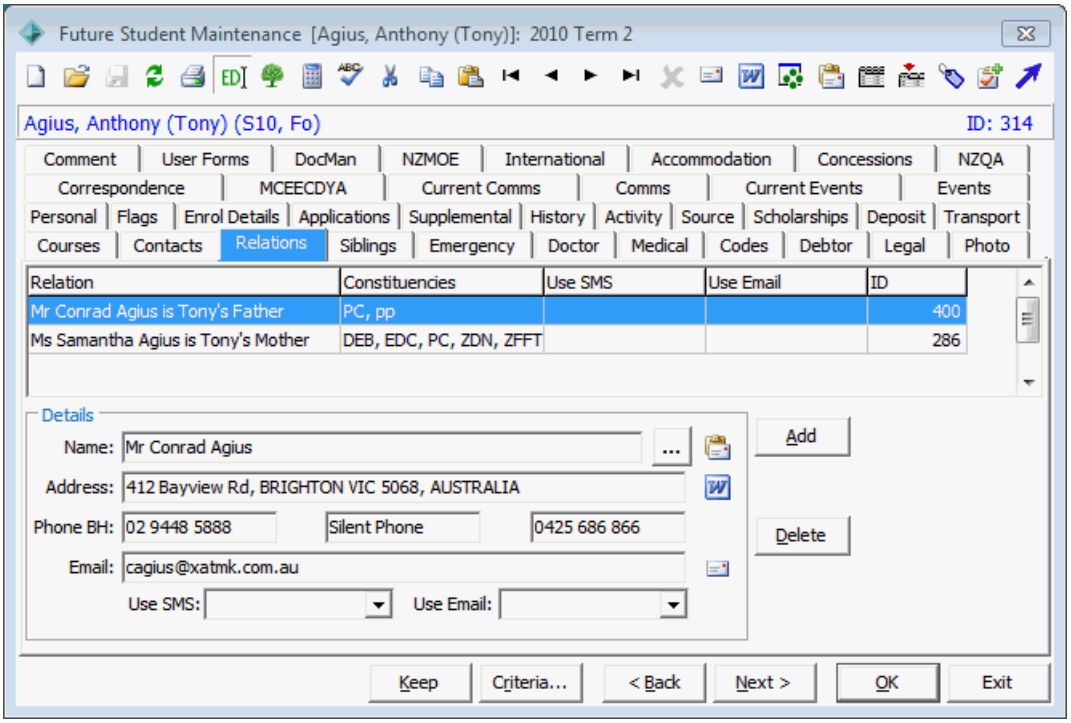
5. You can check the relationship on the **Relations** tab of **Future Student Maintenance**. See *Future Student Maintenance - Relations tab* (on page 168).

Adding agent relationships using the Relations tab of Future Student Maintenance

To add a relationship from a future student to an agent, using the **Relations** tab:

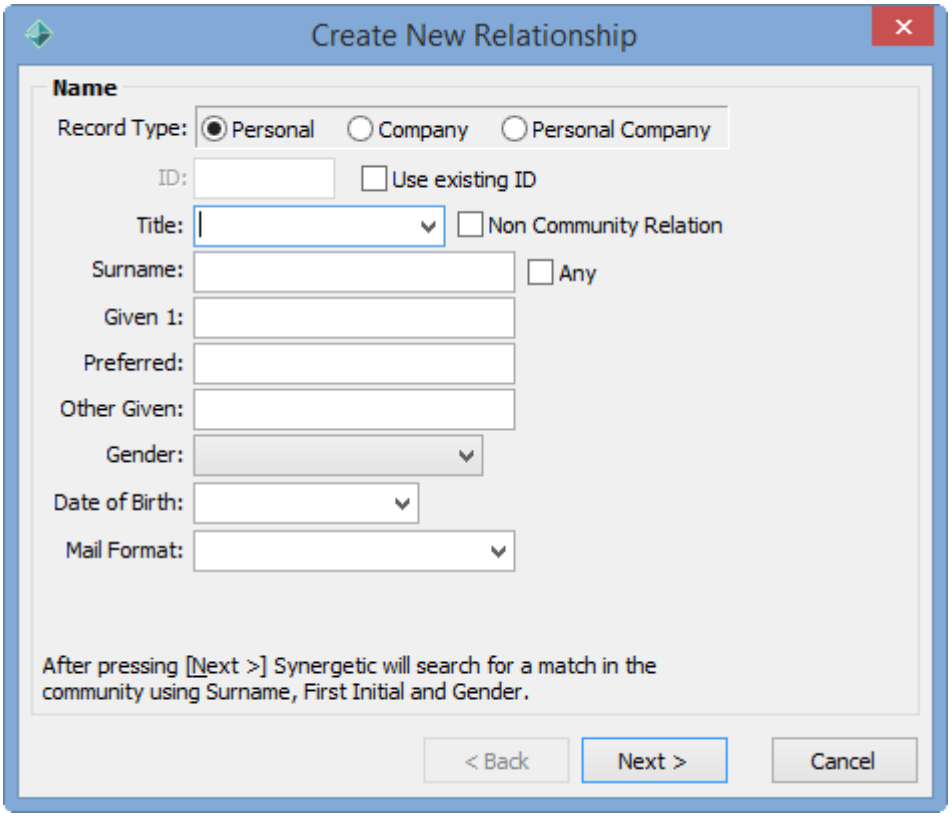
1. Open the **Relations** tab of the **Future Student Maintenance** window. See *Future Student Maintenance - Relations tab* (on page 168).

   The **Relations** tab of the **Future Student Maintenance** window is displayed.



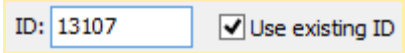
2. Click Add.

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



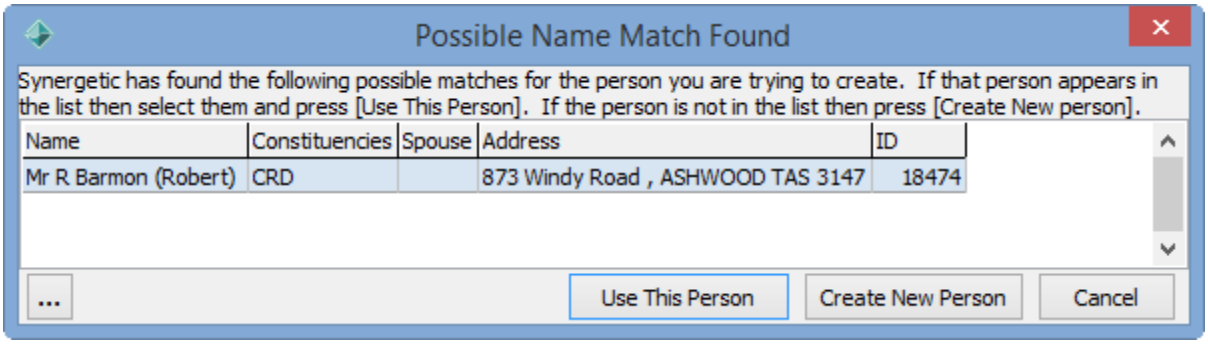
3. Enter information about the agent.

Tip: If you know the agent's Synergetic ID, select **Use existing ID** and type their identifier into the **ID** field.

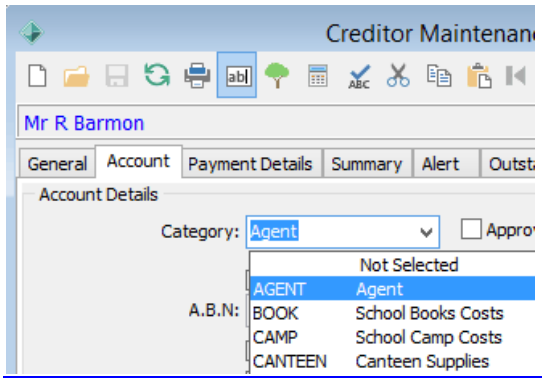


4. Click Next >.

   The **Possible Name Match Found** window is displayed.



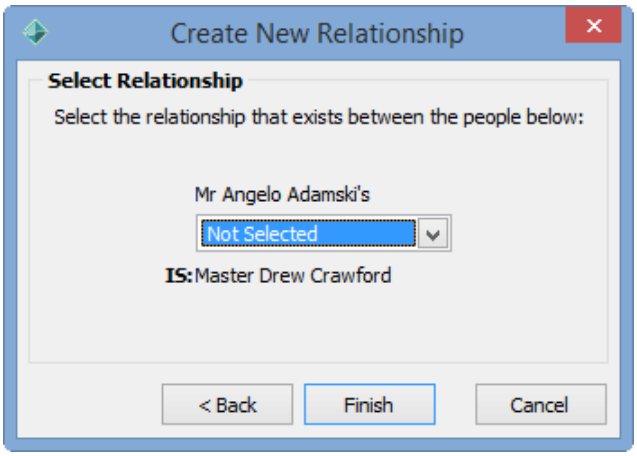
Note: If the agent does not exist, create a community member and a creditor; the latter with a **Category** of **Agent** on the **Account** tab of **Creditor Maintenance**. See *Creditor Maintenance - Account tab* in the Creditors manual.



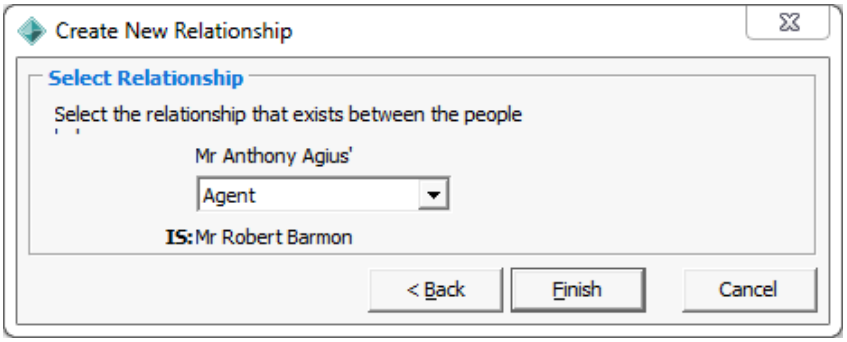
5. Select the agent, if not already done.

6. Click Use This Person.

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

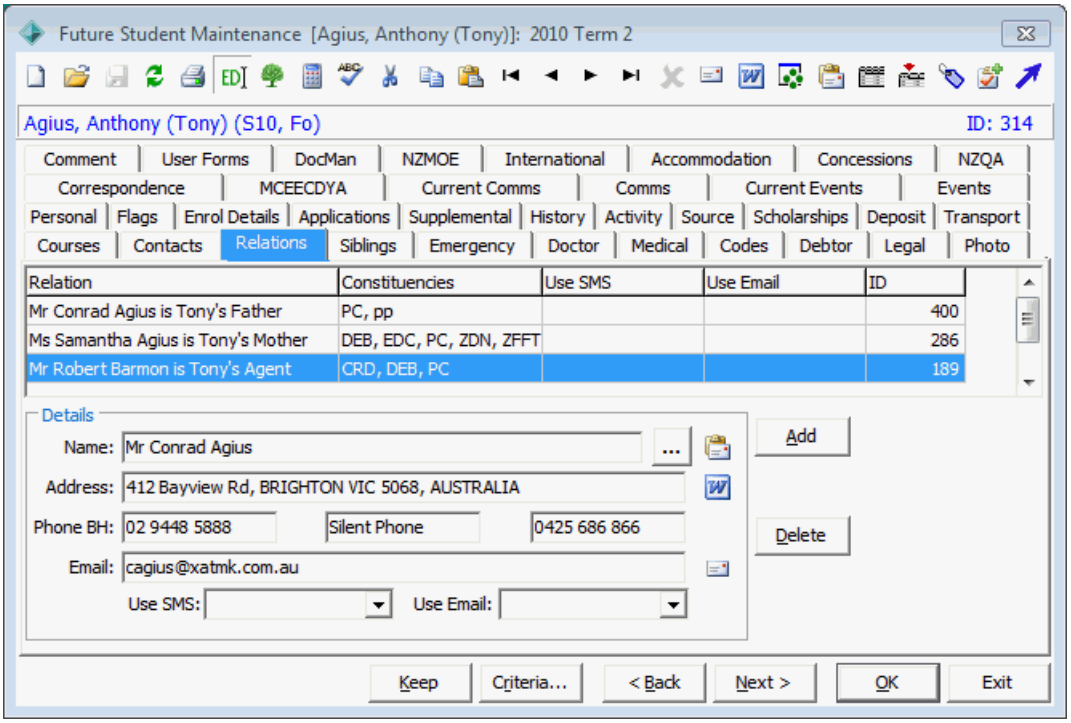


7. Select **Agent** from the drop-down list.



8. Click Finish.

The agent relationship is added to the **Relations** tab.



Using the Agent Commission Schedule Maintenance window

Use the **Agent Commission Schedule Maintenance** window to:

- Display students who are on a course arranged by an agent.
- Select student course enrolments to match with an agent's invoice.
- Authorise agent invoices. See *Authorising agent invoices* in the Curriculum manual.
- Display agent invoices that have been authorised. See *Displaying authorised agent invoices* in the Curriculum manual.
- Reverse the authorisation of selected entries.

Opening the Agent Commission Schedule Maintenance window

You can open the **Agent Commission Schedule Maintenance** window from either of two windows:

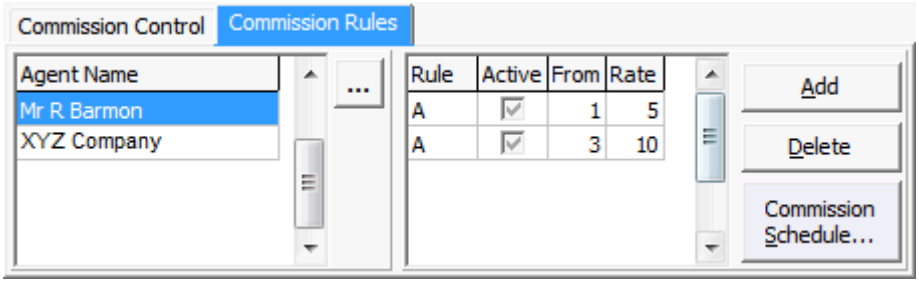
- **Commission Rules** tab of the **Course Agent Maintenance** window
- **Agent** tab of the **Course Details Maintenance** window.

Commission Rules tab of Course Agent Maintenance

To open the **Agent Commission Schedule Maintenance** window from the **Commission Rules** tab:

1. Open the **Commission Rules** tab of **Course Agent Maintenance**. See *Course Agent Maintenance - Commission Rules tab* in the Curriculum manual.

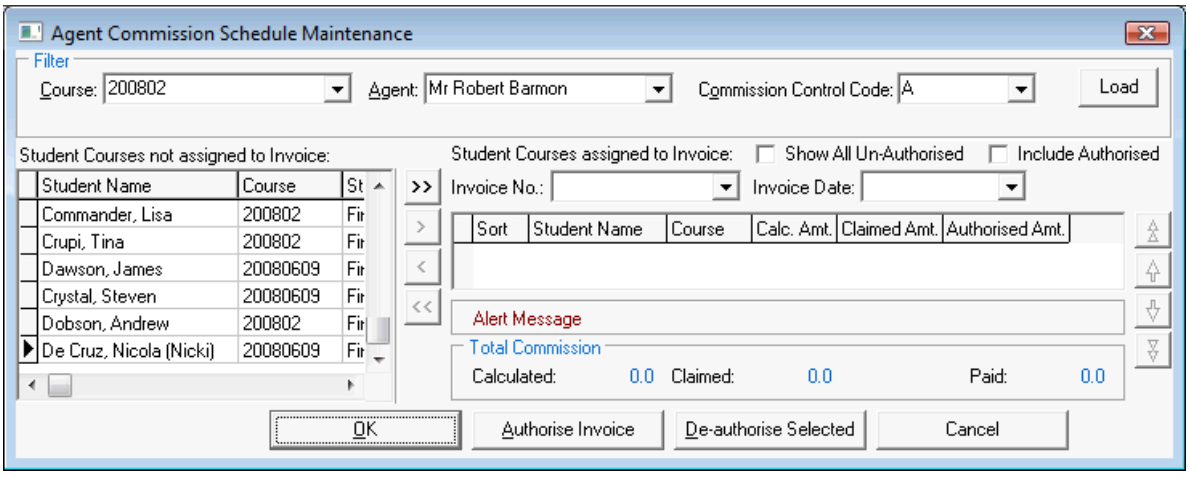
   The **Commission Rules** tab of the **Course Agent Maintenance** window is displayed.



2. Select the agent to view the commission schedule for.
3. Click

.

   The **Agent Commission Schedule Maintenance** window is displayed.

