Guide to the New Inquiry System

<u>To enter a new inquiry:</u>

Click "new" on the left side of the screen. This will bring up the "create a new person" form. At this point, you must enter their first and last names as well as zip code and country. Note that preferred name, birthdate, and gender are optional. Click "submit" when the form is completed. You may use the "reset" button should you make mistakes on the form and wish to start over.

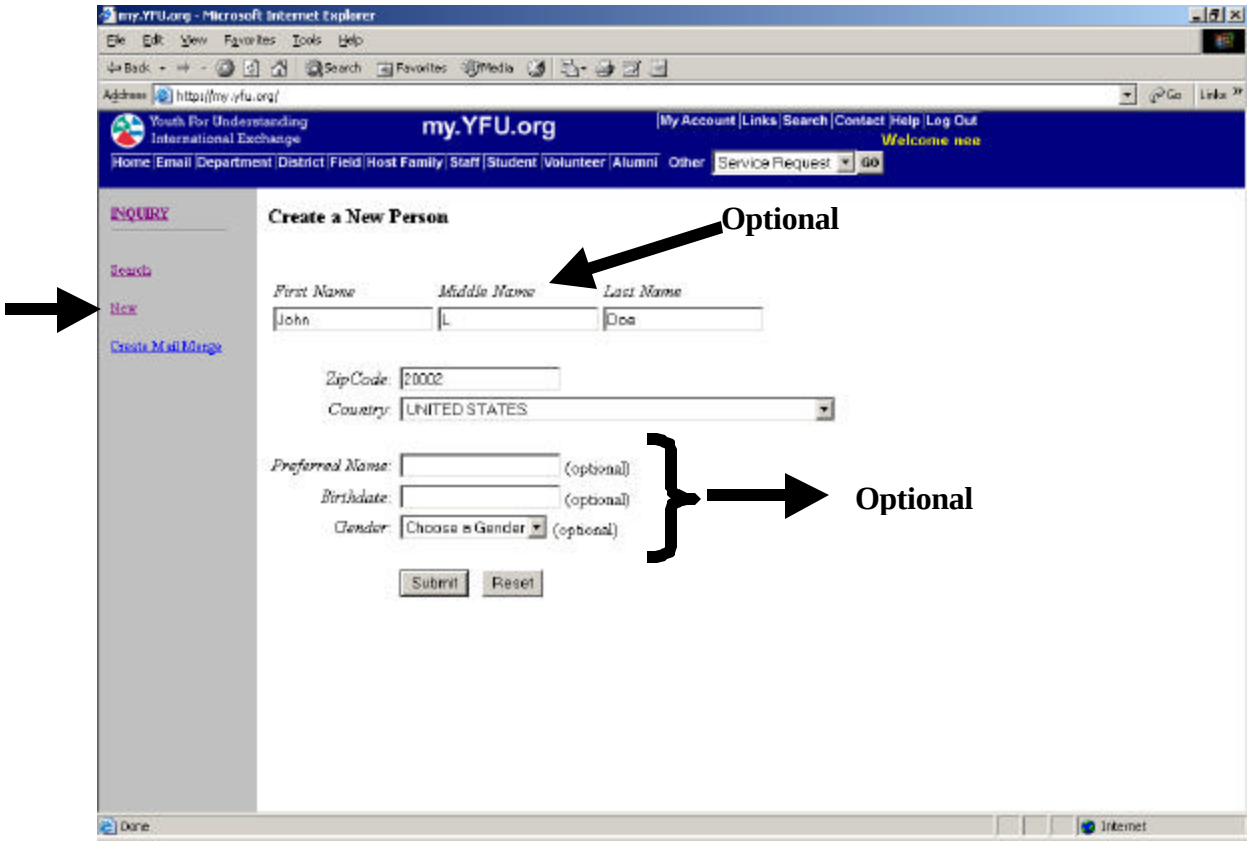


figure 1

2. After clicking "submit" the following page will appear if there is a name already in the system that comes close to your entry. This is to prevent duplication. In the case below, you can see that there are already many of the same entry. If this occurs, please pick the first "existing person" from the tope of the list with the right entry. If none of the existing persons match your entry, click "your entry" to continue.

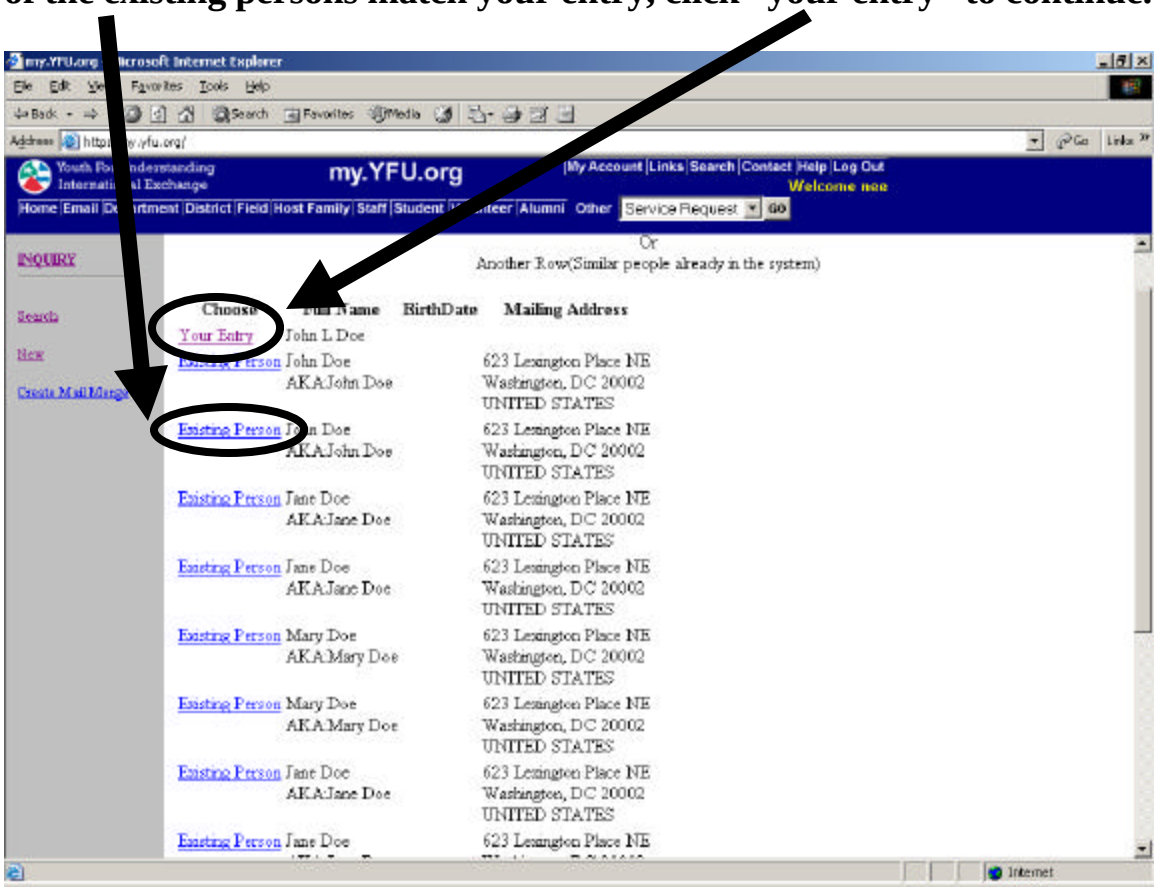


figure 2

3. After selecting the right person in the previous step, you will be given this screen. Using the drop down box, you may indicate if the person is in an apartment, building or suite if it is necessary. If you indicate that the person is in an apartment, building, or suite, you may enter the number of the apt, etc. on the right under Unit Number.

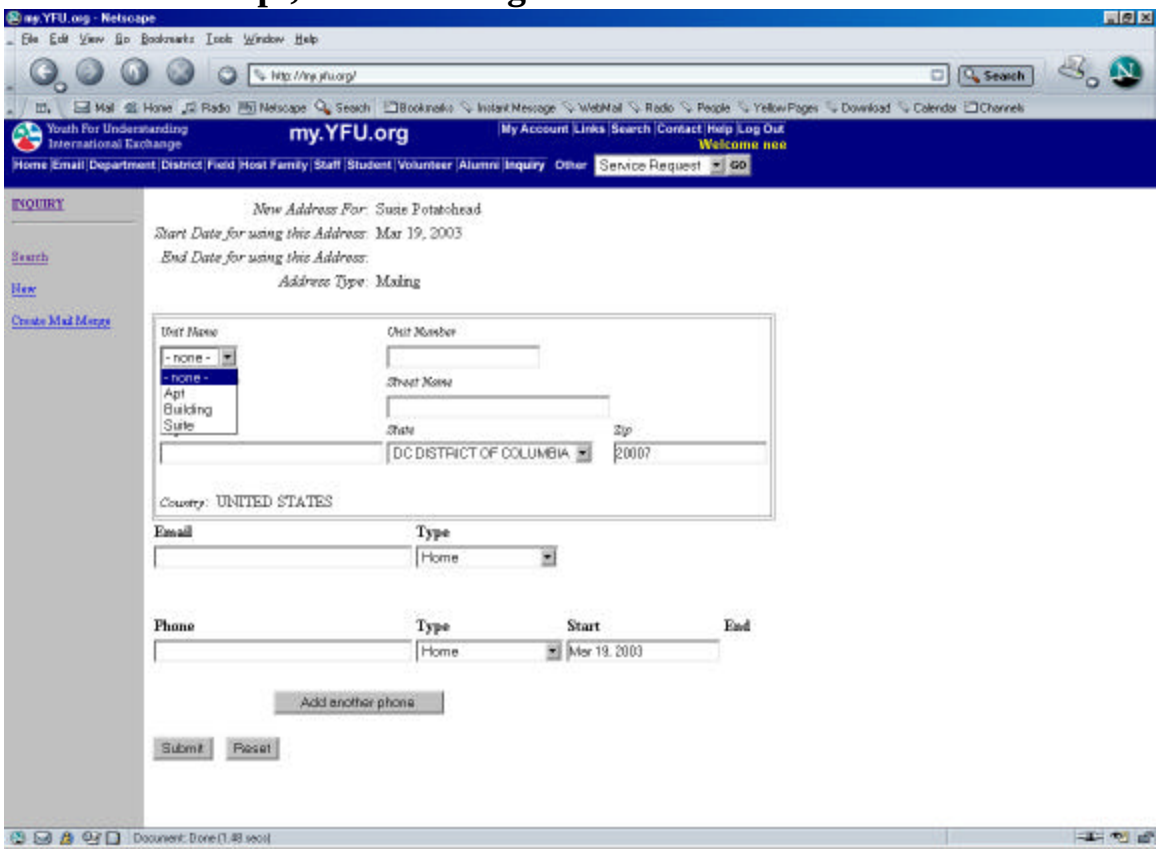


figure 3

4. Continue to fill in the form with the appropriate information in each blank. Note that the site will automatically complete the state and zip code fields for you. Notice that if you wish to enter more than one phone number, you may click on "Add another phone" and another text box will appear. When finished, click "submit". If you make a mistake, press "reset" to clear the form and begin again.

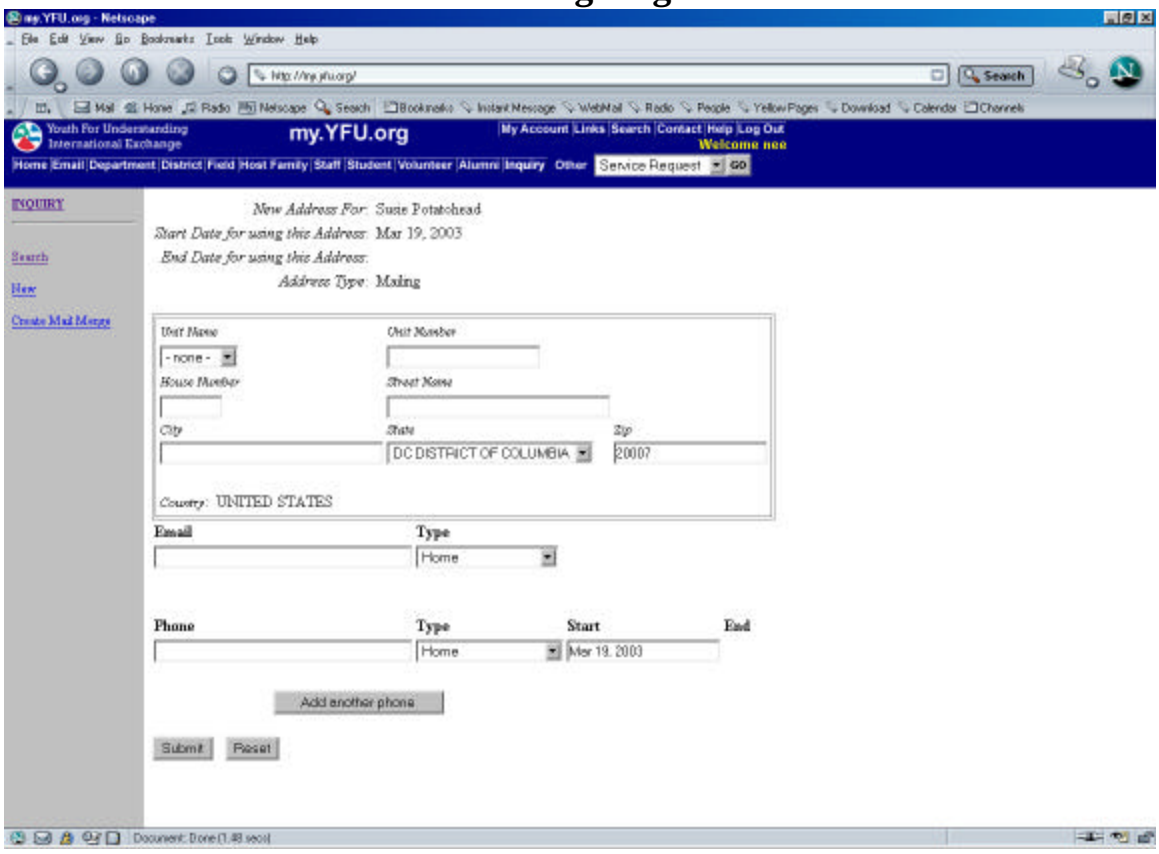


figure 4

5. The screen below shows the next screen to appear. At this time, the system compares your entry with existing entries to eliminate duplication a second time. Note that in the example, "Lexington Pl." was spelled as "Lexingtn Pl." In this instance, the error in spelling has been caught by the computer, and you would choose "existing address" rather than "your entry" seeing as it is, in fact, the same address and person. If you are confident that your entry is different from any other entry shown in the list, click "your entry" to continue. Note that there is only one existing address listed. To the right of this, there is a list of everyone who is registered in the inquiry system from this household, as some people may have the same address.

