

applicaa

# Admissions+ Onboarding Process

Updated September 2023

# Getting your platform ready - Courses & Training (7 - 10 days)



## Course 1 - First Impressions

Customise the key elements of your platform, ensure an excellent display, learn the basics of Admissions+ and how to create basic reports.

[See all articles →](#)

## Course 2 - Profiles

Learn how to manage and monitor student and parent profiles to view, export and create reports on collected data. Includes staff users & permissions.

[See all articles →](#)

## Course 3 - Application process in detail

Customise your application journey; add, edit or remove questions or phases; set mandatory questions; choose what to transfer to your MIS; and more!

[See all articles →](#)

## Sixth Form Only

This course is for Post-16 only and covers creation/ customisation of courses, entry requirements and references.

[See all articles →](#)

## Course 4 - Events

Create, manage and monitor events such as Open Days and Tours using the events area. Significant updates to this area are being released Autumn 2023!

[See all articles →](#)

## Course 5 - Checks, Troubleshooting & Go-Live!

Ensure you work through this course before launching your platform to students or parents.

[See all articles →](#)

## Data & Integrations (IT & Data Managers)

This course covers MIS integration; importing data into A+ via csv or from your MIS; exporting data to csv or MIS; DNS update & step by step guides.

## Course 6 - Timetable & Options (Yr 9 & 12)

Learn how to use the options module in detail; setting rules, importing a timetable, finding and resolving clashes, and optimising your timetable.

## Course 7 - Interviews & Offers

Learn about setting up meetings, inviting students or parents, monitoring attendance and keeping notes. Plus customising, sending & managing offers.

# Receive vital set up information from CSM

Welcome to Applicaa; I will be your designated Customer Success Manager for the next year and am delighted to be working with you.

Our service includes -

- *Unlimited* 1:1 training with me throughout your first year
- Guidance on using all product features to maximise the benefit to your school
- Guaranteed response within 24 hours to emails & voicemails
- 24/7 access to our Knowledge Base and chatbot for self-help
- Technical support for urgent queries & specialised issues

**I really encourage you to reach out to me whenever you need, and I'll also check in with you regularly to make sure you're confident and enjoying the platform.**

To let you know what to expect, here is an [overview of the journey](#) we see used most often; of course you can customise many of these elements and I'll be happy to guide you. If you have any questions on what the platform can do or how the journey flows please don't hesitate to ask.

Over the next few weeks I anticipate your onboarding process as follows -

**Create your platform using [this link](#), complete the basic onboarding tasks**

I will be checking your progress; please let me know of any difficulties

**Begin on [Course 1 - First Impressions](#) & [Course 2 - Profiles](#) ([Knowledge Base](#))**

## Course 1 - First Impressions

Customise the key elements of your platform, ensure an excellent display, learn the basics of Admissions+ and how to create basic reports.

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[See all articles](#) →

## Course 2 - Profiles

Learn how to manage and monitor student and parent profiles to view, export and create reports on collected data. Includes staff users & permissions.

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[See all articles](#) →

Create your platform, complete onboarding tasks as prompted

Read and save the journey overview to note key features for your intake

Work through content of course 1 & 2 - estimated time 3-4 hours

# Training Meeting 1 with your CSM



Overview of the platform & cover any queries you have

Introduce the application form area & possibilities for customisation

Introduce the Events area ready for Course 4

For Sixth Forms, introduce the additional course

# Complete courses 3 & 4 - *estimated 4-6 hours*

## Course 3 - Application process in detail

Customise your application journey; add, edit or remove questions or phases; set mandatory questions; choose what to transfer to your MIS; and more!

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[See all articles](#) →

## Course 4 - Events

Create, manage and monitor events such as Open Days and Tours using the events area. Significant updates to this area are being released Autumn 2023!

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[See all articles](#) →

## Sixth Form Only

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[See all articles](#) →

Customise your form - add & edit questions, include UDFs & lookups

Customise your application journey with Phases & Pathways

Set up your Open Events

*For Sixth Forms, the additional course will take another 3-4 hours*

# Training Meeting 2 with your CSM



Check over any oddities the CSM has noticed in your application form

Check your Events are ready to publish

*For Sixth Forms, cover additional areas (this is likely to need another meeting)*

Cover any queries you have and introduce Course 5

# Complete course 5 - *estimated 1-2 hours*

**Course 5 - Checks,  
Troubleshooting & Go-  
Live!**

Ensure you work through this course  
before launching your platform to  
students or parents.