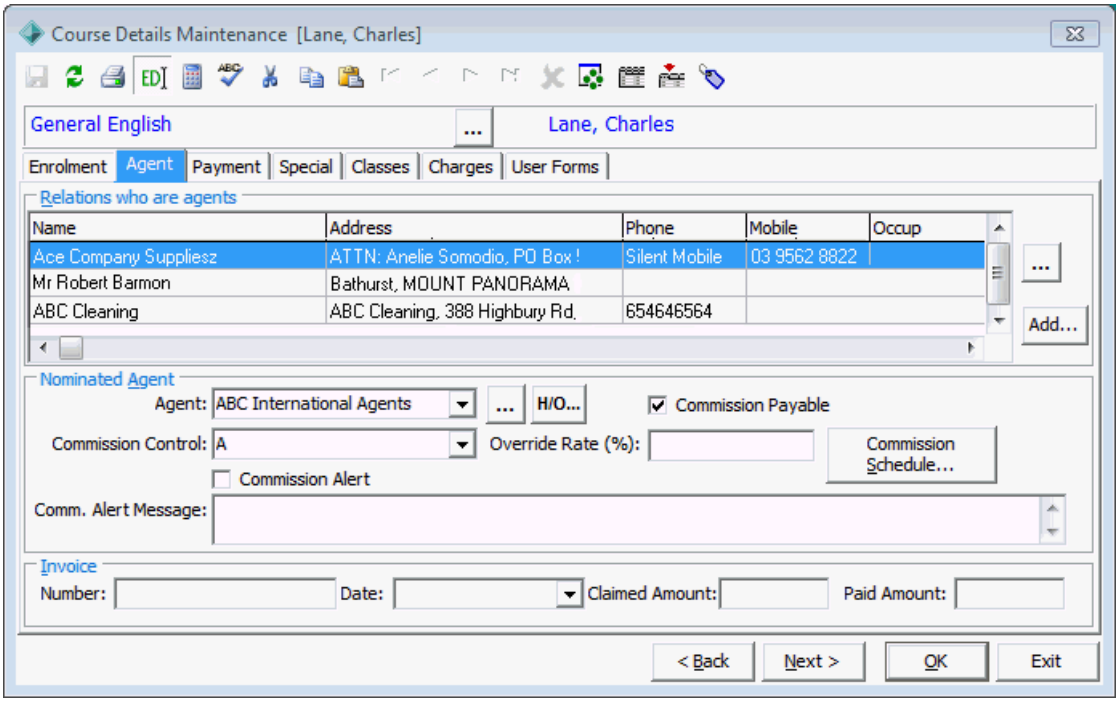


Agent tab of Course Details Maintenance

To open the **Agent Commission Schedule Maintenance** window from the **Agent** tab:

1. Open the **Agent** tab of **Course Agent Maintenance**.

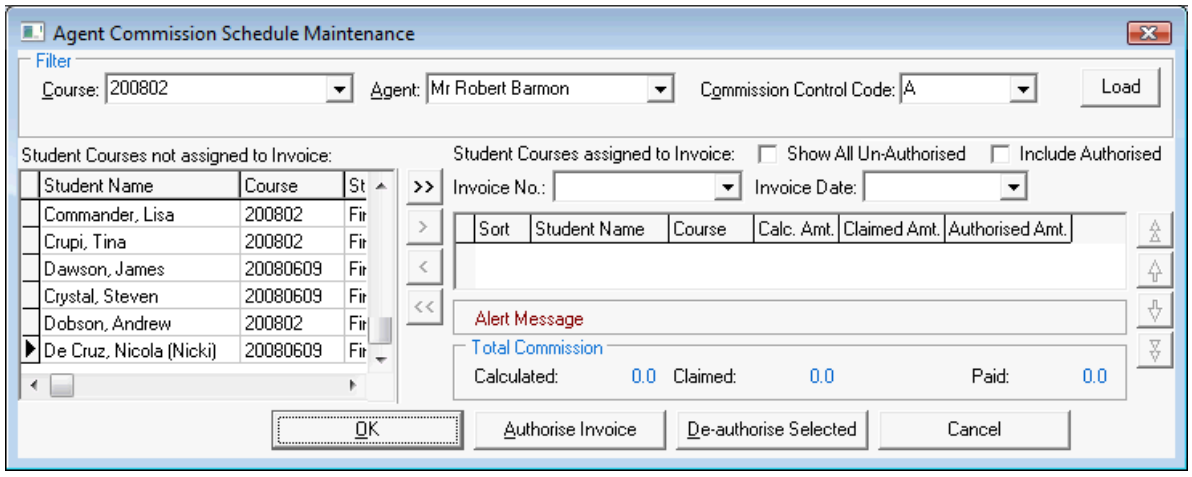
   The **Agent** tab of the **Course Details Maintenance** window is displayed. See *Course Details Maintenance - Agent tab* (on page 337).



2. Select the agent to view the commission schedule for.

3. Click
.

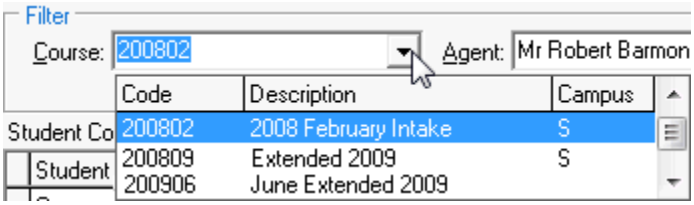
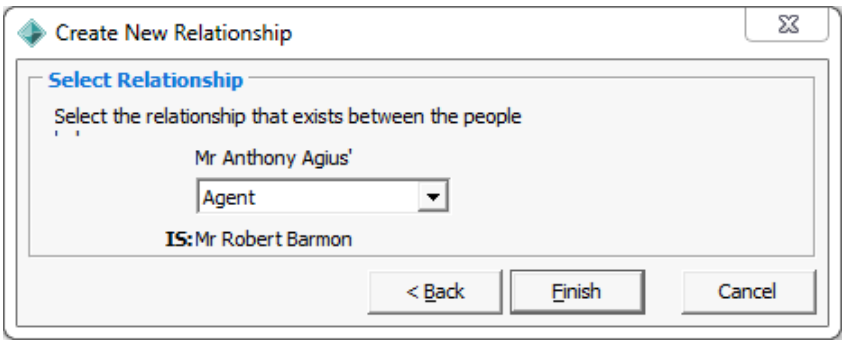
   The **Agent Commission Schedule Maintenance** window is displayed.



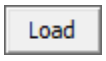
Agent Commission Schedule Maintenance window key fields and buttons

Filter area fields and buttons

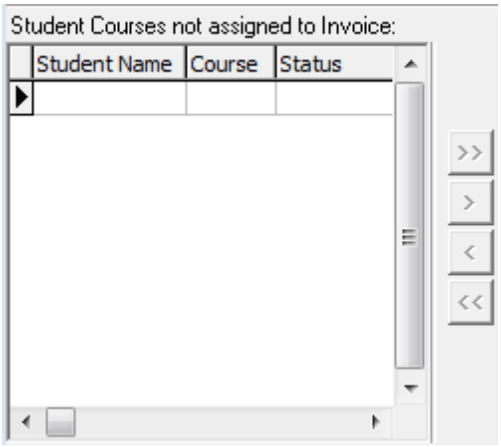
Fields

Field	Description
Course	Select the drop-down list to filter students who are enrolled in the main commission linked courses. 
Agent	Filter enrolled students with a relationship with the agent. The agent defaults to the one selected on the previous window. The relationship is set on the **Relations** tab of **Future Student Maintenance**. See *Adding agent relationships to students* (on page 344). 
Commission Control Code	Filter based on the agent's rules being used.

Buttons

Button	Description
	Load the relevant student courses for the filter selection.

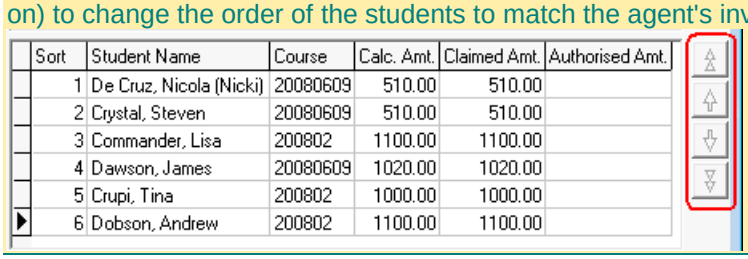
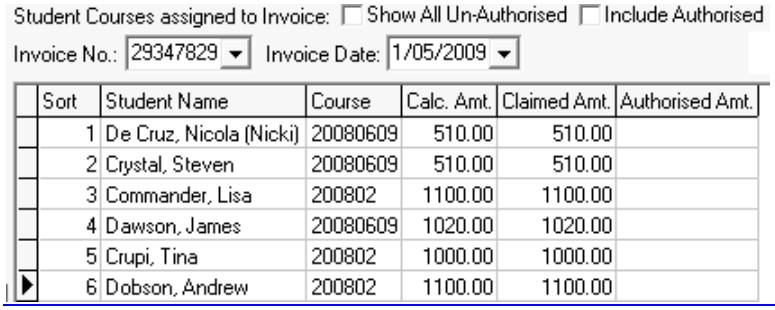
Student Courses not assigned to Invoice area fields and buttons



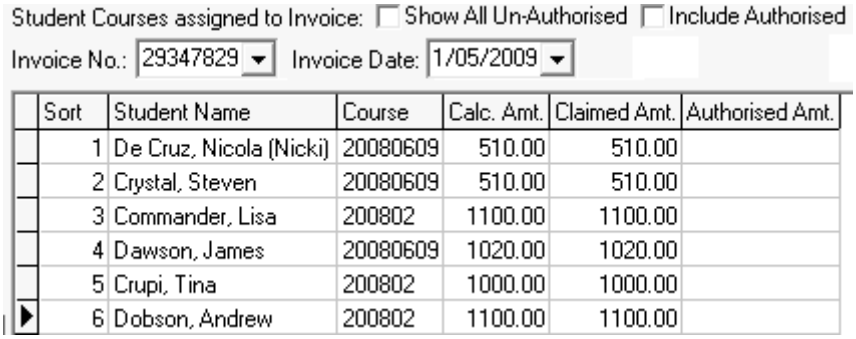
Grid area fields

Field	Description
Student Name	Student's name in the format: **Surname, First Name**.
Course	Code for the course where commission is due to the agent for enrolling the student.
Status	Student's status in the course. For example, Confirmed, Cancelled, Finalised.

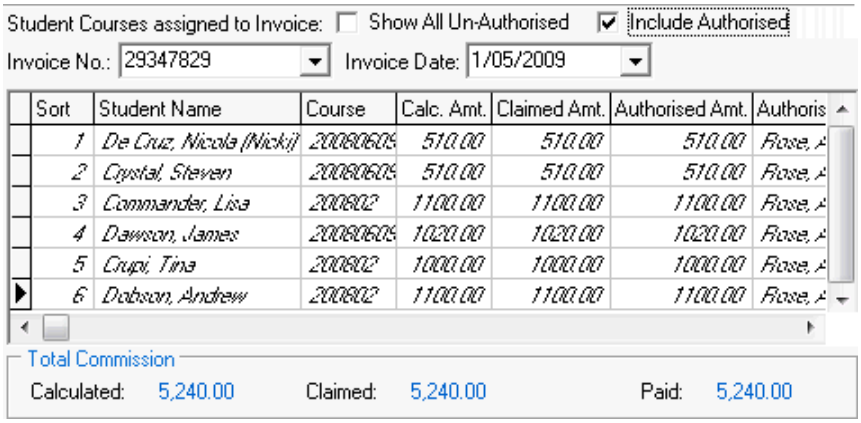
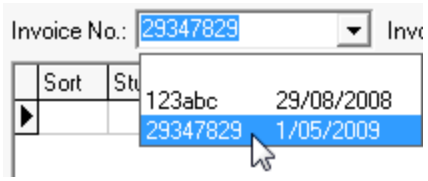
Buttons

Button	Description
>>	Move all of the students' courses to the right pane; that is, the **Student Courses assigned to Invoice** area. **Tip**: Once the students' courses are moved, use the arrows (and so on) to change the order of the students to match the agent's invoice. 
>	Move the selected student's courses to the right pane. **Tip**: Double click on the student to move the course entry. **Note**: We recommend that you select each student in the same order as the agent's invoice - this makes it easier to match the claimed amounts with the calculated amounts. 
<	Move the selected student's course back to the left pane; that is, the **Student Courses not assigned to Invoice** area.
<<	Move all of the students' courses back to the left pane.

Student Courses assigned to Invoice area fields and buttons



Fields

Field	Description
Show all UnAuthorised	Display the details of any unauthorised agent invoices.
Include Authorised	Display the details of any authorised agent invoices. See *Displaying authorised agent invoices* in the Curriculum manual. 
Invoice No.	Invoice number supplied by the agent. When: • Adding a new invoice, type the invoice number in the field. • Viewing an existing invoice, select the invoice from the drop-down list. 

Field	Description
Invoice Date	Date of the invoice supplied by the agent. Type the date or select it from the calendar.

Grid area fields

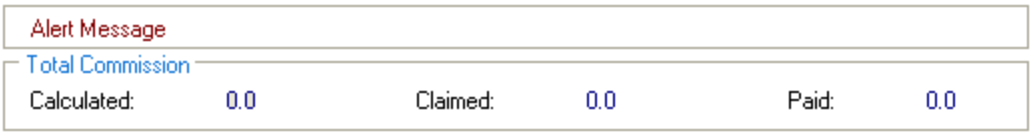
Field	Description
Sort	Sort sequence number. This changes when the order of the entries is changed. See the **Buttons** section below.
Student Name	Student's name in the format: **Surname, First Name**.
Course	Code for the course where commission is due to the agent.
Calc. Amt.	Calculated commission for the student and course, based on the agent's commission rules.
Claimed Amt.	Amount claimed by the agent for enrolling the student in the course.
Authorised Amt.	Amount authorised, if applicable.

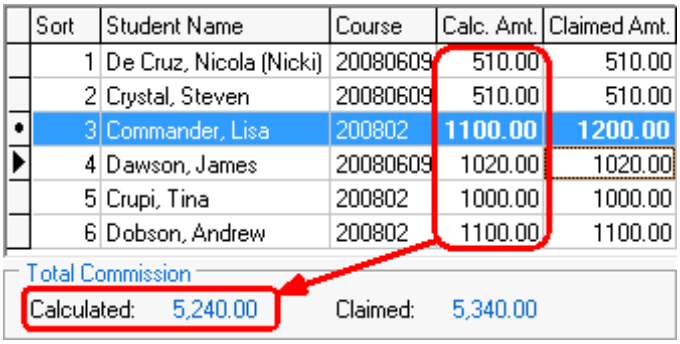
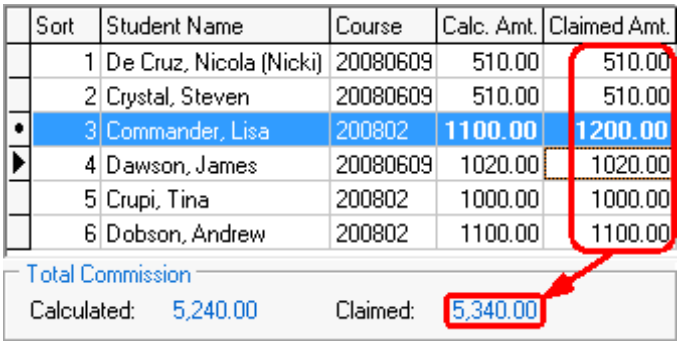
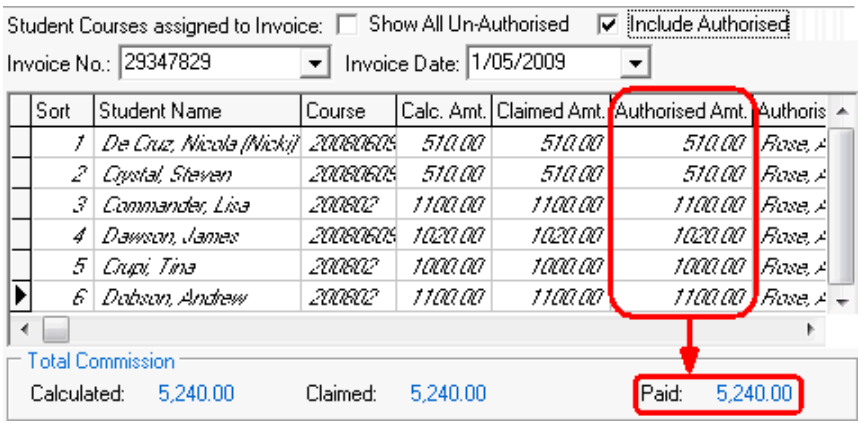
Note: You can sort the grid data by clicking on the column headers.

Buttons

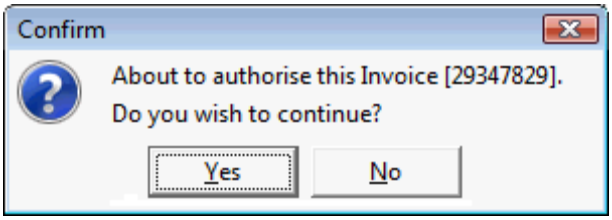
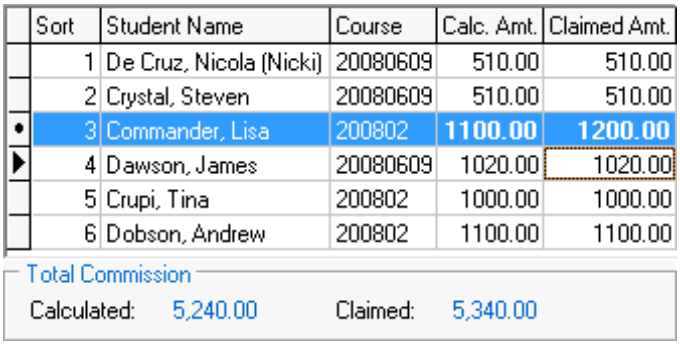
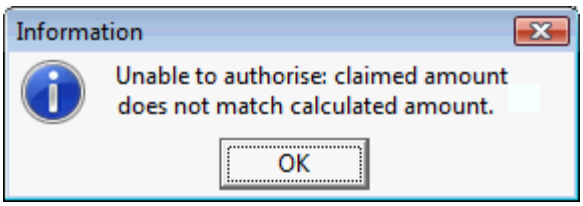
Button	Description
	Move the selected record up ten positions.
	Move the selected record up one position.
	Move the selected record down one position.
	Move the selected record down ten positions.