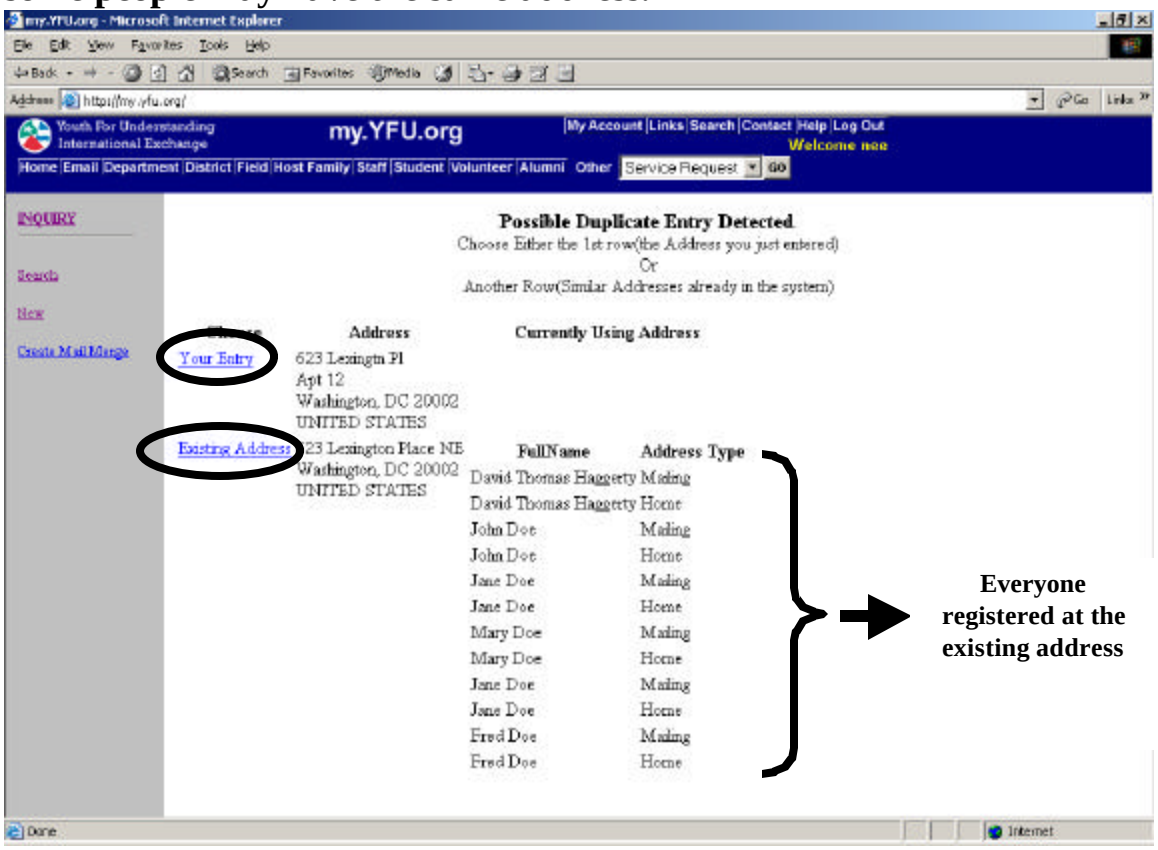


figure 5

6. On the screen below, first, make sure you choose the source of the inquiry. An inquiry without a source will be invalid. Next, choose the categories for which the person would like information. After doing so, clicking "send standard materials" will send the predefined information to the person. If you wish to manipulate what materials are sent, you must click "change materials and send" instead. If you press "send standard materials" you have successfully completed the data entry of the inquiry. If you press "change materials and send", go to step 7.

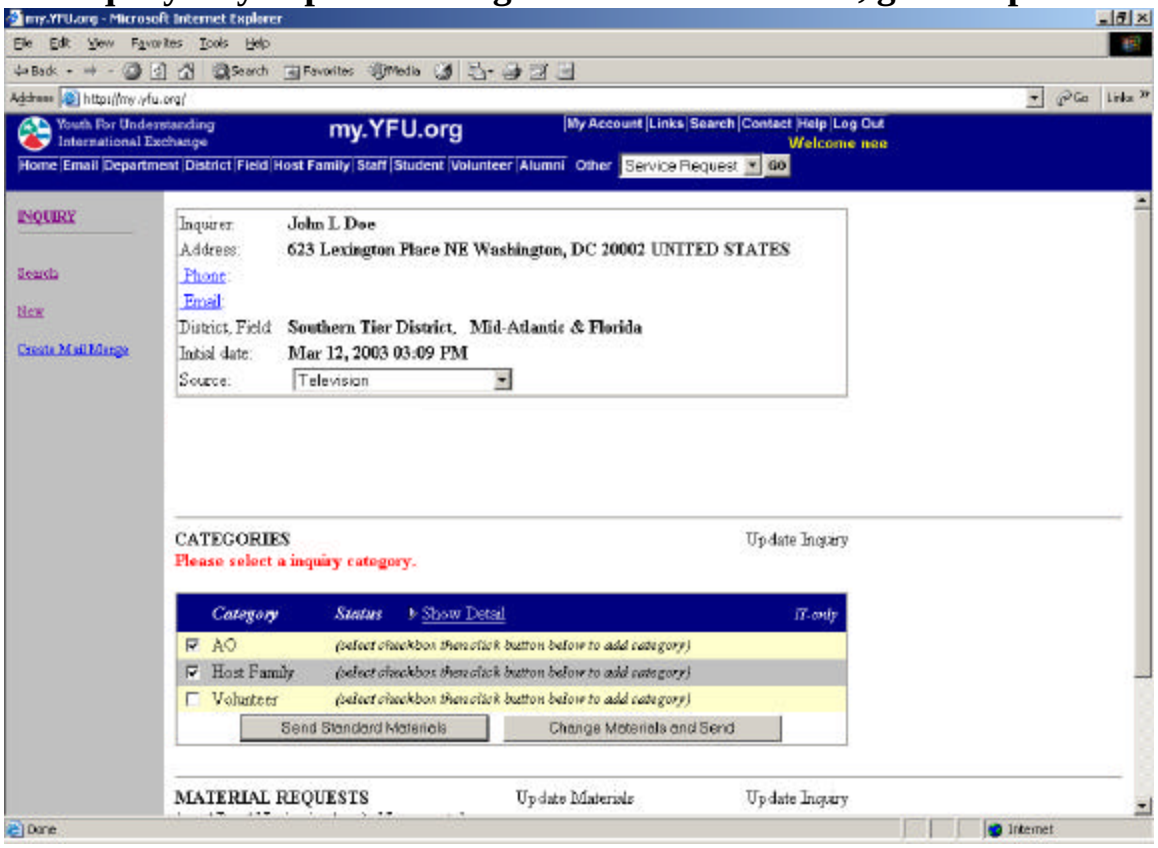


figure 6

7. If you pressed "change materials and send" you will arrive at this screen. This screen will let you manipulate which materials are sent to the person. There is a text field to the left of each material so that an integer number may be entered. If you do not wish to send a material, a zero should be entered. When you are finished changing the quantities, click "update" to complete your selection, or "cancel" if you have decided to go back to the previous screen without sending materials.

