


# How to Create a Prospect Inquiry Form in Target X

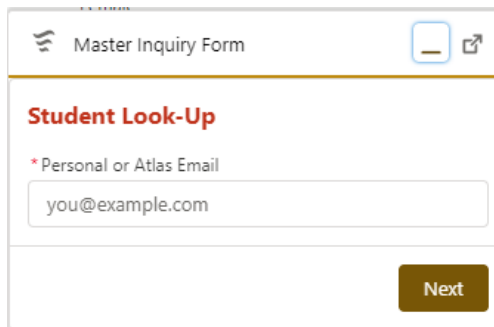
The Answer Center and Enrollment Services staff often assist prospective students. The following are instructions on how to create a prospect inquiry form inside the Target X CRM. The inquiry form will pull in any existing information on the Contact or create a new Contact record if there is no existing information.

Note: You must be in the **Recruitment Manager** or **Recruitment Manager Console** App inside the CRM.

1. At the bottom of the page of the **Recruitment Manager** or **Recruitment Manager Console** App you will see four inquiry forms—you want to use the **Master Inquiry Form**:

 Master Inquiry Form    INTL    CESS    SPS

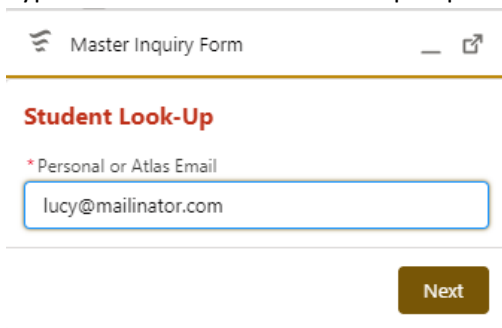
2. Click on  Master Inquiry Form



The screenshot shows the 'Master Inquiry Form' interface. At the top, there is a title bar with a hamburger menu icon, the text 'Master Inquiry Form', and window control icons (minimize and maximize). Below this is a section titled 'Student Look-Up' in red. Underneath, there is a label '\* Personal or Atlas Email' and a text input field containing 'you@example.com'. At the bottom right of the form, there is a brown 'Next' button.

3. The **Master Inquiry Form** box will appear:

4. Type in the email address of the prospective student and click the Next button:



The screenshot shows the 'Master Inquiry Form' interface. At the top, there is a title bar with a hamburger menu icon, the text 'Master Inquiry Form', and window control icons (close and maximize). Below this is a section titled 'Student Look-Up' in red. Underneath, there is a label '\* Personal or Atlas Email' and a text input field containing 'lucy@mailinator.com'. At the bottom right of the form, there is a brown 'Next' button.

5. Enter the requested **Student Contact Information** in the spaces provided and click the Next button:

Master Inquiry Form

### Student Contact Information

**Name**

First Name

Last Name

**Please provide legal first and last names with proper capitalization and no special characters.**

\* Email

Alternate Email

Mobile Phone

**Please do not include any dashes, spaces, or parentheses in the phone number.**

\* Country of Citizenship

**US Mailing Address**

Street

City  State/Province

Zip/Postal Code  Country

\* How Did You Hear About Us?

**Next**

6. Enter the requested **Academic Information** and click the Next button:

Master Inquiry Form

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### Academic Information

\* Student Type

First Time in College

When did you graduate/plan on graduating from High School (mm/yyyy)?

\* Current School Type

High School/Secondary School

Select Current School

Search Accounts...

**If you selected Unknown School above, please check here to input school information.**

Unknown School

Previous Next

7. Enter the requested **Study Plans** information and click the Next button:

Master Inquiry Form

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### Study Plans

\* Are you an International student (planning to attend on a F or J visa)?

Yes

No

\* Term of Interest

Summer 2021

\* Degree or Technical Certificate

-- none selected --

Previous Next

8. The Contact record for the new prospective student has been created:

