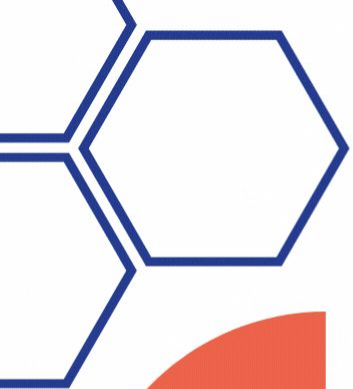




applica

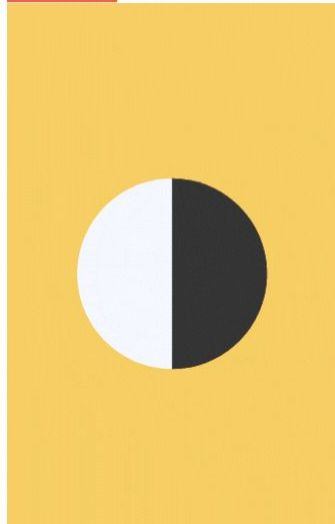
Admissions+ Onboarding Process

For Independent Schools



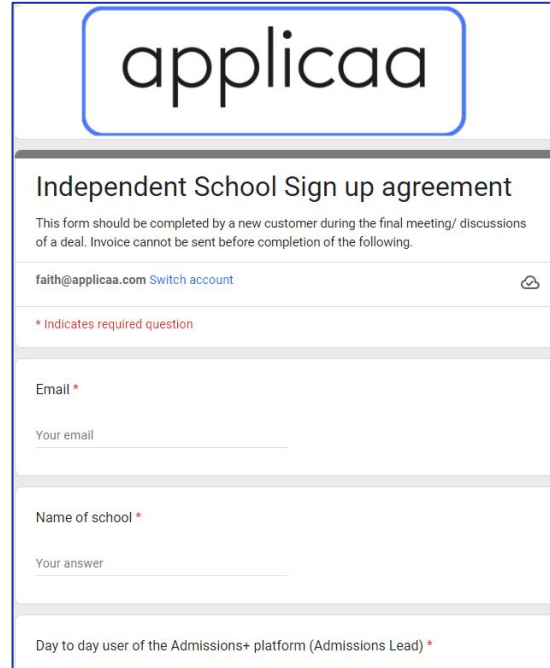
WEEK

1



SET UP AGREEMENT FORM COMPLETION

This form will be completed with your Sales Manager prior to the invoice being sent to you.




The screenshot shows a web form titled 'Independent School Sign up agreement' from the company 'applicaa'. The form includes a header with the company logo, a title, a descriptive paragraph, a user profile section with an email and a 'Switch account' link, and three required input fields: 'Email *', 'Name of school *', and 'Day to day user of the Admissions+ platform (Admissions Lead) *'. A red asterisk legend indicates that these fields are required.

applicaa

Independent School Sign up agreement

This form should be completed by a new customer during the final meeting/ discussions of a deal. Invoice cannot be sent before completion of the following.

faith@applicaa.com [Switch account](#) 

* Indicates required question

Email *

Your email

Name of school *

Your answer

Day to day user of the Admissions+ platform (Admissions Lead) *

RECEIVE WELCOME E-MAIL

The Welcome email contains a Configuration Form that you are required to complete with the requested information, so we can configure your platform

Please ensure you complete this form with everything that we need within 48 hours

This form should be completed by a new customer immediately after receiving the welcome email as this information is required in order to configure the Admissions+ platform.

Please note that configuration will be checked by the school during training and amendments can be made.