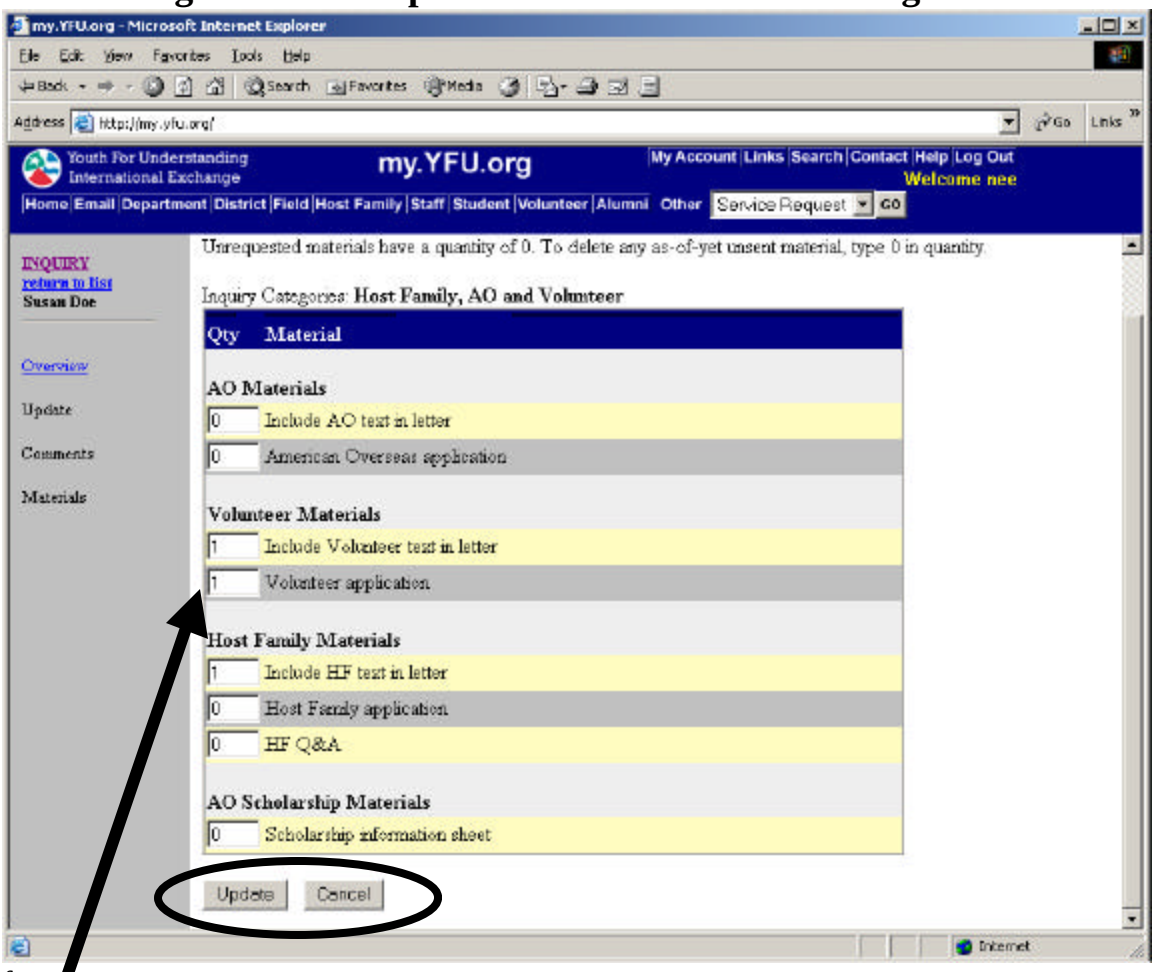


figure 7

Quantities go in these text boxes

To change an existing inquiry:

1. Click on district or field on the top menu bar. Next, select the district or field for which you wish to see inquiries. Click "open inquiries" to view the inquiries for that field or district.

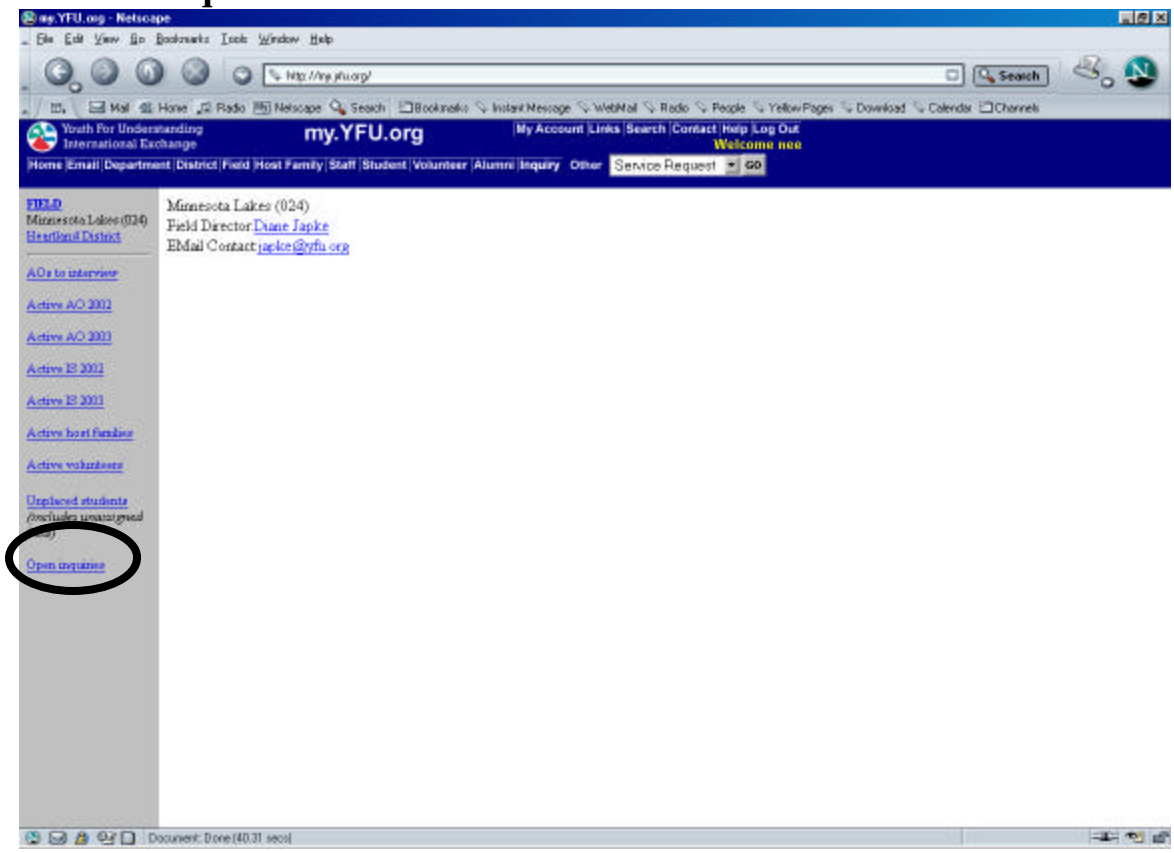


figure 8

2. Select the person for which you were searching from the list by clicking on his or her name.

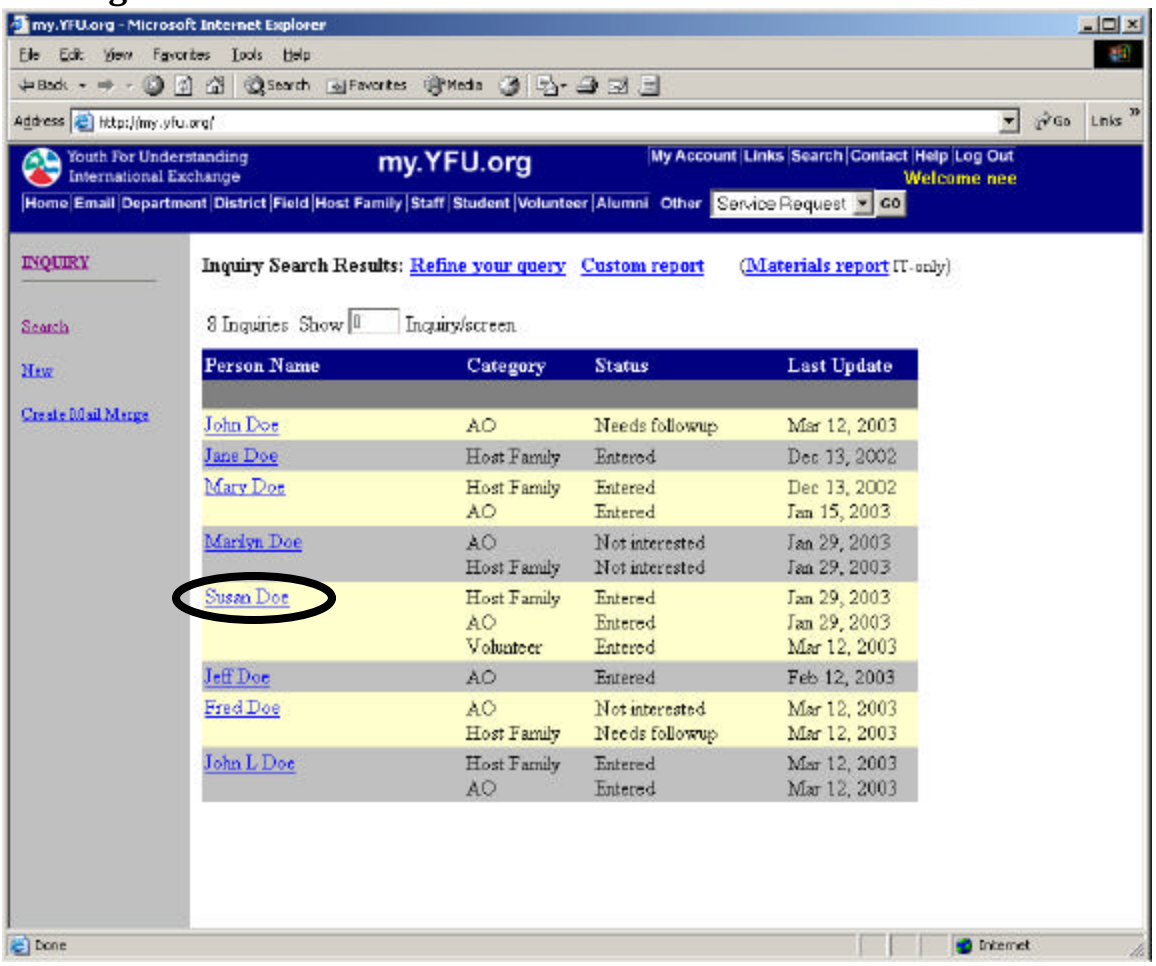


figure 9

3. This will bring up the inquiry screen for that individual. At the top, note that the address, phone number, email, district, initial date of inquiry, and source are listed. As shown in this example, neither and phone number, nor an email have been entered. If you wish to enter these, simply click on the word "phone" or "email". Go to step 3A for further instruction on this. Next, under categories, you see that Host family is separated from AO and volunteer and has a red check. Also note that it has a date next to it and gives the status. This all indicates that this person has already been sent host family materials on the date shown and the status of this inquiry. If you wish to update the status of the Host Family Inquiry, click "update inquiry" in the category area and go to step 3B. If you wish to send the person information on volunteering or AO programs at this time, click the check box next to each. At this point, either click "Send standard materials" to send the preset materials or click "Change materials and send" to edit what materials are sent. Refer to step 7 in the ENTERING A NEW INQUIRY section for more details about this.

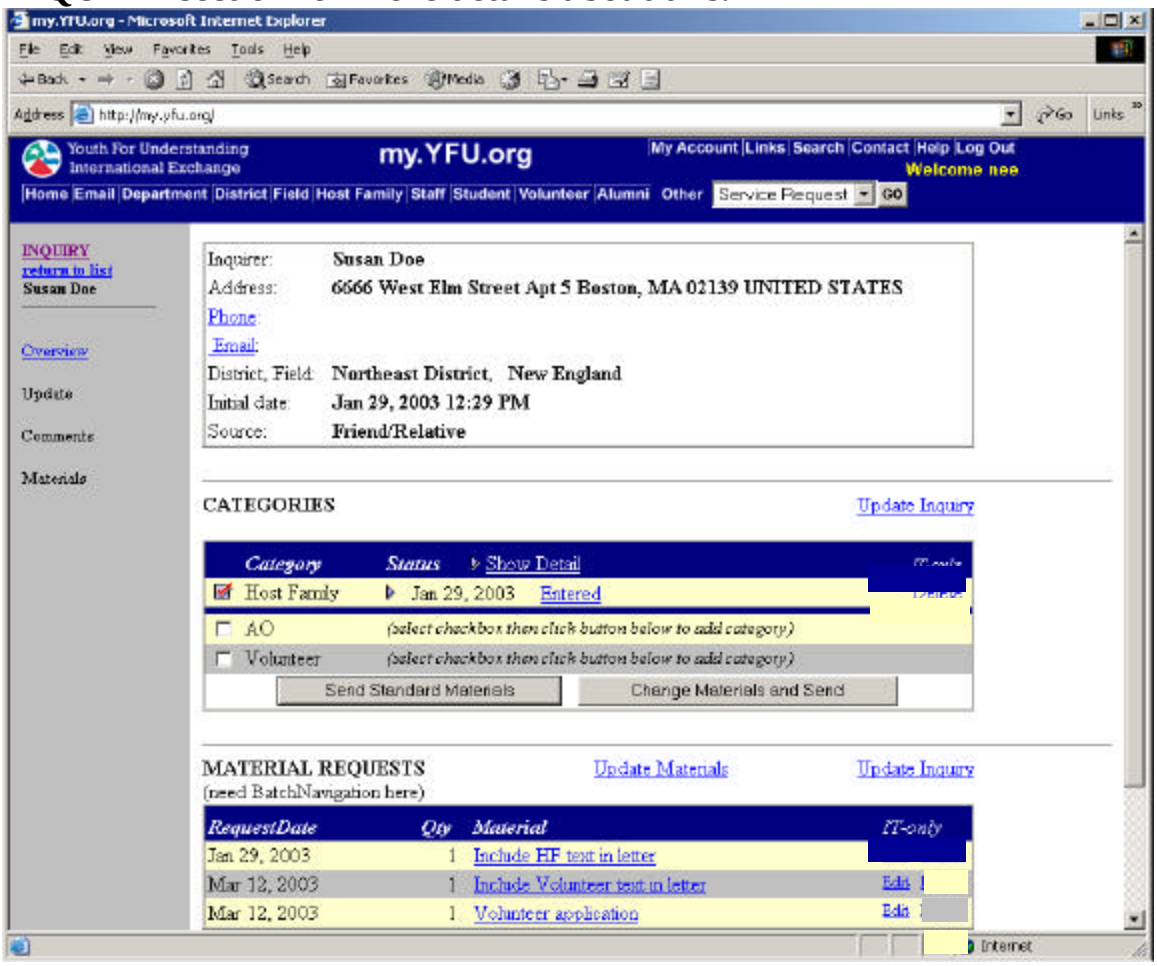


figure 10

3A. If you click phone, you will see the screen below. Enter the phone number in the blank and click "save" if that is the only number to enter. If you wish to enter another, click "add another phone", instead of clicking "save". For each entry, specify the type of phone number and the start date for using this number. If you wish to indicate that a number is no longer valid, you may click "expire now" next to that number and it will be marked with the current date as the end date.

