

Setting up your new cycle

Exams+

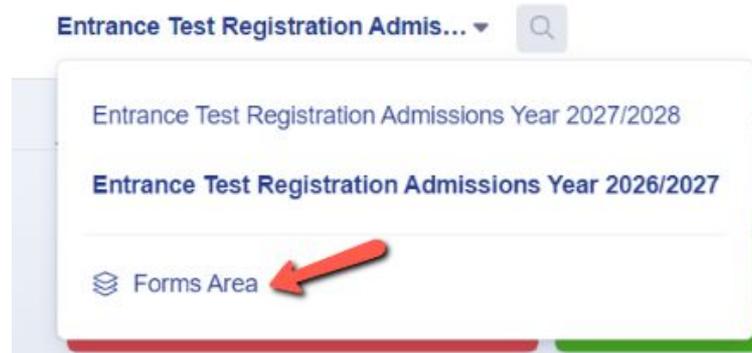


THE TIMELINE

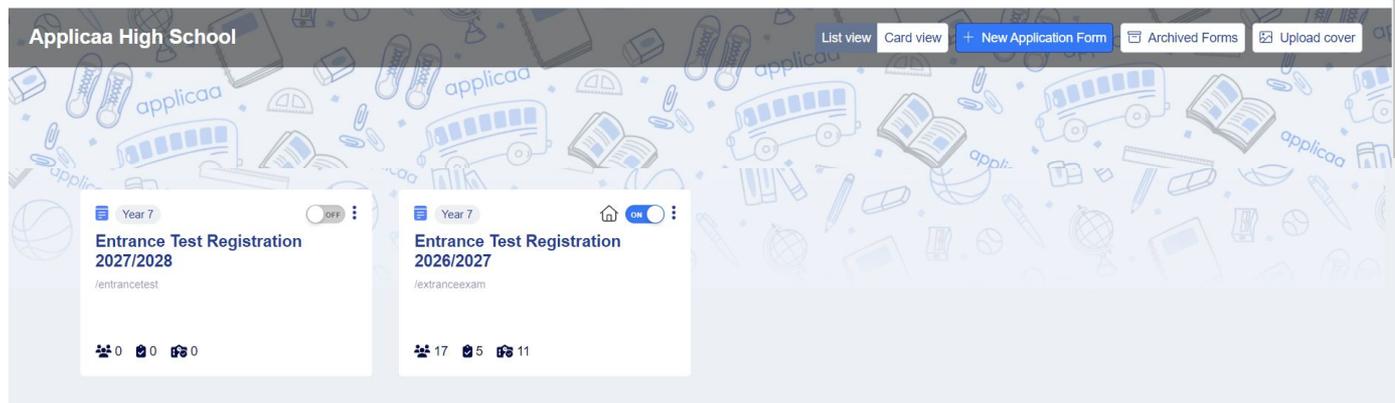
1. You configure the questions which need to be answered by parents in your new form - this will already have been cloned for you from last year's form.
2. You publish the link to your new season's form so parents can register, create an account and apply for their child to sit the test (Summer Term).
3. Children sit the test (September) and the results are processed.
4. You receive the results and these can then be uploaded into the Test Results phase of your Exams+ form.
5. The results can be shared with the parents in two ways; either by email (using mail merge tokens) or by turning on the "Test Results" phase and inviting parents to log in and view the results.
6. Based on the results, parents can then make a decision about whether to apply for a Grammar School place for their child, via the Local Authority.
7. Schools receive their Local Authority lists and can then ask parents to complete their admissions/data collection forms via their Admissions+ system (March).

How to see your new form

Click on the blue wording in the upper left of your dashboard and then click “forms area/multiple forms”.

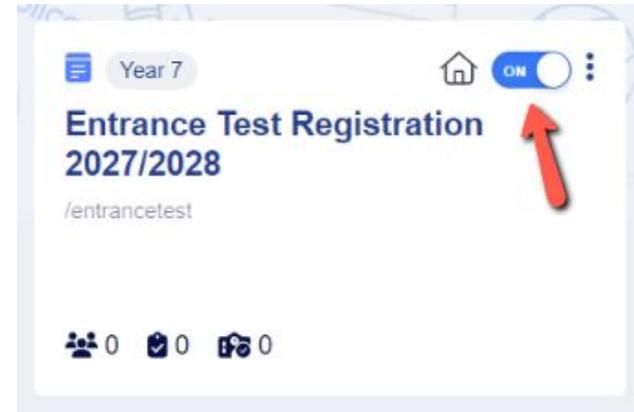


Your tiles area will appear and will look something like this:



Your new form will already have been created for you (cloned from your previous cycle) and you will see it in this area.

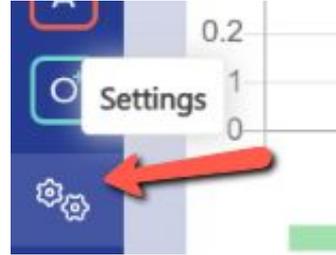
Turn on the toggle switch to make your new form active.



How to close your old form

Now that your previous cycle has finished, you don't want parents completing anything further on that form.

In your old form:
Navigate to **settings > application form >** and click to disable the phases.



Customise Application Journey

All Phases

Sort Phases

Build your student application process step by step. Arrange phases in order, choose what students can see, and add your school's requirements. Your changes save automatically.

1. Account Creation

Disable this phase

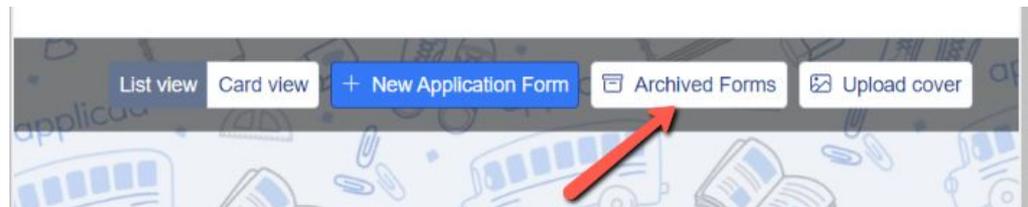
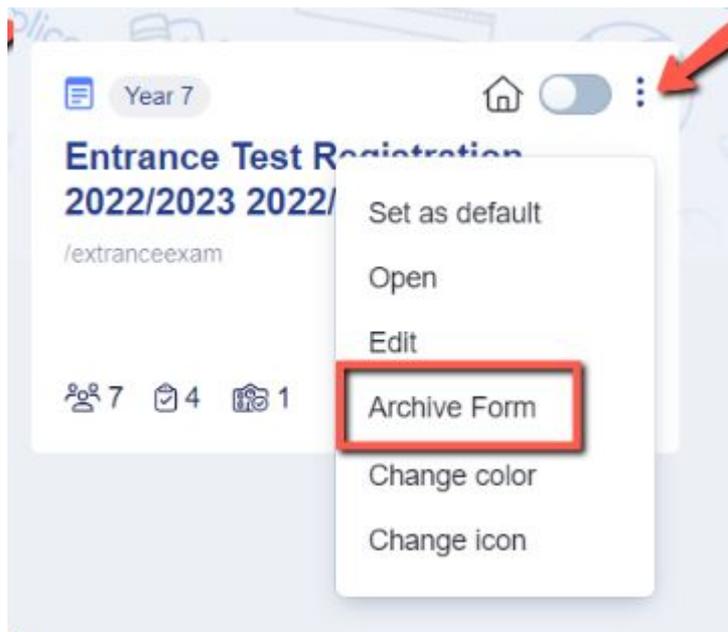
2. Entrance Test Registration Form



3. Test Results



You can also archive old forms in your forms area if you wish to keep your main forms area tidy.