Alert Message and Total Commission area fields



Field	Description
Alert Message	Relevant information used when authorising invoices. Maintain whether an alert is displayed and the alert message text on the **Agent** tab of **Course Details Maintenance**. See *Course Details Maintenance - Agent tab* (on page 337).
Calculated	Total of the calculated amounts. 
Claimed	Total of the claimed amounts. 
Paid	Total of the amounts authorised against the agent's invoice. 

Common buttons

Button	Description
OK	Save the changes and close the window.
Authorise Invoice	Authorise the invoice for payment, if the **Calculated** and **Claimed** totals match.  You are unable to authorise the invoice if the claimed amount does **not** match the calculated amount. In the example, $1200 commission is claimed for Lisa Commander's course enrolment but Synergetic calculated $1100 based on the commission rules.  In this situation, the following message is displayed.  Check the figures and if necessary contact the agent to correct their invoice.
De-authorise Selected	Set the selected records to unauthorised.
Cancel	Cancel the changes and close the window.

Course Details Maintenance - Payment tab

Use the **Payment** tab to view:

- fees for the course
- amount charged, paid to date and owing for the course
- debtor's details and the overall amount owing
- debtor's most recent payment details.

Opening the Payment tab

To open the **Payment** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

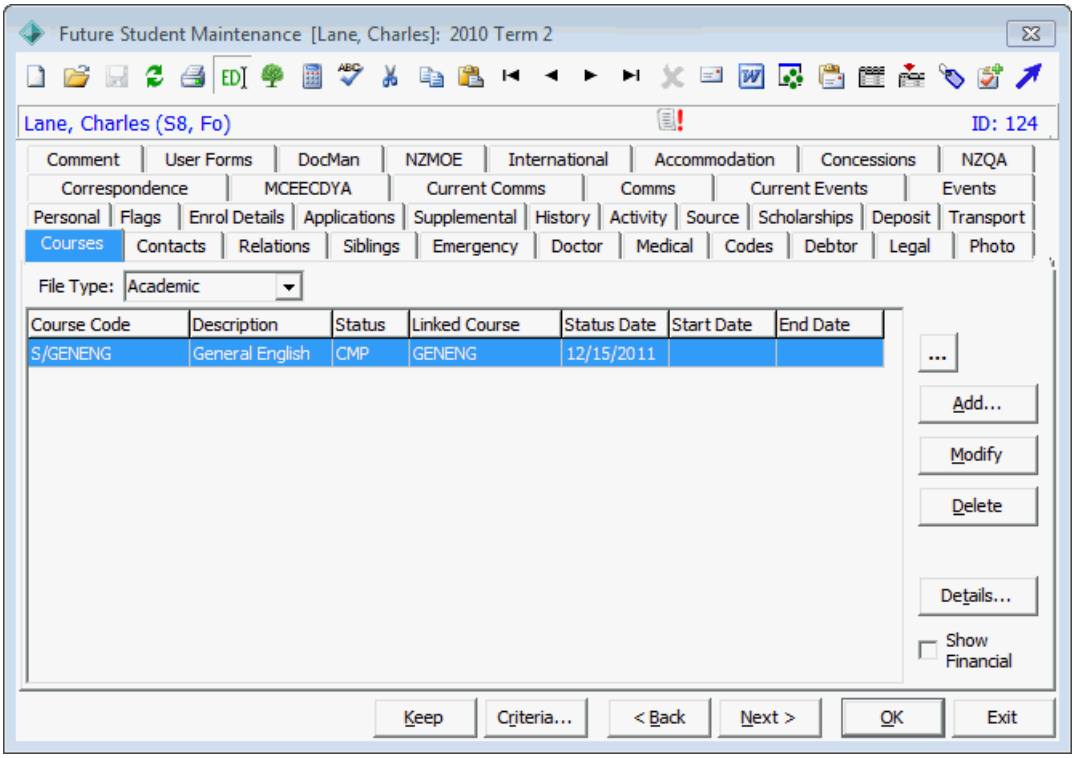
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

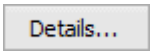
.

2. Select the future student. See *Searching for future students* (on page 78).
3. Open the **Courses** tab of the **Future Student Maintenance** window.

   The **Courses** tab of the **Future Student Maintenance** window is displayed.



4. Select the course to maintain.

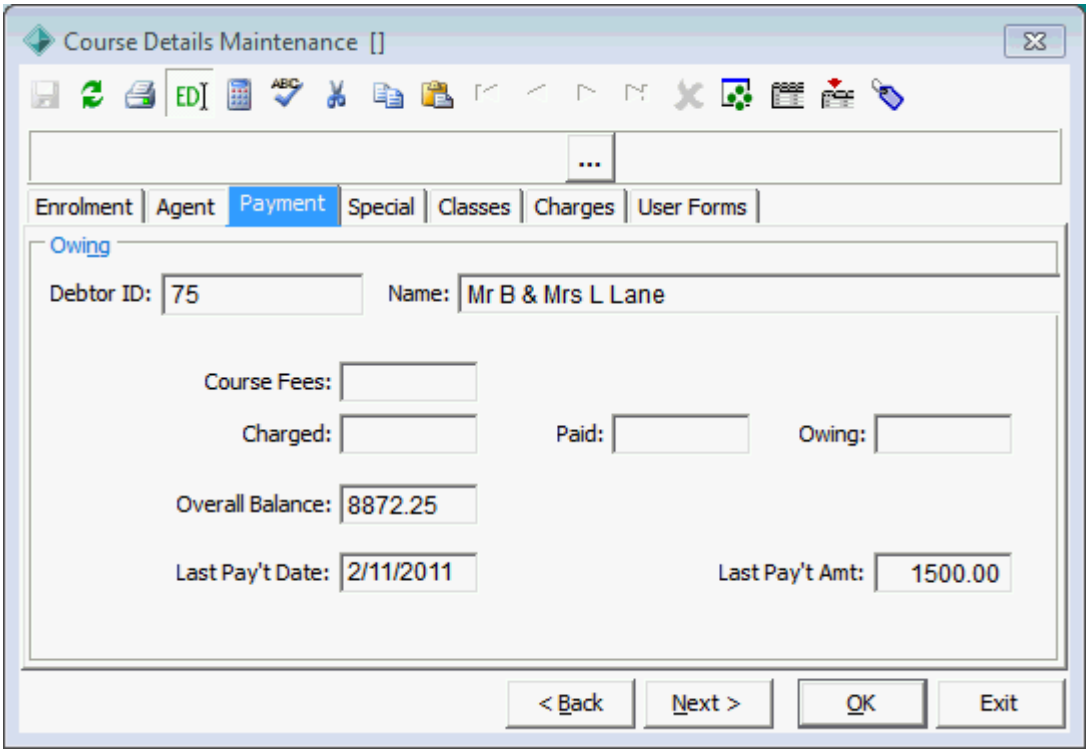
5. Click 

.

   The **Enrolment** tab of the **Course Details Maintenance** window is displayed.

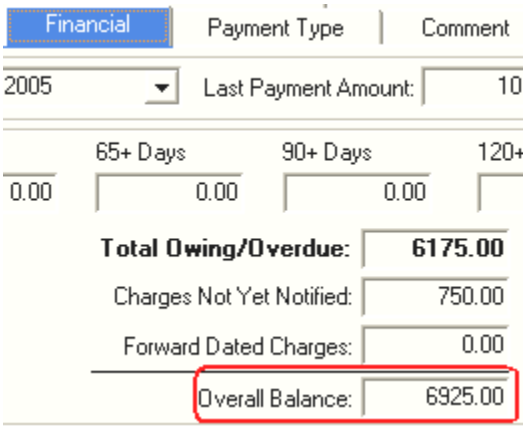
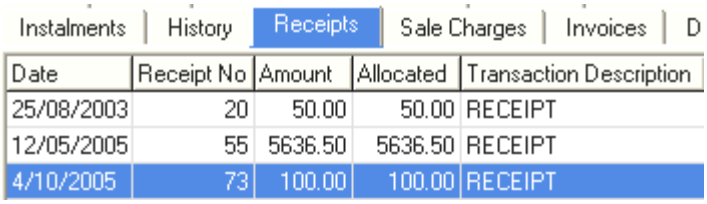
6. Click the **Payment** tab.

   The **Payment** tab of the **Course Details Maintenance** window is displayed.



Course Details Maintenance - Payment tab key fields and buttons

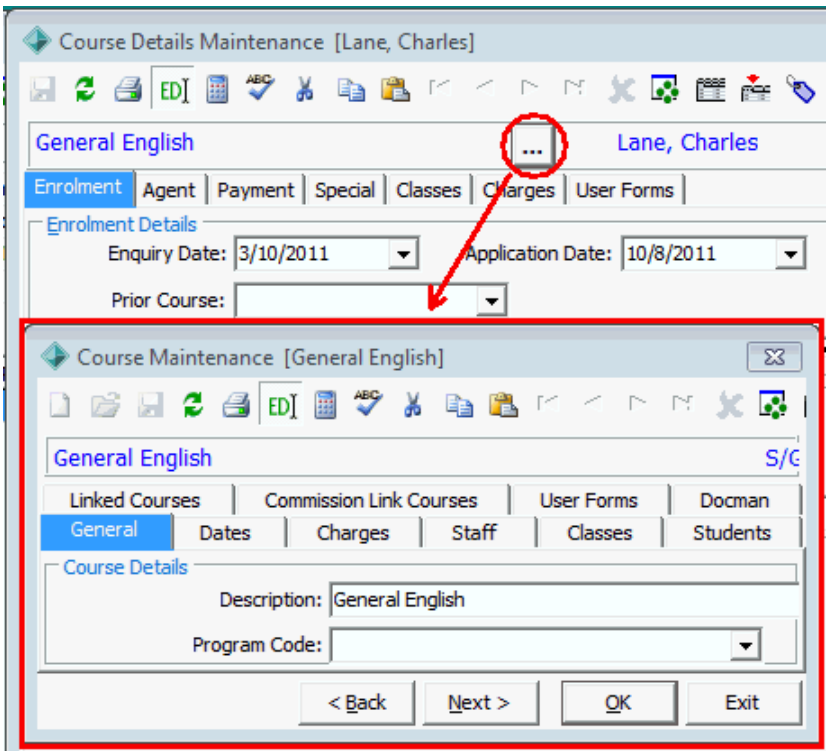
Fields

Field	Description
Debtor ID	Debtor ID for the debtor responsible for the student's course.
Name	Name of the debtor.
Course Fees	Cost of the course. For details of the course fees, see the *Course Details Maintenance - Charges tab* (on page 373).
Charged	Total the student has been charged for the course.
Paid	Amount paid for the course to date.
Owing	Amount owed for the course.
Overall Balance	Overall amount owed by the debtor. This is from the **Financial** tab of **Debtor Maintenance**.  See *Debtor Maintenance - Financial tab* in the Debtors manual.
Last Pay't Date / Last Pay't Amt	Date and amount of the most recent payment. These values are from the **Receipts** tab of **Debtor Maintenance**. In the example, the details from the most recent receipt are used.  See *Debtor Maintenance - Receipts tab* in the Debtors manual.

Buttons

Button	Description
...	Launch into **Debtor Maintenance** for the debtor. See *Maintaining debtors* in the Debtors manual.

Common buttons

Button	Description
...	Launch into **Course Maintenance** for the current course. See *Maintaining courses* in the Curriculum manual. 

Course Details Maintenance - Special tab

Use the **Special** tab to maintain:

- any special comments about the student's participation in the course
- details of any deferral of their attendance.

Opening the Special tab

To open the **Special** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

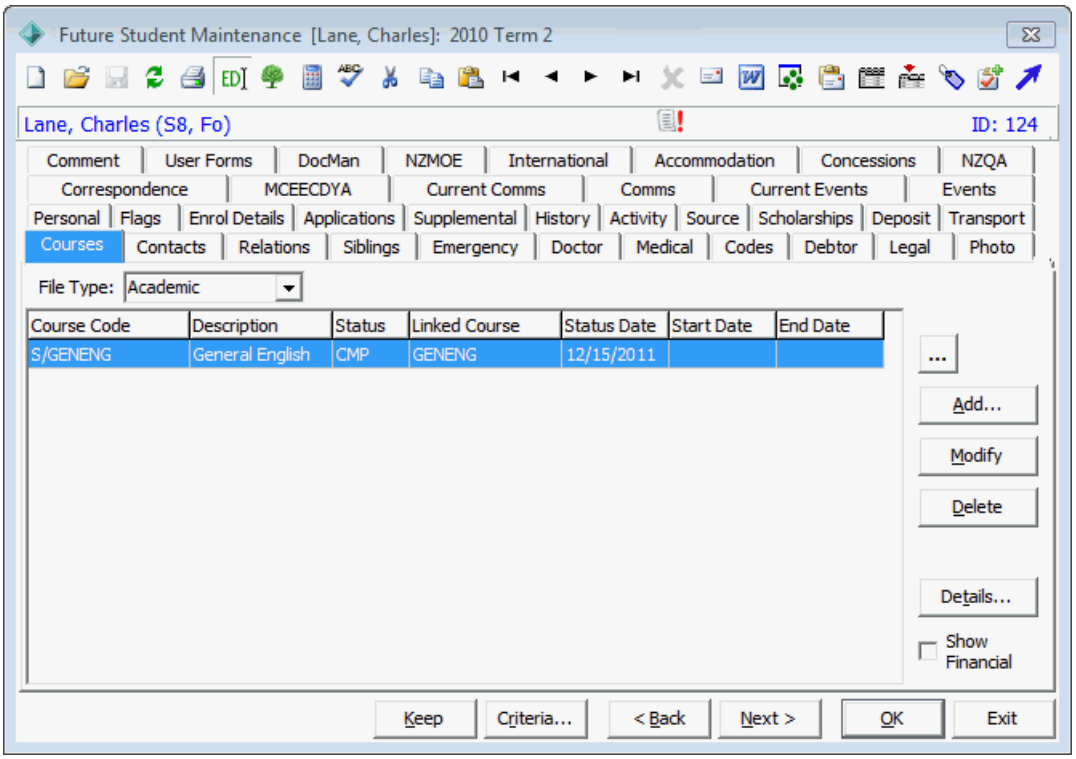
   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Open the **Courses** tab of the **Future Student Maintenance** window.

   The **Courses** tab of the **Future Student Maintenance** window is displayed.



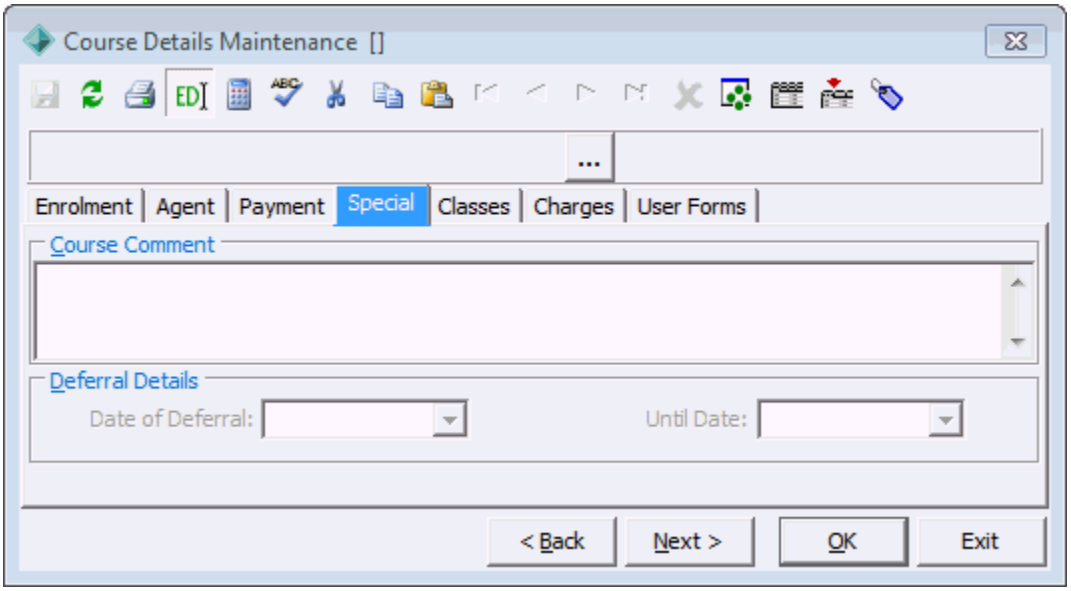
4. Select the course to maintain.

5. Click Details... .

   The **Enrolment** tab of the **Course Details Maintenance** window is displayed.

6. Click the **Special** tab.

   The **Special** tab of the **Course Details Maintenance** window is displayed.

