applicaa

Bursary 16+ Onboarding Process

Getting your platform ready -
Courses & Training (approx 5-7 days)

Receive vital set up information from CSM

Bursary¹⁶⁺
Powered by applicaa

Dear Sixth Form Leader

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 Knowlegde 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.

Please begin with this link to create your platform. Hopefully you will find this User Guide helpful in providing an overview. I will be on hand to answer any questions you have and guide you in making sure the platform suits your setting.

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

Complete the basic onboarding tasks as prompted upon creation

Please let me know of any difficulties

Begin on *B16+ First Impressions* & *B16+ Main dashboard* (Knowledge Base)

- Create your platform, complete onboarding tasks as prompted

- Work through content of B16+ First Impressions and Main Dashboard - estimated time 2-3 hours

Training Meeting 1 with your CSM

- Overview of the platform & cover any queries you have

- Introduce the application form area & possibilities for customisation

- Guide you through key navigation, and settings related to your school and fund

Work through Student Profiles & Manage Users
- *estimated 2-3 hours*

- Understand the student application process

- See how to process applications once received

- Ensure all relevant staff have access to your system

- Try a test application to test the process out for yourselves

B16+ Student Profiles

Student guide to applying for a bursary and making requests

How to use the student bursary profile

How do I edit a student's details on their bursary application?

How to make and save notes on a student's bursary application profile

How to edit a student's email address on their bursary application

How to export student bursary information as a PDF

How to create, update and monitor tasks in your Bursary16+ system

How to edit the student homepage of your Bursary16+ system

Updating/ uploading your school's privacy policy in the Bursary16+ platform

Activating Google Translate in your Bursary16+ platform

Overview of bursary statuses & how to change them

How to follow up with incomplete bursary applications

Manage Users of B16+

How to manually add applicants into your Bursary16+ platform

How to update existing bursary applications using a csv import

How to create a test account in your Bursary 16+ platform

How to add staff into your bursary platform

Training Meeting 2 with your CSM

- Check over any oddities the CSM has noticed in your application form
- Cover any queries you have so far
- Check your email templates and how to send communications to applicants

Final B16 courses -
estimated 2-3 hours

- Learn the finer details of the system and how to manage the data
- Understand how students make requests, and how you process them
- Prepare for launching your system!

B16+ Application Process in Detail

Setting up your New Cycle for B16+

How to Edit/Customise my Bursary Form Questions

Where do I edit questions on Student's Initial Registration

Example csv to import bursary students

See more

B16+ Student Requests & School Expenses

How to update the Bursary Request form

How to assign people to approve the request

How to export all student's bursary requests

How to add an Expense

B16+ Checks, Troubleshooting & Go-Live

Troubleshooting guide: Bursary bands are not showing in student profile

How to update email design - header & footer for Bursary16+

What do the email statuses mean in the bursary platform?

How to send a quick email to a group via Bursary16+ platform

Go-Live Meeting with your CSM

Tess Darmel Marianne Mary

Victor Lucy Arnel

- Cover any queries you have and share tips

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

Post-launch

- Meet regularly with your CSM as needed - training is unlimited in your first cycle
- Revisit the Knowledge Base to refresh your understanding
- We really value your feedback on our products & services, so let us know what you think!

1:1 CSM 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 group training sessions, covering how to set up for your new cycle each year (including how to renew applications from Year 12 into Year 13)
- 8am - 4:30pm telephone support for quick queries
- 24/7 access to our Knowledge Base directly via your platform
- Ask our Live Chat any queries via the Help Hub on your platform

Group training for 2nd cycle & beyond

Week Commencing	Monday 11am	Monday 2pm	Tuesday 11am	Tuesday 2pm	Wednesday 2pm	Thursday 2pm
01/09/2025			→	B16+ New Cycle	In Year	Y12 New Cycle
08/09/2025				Nursery	SI Forms	Y12 New Cycle
15/09/2025			→	B16+ New Cycle	In Year	Y12 New Cycle
22/09/2025				Nursery	SI Forms	Y12 New Cycle
29/09/2025			→	B16+ New Cycle	In Year	Y12 New Cycle
06/10/2025				Nursery	SI Forms	Y12 New Cycle
13/10/2025			→	B16+ New Cycle	In Year	Y12 New Cycle
20/10/2025				Nursery	SI Forms	Y12 New Cycle

Register Here