Editing your landing page and other messages

Navigate to **settings > form settings > landing page**.

Here you can edit your initial message to parents and check your configuration mode. For Exams+, this should be set to “only parents can register”.

You can also update any images here as needed.

Configuration Mode

Choose your landing page configuration mode:

- Only students can register ⓘ
- Students & Parents can register ⓘ
- Students and parents must be imported by staff ⓘ
- Only parents can register ⓘ
- New Application area hidden completely

 [Edit](#)

Customise Texts & Buttons

Show New Application block

Show New Application button

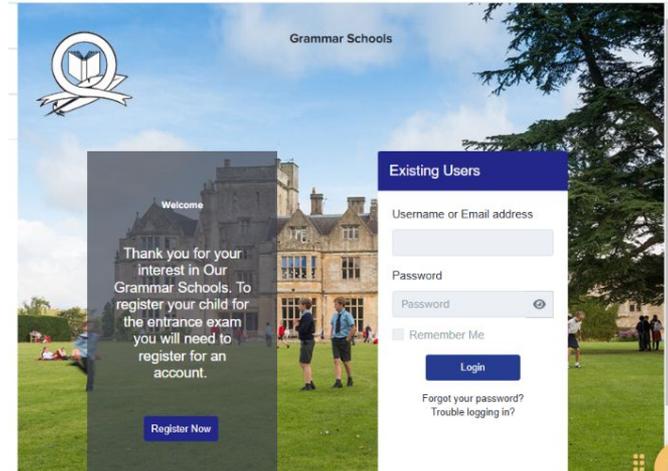
New application title

Welcome

Description

Paragraph **B** U *I* [List icons] [Link icon] [Image icon] [Color icon] [Font size icon] [AI icon] [More icon]

Thank you for your interest in Our Grammar Schools. To register your child for the entrance exam you will need to register for an account.



Navigate to “**parent homepage**” to edit those messages, update your settings and change any images as needed - this is what parents will see once they have logged in.

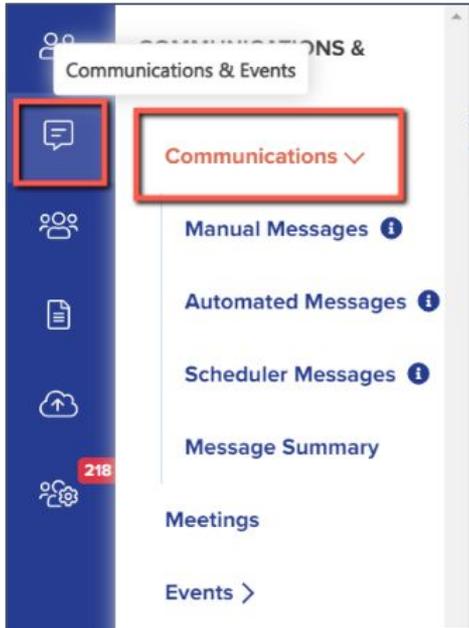
The screenshot shows a configuration page for the 'Parent Homepage'. At the top, there is a navigation bar with the following items: 'Parent Homepage' (which is underlined), 'Landing Page', 'Application Groups', 'Form Groups', and 'Student Profile'. Below the navigation bar, the page is divided into sections. The first section is titled 'General Settings' and contains two toggle switches: 'Parent Must Accept School's Policy' and 'Parent Must Accept Applicaa Policy', both of which are currently turned on. The second section is titled 'General Welcome Message' and features two buttons: 'Preview' and 'Edit'. Below this, there are two columns: 'Messages on parent's homepage' and 'Parent Homepage Image'.

You could consider changing the wording of the action buttons to suit your process:

The screenshot shows a configuration page titled 'Children Status Config'. It contains two rows of text labels on the left and corresponding button text examples on the right. The first row shows the label 'Button text for new application button' next to a button with the text 'Register a child'. The second row shows the label 'Button text for continue application button' next to a button with the text 'Continue Registration'.

Checking your email templates

The email templates area is really useful and can automate a lot of your processes!



There are some automated emails you will need to check - you can preview and edit them by scrolling right on the table.

Created when	Repeat	Enable	Actions
			  
			  
to interview	N/A		   

You can edit, move to folder and delete using these icons

Top Tip: check all active emails to make sure the wording is appropriate for your process.

Priorities for checking ahead of launch - filter your “send to” column to “parent”:

Search in table

+ Add new message + Add new folder

Hide system messages

Showing 1 to 9 of 9 entries (filtered from 34 total entries) Show 50 entries

Type	Template Name	Subject	Send from	Send to	Triggered by	Phase	Triggered when	Repeat
	Search Template I	Search Subject		Parent				

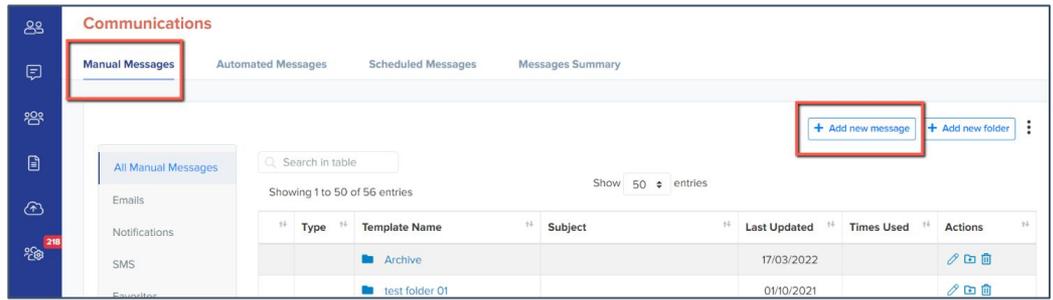
✉	Parent Confirmation Instructions	Welcome to [SCHOOL_NAME]'s Online Application Form
✉	Notify Parent Application Complete	{{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}} has completed their application to [SCHOOL_NAME]

Once a parent has registered for an account, they are sent this email to verify their email address and gain access to complete your form