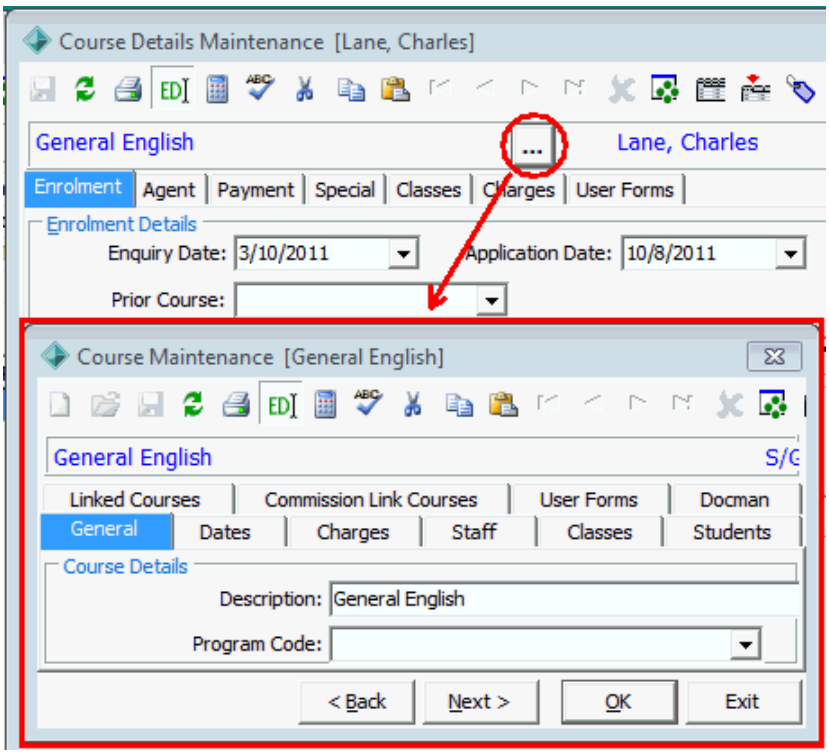


Course Details Maintenance - Special tab key fields and buttons

Fields

Field	Description
Course Comment	Comments relevant to the student's participation in the course. For example, a 10% discount may have been offered.
Date of Deferral	Date the student's participation is deferred.
Until Date	New date that the student is commencing the course.

Common buttons

Button	Description
...	Launch into **Course Maintenance** for the current course. See *Maintaining courses* in the Curriculum manual. 

Course Details Maintenance - Classes tab

Use the **Classes** tab to:

- view classes the student is attending as part of the course
- modify the student's class details
- load default classes for the course from **Course Maintenance**.

Tip: See the **Buttons** area for details of how to maintain the fields.

Opening the Classes tab

To open the **Classes** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

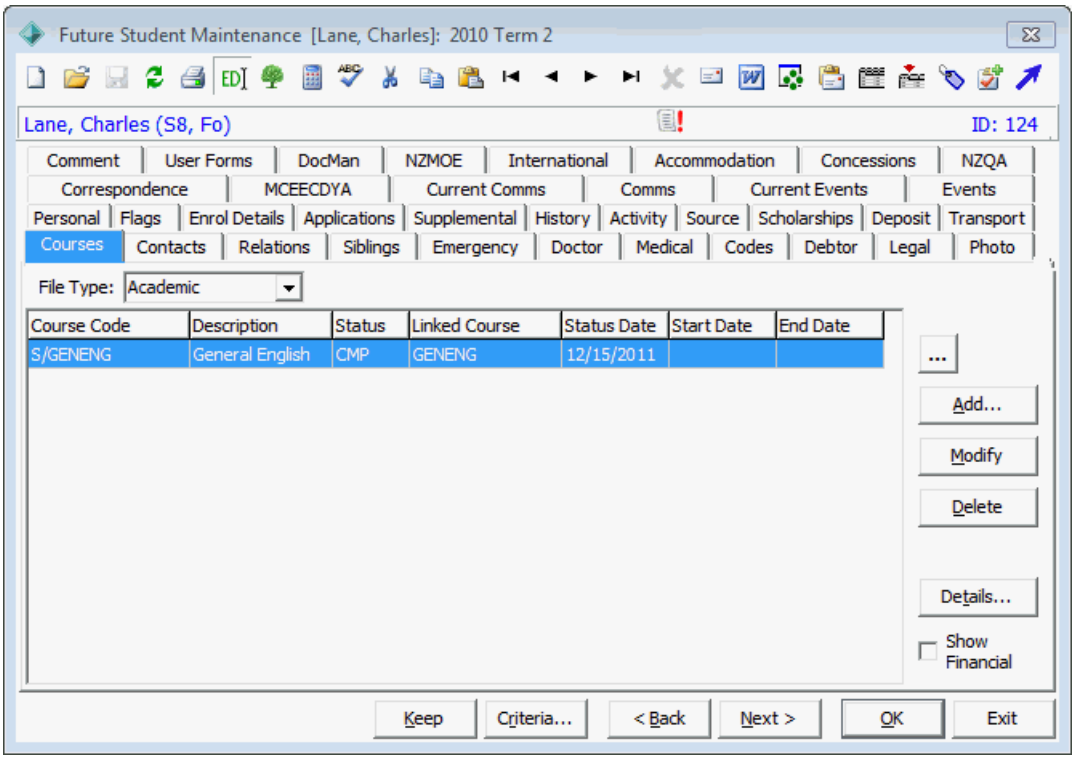
   The **Set Future Student Search Criteria** window is displayed.

   Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Open the **Courses** tab of the **Future Student Maintenance** window.

   The **Courses** tab of the **Future Student Maintenance** window is displayed.



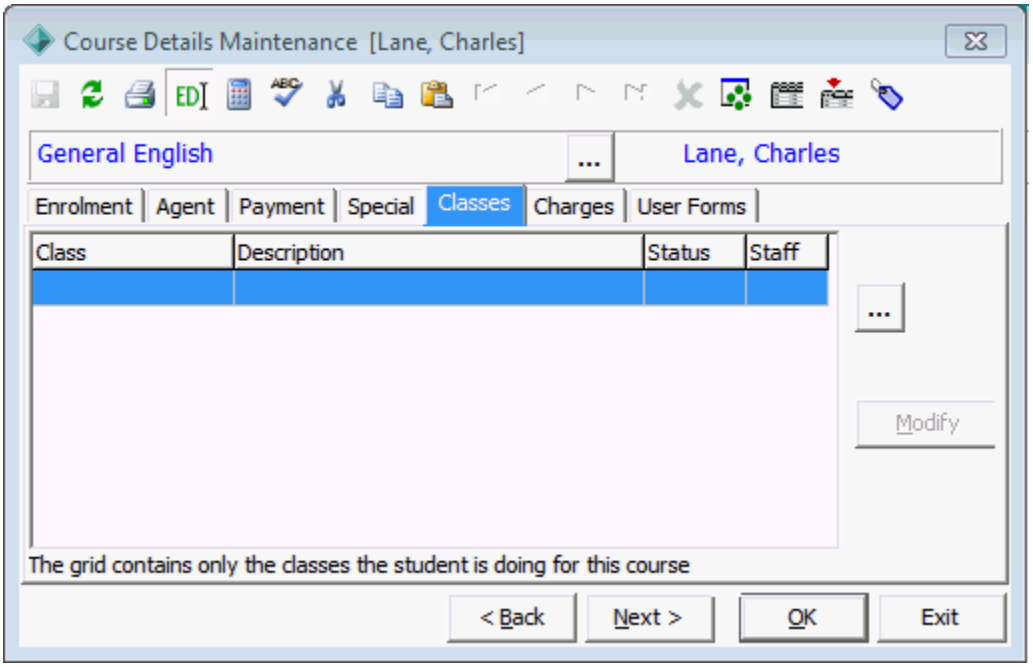
4. Select the course to maintain.

5. Click Details... .

   The **Enrolment** tab of the **Course Details Maintenance** window is displayed.

6. Click the **Classes** tab.

   The **Classes** tab of the **Course Details Maintenance** window is displayed.



Course Details Maintenance - Classes tab key fields and buttons

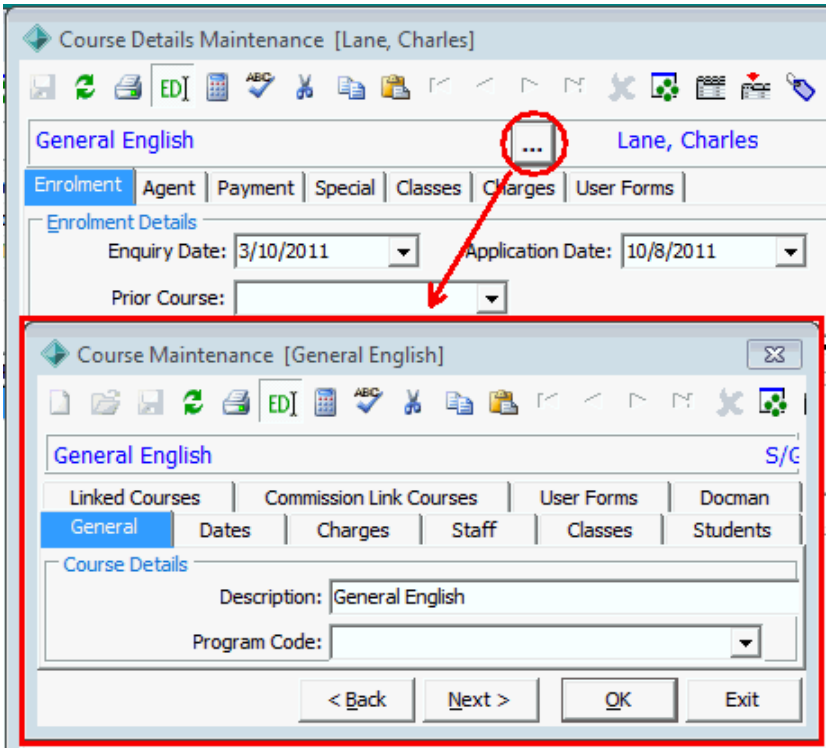
Grid area fields

Field	Description
Class	Abbreviation for the class.
Description	Description populated from **Class Maintenance**. See *Maintaining classes* in the Assessments and reports manual.
Status	Abbreviation of the state of completion for this class for the selected student.
Staff	Abbreviation for the staff member taking the class.

Buttons

Button	Description
	Launch **Class Maintenance** for the selected class. See *Maintaining classes* in the Assessments and reports manual.
	Modify the student's class details. See *Modifying student class details* (on page 371). **Tip:** Double click on the selected class in the grid area to modify the details.

Common buttons

Button	Description
...	Launch into **Course Maintenance** for the current course. See *Maintaining courses* in the Curriculum manual. 

Modifying student class details

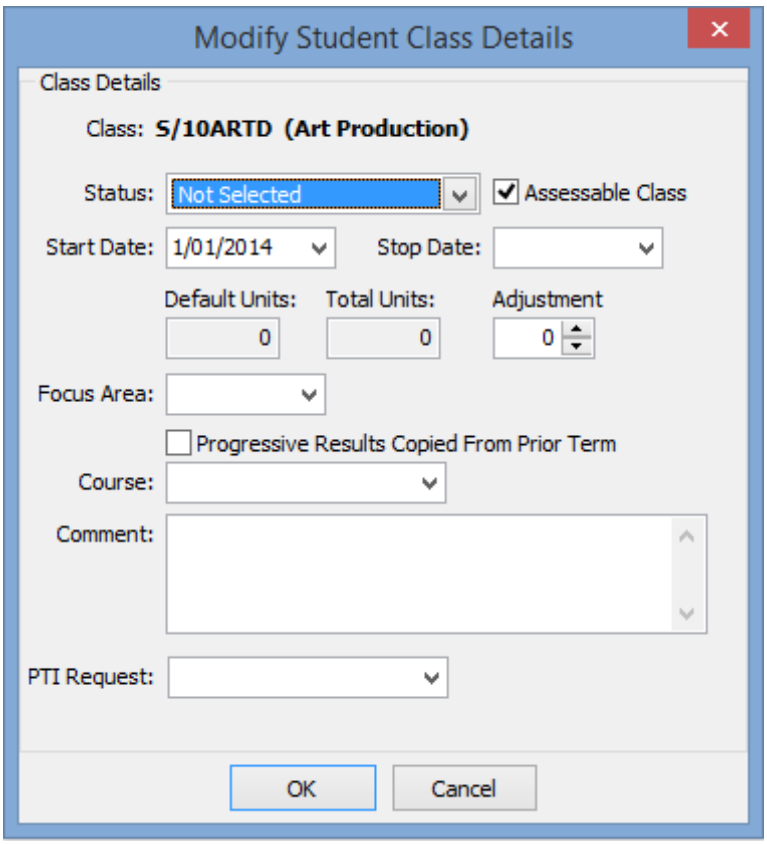
To modify key information about the class being taken by a student:

1. Select the class you want to modify in the grid on the **Class** tab of **Course Details Maintenance**. See *Course Details Maintenance - Classes tab* (on page 367).

2. Click

.

   The **Modify Student Class Details** window is displayed.



Modify Student Class Details window key fields

Field	Description
Status	Class status. **Note:** This field is used primarily for charging debtor accounts.
Assessable Class	Clear if this class is not being assessed. **Note:** The student is not displayed in **Results Maintenance** if this field is not selected.
Start Date	Date the student commenced the class.
Stop Date	Date the student withdrew, if applicable.
Default Units	Default number of units in the class for the term, if the class is charged.
Total Units	Actual number of units undertaken by the student in the class for the term, if the class is charged. Class charges are set in **Debtor Maintenance** for this year and term/semester.
Adjustment	Adjustments to the number of units to take into account missed classes. For example, a music class may have a number of classes per term **(Default Unit**) but due to absences, public holidays or other events, some may not have been attended. See *Making adjustments for students not attending classes* in the Debtors manual.
Focus Area	Class area of focus. For example, the instruments studied in a music class.
Progressive Results Copied From Prior Term	For progressive learning classes, this field is automatically selected after the **Create Term Results** program has been run. There is no need to clear this selection unless you need to copy the results in again.
Course	Course that the class is part of.
Comment	Additional comments about the student or their requirements. For example, the student may have special needs for the class.
PTI Request	Status of the request for a parent teacher interview. This field details whether an interview is required, requested, not available or not required.

Course Details Maintenance - Charges tab

Use the **Charges** tab to:

- view default fees that apply to the student enrolled in the course
- change the amounts and charge dates that apply
- view financial details, including what has been charged and is still owed by the debtor
- add or delete fees from the student's course
- reload the default fees.

The entries default to the fees, amounts and charge dates set up for the course. See *Course Maintenance - Charges tab* in the Curriculum manual.

Opening the Charges tab

To open the **Charges** tab:

1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

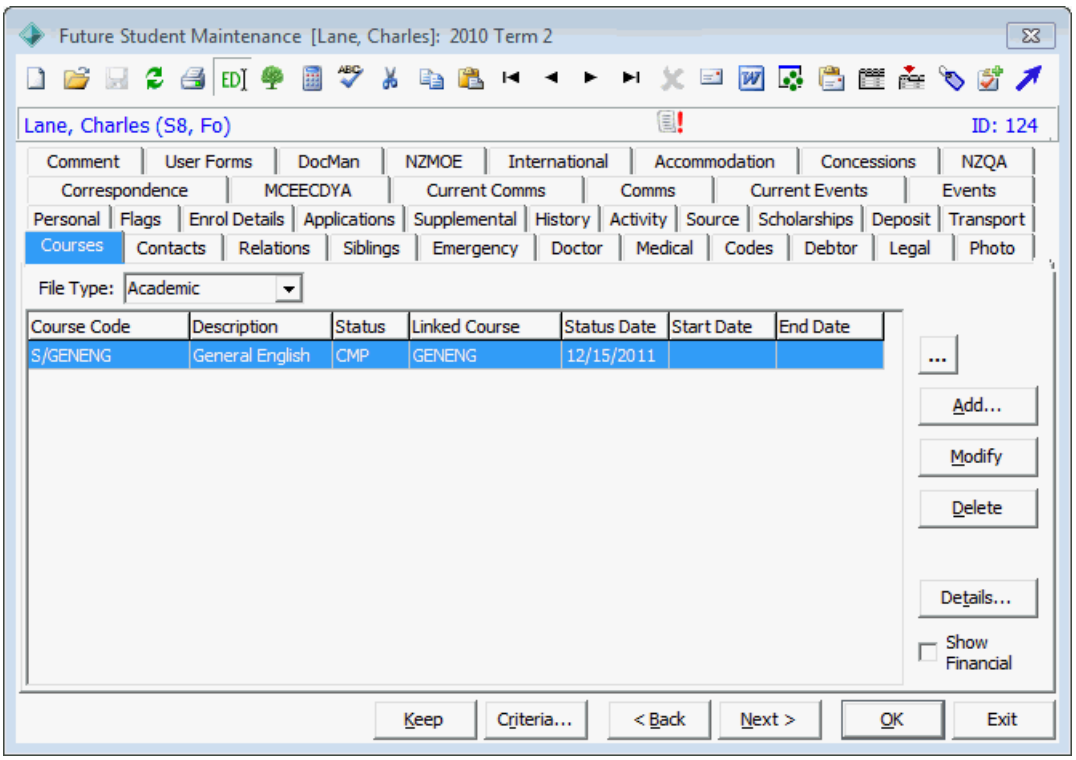
   The **Set Future Student Search Criteria** window is displayed.

   Tip: You can also access the future student functions by clicking

.

2. Select the future student. See *Searching for future students* (on page 78).
3. Open the **Courses** tab of the **Future Student Maintenance** window.