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[See all articles](#) →

Edit email templates, choose which to switch on or off

Learn how to manage communications

Basic troubleshooting for when families begin to use your form



# Go-Live Meeting with your CSM



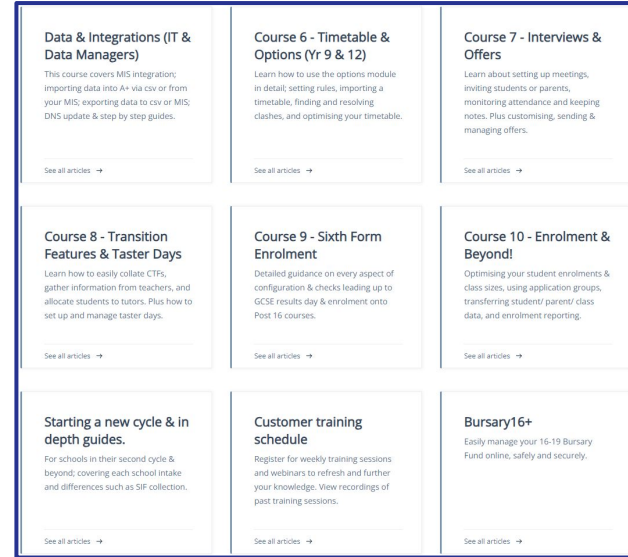
Cover any queries you have and share tips

Introduce other courses for later in the application process

Book your first catch-up after launch to see how applications are going



# Post-launch



Meet regularly with your CSM to train on other features  
Complete the relevant courses at various times in the process  
We really value your feedback on our products & services  
Let us know what you think!

# Customer Success Manager service

(Year 1 of subscription unless purchased again)

*Unlimited* 1:1 training meetings with your designated Customer Success Manager

Guidance tailored to your staff & school

Prompts from your CSM throughout the year to ensure utilisation of all features

Unlimited telephone and email queries to your CSM with a guaranteed turn around time of 24 hours

## Additional Support

Optional weekly group training sessions, covering each topic as it becomes relevant

ie forms, interviews, offers, timetabling, taster days, sorting hat etc

8am - 4:30pm telephone support for quick queries

Ticket pipeline for reporting technical issues

24/7 access to our Knowledge Base directly via your platform

# Group training for 2nd cycle & beyond

Week	Wednesday 2pm	Thursday 2pm
04/09/2023	B16+ New Cycle	Y12 New Cycle
11/09/2023	In Year	SI Forms
18/09/2023	B16+ New Cycle	Y12 New Cycle
25/09/2023	In Year	Nursery
02/10/2023	B16+ New Cycle	Y12 New Cycle
09/10/2023	In Year	Nursery
16/10/2023		Y12 New Cycle
23/10/2023	Holidays	
30/10/2023		Y12 New Cycle
06/11/2023		Interviews, Offers, Timetabling
13/11/2023		Interviews, Offers, Timetabling
20/11/2023		Interviews, Offers, Timetabling
27/11/2023		Interviews, Offers, Timetabling
04/12/2023		Interviews, Offers, Timetabling
11/12/2023		Interviews, Offers, Timetabling
18/12/2023		Interviews, Offers, Timetabling
25/12/2023	Holidays	
01/01/2024	Holidays	
08/01/2024		Y7
15/01/2024	Y9 Options	Y7
22/01/2024		Y7
29/01/2024	Y9 Options	Y7
05/02/2024		Y7
12/02/2024	Holidays	

Week	Wednesday 2pm	Thursday 2pm
12/02/2024	Holidays	
19/02/2024		Reception
26/02/2024		Reception
04/03/2024	Taster Days	Reception
11/03/2024	Taster Days	Reception
18/03/2024	Taster Days	Reception
25/03/2024	Taster Days	Reception
01/04/2024	Holidays	
08/04/2024	Holidays	
15/04/2024	Transition Features	Enrolment 1
22/04/2024	Exams+	Enrolment 1
29/04/2024	Transition Features	Enrolment 1
06/05/2024	Exams+	Enrolment 1
13/05/2024	Transition Features	Enrolment 1
20/05/2024		Enrolment 1
27/05/2024	Holidays	
03/06/2024		Enrolment 2
10/06/2024	B16+ New Cycle	Class Management, reports
17/06/2024		Enrolment 2
24/06/2024	B16+ New Cycle	Class Management, reports
01/07/2024		Enrolment 2
08/07/2024	B16+ New Cycle	Nursery New Cycle
15/07/2024		Enrolment 2
22/07/2024		SI Forms