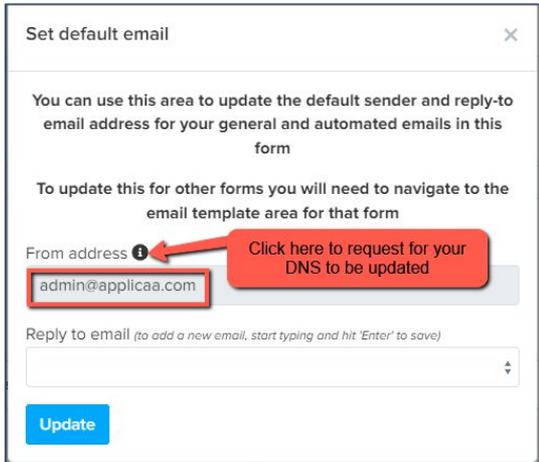
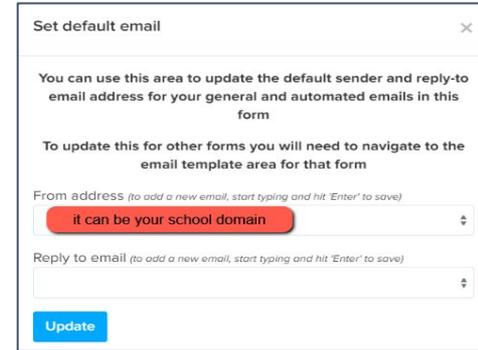
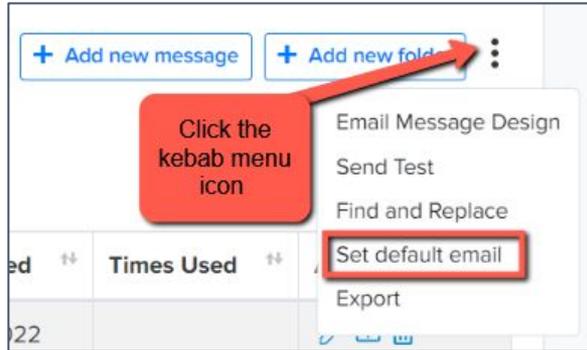
Once a form is completed and submitted, this email is triggered.

Consider rewording it to fit your purpose - "we have received the completed registration for {{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}}"

Create any manual templates now so they are set and ready to use later on in the cycle - future you will be grateful!

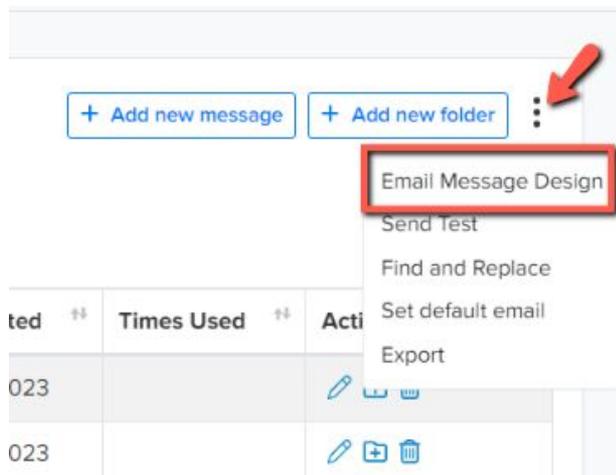


Check who the emails are being sent from and who the replies will come to - set your defaults here:



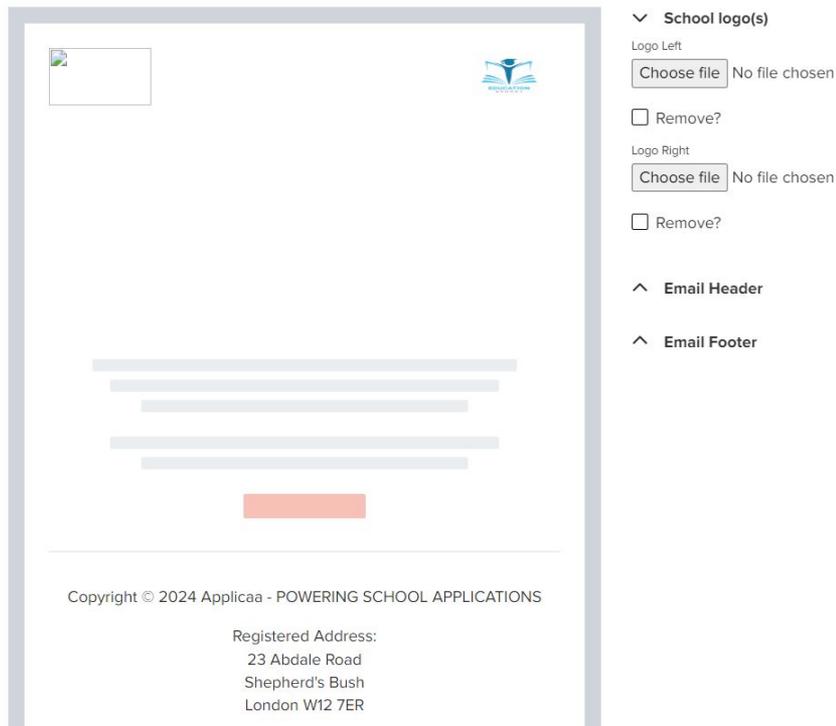
If you are seeing “admin@appliance.com” in the From address, this means you have not requested a DNS update. You can request this by clicking this icon and adding the details for your IT Manager - it will then mean you can send emails from your own school domain!

Customise your email templates in bulk - add a header and footer, and your school or consortium logos.



The screenshot shows a user interface with two buttons: '+ Add new message' and '+ Add new folder'. To the right of these buttons is a vertical ellipsis menu icon, which is highlighted with a red arrow. A dropdown menu is open, and the first option, 'Email Message Design', is highlighted with a red rectangular box. Below the menu, a table is partially visible with columns for 'ted', 'Times Used', and 'Acti'.

ted	Times Used	Acti
023		  
023		  



The screenshot shows the email template design editor. The main area displays a preview of the email template. On the left, there is a placeholder for a logo. On the right, there is a school logo. Below the preview, there are sections for 'School logo(s)', 'Email Header', and 'Email Footer'. The footer section contains the text: 'Copyright © 2024 Applicaa - POWERING SCHOOL APPLICATIONS' and 'Registered Address: 23 Abdale Road, Shepherd's Bush, London W12 7ER'.

▼ School logo(s)

Logo Left
 No file chosen
 Remove?

Logo Right
 No file chosen
 Remove?

^ Email Header

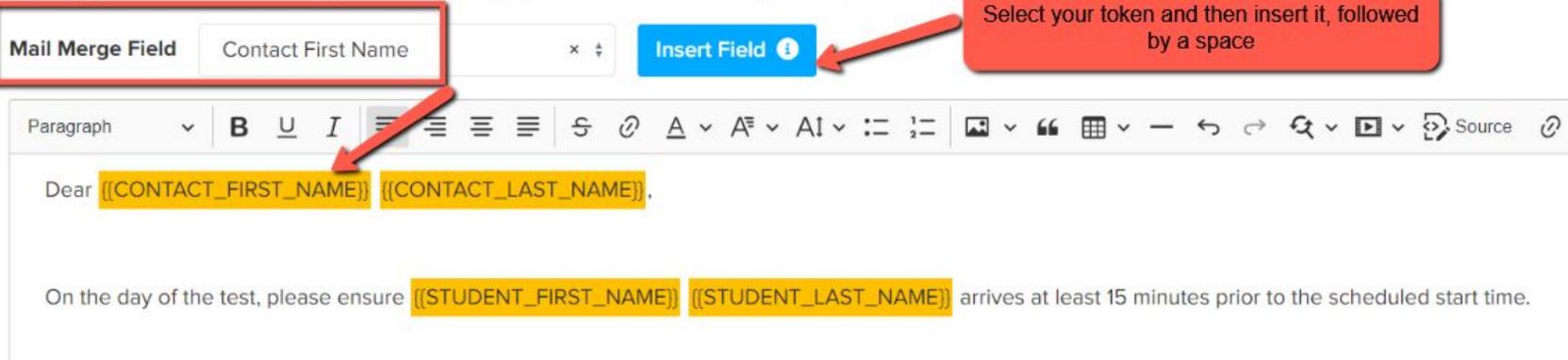
^ Email Footer

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Registered Address:
23 Abdale Road
Shepherd's Bush
London W12 7ER

Insert mail merge fields and add attachments as required to personalise your messages.