   The **Courses** tab of the **Future Student Maintenance** window is displayed.



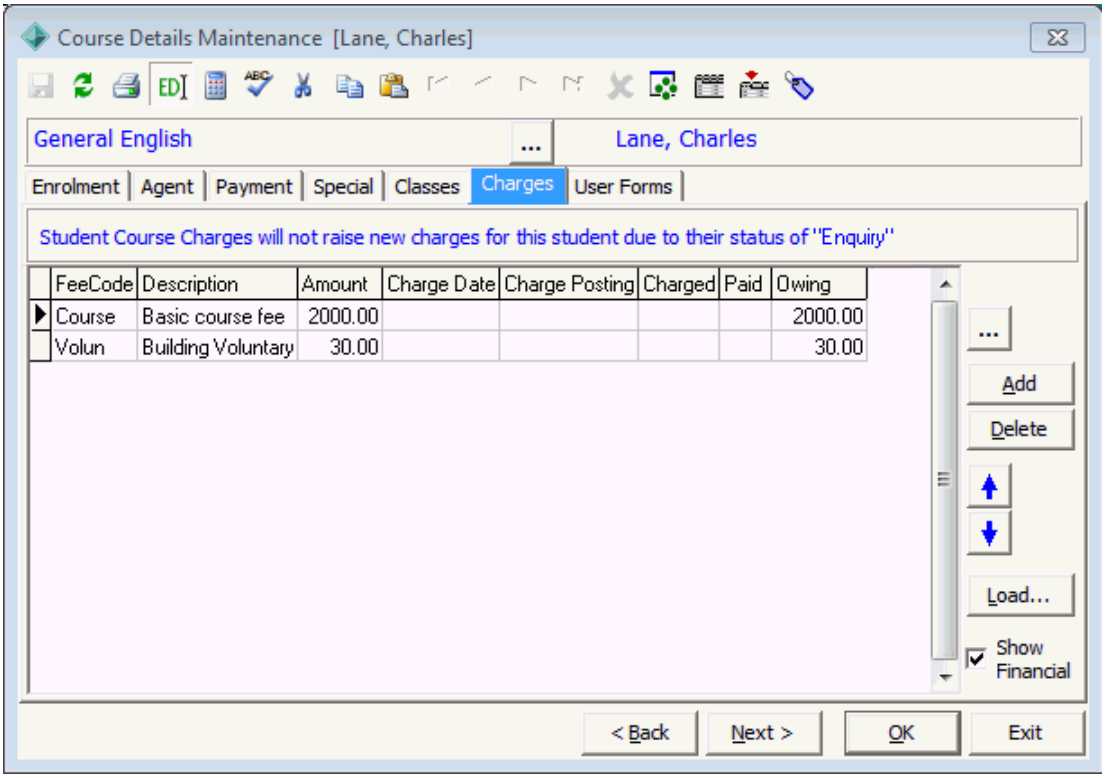
4. Select the course to maintain.

5. Click Details... .

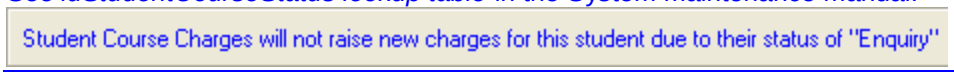
   The **Enrolment** tab of the **Course Details Maintenance** window is displayed.

6. Click the **Charges** tab.

   The **Charges** tab of the **Course Details Maintenance** window is displayed.

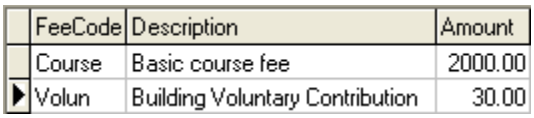
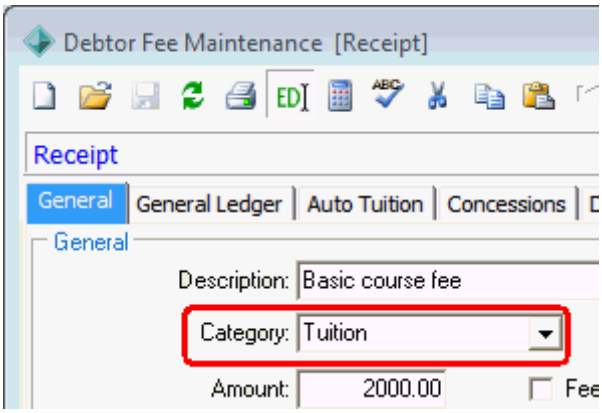
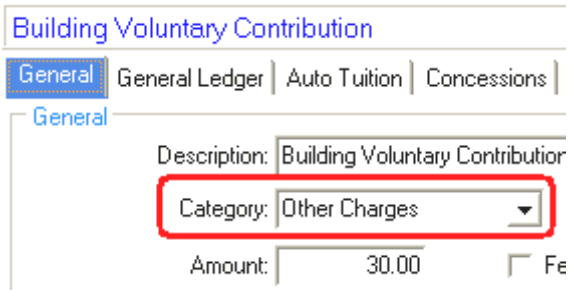


Note: If the student's course status is not set to allow charges, the course charges are not raised. See *luStudentCourseStatus lookup table* in the System maintenance manual.



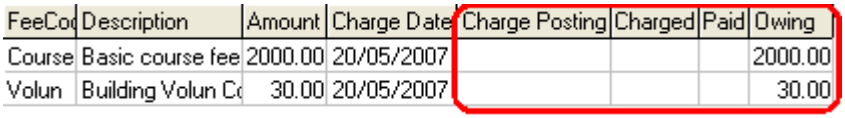
Course Details Maintenance - Charges tab key fields and buttons

Grid area fields

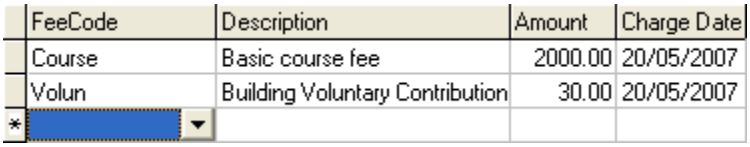
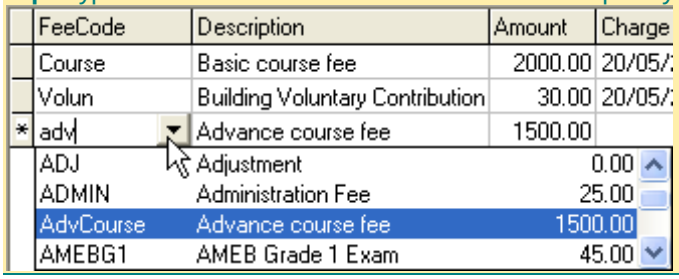
Field	Description
Fee Code	Code for each fee applicable to the selected course and student. If your organisation engages agents to enrol students in your courses, commission is payable on tuition fees only.  In the example, the: • **Basic course fee** is charged because the fee has a **Category** of **Tuition** in **Debtor Fee Maintenance**  • **Building Voluntary Contribution** is *not* charged because the fee is not a tuition charge.  See *Debtor Fee Maintenance - General tab* in the Debtors manual.
Description	Description for the fee.
Amount	Amount of the course fee.
Charge Date	Date the charge is issued. If blank, charges are issued as soon as the student's course status allows.
Charge Posting	Posting number of the fee charges. **Note**: This field and the following three are only displayed if the **Show Financial** field is selected. See the **Show Financial** field below.
Charged	Amount charged to the student's debtor for the course fee. You can type a different value from the course fee (**Amount** field) if required.
Paid	Amount paid to date by the debtor and allocated to the course fee.

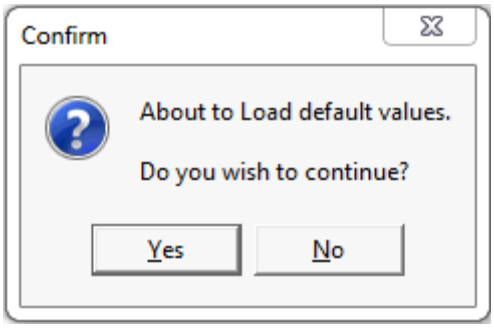
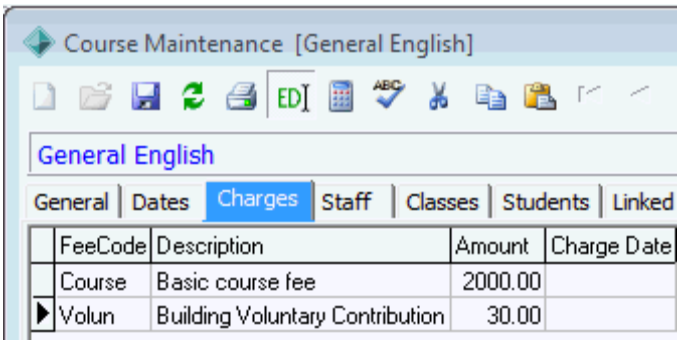
Field	Description
Owing	Amount owing on the course fee.

Fields

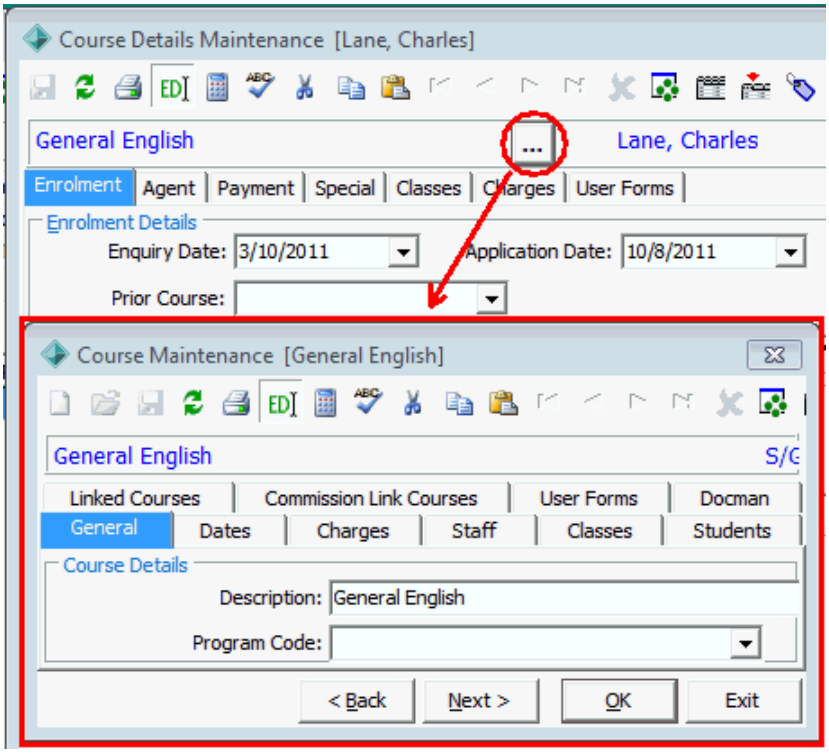
Field	Description
Show Financial	Also display financial details about each fee associated with the course.  See *Debtor Fee Maintenance - General tab* in the Debtors manual.

Buttons

Button	Description
...	Launch **Debtor Fee Maintenance** for the selected fee. See *Maintaining debtor fees* in the Debtors manual.
Add	Add a new row then type in the fee details.  **Tip**: Type in the first few letters of the fee code to quickly find the fee. 
Delete	Delete the selected fee entry.
	Move the selected record up one position, if applicable.
	Move the selected record down one position, if applicable.

Button	Description
Load...	Load the default fees and charges for the course from **Course Maintenance**. The following dialog window is displayed.  Click Yes to clear any existing fees from the tab, and load the default fees and charges. The following example shows the course fees and charges used.  See *Course Maintenance - Charges tab* in the Curriculum manual.

Common buttons

Button	Description
...	Launch into **Course Maintenance** for the current course. See *Maintaining courses* in the Curriculum manual. 

Course Details 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:

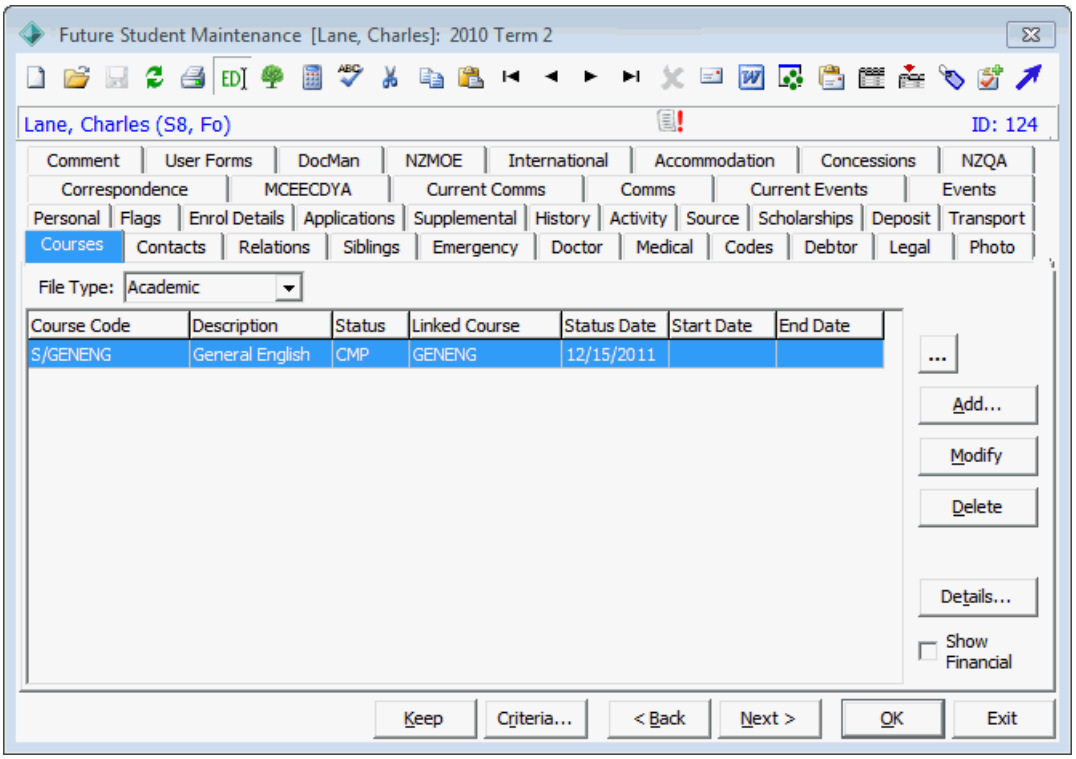
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking Future.

2. Select the future student. See *Searching for future students* (on page 78).
3. Open the **Courses** tab of the **Future Student Maintenance** window.

   The **Courses** tab of the **Future Student Maintenance** window is displayed.



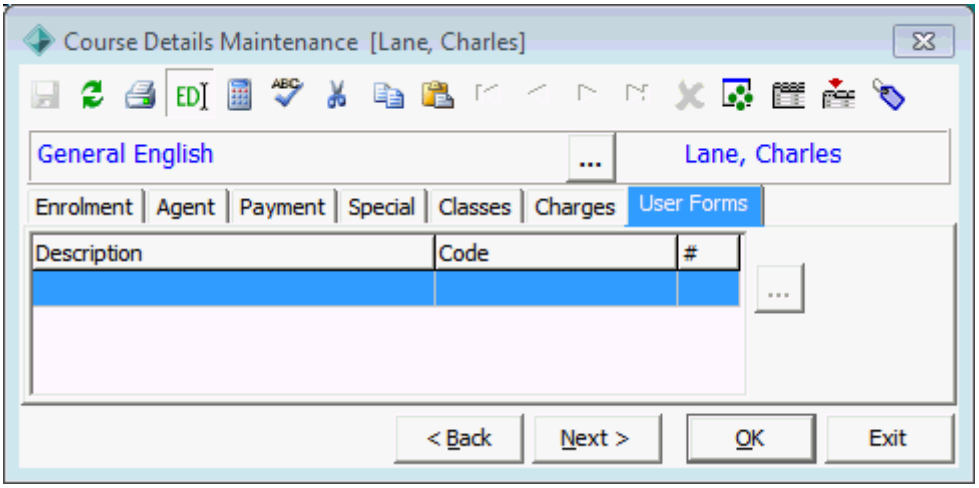
4. Select the course to maintain.

5. Click Details... .

   The **Enrolment** tab of the **Course Details Maintenance** window is displayed.

6. Click the **User Forms** tab.

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



Course Details 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.

Processing applications

The following procedure describes a typical way of processing prospective students' applications.

Processing an enquiry

When you receive an enquiry:

1. In the Enquiries module, record some details about the person making the enquiry and the prospective student, such as name, address, name of student and targeted year of enrolment. See *Creating new enrolment enquiries* (on page 14).
2. Use Microsoft Word mail merge to send out a standard letter and prospectus, using the information in Synergetic.

You can keep in touch with the person by informing them about events of interest such as open days or school concerts.

You can add any additional information about the prospective student at any time. See *Maintaining enrolment enquiries* (on page 6).

Processing an application

When you receive an application:

1. Display the enrolment enquiry details. See *Searching for enrolment enquiries* (on page 8).
2. Enter the details of the contact's spouse if you have not already done so. See *Enquiry Student Maintenance - Contact Spouse tab* (on page 54).

   Note: You may need to change the primary contact person at this point. See *Maintaining community members* in the **Community** manual.