Email *

School name *

Platform Configuration

Please upload your school logo with file type .jpg .gif or .png, with a maximum size of 20MB *

No file chosen

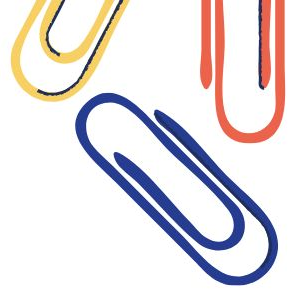
Please upload an image of your school to be displayed on your login/ registration page with file type .jpg .gif or .png, with a maximum size of 20MB *

No file chosen

Please upload an image of the Headteacher for the welcome message, with file type .jpg .gif or .png and a maximum size of 20MB *

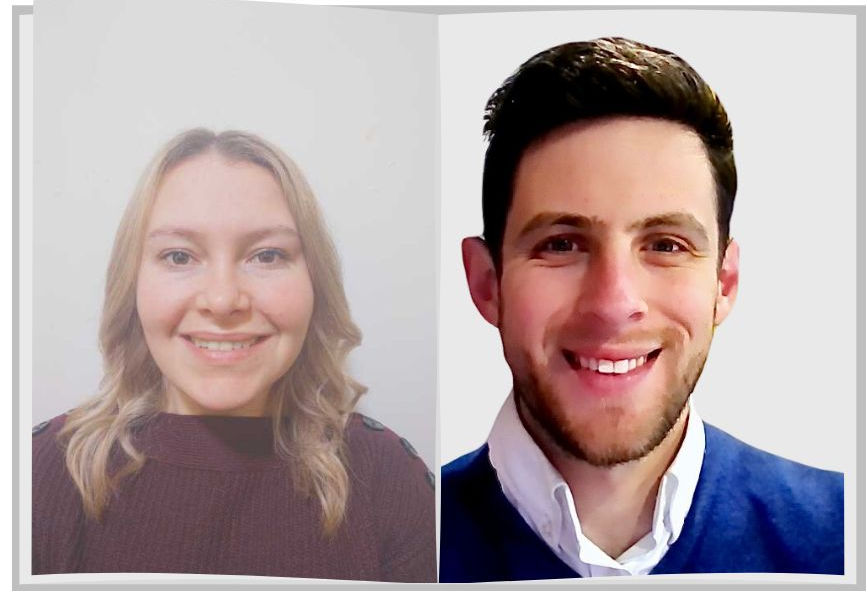
No file chosen

WELCOME MEETING WITH CSM

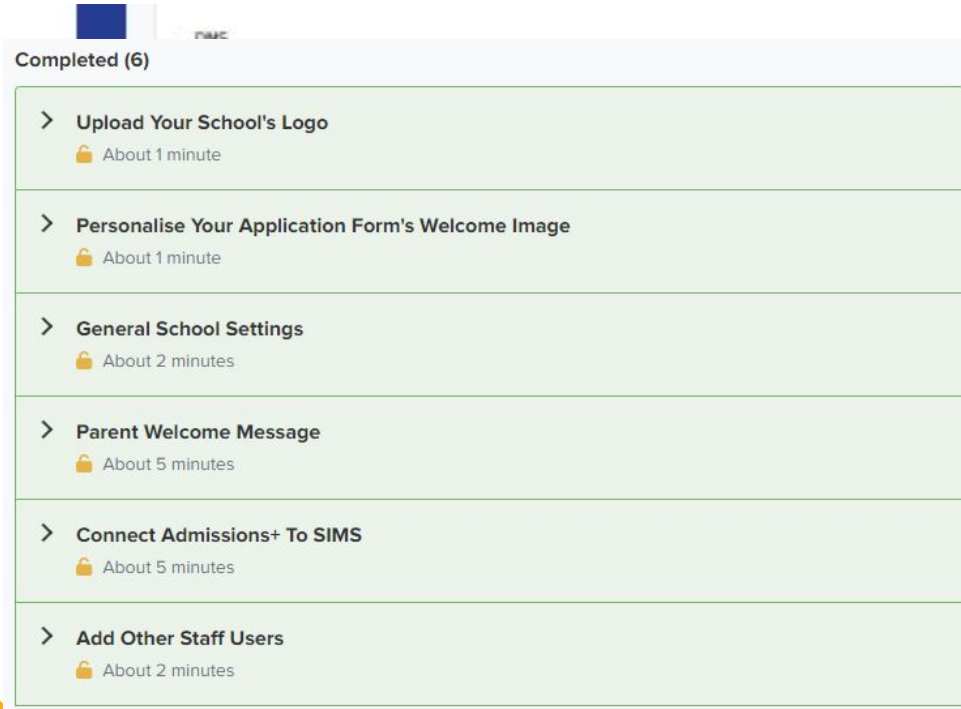


Day-to-day users of Admissions+ will have a welcome meeting with the designated Customer Success Manager

- Reiterate the role of CSM and others
- Book all training sessions
- Book integration meeting for IT
- Answer any queries



