



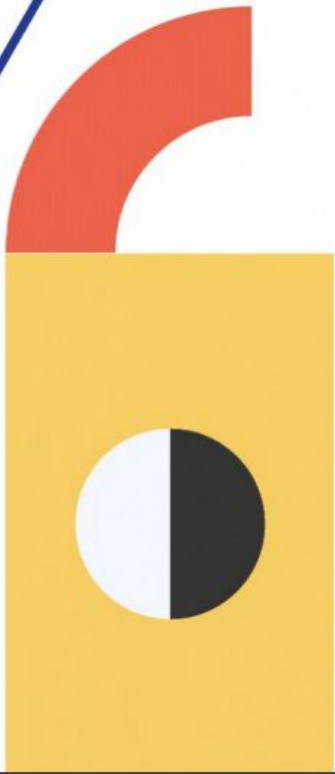
applica

**Admissions+**  
**Onboarding Process**  
**For Independent Schools**



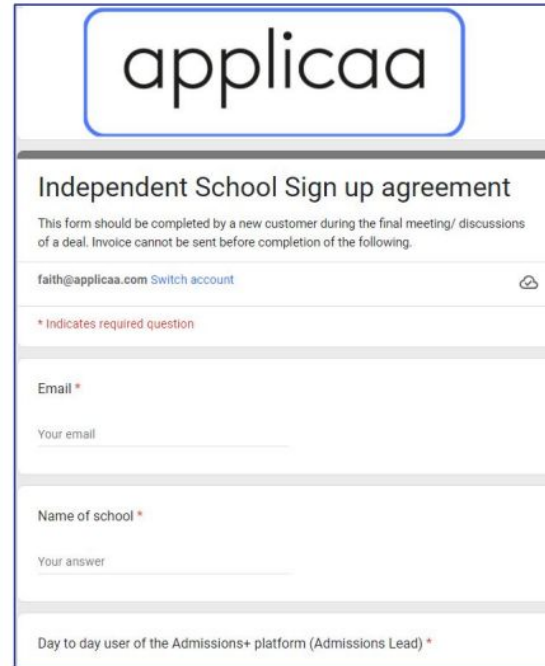
**WEEK**

**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 brief instruction, a user profile section with an email and a "Switch account" link, a legend for asterisks, and three required input fields: "Email", "Name of school", and "Day to day user of the Admissions+ platform (Admissions Lead)".

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 \*

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School name \*

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## Platform Configuration

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

No file chosen

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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

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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



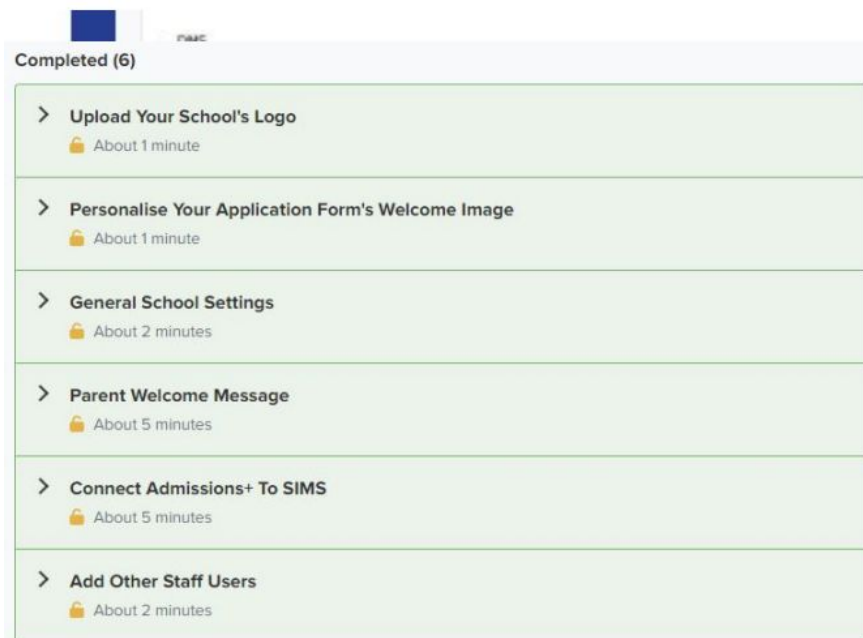
Day-to-day users of Admissions+ will have a welcome meeting with their designated Customer Success Manager (Paul)

- 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.