By using personalisation tokens, you can mail merge personalised content to your recipients.



The screenshot shows a mail merge editor interface. At the top, there is a 'Mail Merge Field' dropdown menu with 'Contact First Name' selected. To its right is an 'Insert Field' button. A red callout box with an arrow pointing to the 'Insert Field' button contains the text: 'Select your token and then insert it, followed by a space'. Below this is a rich text editor toolbar with various icons for text formatting and alignment. The main text area contains two paragraphs: 'Dear {{CONTACT_FIRST_NAME}} {{CONTACT_LAST_NAME}},' and 'On the day of the test, please ensure {{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}} arrives at least 15 minutes prior to the scheduled start time.' The merge tokens are highlighted in yellow. A red arrow points from the 'Mail Merge Field' dropdown to the first token in the first paragraph.

📎 Attachments (File from computer will be uploaded and selected if exist)

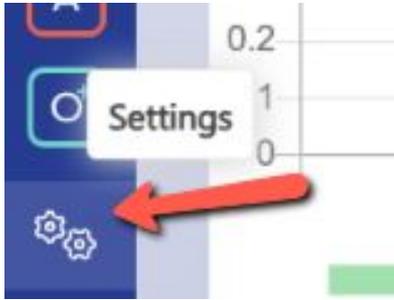
+ Add Attachment

← Back

Save

Configuring the Exams+ Registration Form

Navigate to **settings > application form** and disable any phases not in use at this time in the cycle.



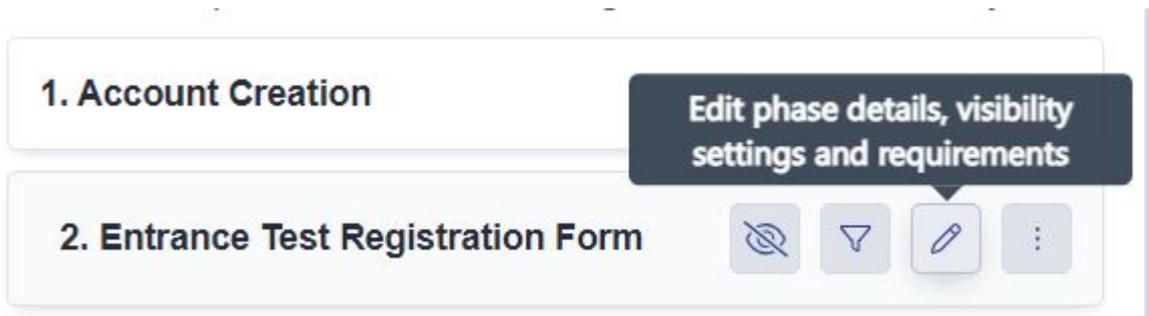
Customise Application Journey

All Phases Sort Phases

Build your student application process step by step. Arrange phases in order, choose what students can see, and add your school's requirements. Your changes save automatically.

1. Account Creation
2. Entrance Test Registration Form Disable this phase
3. Test Results

You can also rename the Application Form phase to something more appropriate for your intake, if you like:



Edit Phase: Entrance Test Registration Form



Name

Entrance Test Registration Form

Visible to Staff on Student Profile

Internal Applicants

Lock form after submission ? OFF

Disable submissions ? OFF

External Applicants

Lock form after submission ? OFF

Disable submissions ? OFF

Stand alone ?

Trigger by condition

Close

Update Phase

Make any changes to questions/fields - are there questions you wish you'd asked last cycle? Now is the time to add those in!

Navigate to **settings > application form** and click on the name of a step to open it, and then select **I want to make more changes** in order to add or amend.

Customise Application Journey

Switch to old view

Click any phase below to open it and customise the steps students will complete. Add ones to fit your school's process.

1. ACCOUNT CREATION 3 steps

2. OFFER 0 steps

3. ADMISSION FORM 9 steps

Visible to Student

Step 1: Student Basic Details

Step 2: Support Information

Step 3: Agreement

Student Basic Details

Allowing new registrations Open Full View

Enable for Internal External

Settings that apply to ALL applicants

1. Would you like to collect phone numbers from applicants during registration?

Internal External

Yes Yes

No No

2. Which number would you like to collect from

Preview this step Internal Student External Student

Student Basic Details

Please upload a recent passport-style photograph of yourself Max 250MB

Legal First Name* Legal Last Name*

I want to make more changes

You can choose which steps to have active and which questions you need parents to answer.

Do you need them to provide an image of their child, for example, for confirmation purposes on the day of the test?

Click “+ New Question” and you will be prompted to choose what you would like to add.

Here is a link to our [form customisation guide](#).

Add a new question

Your child's details.

Question

Please upload a recent passport-style photograph of the child

Question	MIS export	Internal	External	Visible on Profile	Actions
Please upload a recent passport-style photograph of yourself	<input type="checkbox"/>	<input checked="" type="checkbox"/> ON	<input type="checkbox"/> ON	<input checked="" type="checkbox"/> ON	 
Legal First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON	 



Pre-defined Question & Fields

MIS Compatible



Custom Question

Non-MIS Compatible

Explanation Text Block

Add paragraphs to the form so you can explain more details to applicants.

If your system is an Exams+ system, there will not be any integration with your MIS (this tends to apply to consortiums). If your system is an Admissions+ system, MIS integration will be in place.

In the **Preferred Test Centre** step, you can give parents the option of where the child will sit their test. This will apply if you are part of a consortium, or have multiple test venues.

In the **Sharing Your Child's Results** step, you can give parents the option of which school(s) should receive the results for their child. This can be configured so that only the relevant schools are displayed to the parent (for example, so that their daughter's results aren't shared with any Boys' Schools, or vice versa). See how to set **Conditional/Toggleable Fields** [here](#).

In the **Sitting Other Entrance Tests - Clashing Dates** step, you can ask parents to specify if they have already registered their child to sit a test at another centre. (Technically, the child should only be sitting the 11+ exam once).

[Step 6: Preferred Test Centre](#) 

[Step 7: Sharing your child's results](#) 

[Step 8: Sitting Other Entrance Tests - Clashing Dates](#) 

Pate's Grammar School - Cheltenham - boys and girls

Yes No

Ribston Hall High School - Gloucester - girls only

support for: Your Child's Gender

Yes No

Sir Thomas Rich's School - Gloucester - boys only

support for: Your Child's Gender

Yes No

Configure your **properties** so they are correctly formatted in the way you prefer.

first name

Showing 1 to 2 of 2 entries (filtered from 377 total entries)

Show 50 entries

Category	Apply For	Name	Code	MIS	Lookups imported?	Used in number of fields	Actions
Basic Details	Student, Guardian, OtherGuardian, EnquiryUser, Parent, EnquiryChildren,	First Name	first_name		No	200	



Navigate to **settings > properties > properties.**

Here's a [guide](#) to our properties area.

Title *

Text format ⓘ *

Capitalise First Letter of Every Word

- Texts
- none
- Capitalise First Letter of Every Word**
- Capitalise First Letter of Sentence
- ALL CAPS
- all lower case

You will see the option to configure properties like Postcode formatting to ensure it is entered in ALL CAPS, or format First Name and Last Name to Capitalise First Letters, for example.

