

Secure Document Storage, Upload Pre-Applicant Documents

This article outlines how to store pre-applicant documents securely on a prospective student record.

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Lead Documents

Lead Documents stores prospective student documents received prior to the prospect starting an application. Documents received as part of their official admissions application should be stored on the active Application Record.

Resumes can easily be uploaded via the **'Upload Resume'** button or resume upload link - <https://inquire.bus.wisc.edu/resume>. They will also be stored in Lead Documents.



Name ↑	Modified On
Other	5/22/2017 3:18 P..
Resumes	5/22/2017 4:11 P..



If the document is considered part of their official admissions application, please upload the document to the **Application Record**.

To add a new secure document:

1. Open a Contact Record
2. Navigate to the **'Lead Documents'** section of the Prospective Student View form
3. Click on the plus sign to the right of the screen, then the search button that appears below, and create a new document record by selecting new



4. Select a Document Type
 - a. Current document types include:
 - i. Resume
 - ii. Official Test Scores
 - iii. Unofficial Test Scores
 - iv. Official Transcript
 - v. Unofficial Transcript
 - vi. Other
 - vii. Employer Authorization
 - viii. Recommendations



SECURE DOCUMENT : INFORMATION

New Secure Docume...

General

Document Type * Owner * [Dean McInerney](#)

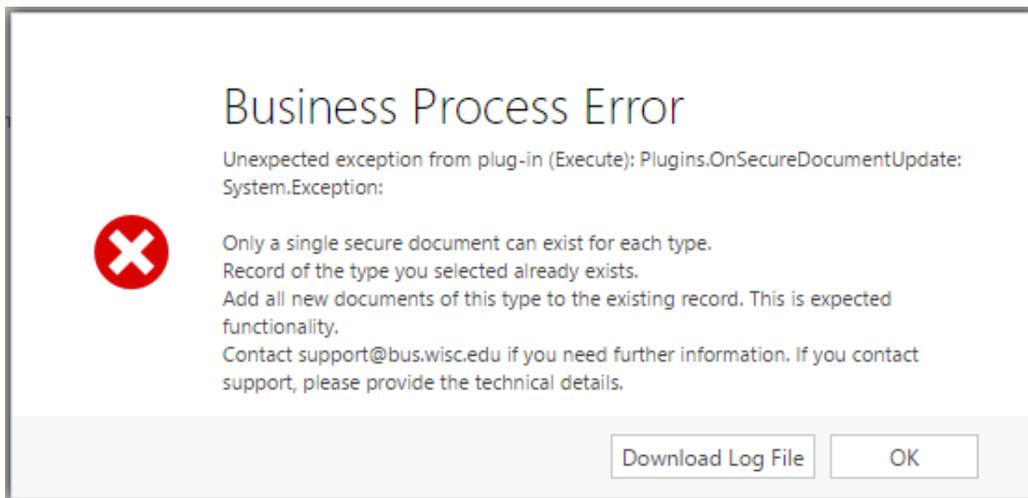
5. After selecting a document type, save the form. This will cause **'Notes'** to be activated. Click in the box which says "Enter a note."



6. Scroll down in the small box, and click on 'Attach.' After selecting your document, click 'Done' and save the form again.



Only one document folder of each type may exist. If you try to save a document of an existing folder type, the following business process error will appear.



You must upload multiple documents of the same type in the same document folder.

Add additional documents of the same type:

- a. Open the existing document folder on the Person record from the Lead Documents section.
- b. Follow the steps 5 & 6 above to attach another note.

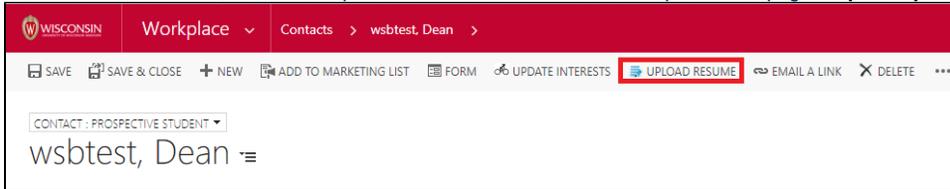
Upload resume via web form:

You can upload a resume in one step by using the Upload Resume button.