The screenshot shows a dashboard with a header area containing a blue square icon and the text 'FABC'. Below the header, the text 'Completed (6)' is displayed. The main content area is a list of six tasks, each with a right-pointing chevron icon, a title, and a lock icon followed by a duration. The tasks are: 'Upload Your School's Logo' (About 1 minute), 'Personalise Your Application Form's Welcome Image' (About 1 minute), 'General School Settings' (About 2 minutes), 'Parent Welcome Message' (About 5 minutes), 'Connect Admissions+ To SIMS' (About 5 minutes), and 'Add Other Staff Users' (About 2 minutes).

Task	Duration
> Upload Your School's Logo	About 1 minute
> Personalise Your Application Form's Welcome Image	About 1 minute
> General School Settings	About 2 minutes
> Parent Welcome Message	About 5 minutes
> Connect Admissions+ To SIMS	About 5 minutes
> Add Other Staff Users	About 2 minutes

# SET UP AGREEMENT FORM COMPLETION

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

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





WEEK 2

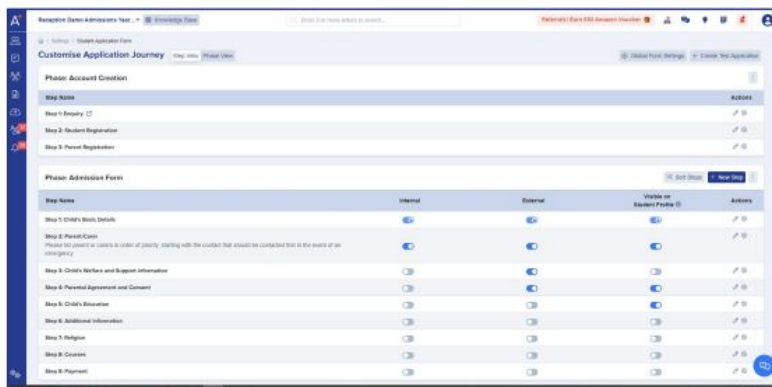
The illustration features four diverse school children standing on a grey horizontal line that serves as the top edge of the word 'WEEK'. From left to right: a boy in a light blue shirt and dark pants with a yellow backpack; a girl in a blue dress over a light blue shirt with a yellow bag; a boy in a 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 and black drop shadows. 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 '2'. 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.



# 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<sup>+</sup>

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:

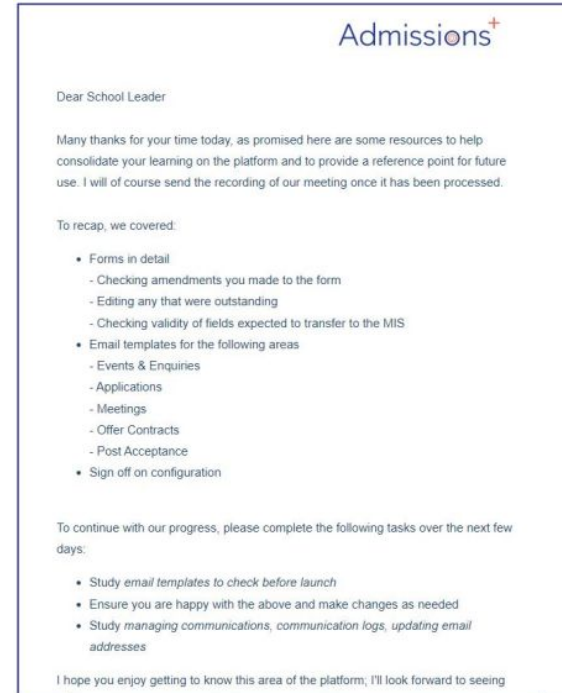
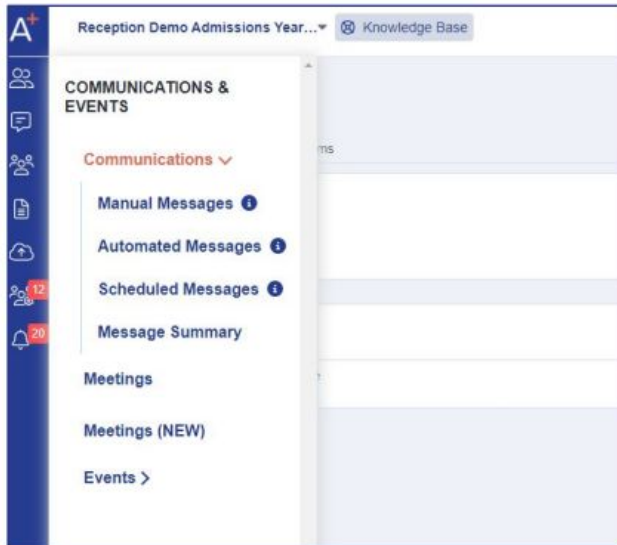
- Study *how to create and use test accounts*
- Create a test account & follow through form, making note of any changes needed & where they are.
- Use this *detailed form guide* to make these amendments ready for checking in our next session

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



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 edge 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 dark 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, solid black number '3'. 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.









# 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 labeled 'Search for meeting...' and a '+ Create new meeting' button. Below this is a section titled 'Getting to know you' with an 'Open Meeting' button. A filter bar contains the following categories: All (9), Allocated (0), Invited (0), Not Confirmed (0), Confirmed (0), Completed (0), Incomplete (0), Did not attend (0), Cancelled (0), and Declined (0). Below the filter bar, a meeting card is displayed for 'Saturday 22nd, April 2023' from 16:36 - 19:36, titled 'Happy Test', with 0/9 attendees and a user 'test'.

The screenshot shows the 'Events' interface. It has a search bar 'Search for events...' and an '+ Add New' button. Below is a table with the following data:

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

# FOURTH MEETING & RESOURCES

Two-hour meeting covering:

- Payments
- Offer Contracts
- Post Acceptance

Resources will be provided to consolidate your learning.

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

The screenshot shows a web interface for 'Parental Agreement and Consent'. It includes a sidebar with 'Parental Consent', 'Policies', 'Terms And Conditions', and 'Other Settings'. The main area has a 'Parental Consent' section with a table of questions and their settings. Below this is a 'Policies' section with fields for 'Policy title' and 'Agreement text', and an 'Upload' button.

Question	MIS export	Internal	External	Visible on Profile	Actions
Please select the parental consent given for the child. <small>(Answer: Data Exch., Copyright, Sex Ed/Sci., Permission, 4 answers)</small>	MIS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Which mode of travel will the child take to school? <small>(Answer: Bus type, Car/Train, Car/Van, Cycle, 3 answers)</small>	MIS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Do you consent to the school acting on your behalf in the case of an accident or emergency? <small>No: Yes</small>	MIS	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Policies**

Internal  External

Polices that student must read

Policy title \*

Agreement text \*

I have read and agree to the above policy

Choose file | No file chosen

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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 diverse 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 and black outlines. The letters are colored: 'W' is blue, 'E' is yellow, 'E' is red, and 'K' is blue. To the right of 'WEEK' is a large, solid black number '4'. The background is white with decorative elements: 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.

# FINAL CHECKS BEFORE GO-LIVE

Admissions<sup>+</sup>

One-hour meeting for final checks before going live.

Learn troubleshooting skills.

Resources will be provided to consolidate your learning.

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 diverse school children standing on a grey platform atop 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 dark 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, solid 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, and green wavy lines in the bottom right.