Title *

Phone format ⓘ *

XXXXX-XXXXXX

Unique Code: ⓘ *

Default value: ⓘ

Do not include spaces in the number.

Preview the whole form as external students to see the form from the perspective of the parent and check if it is all working as expected.

Allowing new registrations [Open Full View](#)

Preview this step Internal Student External Student [I want to make more changes](#)

THIS APPLICATION FORM MUST BE FULLY COMPLETED DEAD LINE DATE

Your child's details.

Please ensure that the names you enter on this form are your child's LEGAL names with the same spelling as those you enter on any other forms, especially if you apply to other Grammar Schools outside Applicaashire. These must also match the names and spelling you use when you complete the Common Application Form for your Home Local Authority in October after you have received your child's results. This also applies to your child's Date of Birth.

Eligibility to sit the Entrance Test - Expected Dates of Birth

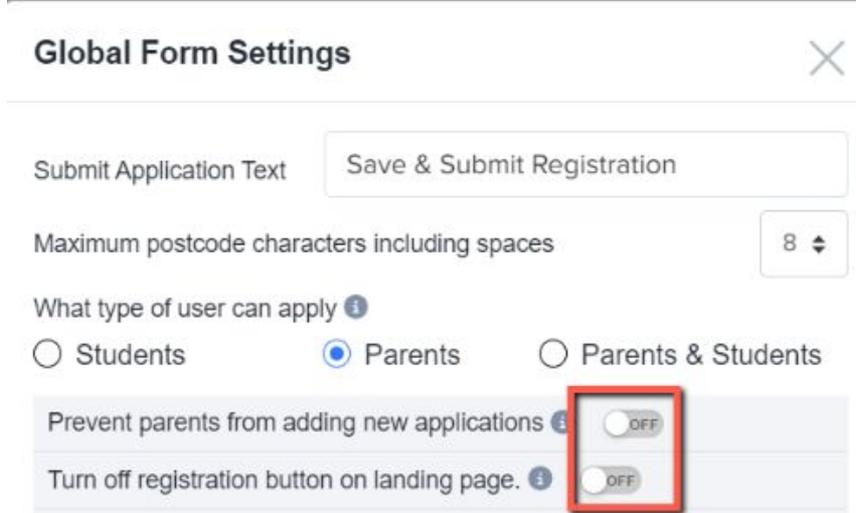
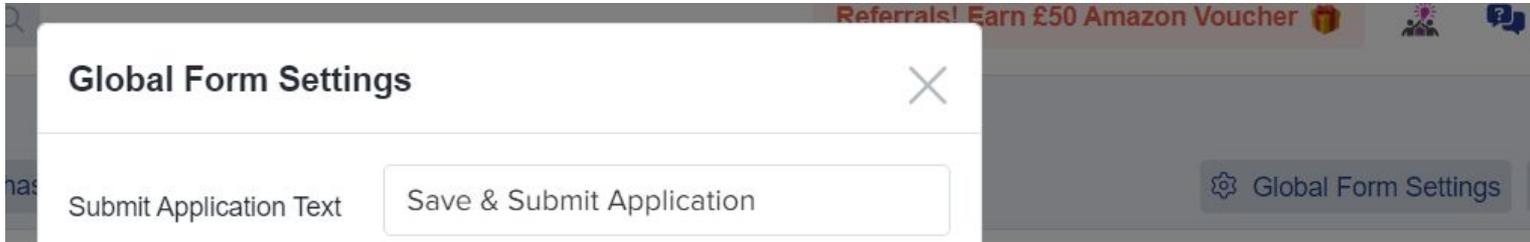
Generate a test parent and student to practice with.

Make yourself an account as a parent first, and then add a student and link them together (you'll be prompted to do that). This will enable you to complete the whole process to try it out from their perspective.



Check your Global Form Settings: **settings > application form > global form settings**.

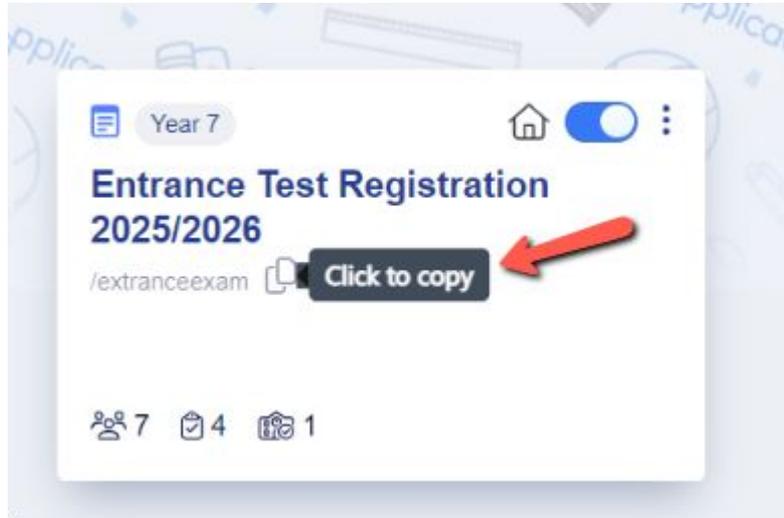
The wording of your “Submit Application Text” button can be edited - perhaps consider rewording to “Save & Submit Registration”.

A screenshot of the 'Global Form Settings' dialog box. The title bar shows 'Global Form Settings' and a close button. The 'Submit Application Text' field is set to 'Save & Submit Registration'. Below this, there is a field for 'Maximum postcode characters including spaces' set to '8'. The 'What type of user can apply' section has three radio buttons: 'Students', 'Parents' (which is selected), and 'Parents & Students'. At the bottom, there are two toggle switches, both of which are turned OFF. The second toggle switch is highlighted with a red rectangular box.

When you are ready to launch your form, ensure the switches highlighted are both turned OFF.

Publish Your Link

When you're ready to launch, copy your link from the forms area and paste it onto your school or consortium website.



Managing Your Registrations

You may receive a large quantity of registrations to sit the test, and it will be important to manage these effectively.

The use of dashboard tiles and application groups will be useful to keep track of who is sitting at which test centre (if applicable), who attends on the day of the test and who requires SEN provision, for example.

Tiles



7

Registered Students

4

Applications Completed

0

Vision Impairment

1

Test 1

4

Access Arrangements

Entrance Test Registration Form Statuses

3

Incomplete

0

Awaiting Reference

4

Completed

0

Declined

0

Withdrawn

0

Deadline Missed

0

Waiting List

Create **dashboard tiles** by following the steps in this [guide](#).

Create application groups by following the steps in this [guide](#), and add children to the groups using this [guide](#) (you could create groups for "attended" and "did not attend", for example, so you know which list of students to export in preparation for uploading their results).