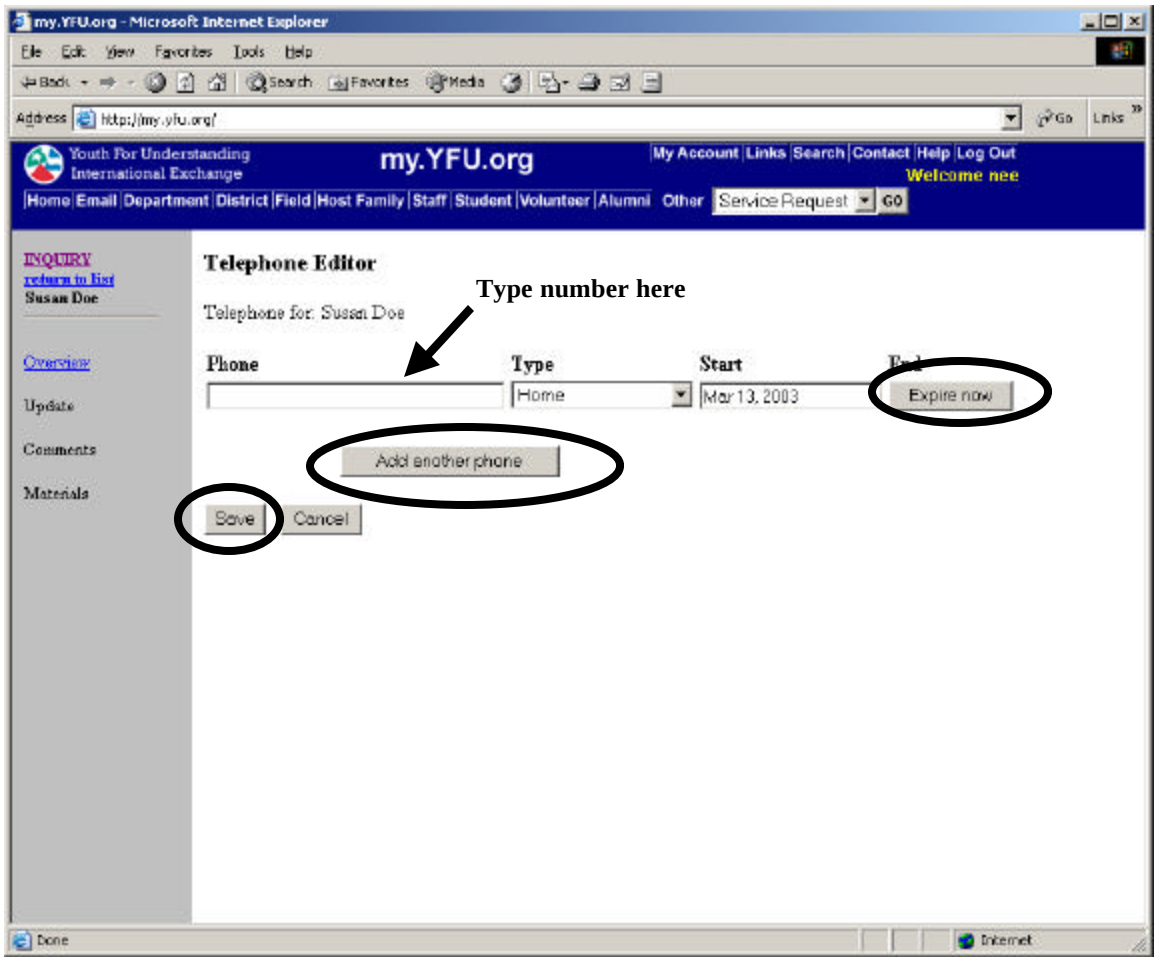


figure 11

3A cont.

For email, enter the email address, the type of email address and click save.

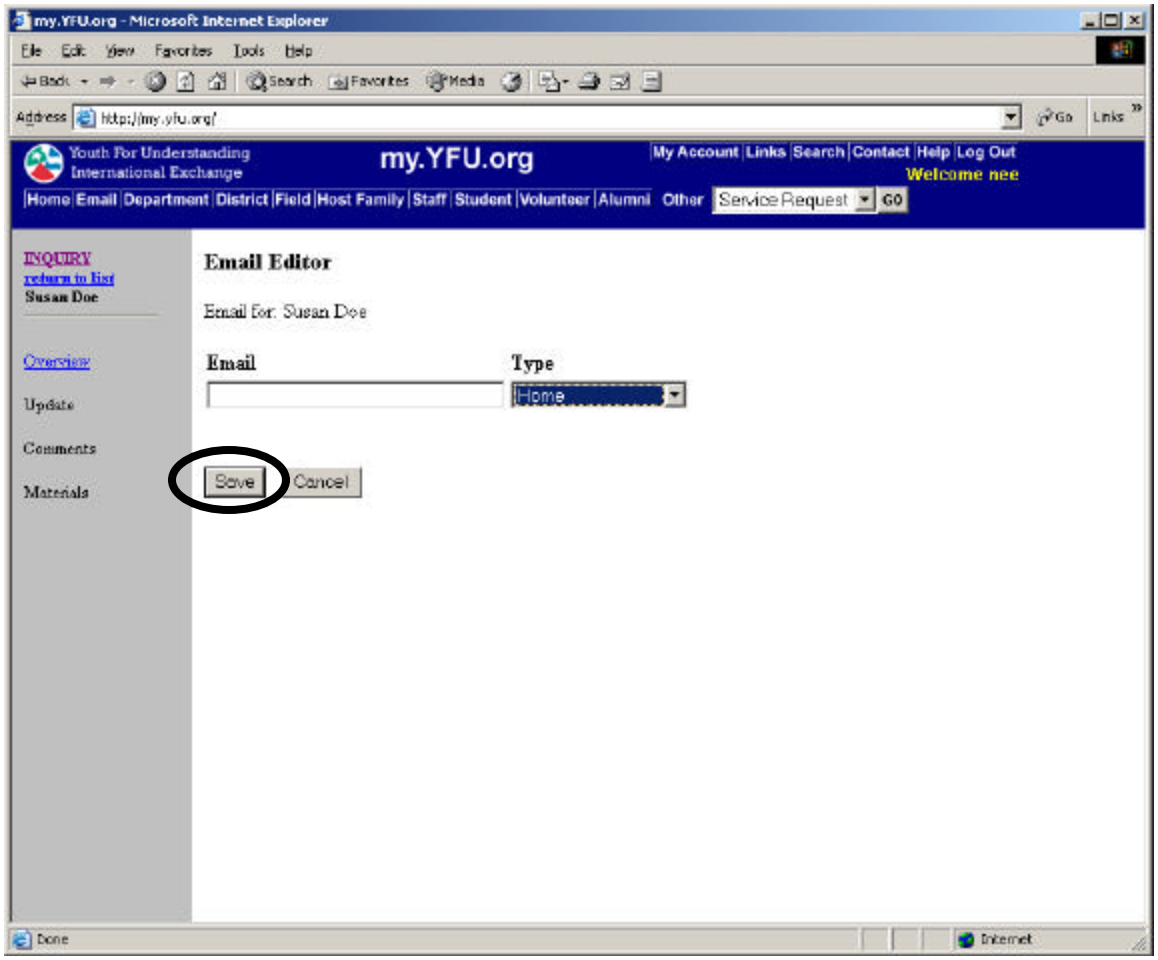


figure 12

3B. To update the status of an inquiry, you must first choose the status of the inquiry from the drop down menu (figure 13). If necessary, enter a date in the proper format to the right of this. Note in figure 14, that there is a section marked "apply to". In this area, you specify which inquiry you wish to apply the status change to. In the case of this example, the only open inquiry is a host family inquiry, so that is the only check box you may manipulate. Had there been an open volunteer inquiry as well, a text box would appear next to the host family one. You may check one at a time or multiple check boxes. Please note, if you multiple boxes are checked, the changed status will be applied in multiple places. Once you have made the proper selection, click "update" to save the change. Please realize, you may only change to one status at a time. For example, if you wish to change a Host Family inquiry to "not interested" and a volunteer inquiry to "needs followup", you must set the Host family inquiry to "not interested", click update, and follow the same procedure over again for the volunteer inquiry.