INITIAL PLATFORM CONFIGURATION



Using the information you have given us, we will create and configure the platform for you within 48 hours

INTEGRATION MEETING

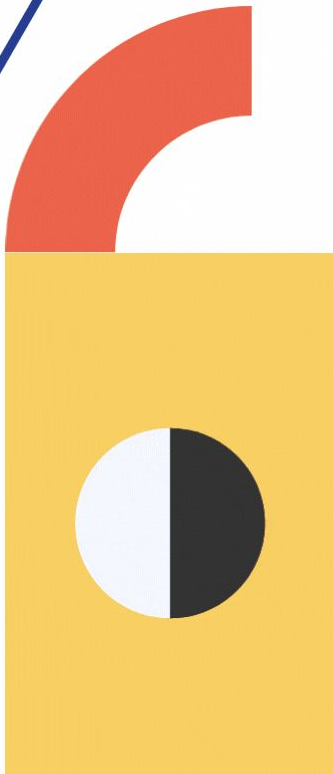
Your IT Manager will have a meeting with our Lead Technician (Andy) to set up the MIS integration

A guide will be sent ahead of time to prepare your MIS database





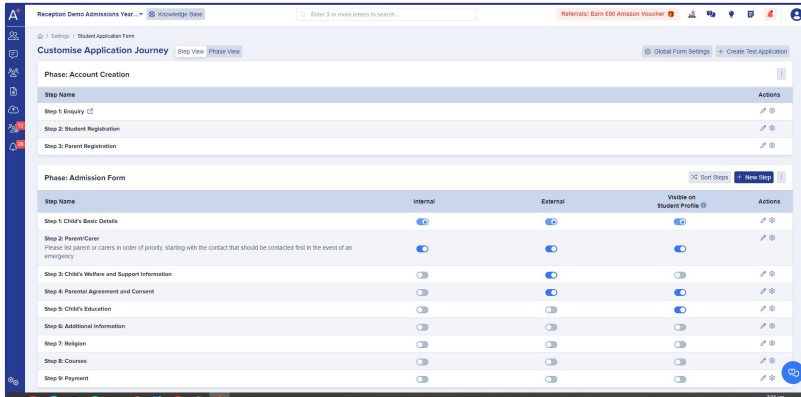
WEEK 2



FIRST MEETING & RESOURCES

Two-hour meeting covering -

Overview of the platform
Overview of the Application
Phases & Form Area
Walkthrough creating an enquiry
Additional Questions



Admissions⁺

Dear School Leader

Many thanks for your time today, as promised here are some resources to help consolidate your learning on the platform and to provide a reference point for future use. I will of course send the recording of our meeting once it has been processed.