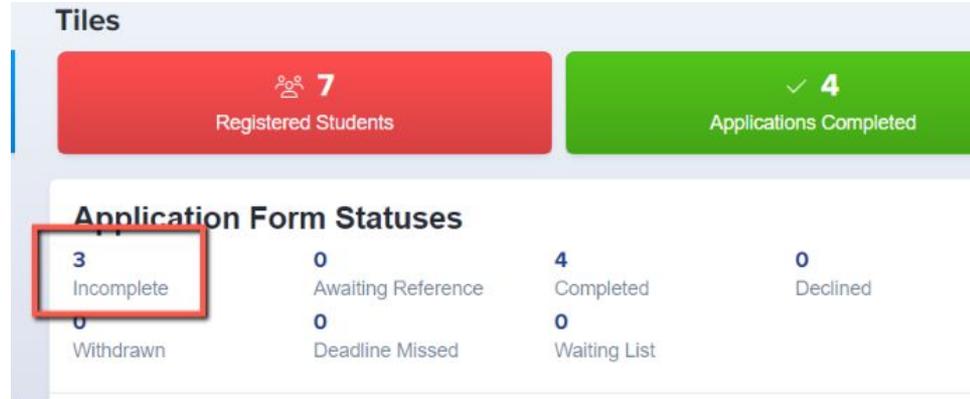
Chasing Incompletes

You can chase incomplete forms by sending reminders to the parents - either manually, or by scheduling an automated chaser.

Click the “incomplete” status on your main dashboard.

Select them all using the checkbox and then click “communications” > “send email”.

You can then type a message and send to the parents of the selected children, or insert a premade manual template.



Change Application Status Make Offer Change Offer Status Change Enrolment Status Change Internal Status Change Phase Status Add to group Remove from group **Communications** Reset Passw

Change Colour Bulk Update Add to interview Export To PDF Confirm Account

Showing 1 to 7 of 7 entries 7 rows selected Show 10 entries

<input checked="" type="checkbox"/>	ID	Student Code	First Name	Last Name	Birthday	Gender	Email/Username
<input checked="" type="checkbox"/>	20	NU7M	Deesha	Assani	05/07/2010	Female	kalpnabhudia@yahoo
<input checked="" type="checkbox"/>	21	JQNXX	Deesha	Assani	05/07/2010	Female	mitesh.assani@gmail

School

To schedule an auto-chaser, navigate to **communications and events > communications > automated messages** and click **+New Message**.

Set your initial configuration and move through the wizard to send the message “when an applicant does something” > “has been incomplete for a certain amount of time”.

When a student’s form meets these parameters, the email will then be triggered and sent to the parent automatically.



Communication Type *
Email

Subject Header *
Please complete admission form.

Sender Email *
admin@appli.ca.com

Template Name *
Incomplete

Target Audience *
Parent

Reply-To Email (to add a new email, start typing and hit 'Enter' to save) *
admin@appli.ca.com

Template Description

Set up how you would like to send this email here

When applicant does what? *
Automatically when an applicant does something

When applicant does what? *
Has been incomplete for certain amount of time

Select phase applied to *
Application Form

This may say "admission form" depending on your settings from earlier

Send after 5 day(s) 0 hour(s) 0 minute(s)

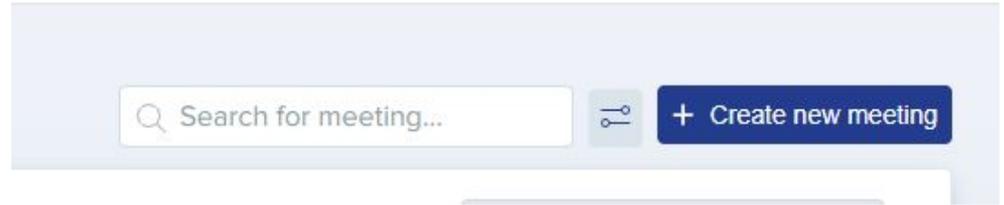
Repeat email after every 5 day(s) until they submit

Scheduling Your Test

You can use the **Meetings** area to schedule the times and locations of your test, and then invite parents to confirm the attendance of their child.

Communications & Events > Meetings

Click to “Create new meeting”.



Complete the **Set Up** step by adding the title and description of the meeting, as well as deciding how the meetings will be scheduled - will you allow them to choose their own timeslot, or will you assign these for them?

Set Up

Title (keep it user-friendly, this will appear in your email invitation) *

Entrance Test

Internal Meeting Name ⓘ

AM Session

Description (keep it user-friendly, this will appear in your email invitation) *

Details of your child's Entrance Test arrangements.

How will the meeting be scheduled?*

Applicants will be invited to choose their own meeting slots

Staff will assign meeting slots before sending out invitations.

Attendee Actions

Allow attendees to cancel or reschedule their meeting slots. Confirmation emails will be sent automatically to notify staff of changes.

Should attendees be able to cancel their slot?

Yes

No

Should attendees be able to reschedule their slot? ⓘ

Yes

No

Configure the corresponding email templates:

Invitation Email 

Email Subject Header

Invitation to interview at {{SCHOOL_NAME}}

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Paragraph            

Dear {{CONTACT_TITLE}} {{CONTACT_FIRST_NAME}} {{CONTACT_LAST_NAME}},

This email is in relation to the entrance test application for {{STUDENT_FIRST_NAME}}
{{STUDENT_LAST_NAME}} at {{SCHOOL_NAME}}.

Your child's test details are as follows:

Meeting: {{INTERVIEW_TITLE}}

Time: {{START_TIME}}

Date: {{START_DATE}}

Location: {{LOCATION}}

Description: {{DESCRIPTION}}

Please click on the link below to log on and respond to this invitation.

{{LINK}}

Confirmation Email 

Email Subject Header

{{SCHOOL_NAME}} Meeting Confirmation Details

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Paragraph            

Dear {{CONTACT_TITLE}} {{CONTACT_FIRST_NAME}} {{CONTACT_LAST_NAME}},

This email is in relation the application for {{STUDENT_FIRST_NAME}}
{{STUDENT_LAST_NAME}},

Thank you for accepting your meeting invitation.

For your reference, please see the details below.

Meeting: {{INTERVIEW_TITLE}}

Time: {{START_TIME}}

Date: {{START_DATE}}

Location: {{LOCATION}}

Description: {{DESCRIPTION}}

Kind regards,

Note - you can check and amend the master copies of your invitation templates by navigating to **communications and events > communications > automated messages** if required.

invite to |

Showing 1 to 4 of 4 entries (filtered from 53 total entries) Show 50 entries

Type	Template Name	Subject	Send from	Send to
	<input type="text" value="Search Template I"/>	<input type="text" value="Search Subject"/>	<input type="text"/>	<input type="text"/>
✉	Invite parent to an Meeting	Invitation to meeting	admin@applicaa.com	Parent
✉	Invite parent to an Meeting (parent select meeting slot)	Invitation to meeting	admin@applicaa.com	Parent

This template will be used if you are assigning their appointments

This template will be used if you are allowing them to select their own appointment

Add new meeting slots

SAT

Start date **i** 31/10/2023

Start time **i** 16 : 51

End time **i** 16 : 51

Set up as repeating slots? Yes

Repeat on Tuesday X Thursday X X

Repeat ends 22/12/2023

Length of each slot minute(s)

Gap between slots minute(s)

Number of attendees per slot **i** 1 student(s)



Add the date of the session, and set the session start and end times, and how many students can be accommodated in that session.

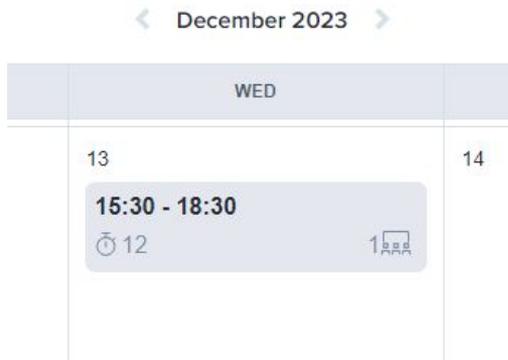
You'll then be able to assign staff to each slot if required, and add a location (both optional).