3. Click to transfer the student from an enquiry to a future student.

   The **Create Future Student** wizard runs. The status of the applicant is changed to Future Student. See *Creating future students* (on page 85).

   The future student record includes all the information entered at the time of the initial enquiry. Use the **Future Student Maintenance** windows to add further information. See *Maintaining future students* (on page 73).
4. You can select the priority to be given to the application using criteria such as a sibling at school, a parent is a staff member and so on. This priority is used as one criterion in the ranking process. See *How ranking works* (on page 383).
5. In addition, you can:
   - Create an enrolment application for a future student. See *Creating future student enrolment applications* (on page 118).
   - Modify an enrolment application. See *Modifying future student enrolment applications* (on page 121).
   - Add enrolment applications in bulk. See *Creating future student applications in bulk* (on page 124).

How ranking works

If you have fewer places available than students who have applied, then you offer places based on the student's ranking. Prospective students are ranked **one** to **n** based on a combination of their:

- year, campus and year level
- status ranking group
- priority
- date of original application or subsequent application, depending on the configuration
- gender, depending on the configuration.

Manual versus automatic ranking

If your organisation ranks prospective students automatically:

- The future student's details and relationships are checked and a priority assigned to them. For example, the following relationships are checked:
  - siblings who are current students
  - parents or guardians who are staff members.
- If their details or relationships change later, the changes trigger a re-evaluation and a new priority may be assigned to them.
- Future students who do not match any of the other priorities are assigned a priority of **Normal**.

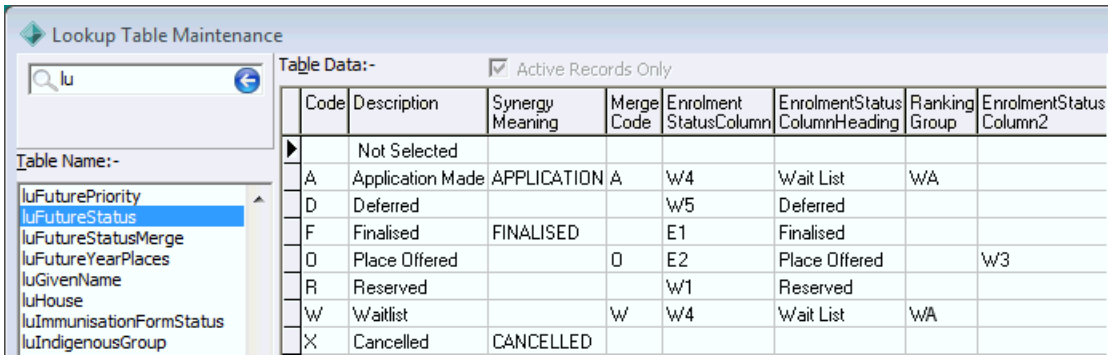
Note: The **AutoUpdate** configuration setting determines whether your organisation ranks prospective students automatically or not. See *AutoUpdate configuration setting* in the System maintenance manual.

You maintain the valid values for the status and priority in Synergetic lookup tables:

- **luFutureStatus**
- **luFuturePriority**.

luFutureStatus lookup table

In the **luFutureStatus** example below, **A** and **W** can be set to the same ranking group.

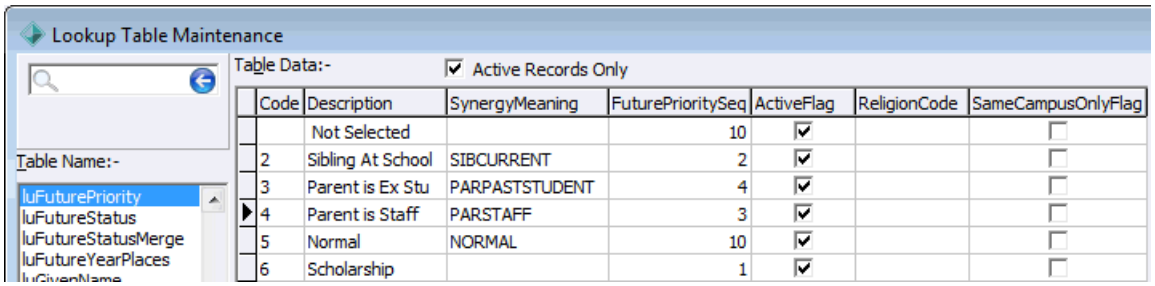


Code	Description	Synergy Meaning	Merge Code	Enrolment StatusColumn	EnrolmentStatus ColumnHeading	Ranking Group	EnrolmentStatus Column2
	Not Selected						
A	Application Made	APPLICATION	A	W4	Wait List	WA	
D	Deferred			W5	Deferred		
F	Finalised	FINALISED		E1	Finalised		
O	Place Offered		O	E2	Place Offered		W3
R	Reserved			W1	Reserved		
W	Waitlist		W	W4	Wait List	WA	
X	Cancelled	CANCELLED					

Note: The SynergyMeaning of a **luFutureStatus** entry also influences ranking.

See *luFutureStatus lookup table* in the System maintenance manual.

luFuturePriority lookup table



In the **luFuturePriority** lookup table you specify the numeric priority (**FuturePrioritySeq**) given to each entry. The lower the number, the higher the priority. In the example shown, a student receiving a scholarship has the highest priority of 1, as they have been definitely awarded a place.

See *luFuturePriority lookup table* in the System maintenance manual.

Transferring future students to current students

When the time comes for new students to be introduced to your organisation, you need to transfer confirmed future students with their existing details and make them current students.

Before transferring the students:

- Update the application of any future students who cancel next year's enrolment. See *Updating a cancelling future student's application* (on page 386).
- Update the application of any future students who defer their enrolment to a later year. See *Updating a deferring future student's application* (on page 388).

You can either transfer future students individually or you can transfer a group of students in bulk. To transfer:

- An individual student, see *Transferring individual future students to current students* (on page 391).
- A group of students, see *Transferring future students in bulk to current students* (on page 394).

Updating a cancelling future student's application

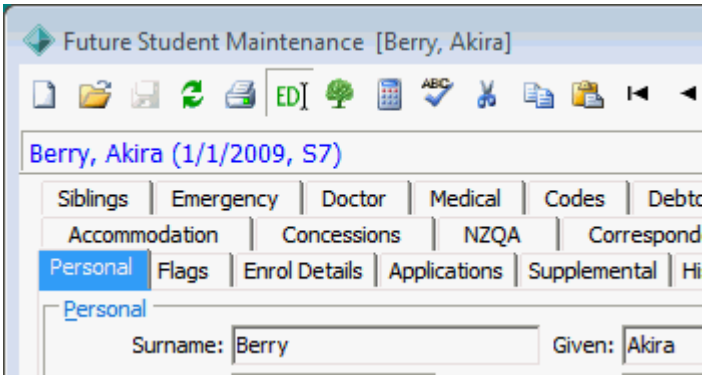
If a confirmed future student cancels, update their application **before** the new academic year is created so that they are not transferred to current students.

> **Note:** If a confirmed future student cancels **after** the new academic year has been created, you need to remove them from the new academic year manually. See *Removing a confirmed future student who cancels after the new year is created*.

To cancel a future student's application:

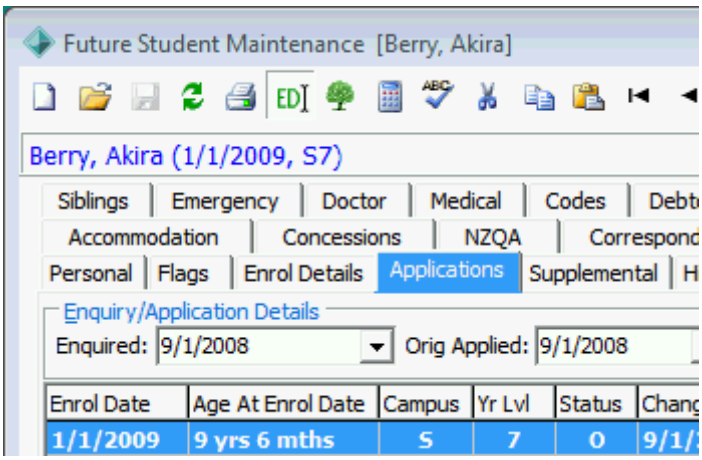
1. Search for the student in **Future Student Maintenance**. See *Searching for future students* (on page 78).

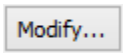
   The **Personal** tab of the **Future Student Maintenance** window is displayed.



2. Click the **Applications** tab.

   The **Applications** tab of the **Future Student Maintenance** window is displayed. See *Future Student Maintenance - Applications tab* (on page 113).

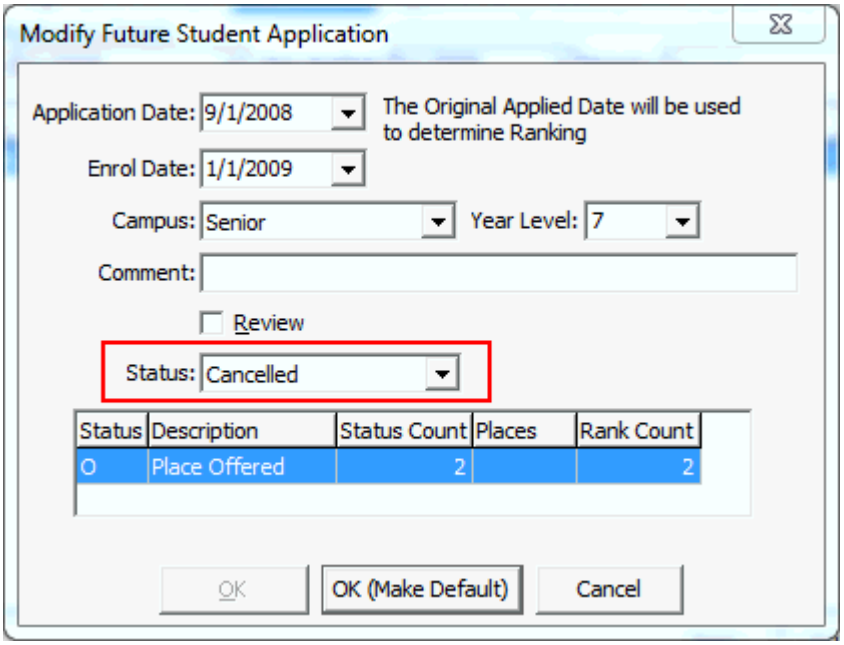


3. Click 

.

   The **Modify Future Student Application** window is displayed.

4. Select **Cancelled** from the **Status** drop-down list. See *Modifying future student enrolment applications* (on page 121).



5. Click .

The **Applications** tab of the **Future Student Maintenance** window is displayed.

Updating a deferring future student's application

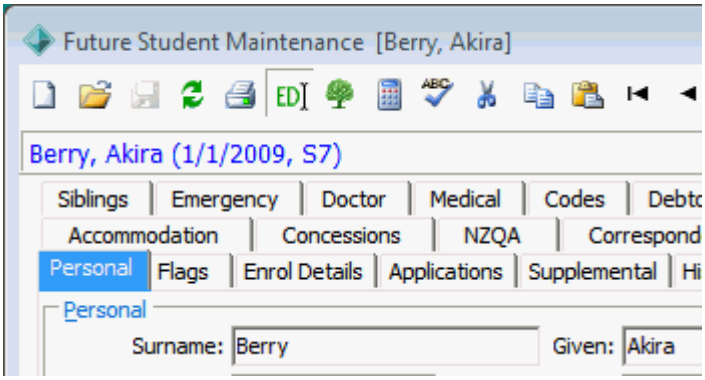
If a confirmed future student defers, update their application **before** the new academic year is created so that they are not transferred to current students.

> **Note:** If a confirmed future student defers **after** the new academic year has been created, you will need to remove them from the new academic year manually and perform other steps. See *Removing a confirmed future student who defers after the new year is created* in the Curriculum or Next year process manual.

To defer a future student's application:

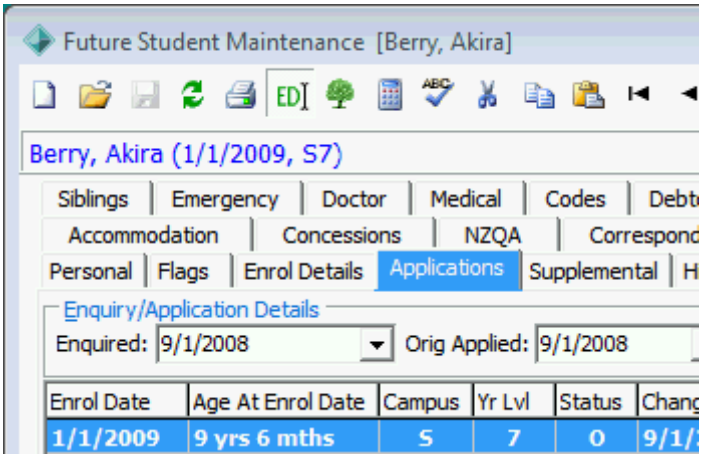
1. Search for the student in **Future Student Maintenance**. See *Searching for future students* (on page 78).

   The **Personal** tab of the **Future Student Maintenance** window is displayed.



2. Click the **Applications** tab.

   The **Applications** tab of the **Future Student Maintenance** window is displayed. See *Future Student Maintenance - Applications tab* (on page 113).

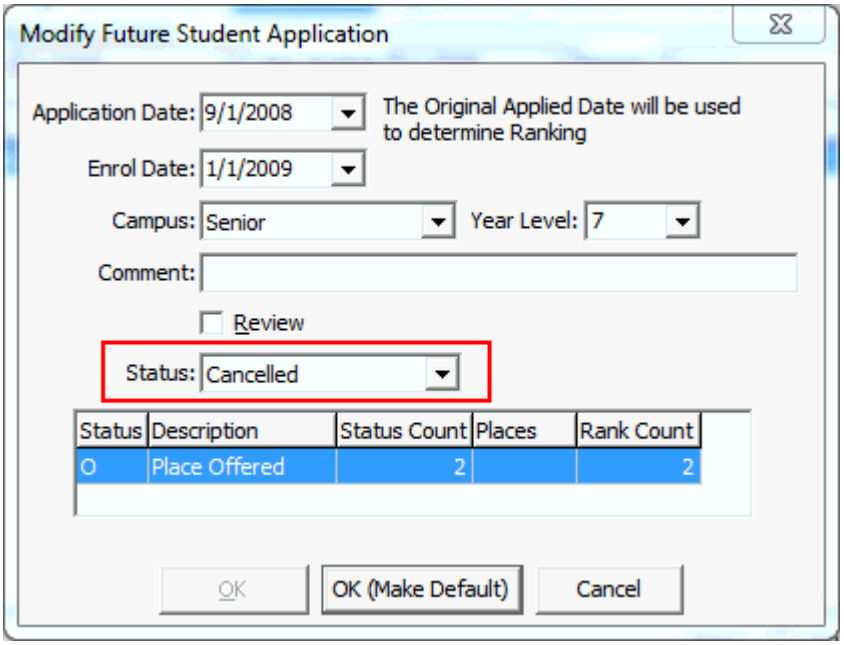


3. Click

.

   The **Modify Future Student Application** window is displayed.

4. Select **Cancelled** from the **Status** drop-down list. See *Modifying future student enrolment applications* (on page 121).

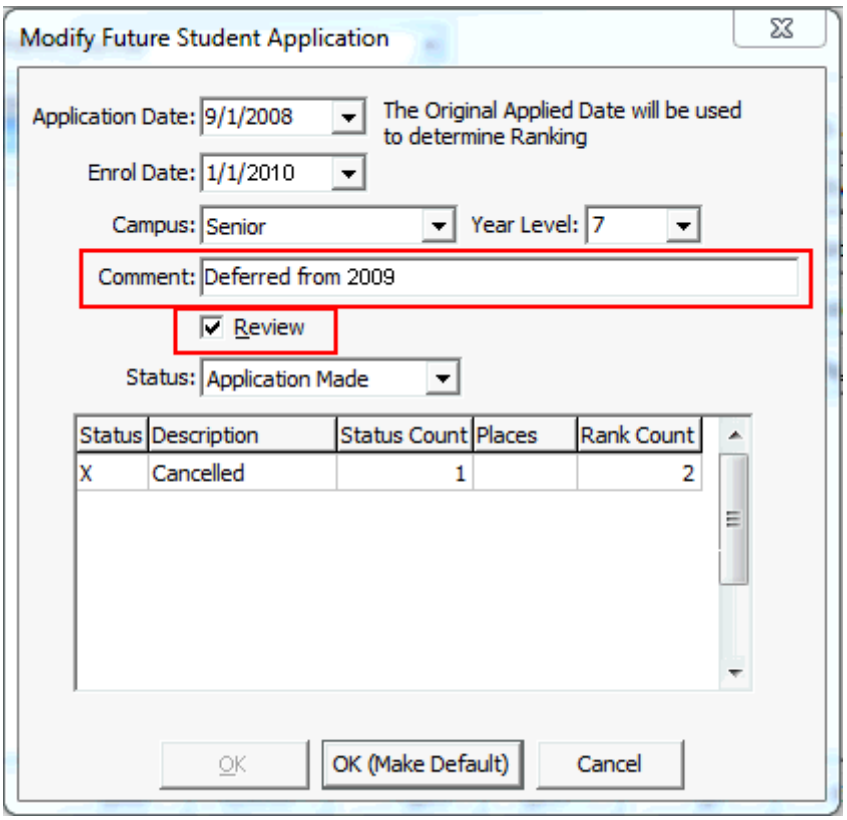


5. Click .

The **Applications** tab of the **Future Student Maintenance** window is displayed.