To recap, we covered:

- An overview of the platform
 - Dashboard features
 - Landing/ registration page
 - Welcome messages
 - Parent homepage
- An overview of the application phases
 - Enquiries
 - Applications
 - Offer Contracts
 - Post Acceptance
- Walking through the journey as an enquirer
- Additional questions

To continue with our progress, please complete the following tasks over the next few days:

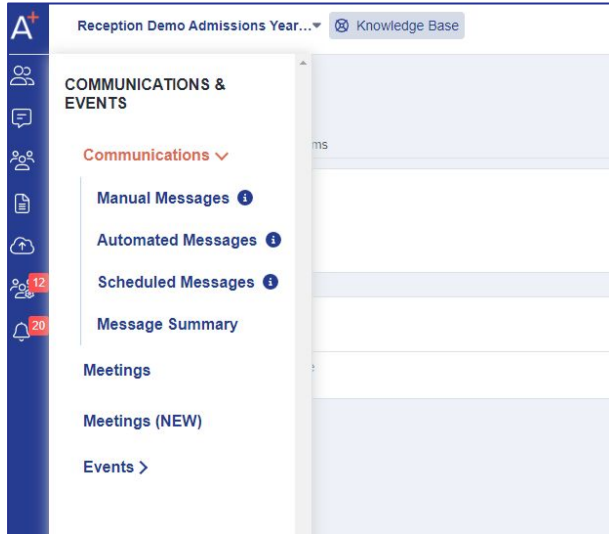
- Study *how to create and use test accounts*
- Create a test account & follow through form, making note of any changes needed & where they are.
- Use this *detailed form guide* to make these amendments ready for checking in our next session

Resources will be provided to consolidate your learning

SECOND MEETING & RESOURCES

Two-hour meeting on form detail and e-mail templates

- Configure e-mail templates
- Check each phase of the form
- Sign off configuration



Admissions⁺

Dear School Leader

Many thanks for your time today, as promised here are some resources to help consolidate your learning on the platform and to provide a reference point for future use. I will of course send the recording of our meeting once it has been processed.

To recap, we covered:

- Forms in detail
 - Checking amendments you made to the form
 - Editing any that were outstanding
 - Checking validity of fields expected to transfer to the MIS
- Email templates for the following areas
 - Events & Enquiries
 - Applications
 - Meetings
 - Offer Contracts
 - Post Acceptance
- Sign off on configuration

To continue with our progress, please complete the following tasks over the next few days:

- Study *email templates to check before launch*
- Ensure you are happy with the above and make changes as needed
- Study *managing communications, communication logs, updating email addresses*

I hope you enjoy getting to know this area of the platform; I'll look forward to seeing

Resources will be provided to consolidate your learning



WEEK 3

The illustration features four school children standing on a grey platform that forms the top of the word 'WEEK'. From left to right: a boy in a light blue shirt and dark pants with a yellow backpack; a girl in a blue dress over a light blue shirt with a yellow backpack; a boy in a dark blue suit with a red tie and a yellow backpack; and a girl in a light blue shirt and dark skirt with a red backpack. The word 'WEEK' is rendered in large, bold, block letters with a 3D effect. The 'W' is blue, 'E' is yellow, 'E' is red, and 'K' is blue. To the right of 'WEEK' is a large, solid black number '3'. The background includes a blue hexagonal pattern in the top left, a yellow circle in the top right, a red arc on the left, a yellow vertical bar with a black and white circle on the left, and green wavy lines in the bottom right.









THIRD MEETING & RESOURCES

Two-hour meeting on events, managing enquiries, meetings and testing these areas

Resources will be provided to consolidate your learning

The screenshot shows the 'Meetings' interface. At the top, there is a search bar with the text 'Search for meeting...' and a '+ Create new meeting' button. Below the search bar is a section titled 'Getting to know you' with an 'Open Meeting' button. A horizontal filter bar contains buttons for 'All 9', 'Allocated 0', 'Invited 0', 'Not Confirmed 0', 'Confirmed 0', 'Completed 0', 'Incomplete 0', 'Did not attend 0', 'Cancelled 0', and 'Declined 0'. At the bottom, there is a status bar showing 'Saturday 22nd, April 2023', a clock icon with '16:36 - 19:36', a user icon with 'Happy Test', a person icon with '0 / 9', and a location pin with 'test'.