You can update the assigned staff, attendee number, and location for multiple slots at once by selecting the corresponding rows and making changes in bulk.

1 to 12 of 12 entries

<input type="checkbox"/>	Meeting date	Start time	End time	Assigned staff	Location	Maximum Attendees
<input type="checkbox"/>	Wednesday, 13/12/2023	15:30	15:45	<input type="text"/>	<input type="text"/>	1
<input type="checkbox"/>	Wednesday, 13/12/2023	15:45	16:00	<input type="text"/>	<input type="text"/>	1





The meeting will then be displayed on the calendar, and you can repeat the process to add as many more sessions/times/locations as needed.

You'll then be prompted to add students to the meeting - either one by one, from a group, or by using the advanced filtering option.

All meeting slots

All 12 Added 0 Invited 0 Confirmed 0 Completed 0 Incomplete 0 Not Attended 0 Not Confirmed 0 Canceled 0

Make Offer Change Offer Status Communications Reset meeting status Add to group Remove from group Remove students + Add students

Add new students to the meeting



Student

Group

Filter

Add to meeting

Depending on your setup, you will either be prompted to **invite students** (if they are choosing their own slots) or first to **allocate students and then invite them** (if you are assigning appointments for them).

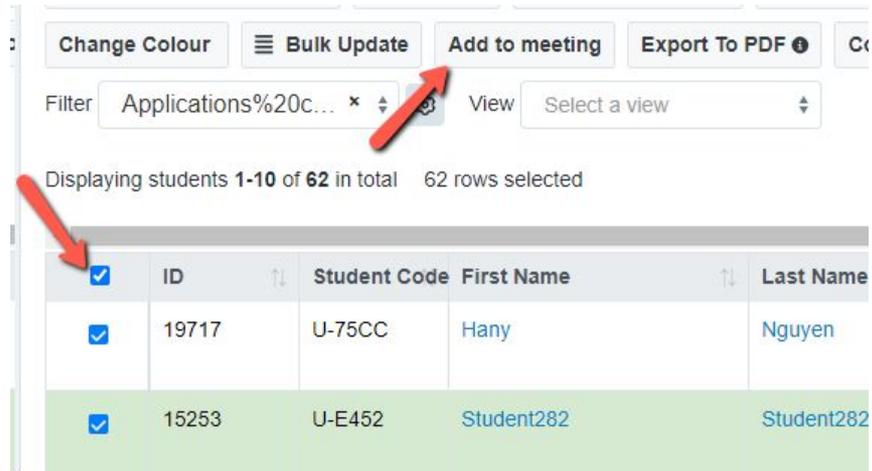
When you click to invite the students, you will be shown the email template again so you can check it before clicking send.

Adding students to a meeting from your main dashboard

Select a tile or a category, to load a list of students.

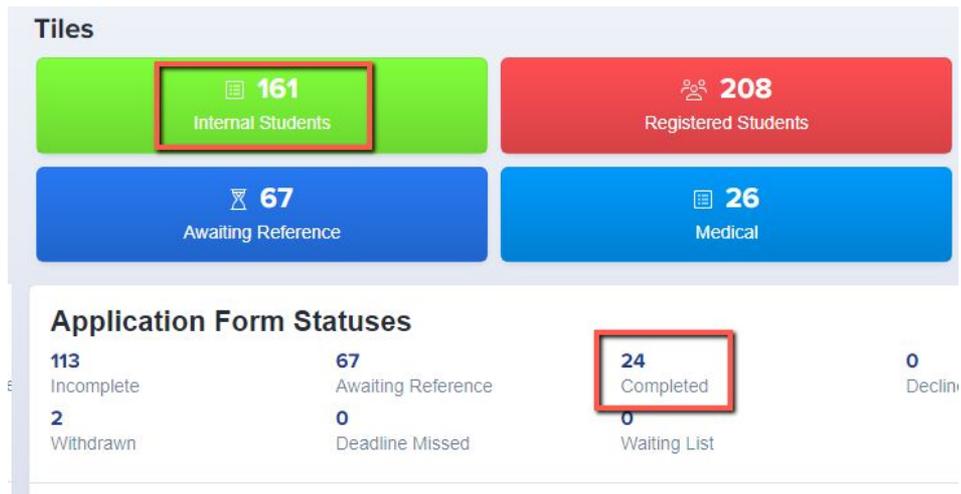
Select the students you want to add to a meeting and choose “add to meeting” (this relies on you having created the meeting already).

You can then return to the meetings area to send your invitations.



The screenshot shows a student list interface. At the top, there are buttons for "Change Colour", "Bulk Update", "Add to meeting", and "Export To PDF". A red arrow points to the "Add to meeting" button. Below the buttons is a filter field containing "Applications%20c..." and a "View" dropdown menu. Below the filter, it says "Displaying students 1-10 of 62 in total 62 rows selected". A table below shows student details with columns for ID, Student Code, First Name, and Last Name. The first row is highlighted in green. A red arrow points to the checkbox in the first column of the table.

<input checked="" type="checkbox"/>	ID	Student Code	First Name	Last Name
<input checked="" type="checkbox"/>	19717	U-75CC	Hany	Nguyen
<input checked="" type="checkbox"/>	15253	U-E452	Student282	Student282



The screenshot shows a dashboard with four tiles and a section for application form statuses. The tiles are: "Internal Students" (161), "Registered Students" (208), "Awaiting Reference" (67), and "Medical" (26). The "Internal Students" tile is highlighted with a red box. Below the tiles is the "Application Form Statuses" section, which shows: 113 Incomplete, 67 Awaiting Reference, 24 Completed (highlighted with a red box), and 0 Declined. It also shows 2 Withdrawn, 0 Deadline Missed, and 0 Waiting List.

Tiles

- Internal Students: 161
- Registered Students: 208
- Awaiting Reference: 67
- Medical: 26

Application Form Statuses

- Incomplete: 113
- Awaiting Reference: 67
- Completed: 24
- Declined: 0
- Withdrawn: 2
- Deadline Missed: 0
- Waiting List: 0

Inviting Registrants

Once you have added students to a meeting, you then need to send the invitations to their parents. Visit your meetings area and click on the “all” button to see the list of available meeting slots.

You will be notified if you have added any students who have not yet been allocated and/or invited and you can click the action buttons (“invite students” for example) to complete the process and send the invitations out.

Guidance Meetings

All 12 | Added 2 | Invited 2 | Confirmed 0 | Completed 0 | Incomplete 0 | Not Attended 0 | Not Confirmed 2 | Canceled 0

 Wednesday 13th, December 2023

 15:30 - 18:30



 You have 4 unallocated student(s)

[View details](#) [Allocate students](#)

 You have 4 applicant(s) that have been allocated but have not been invited

[View details](#) [Invite students](#)

To check the status of your invitations and ensure they have been sent, scroll right on the table to view the **Invitation Status** column.

Invitations have to be sent in order for the parents to be able to respond (accept or decline) so you can track responses.