6. Create a new enrolment application, according to your organisation's policy for deferred applications. For example, you might:
   - set the **Application Date** to the application date of the original application
   - add a **Comment** that the application is deferred
   - select the **Review** field for further follow up.

   See *Creating future student enrolment applications* (on page 118).



Transferring individual future students to current students

To transfer an individual future student to current students:

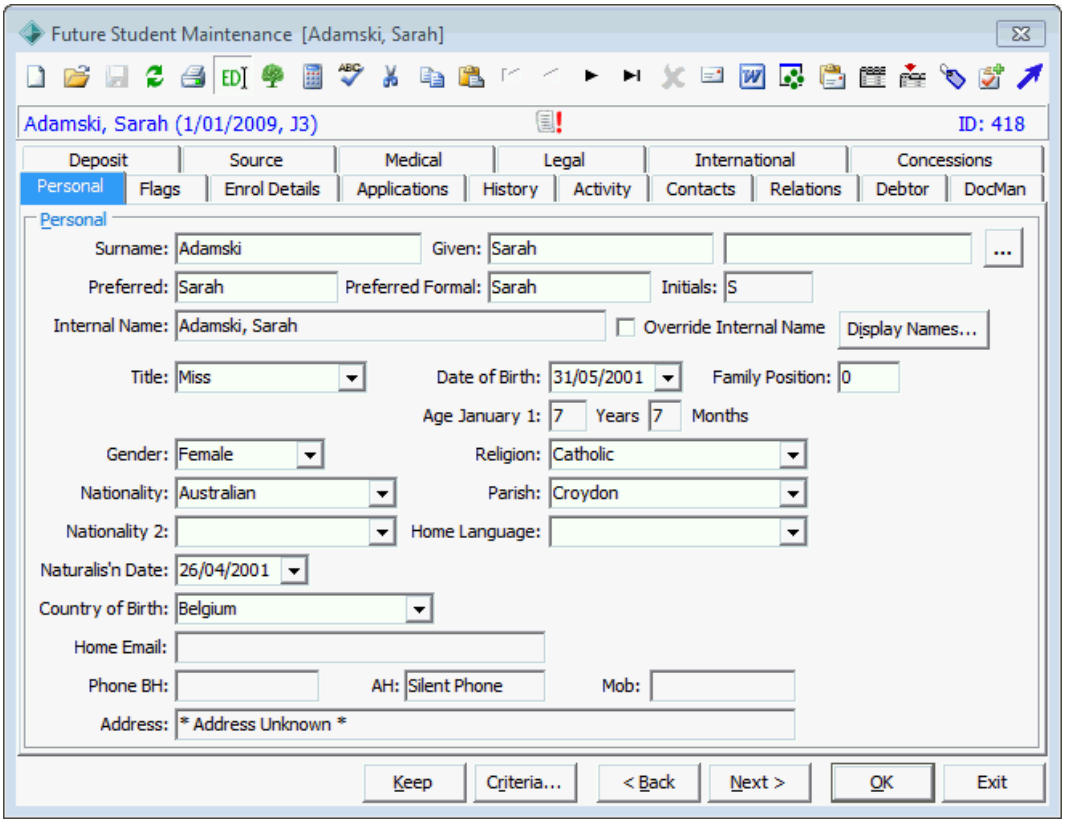
1. Select **Module > Future Students > Future Student Maintenance** from the main menu.

   The **Set Future Student Search Criteria** window is displayed.

Tip: You can also access the future student functions by clicking

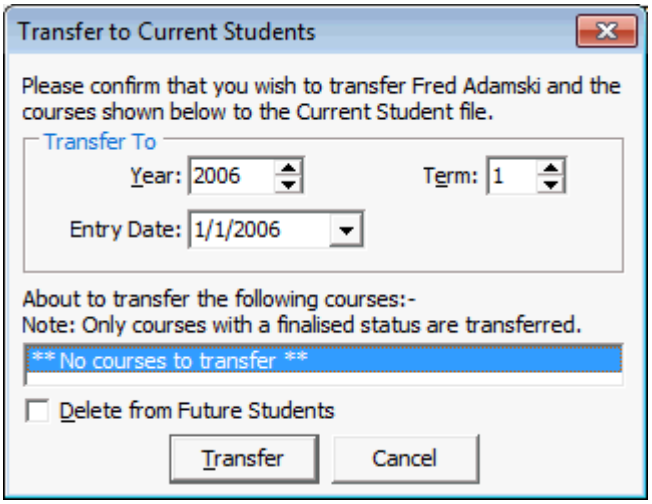
.

2. Select the future student. See *Searching for future students* (on page 78).
3. The **Personal** tab of **Future Student Maintenance** is displayed.



4. Click the transfer icon .

   The **Transfer to Current Students** window is displayed.



5. Select the **Delete from Future Students** field, if required at your organisation.

Transfer to Current Students window key fields

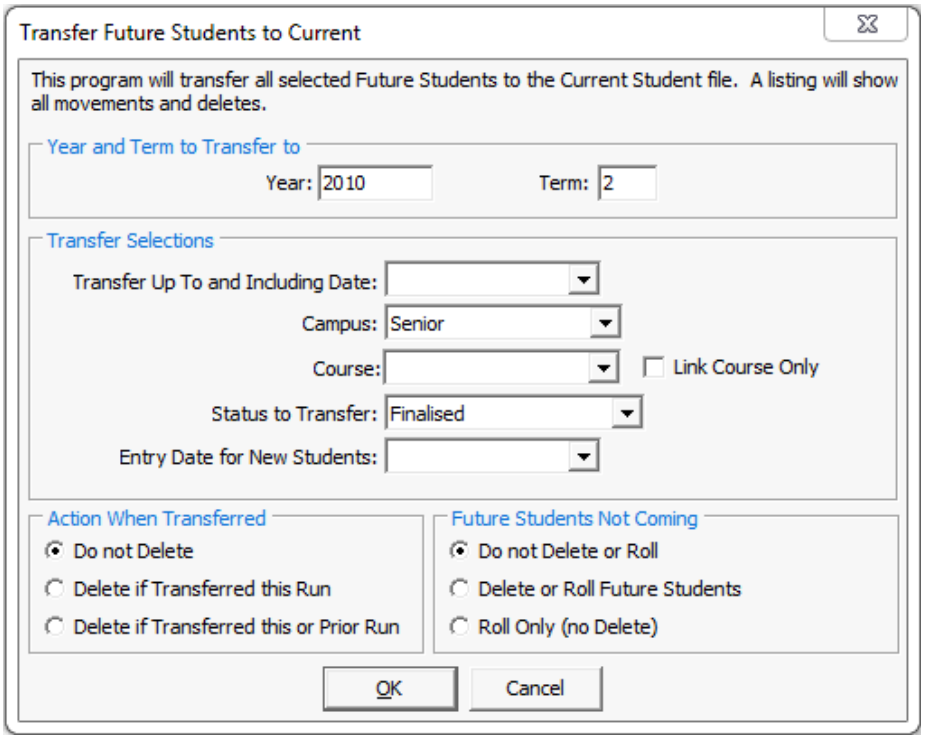
Field	Description
Year / Term	Year and term when the current student will commence at your organisation.
Entry Date	Entry date for the future student being transferred. Generally, they are transferred into the first day of the semester.
Delete from Future Students	Select to delete the record from future students. **Tip:** We recommend that you transfer without deleting at the end of the current year for the next year. Then in the next year, delete those not coming. Some organisations leave students in future students while they are of school age. However, due to the archive capability this is not normally required.

Transferring future students in bulk to current students

To transfer a group of future students to past students:

1. Select **Module > Future Students > Transfer Future Students to Current Student File**.

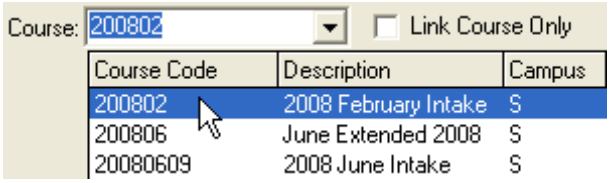
   The following dialog is displayed.



2. Enter the **Year** and **Term** to transfer to.
3. In the **Transfer Selections** area, select the set of student records to transfer using the date and schooling options.
4. In the **Action when transferred** area, select what to do with the old future student records after the transfer.

   If you do not delete these files, they will still be linked to the current student files. Deleted future student records can still be accessed via the **Future Student Archive**. See *Searching for future students* (on page 78).
5. In the **Future Students not coming** area, select what to do with the records of students who decline the offer of a place.

Transfer Future Students to Current window key fields

Field	Description
Year and Term to Transfer to	Year and term when the current students commence at your organisation.
Transfer Up To and Including Date	Transfer students up to and including the **To Start on** date field on the **Enrol Details** tab of **Future Student Maintenance**. See *Future Student Maintenance - Enrol Details tab* (on page 108).
Campus	Campus where the future student is enrolled. Leave blank to transfer the student regardless of the entry campus.
Course	Course that the future student is enrolled in.  Leave blank to transfer the student regardless of the course.
Link Course Only	Select the common course that feeder courses link to. For example, a main course may have a feeder course that starts earlier or later than the actual main course. The default value is its own course code. **Tip**: You can update the **Prior Course** field on the **Enrolment** tab of **Course Details Maintenance**. See *Course Details Maintenance - Enrolment tab*.
Status to Transfer	Status of the future students to be transferred. Typical values are: • **Application Made** • **Deferred** • **Finalised** • **Place Offered** • **Reserved** • **Waitlist** • **Cancelled**. **Note:** Generally, future students are only transferred to the current student file if their status is **Finalised**. Otherwise, select the students with a particular status to be transferred. Your organisation may use another status to determine students to be accepted into your organisation. This is maintained in the **luFutureStatus** lookup table. See *luFutureStatus lookup table* in the System maintenance manual.

Field	Description
Entry Date for New Students	Entry date for all future students transferred on this run. Generally, they will be transferred into the first day of the semester. **Note:** This is stored in the **Entry Date** field on the **Entry** tab of the **Current Student Maintenance** window. See *Current Student Maintenance - Entry tab* in the Current students manual.
Action when transferred	Action to be taken with the records in the future student database after the transfer.
Future Students Not Coming	The records for the future students who have enrolled at your organisation but have decided not to continue with their enrolment can either be: • deleted • rolled • left in the database for future reference. For example, the student may change their mind and enrol at your organisation again. Select the relevant **Future Students not coming** radio button to make your selection. Rolling future students not coming uses the 2nd and 3rd choice enrolments on the **Supplemental** tab in **Enquiry Student Maintenance**. If the first choice enrolment ended with a status other than that of **Finalised**, then the 2nd choice enrolment is rolled up to the 1st choice. **Tip:** We recommend that you transfer without deleting at the end of the current year for the next year. Then in the next year, delete those not coming. Some organisations leave students in future students while they are of school age. However, due to the archive capability this is not normally required.

Printing out transferred students

After the transfer has been run, Synergetic prints a list of all of the students that were affected by the transfer. The list shows ID, name, campus, year level, application date, enrolment date and the process types. The list can show multiple processes.

The process types are as follows:

- T = Transferred to Current Students
- D = Deleted from Future Students
- R = Future Student Enrol Details Rolled Up (if using multiple applications).

Transferring future student scholarship information to current students

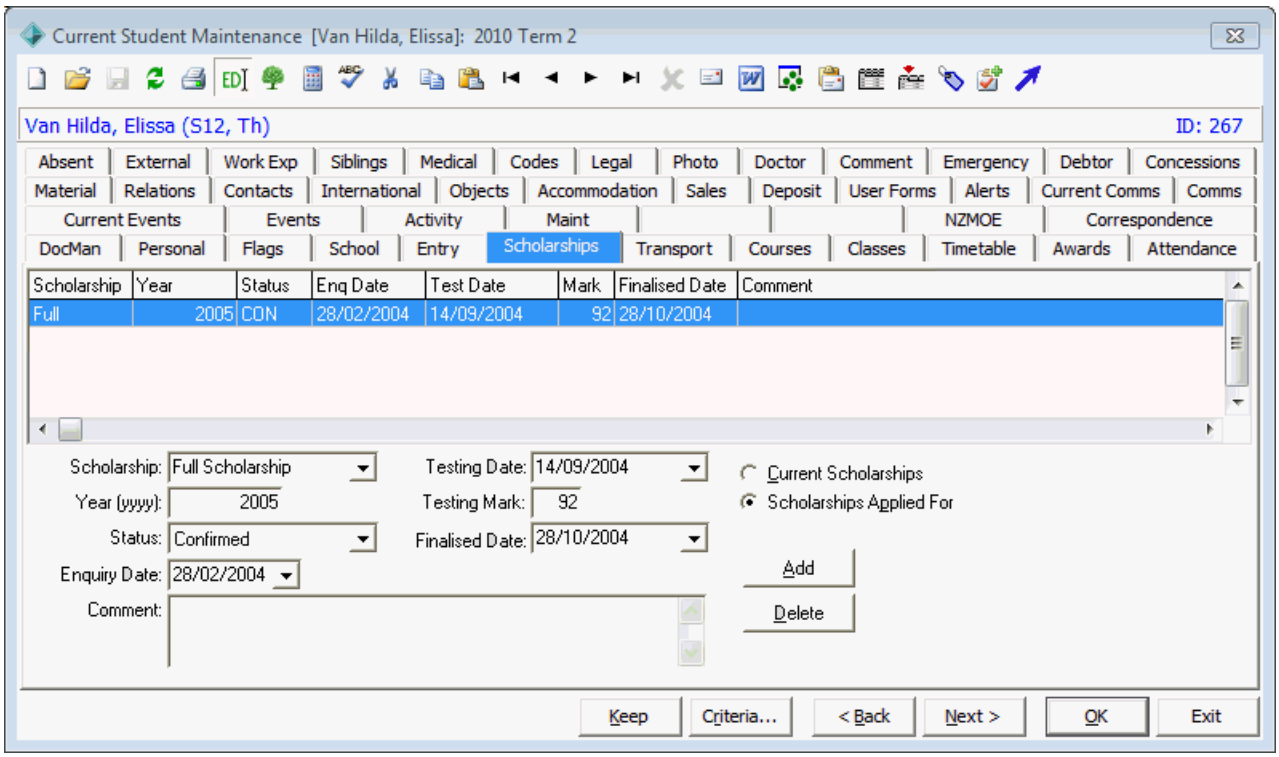
If a future student is offered a scholarship it is possible to record this information in the future student record and it will be automatically transferred when the future student becomes a current student record. See *Transferring future students to current students* (on page 385).

Only scholarships with the following conditions are automatically transferred.

1. The scholarship must have a Synergy Meaning of CONFIRMED in the **luScholarshipStatus** lookup table. See *Maintaining lookup tables* in the System maintenance manual.
2. The scholarship must exist in the current year that the future student is being transferred into. For example, a future student may be awarded a scholarship in 2005. If the future student is transferred to become a current student in 2006, this scholarship information will not be transferred automatically as the scholarship is only applicable to 2005. Scholarship information for 2006 must be entered manually.

Scholarships that comply with both of the above conditions are transferred into the current student record and display when **Current Scholarships** is selected.

If a scholarship does not comply with both of the above conditions it will display when **Scholarships Applied For** is selected in the current student record.



Archiving a future student

If required, you can remove a future student from the future student constituency and place all of the details into an archive. If sometime in the future, you attempt to create a new future student whose details match those of the archived student, you can choose to restore the archived student. See *Restoring a future student from the archive* (on page 401).

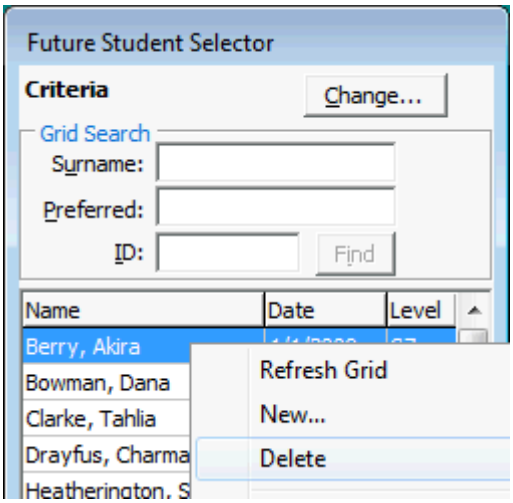
To remove a future student from the future student constituency and archive the student details:

1. Run a search to find the student or students who you want to archive. See *Searching for future students* (on page 78).

   The students that match your search criteria are displayed in the **Future Student Selector** window.

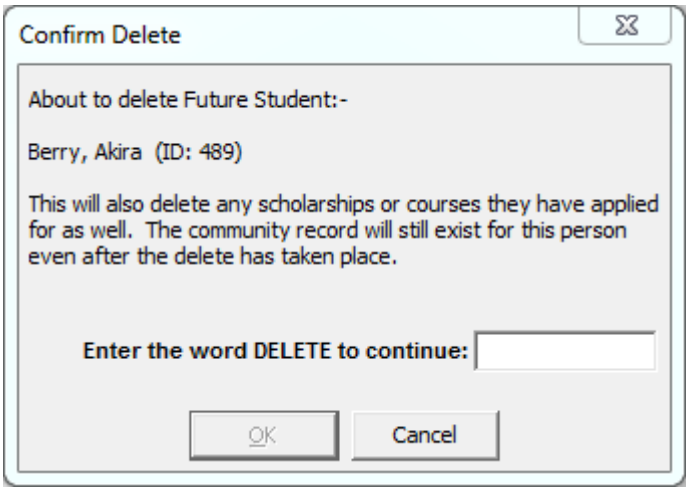
2. Right click on the student records that you want to archive.