The screenshot shows the 'Events' interface. At the top, there is a search bar with the text 'Search for events...' and a '+ Add New' button. Below the search bar is a table with the following columns: Actions, Date, Event, URL, Location, Visibility, Limit, Registrants, Invitees, and Attended. The table contains two rows of event data.

Actions	Date	Event	URL	Location	Visibility	Limit	Registrants	Invitees	Attended
 	Sunday 23 April, 2023 10:48 - 10:48	New Test Event New Test Event	Public URL  https://andytestgdst.applicaa.com/events/3 Enquiry URL  https://andytestgdst.applicaa.com/enquiry_events/3		Published Sixth Form	Unlimited	0	0	0
 	Friday 2 June, 2023 09:00 - 16:00	Open Day May 2023 Join us at our May 2023 Open Day!	Public URL  https://andytestgdst.applicaa.com/events/10 Enquiry URL  https://andytestgdst.applicaa.com/enquiry_events/10	School	Published Early Years Sixth Form	100	0	0	0

FOURTH MEETING & RESOURCES

Two-hour meeting covering:

- Payments
- Offer Contracts
- Post Acceptance

Phase: Offer
Step Name
Step 1: Offer Letter
Step 2: Eligibility
Step 3: Parents & Bill Payers
Step 4: Direct Debit
Step 5: Deposit
Step 6: Contract Signatures

← Parental Agreement and Consent Customise Sections Preview Application Forms

Parental Consent Sort Questions New Question

Question	MIS export	Internal	External	Visible on Profile	Actions
Please select the parental consent given for the child Internet <input type="checkbox"/> Data Exch. <input type="checkbox"/> Copyright <input type="checkbox"/> Sex/Educa. <input type="checkbox"/> Permissio. <input type="checkbox"/> 9 answers	SMS	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Which mode of travel will the child takes to school? Boarder <input type="checkbox"/> Bus (type) <input type="checkbox"/> Car Share <input type="checkbox"/> Car/Van <input type="checkbox"/> Cycle 13 answers	SMS	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Do you consent to the school acting on your behalf in the case of an accident or emergency? No <input type="checkbox"/> Yes <input type="checkbox"/>	SMS	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Policies Internal External

Policies that student must read

Policy title *

Agreement text *

No file chosen

Resources will be provided to consolidate your learning

Admissions⁺

Dear School Leader

Many thanks for your time today, as promised here are some resources to help consolidate your learning on the platform and to provide a reference point for future use. I will of course send the recording of our meeting once it has been processed.

To recap, we covered:

- Offer Contract Phase
 - Offer letter templates
 - Emails
 - Bill payers
 - Fees data
 - Offer acceptance/ terms wording
- Post Acceptance
 - Configuration of your uploaded information
 - Overview of form with tips to tweak closer to the time if needed

To continue with our progress, please complete the following tasks over the next few days:

- Study *this Offer Contract guide*
- Familiarise yourself with *bill payer* settings
- Study further how *fees data* impacts the system
- Double check *email templates* relevant to Offer Contracts

I hope you enjoy getting to know this area of the platform; I'll look forward to seeing you in a few days.

With best wishes,



WEEK 4

The illustration features four school children standing on a grey platform that forms the top of the word 'WEEK'. From left to right: a boy in a light blue shirt and dark pants with a yellow backpack; a girl in a blue dress over a light blue shirt with a yellow bag; a boy in a dark blue suit with a red tie and a yellow backpack; and a girl in a light blue shirt and dark skirt with a red backpack. The word 'WEEK' is rendered in large, bold, block letters with a 3D effect. The 'W' is blue, 'E' is yellow, 'E' is red, and 'K' is blue. To the right of 'WEEK' is a large black number '4'. The background includes a blue hexagonal pattern in the top left, a yellow circle in the top right, a red arc on the left, a yellow vertical bar with a black and white circle on the left, and green wavy lines in the bottom right.