# SIXTH MEETING & RESOURCES

Admissions<sup>+</sup>

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@apilcaa.com

more ▾

- Reset Password
- Send SMS
- Send notification
- Convert to Parent Account
- Confirm This Account
- Merge
- Change Application Form
- Delete

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

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<sup>+</sup>

HOME

MESSAGES

DOCUMENTS

CALENDAR

Hello Test Monte,

Test Monte Test Macejkovic Student Code: U-ESC8

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

Additional phases

[Yr 7 Maths Scholastic](#)

School Message

No message

Upcoming Events

No event



**WEEK 6**

**&**



**WEEK 7**

### **Week 6**

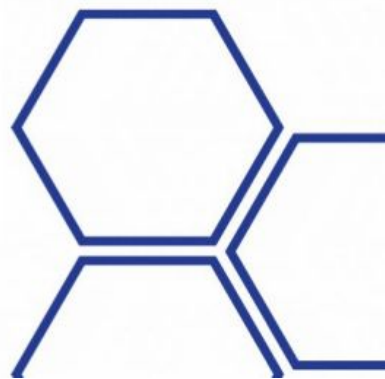
One hour to cover queries raised by the school.

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.



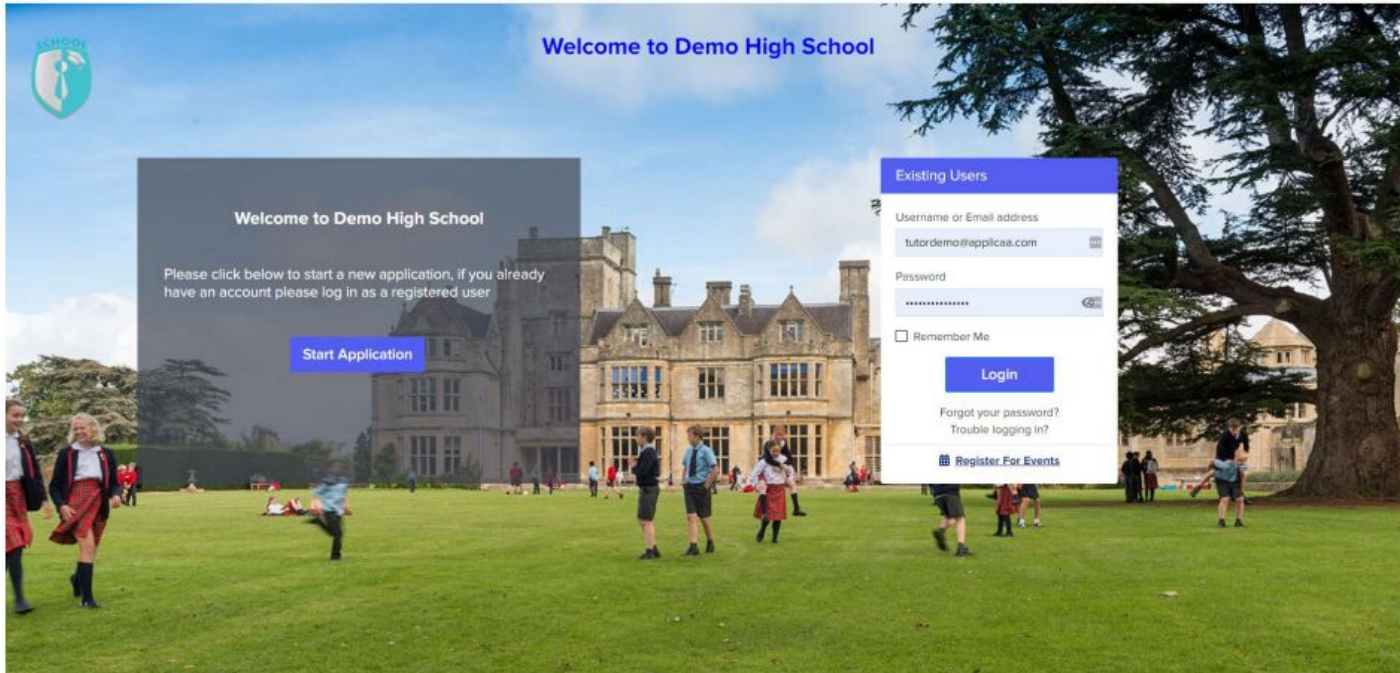


WEEK 8

The illustration features four school children standing on top of the text 'WEEK 8'. From left to right: a boy in a light blue shirt and dark pants with a yellow backpack, a girl in a blue dress 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 text 'WEEK 8' is rendered in large, bold, block letters. The 'W' is blue, 'E' is yellow, 'E' is red, 'K' is blue, and '8' is black. 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.

# 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.