

## ENTERING AN INQUIRY

When someone expresses interest in a YFU program, information should be entered into the Inquiry System, allowing YFU to track communication and progress with that potential participant.

Tip!  
Send an email to the staff person who should know that there's a new hot lead.

### ENTERING OR CHANGING A SINGLE INQUIRY

From the front of my.yfu.org, in the top menu bar, click on "Inquiry", and then in the left sidebar, click on "New."



### BASIC INFORMATION

Enter all data that you have and click "Next" (first/last names, zip code, country are required).

### POSSIBLE DUPLICATE ENTRY DETECTED

If a person with the same or similar name already exists in my.yfu.org, you will be asked to link your inquiry to that person if appropriate.

In cases where there is more than 1 duplicate record, look to the right "Affiliations" column and select the record that identifies a role (e.g. Friend, Volunteer, Staff) rather than "Inquiry."

Choose	Relationship to Selected Person	Full Name	BirthDate	Mailing Address	Affiliations
<input type="radio"/> Your Entry		Test Test			
<input type="radio"/> Same Person	Choose Relationship ▾	Erin Test		Bethesda MD 20817	Inquiry
<input type="radio"/> Same Person	Choose Relationship ▾	Neil Test AKA:Neil Test		6401 Goldsboro BETHESDA, MD 20817	Friend of YFU

### ADDRESSES

Enter as much contact information as you have and click "Next."

If you do not have a mailing address, click "Use only zip."

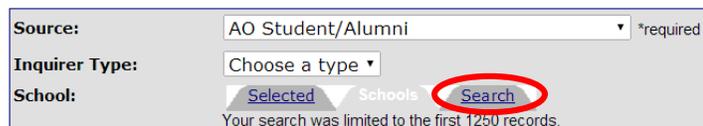
Tip!  
The "Send Mail" check box identifies this as the primary mailing address.

### SOURCE, TYPE, SCHOOL

Source: this is critical to track how inquiries come to YFU.

Inquirer Type: If unsure, simply skip.

School: If unsure, simply skip or click on the "Search" tab to find the school.



The screenshot shows the following form fields: Source: AO Student/Alumni (dropdown menu, marked as \*required); Inquirer Type: Choose a type (dropdown menu); School: Selected (dropdown menu) and Search (button, circled in red). Below the fields, it says "Your search was limited to the first 1250 records."

## ADD A CATEGORY, COMMENT AND ASSIGNMENT

Category: You can select more than 1 category of inquiry.

For Community College, Adult Programs or Alumni Programs, select "Other" and click the drop-down menu.

Materials: Standard **Host Family**, **Volunteer** and/or **Study Abroad** materials are mailed unless you select "Customize Materials" or "No Materials."

Category	Subcategory
<input type="checkbox"/>	Study Abroad
<input checked="" type="checkbox"/>	Host Family
<input type="checkbox"/>	Presentation
<input checked="" type="checkbox"/>	Volunteer
<input checked="" type="checkbox"/>	Other

Community College  
 Adult Programs  
**Alumni**

Tip!  
"Presentation" indicates a school or group that wants a YFU presentation.

To add an interest, check at least one category above and select what materials to send:

Standard Materials  
 Customize Materials  
 No Materials

If you select "Customize Materials" you can indicate the quantity of each item you would like to have sent.

Comments: Enter additional information about the inquiry.

Users allowed to read: Skip because all staff/volunteers can see all inquiries in a field.

**Inquiry Materials List Editor**  
 Unrequested materials have a quantity of 0. To delete any as-of-yet unselected material, type 0 in quantity.

**Inquiry Categories:** Other, Volunteer and Host Family

Qty	Material	Update	Cancel
<b>Volunteer Materials</b>			
1	Include Volunteer Text in Letter		
1	Volunteer Brochure		
0	Steps to Volunteer		
<b>Host Family Materials</b>			
1	Include HF Text in Letter		
1	HF Q&A		
1	HF Brochure		
0	HF Poster		
0	Steps to Hosting		

Assign to: Generally skip because all staff/volunteers can see all inquiries. If there is someone specific who should make a subsequent call you can assign to that person.

## FINISHED INQUIRY

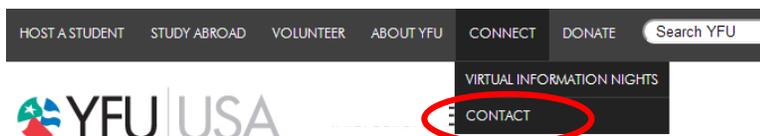
Once the inquiry has been added you can potentially add a "Manual Weight" to the Hotness score. This should only be done by those who are responsible for following up with the inquiry.

Hotness		Minimize
<b>Last Scored:</b>	AO Student/Alumni	1000
<b>Manual Weight</b>	<input type="text"/>	<b>save</b>
<b>Total Score:</b>		

## ENTERING AN INQUIRY WHILE OUT & ABOUT

To enter an inquiry using a tablet or smartphone, go to YFU's public website: [www.yfuusa.org](http://www.yfuusa.org).

In the top menu bar, hover over "CONNECT" and click on "CONTACT."



Under "CONTACT ME" enter the data you have and click "SUBMIT".

Tip!  
Keep the "CONTACT ME" page open on your smartphone.

**CONTACT ME**

I am interested in\*:

youth and young adult study programs

I would like to receive materials and more information from YFU.

**SUBMIT**

## ENTERING OR CHANGING A GROUP OF INQUIRIES

The Inquiry Management Tool (IMT), an excel-based tool, should be used when you need to review, change or add inquiries en masse. Once you have finished adding or editing the data on the spreadsheet, you must email it, thus updating the my.yfu.org Inquiry System.

Log into the YFU wiki and search for "Use the Inq Mgmt Tool". Click on the link to download the Inquiry Management Tool.