FINAL CHECKS BEFORE GO-LIVE

One-hour meeting for final checks
before going live

Learn troubleshooting skills

Resources will be provided to
consolidate your learning

Admissions⁺

Dear School Leader

Many thanks for your time today, as promised here are some resources to help consolidate your learning on the platform and to provide a reference point for future use. I will of course send the recording of our meeting once it has been processed.

To recap, we covered:

- Final Checks before Go-Live

To assist you during your launch over the next few days, please use these resources:

- Independent School Go-Live guide

Ahead of next week's session on reporting, please let me know with 24 hours notice which reports you would like to create during training. You may reply to this email with your list and I will ensure I'm prepared to cover at least those and any I deem relevant to your school.

I hope you have enjoyed our pre-launch training and learnt lots about managing admissions with Applicaa. I will look forward to seeing you next week to study the reporting area.

With best wishes,



WEEK 5

The illustration features four school children standing on a grey platform that forms the top of the word 'WEEK'. From left to right: a boy in a light blue shirt and dark pants with a yellow backpack; a girl in a blue dress over a light blue shirt with a yellow bag; a boy in a dark blue suit with a red tie and a yellow backpack; and a girl in a light blue shirt and dark skirt with a red backpack. The word 'WEEK' is rendered in large, bold, block letters with a 3D effect. The 'W' is blue, 'E' is yellow, 'E' is red, and 'K' is blue. To the right of 'WEEK' is a large black number '5'. The background includes a blue hexagonal pattern in the top left, a yellow sun in the top right, a red arc on the left, a yellow vertical bar with a black and white circle on the left, and green wavy lines in the bottom right.

SIXTH MEETING & RESOURCES

Two-hour meeting on managing live applications and using the reporting area

- Merging Accounts
- Common Errors
- Impersonate Student Profile
- Set up reports

Registered students / Student profile

Test Student Fn Test Student Ln #U-E776

Phone
School
Email teststudent@applicaa.com

more

Overview Application Form Addition

Student Info (External)

Student Code
Application Reference Number
Sims Admission Number
First Name
Last Name
Gender
Date of Birth
School
Email

teststude

Admissions⁺

Dear School Leader

Many thanks for your time today, as promised here are some resources to help consolidate your learning on the platform and to provide a reference point for future use. I will of course send the recording of our meeting once it has been processed.

To recap, we covered:

- Managing live enquiries
 - Merging accounts
 - Common errors
 - Impersonation
- Reporting
 - Your list of desired reports
 - Reports I see commonly used by schools that may be relevant to you

To continue with our progress, please complete the following tasks over the next few days:

- Study *this Reporting guide*
- Revisit *Managing duplicates & Known SIMS Users*
- *Make note as you work of any queries that come up and send to me to request training next week.*

Training is optional during the next two weeks and then your school will be graduating to manage the platform independently.

It has been a pleasure working with you and getting to know your school; I will wait to hear whether you would like training next week and otherwise will check in with you in a couple of weeks.

A⁺

HOME

MESSAGES

DOCUMENTS

CALENDAR

Hello Test Monte,

Test Monte Test Macejkovic Student Code: U-EB08

Application Form → Enrolment Form → GDST Pre-admissi... → Tring Test add new phase

Additional phases

Yr 7 Maths Scholarship

School Message

No message

Upcoming Events

No event



Week 6

One hour to cover queries raised by the school.

This meeting is optional & content will be sent ahead of time by the school user.