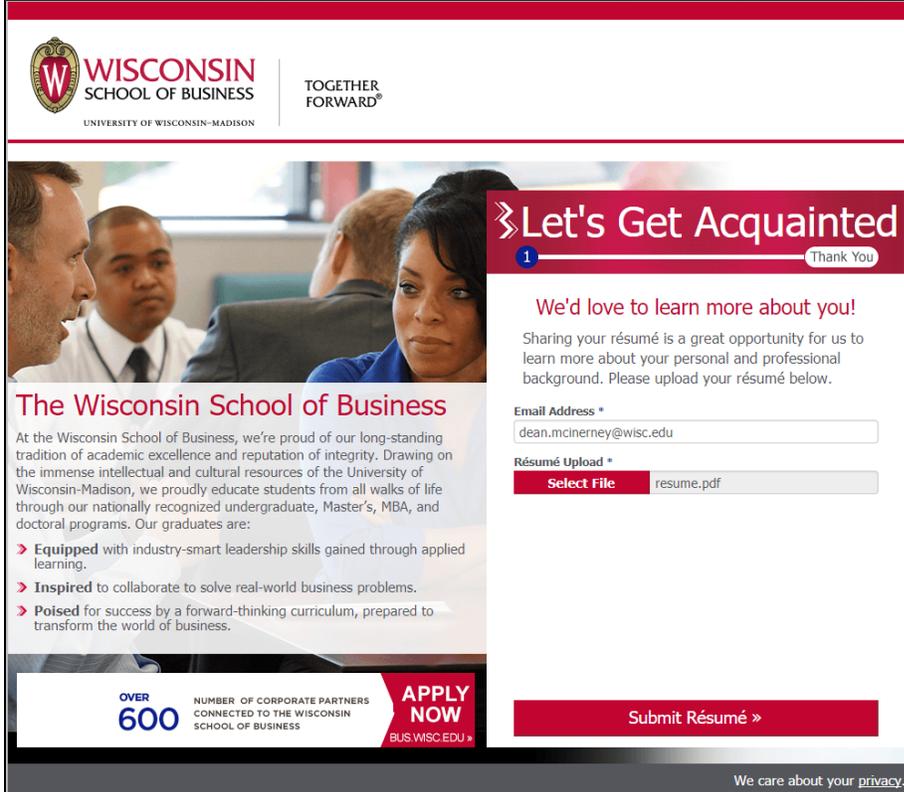


In order to use this web-based function, the contact must already exist in the database and the same email address must be used. The contact must also be flagged as a prospective student.

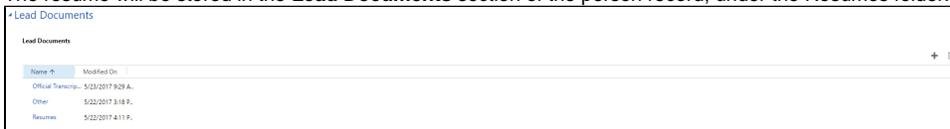
1. From the Contact record, select the "Upload Resume" button. This button opens a webpage: <https://inquire.bus.wisc.edu/resume>



2. The contact's email will auto-populate the form. Select the resume file you wish to upload for the prospect. Submit the form.



3. The resume will be stored in the **Lead Documents** section of the person record, under the Resumes folder.



Allow external user to upload resume:

If you would like to have a prospective student upload a resume, you must ensure they have an existing contact record in LRM. This tool is to be used only to follow up with a prospect after they are in our system (such as completing an event registration), not to recruit new prospects. Please do not publish this link on your website, or on any other public portal. Use this link to follow up with existing prospects: <https://inquire.bus.wisc.edu/resume>



The prospective student MUST enter the email that is stored on their contact record in LRM or they will experience an error!