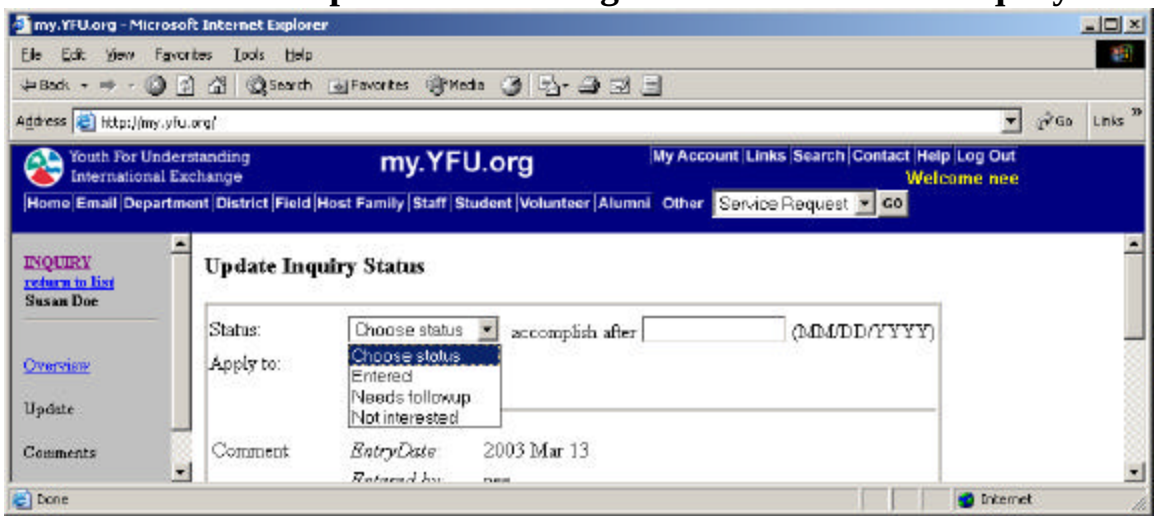
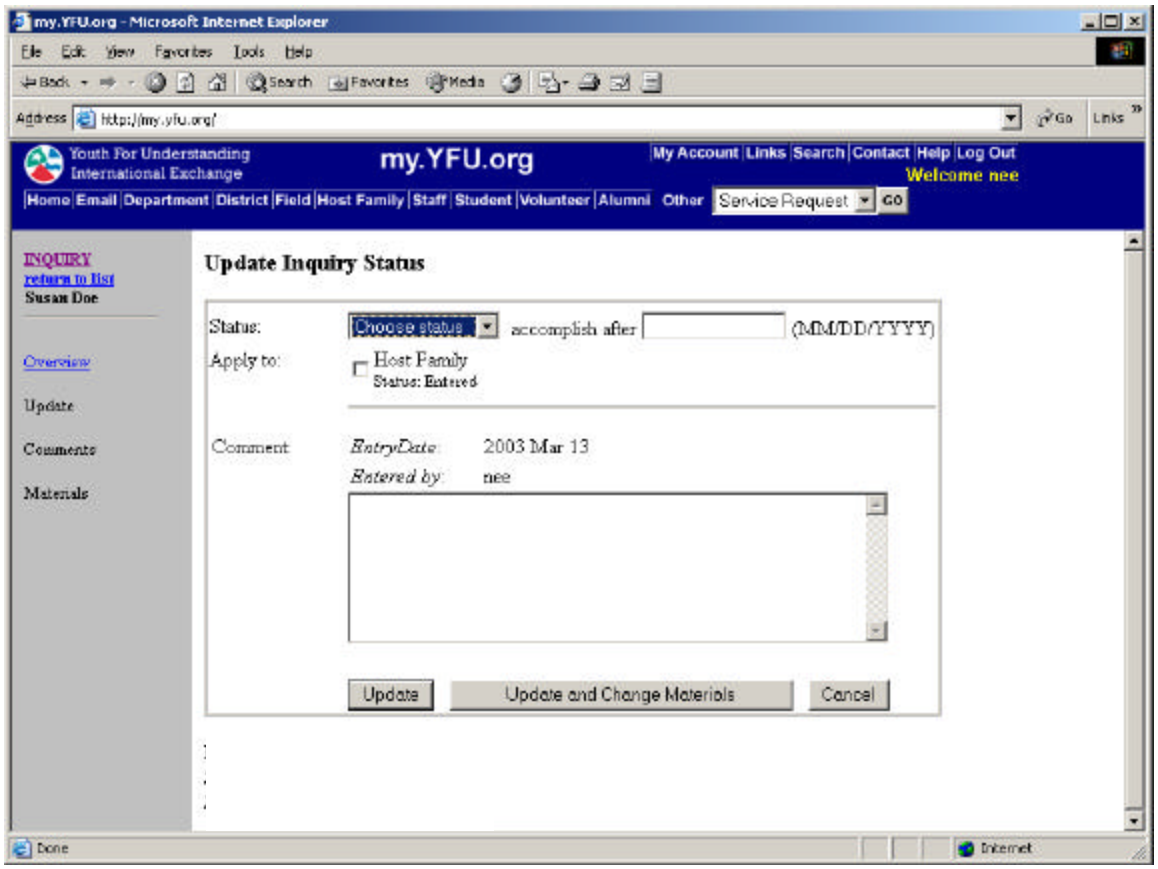


figure 13


my.YFU.org - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://my.yfu.org/
Go Links
Youth For Understanding International Exchange
my.YFU.org
My Account Links Search Contact Help Log Out
Welcome nee
Home Email Department District Field Host Family Staff Student Volunteer Alumni Other Service Request GO
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return to list
Susan Doe
Overview
Update
Comments
Materials
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Apply to:
Host Family
Status: Entered
Comment
EntryDate:
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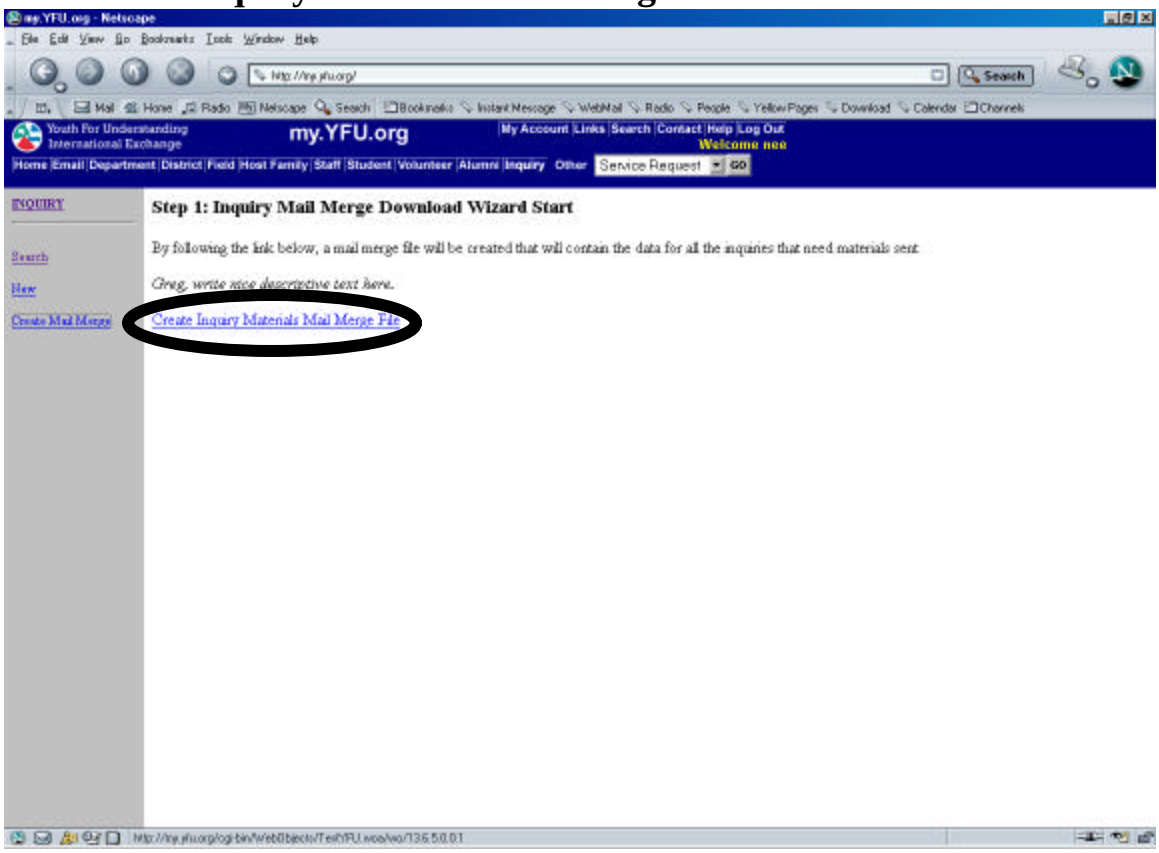
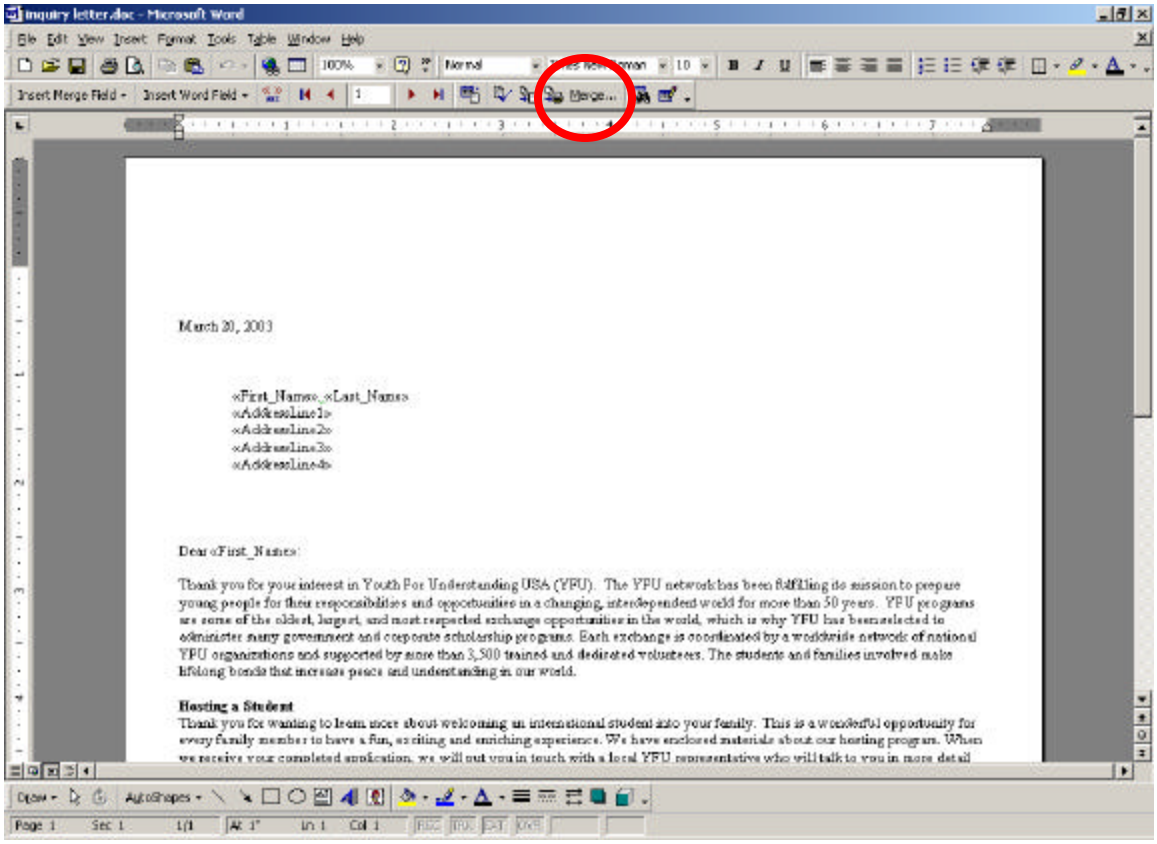
nee
Update
Update and Change Materials
Cancel
Done
Internet
figure 14

To perform the mail merge for new inquiries:

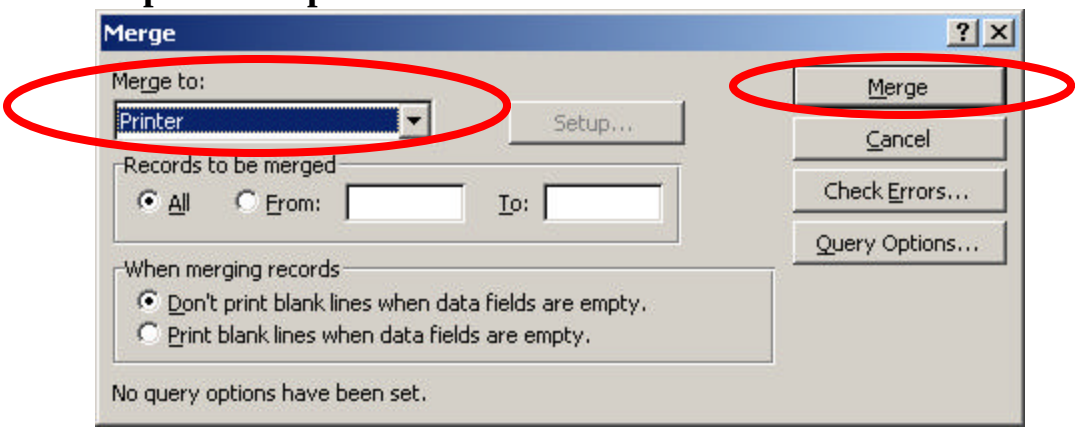
1. **Log on to my.yfu.org. Then, click "inquiry" on the top menu bar. Click "Create mail merge". You will see the screen below. Click on "Create Inquiry Materials Mail Merge File".**



2. **The directions for doing the mail merge are now displayed on the screen. Minimize my.yfu.org. Use the icon on the desktop marked "Shortcut to Inquiry Letter" to open the mail merge document. If there are no inquiries, you will get an error message. Click the "X" in the upper right hand corner to exit the error, and do the same for the program. If there is data to be merged, the letter will open. Next, click "Merge…" on the top toolbar. A smaller window will open.**



3. **In the small window, select either "new document" or "printer" in the "Merge to:" drop down box. New document will allow you to view all of the merged letters in a new file. Printer will print the letters directly to the printer you specify. When you have made your selection, click "Merge". Make sure when printing that you set the printer to print from the drawer that contains letterhead.**



4. **When printing is complete, close the mail merge in Word, without saving it. Go back to my.yfu.org. Click "Confirm". This will remove the data file so that the same merge is not run twice.**