   The following menu is displayed.



3. Select **Delete**.

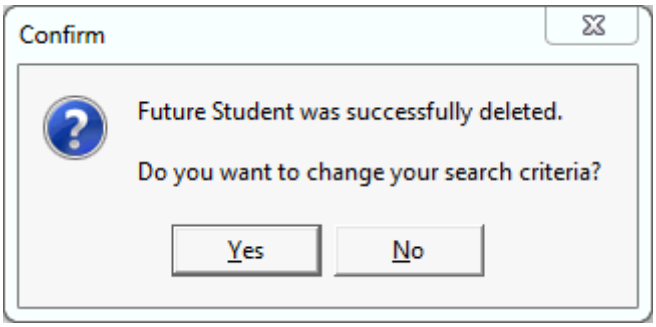
   The following confirmation window is displayed.



4. Type the word **delete** in the confirmation field.

5. Click OK.

   The following window is displayed.



Note: Future students are automatically archived when they are transferred or deleted. To restore a future student from the archive, see *Restoring a future student from the archive* (on page 401).

6. Either click:

   - Yes to run another search
   - No to close the dialog box.

Restoring a future student from the archive

The details of a future student who has been deleted from the future student constituency are placed in an archive.

To restore a future student from the archive:

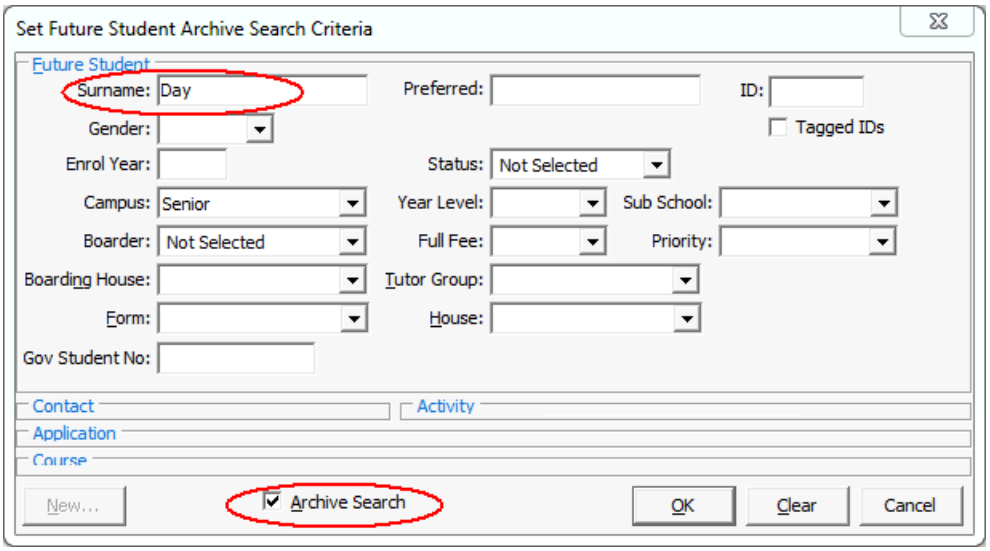
1. Select **Module > Future Students > Future Student Maintenance**.

   The **Set Future Student Search Criteria** window is displayed.

2. Type in identifying information about the student. For example, the surname **Day**.

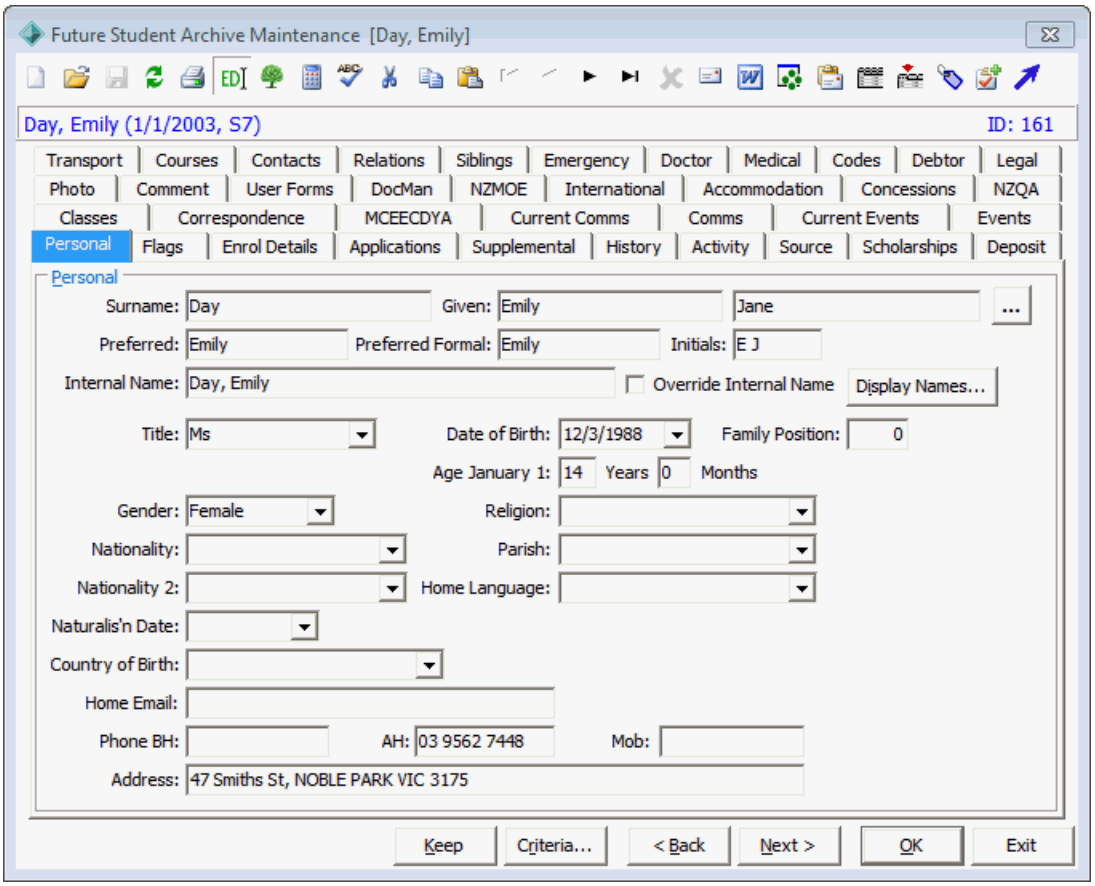
3. Select the **Archive Search** field.

   The window changes its name to the **Set Future Student Archive Search criteria** window.



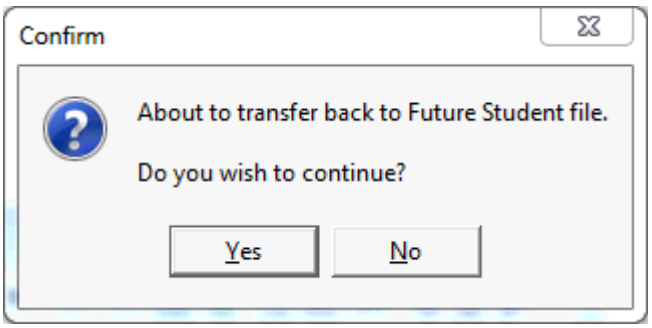
4. Click OK.

   The **Personal** tab of the **Future Student Maintenance** window is displayed.



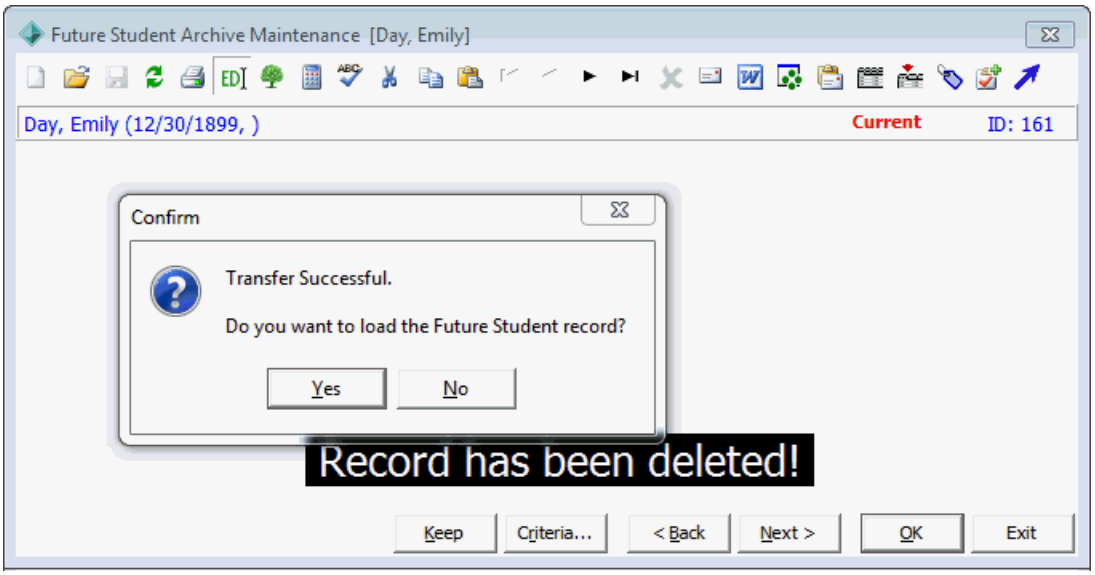
5. Click the transfer icon .

   The following dialog box is displayed.



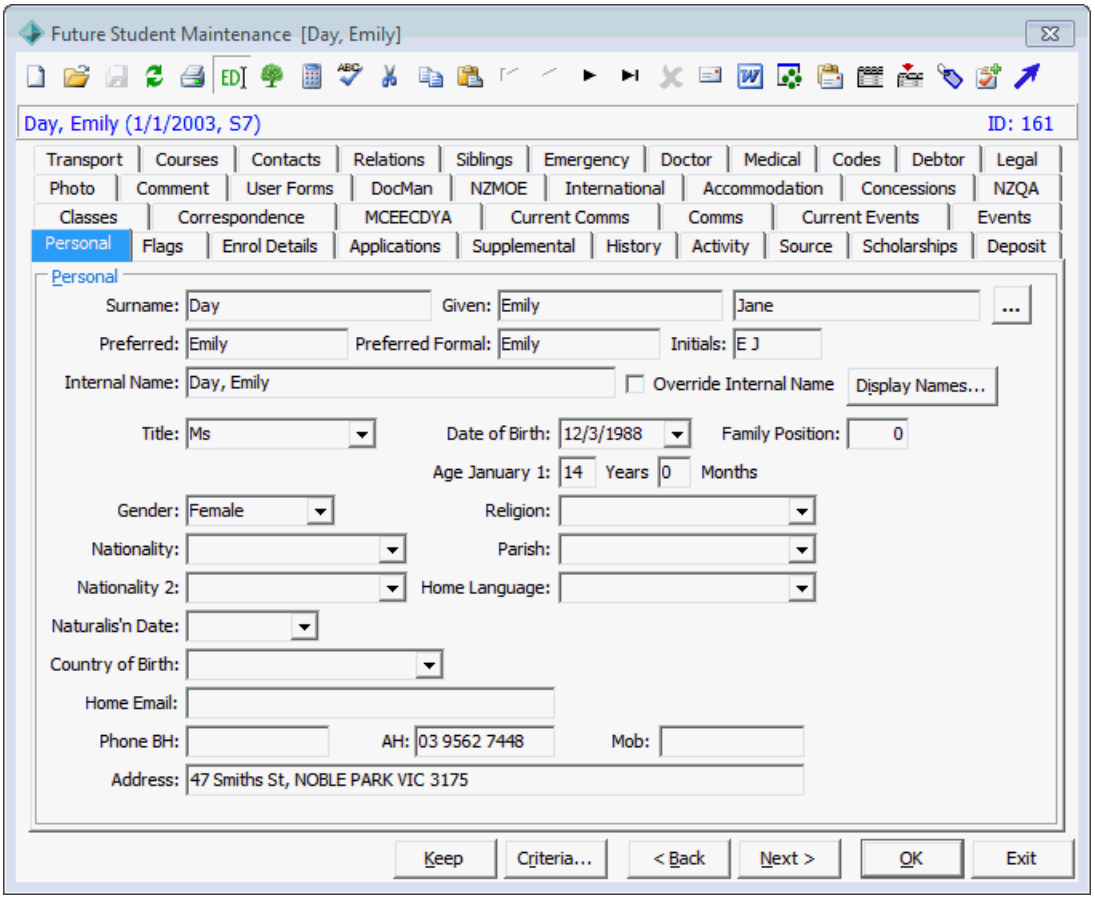
6. Click Yes to confirm transferring the archived student back to future students.

   The following dialog box is displayed.



7. Click Yes to confirm loading the future student record.

   The **Personal** tab of the **Future Student Maintenance** window is displayed.



8. Update the future student details, as required. See *Maintaining future students* (on page 73).

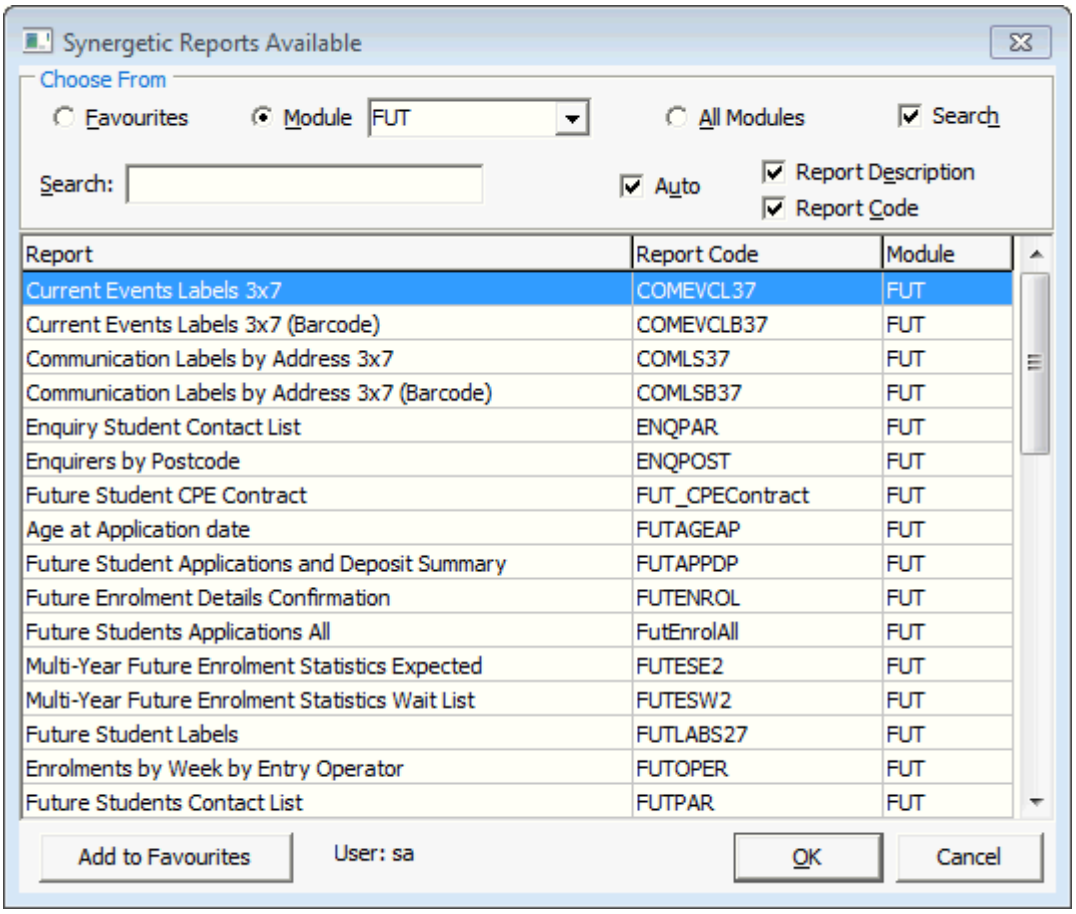
Key future student reports

There are a number of standard reports available to you to help you manage your future students. See the folder of Crystal Reports supplied to your organisation.

To access these reports, select **Module > Future Students > Future Student Crystal Reports Available**. See *Running reports* in the Introduction manual for general information on how to run reports in Synergetic.

Tip: You can also access the future student functions by clicking

.



Description of standard reports

Report	Description
Enquiry Student Contact List	Contact list for enquiries.
Age at Application date	Future students and how old they were when the application was made.
Multi-Year Future Enrolment Statistics Expected	Statistical analysis of future student data. Calculates the expected count of students for a given year.
Multi-Year Future Enrolment Statistics Wait List	Statistical analysis of waitlisted students by year level.
Future Students Contact List	Future students and their contact details.
Future Students by Default Status	List of future students by the default status.
Future Students by Application Status	List of future students by the application status.
Future Students Summary by Year Campus and Level	Group by year level with a count of students.
***Future Students Enrol All**	Enrols all future students, including archived future student records.

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