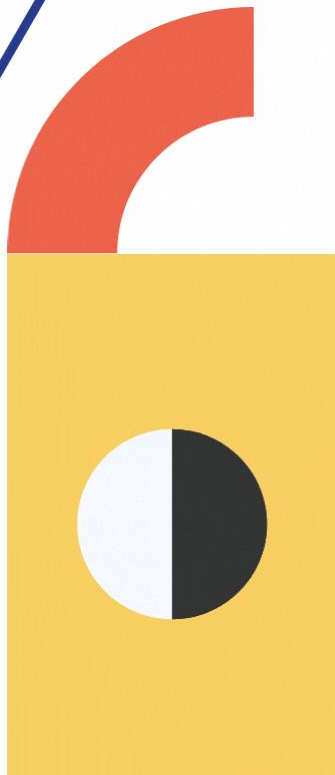
Week 7

One hour to cover queries raised by the school.

This meeting is optional & content will be sent ahead of time by the school user.

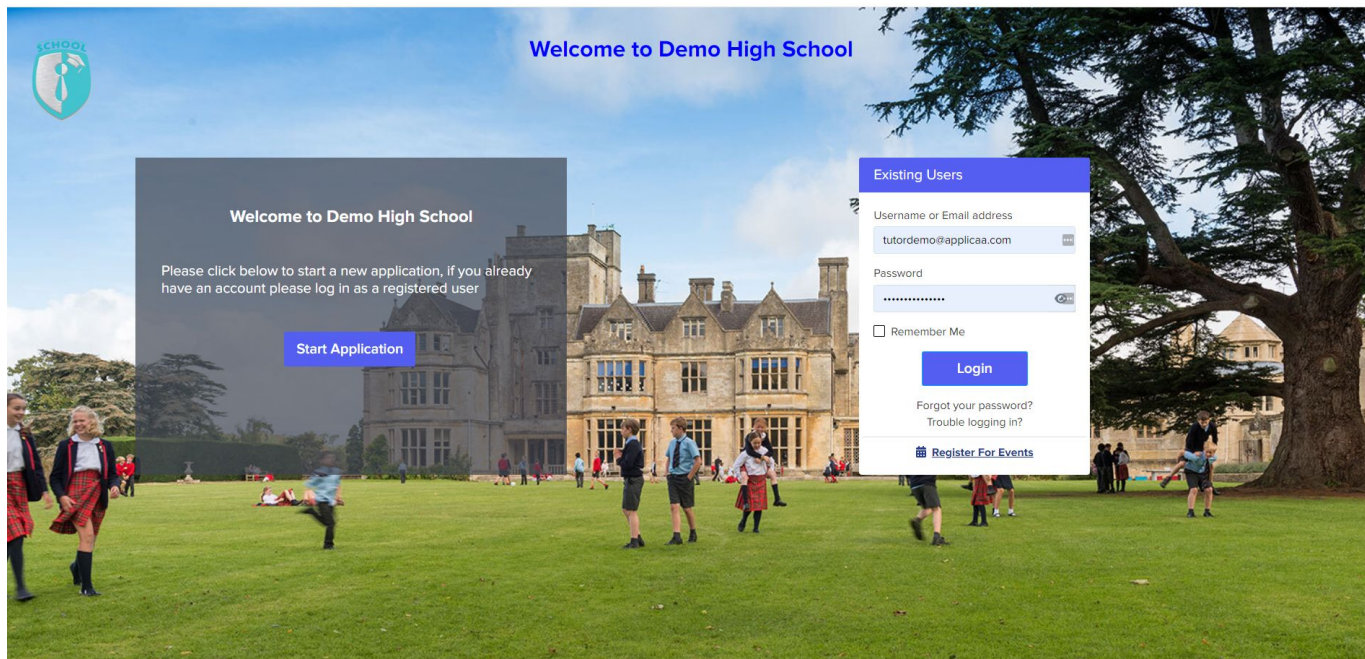


WEEK 8



ONBOARDING TRAINING GRADUATION

Your school will now be able to independently utilise Admissions+ with confidence, and raise tickets for technical issues or queries



REFRESHER TRAINING

Week 12 - CSM calls to check in & see all is well

Ahead of Application launch - CSM calls to check all is well & offer refresher training

Ahead of Offer Contract launch - CSM calls to check all is well & offer refresher training