Displaying 12 students

Show entries

<input type="checkbox"/>	Meeting Date	Time	Student Code	Email/Username	School	Room	Offer Status	Enrolment Status	Application Group	Meeting Status	Invitation status
<input type="checkbox"/>	03/11/2023	12:00 - 12:30	U-47EA	frost@example.com	Greenford High School - Sales Demo		Accepted	Enrolment waiting list	New Ranked Group	denied	delivered 20/10/2023 09:02:56 AM
<input type="checkbox"/>	03/11/2023	12:00 - 12:30									



Tracking Responses



Jason Bourne Student Code: U-8E2D

School Message

Welcome to the application portal for Test Grammar School.

EXAM TEST DAY

Entrance test for 2025 intake

14/09/2024 09:00 - 12:00

Main Hall

Decline

Accept

Once you have sent your invitations, parents will log into their accounts and will see something like this.

You can track their responses by clicking on the coloured boxes in your meetings area.

Exam test day

All 330

Allocated 5

Invited 5

Not Confirmed 5

Confirmed 0

Completed 0

Incomplete 0

Did not attend 0

Cancelled 0

Declined 0

Monday 17th, October 2022

10:00 - 11:00

Tutor Demo

3 / 1

School hall

Saturday 14th, September 2024

09:00 - 12:00

2 / 1

Main Hall

Registering Attendance

You can access an appointment directly from your meetings area, by clicking the pencil icon.

Meeting slots: All 42 | Allocated 42 | Invited 0 | Not Confirmed 42 | Confirmed 0 | Completed 0 | Incomplete 0 | Not Attended 0 | Canceled 0 | Declined 0

Buttons: Make Offer, Change Offer Status, Communications, Reset meeting status, Add to group, Remove from group, Remove students, Configure Meetings Settings, Add students

Search: Search in table | Export

Displaying 42 students | Show 50 entries

Meeting Date	Time	Teacher	Type of student	First Name	Last Name	Student Code	Email/Username	School	Room	Offer Status	Enrolmen	Action
02/02/2023	10:20 - 10:30	Tutor Demo	Internal	Ajoh	116684	U-5C86	student+16684@example.com	Greenford High	Room B	Pending	Pending	   

Mark as “completed” if the child attended and sat the test, or “no-show” if they did not.

← Saturday, 14/09/2024 | 09:00 - 12:00

Jason Bourne

Buttons: Resend invitation, Meeting cancelled, Mark as No-show, Pending

Buttons: Manage pins, View full application

Application Form

Your Child's Details	Child's Current School
Application Form Notice THIS APPLICATION FORM MUST BE FULLY	Home Schooled or at School Is your child at school or home schooled? At School

Meeting Questions

No question yet.

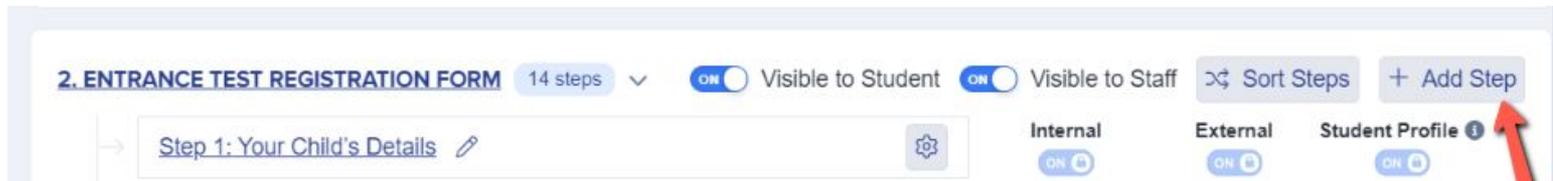
Buttons: Mark as incomplete, Mark as completed

Imports

You can upload any other data which will be of use to you in managing your exams process.

For example, if you need to allocate seat numbers to each child, you could import that information into Exams+ and then email it to parents ahead of the test.

You would first need to create the field in your application form. Navigate to **settings > application form** and either use an existing step, or create a new one (maybe called “Test Information”). Use the [Form Customisation Guide](#) to follow the steps for adding new sections and fields as needed.



Add New Step

Step Name !

Test Information

You will then need to export a list of all children who are registered to sit the test, so that you have a CSV file containing their key information, including their unique code. The unique **student code** is essential for successfully importing the new data and linking it to the correct child.

Registered Students

Filter

View

Showing 1 to 10 of 478 entries

Student Code
U-F98B
U-211E
U-20A8

Once you have clicked onto a group or dashboard card, you will see the function to export

[↔ Switch to Old Table](#)

[↓ Export](#)

[🔗 Share](#)

Add your data to the CSV you exported and save your file.

Go to **Data > Import > Start an Import** and name your file.

1	Student Code	First Name	Last Name	Birthday	Gender	Candidate Seat Number
2	U-4562	Applicaad	Demo	15/03/2011	Female	A1
3	U-8E2D	Jason	Bourne	31/10/2016	Male	A2
4	U-D1E0	A	B	13/11/2012	Female	A3
5	4VH6	Lizzie	Windsor	10/10/2010	Female	A4
5						

Select **Users > Existing Users > Students** and then attach your CSV file.

Map your import as follows:

Do you want to create Parent profile from Guardian/Contact? x ↓

You are importing Internal/External x ↓

Select a column to match student information at Admissions+

From uploaded file x ↓ From Admissions+ x ↓

MATCHED	COLUMN HEADER FROM FILE	PREVIEW INFORMATION	ADMISSIONS+ PROPERTY
✓	Student Code	U-4562 U-8E2D	<input type="text" value="Select a value"/> ↓
✓	First Name	Applicaad Jason	<input type="text" value="Select a value"/> ↓
✓	Last Name	Demo Bourne	<input type="text" value="Select a value"/> ↓
✓	Birthday	15/03/2011 31/10/2016	<input type="text" value="Select a value"/> ↓
✓	Gender	Female Male	<input type="text" value="Select a value"/> ↓
✓	Candidate Seat Number	A1 A2	<input type="text" value="Candidate Seat Number"/> x ↓

Uploading Test Results

Export a CSV of the children, and add your results data to the CSV you exported.

Go to **Data > Import > Start an Import** and name your file.

Select **Users > Existing Users > Students** and then attach your CSV file.

Map your import as follows:

The screenshot shows the 'Imports' section of a system interface. At the top, there are tabs for 'Imports', 'Exports', and 'Uploaded Files'. Below the tabs, there are several configuration options:

- 'Do you want to create Parent profile from Guardian/Contact?' with a dropdown set to 'No'.
- 'You are importing Internal/External' with a dropdown set to 'Unchanged -> if the stude...'
- 'Select a column to match student information at Admissions+' with two dropdowns, both set to 'Student Code'.

Below these options is a table with four columns: 'MATCHED', 'COLUMN HEADER FROM FILE', 'PREVIEW INFORMATION', and 'ADMISSIONS+ PROPERTY'. The table contains four rows of data:

MATCHED	COLUMN HEADER FROM FILE	PREVIEW INFORMATION	ADMISSIONS+ PROPERTY
✓	Forename	Ada Antony	Forename
✓	Surname	Aisel Wambua	Surname
✓	Student Code	U167 U168	Select a value
✓	Test Result	21 79	UGS Score

Yellow callout boxes provide additional context:

- A callout box on the right points to the 'No', 'Unchanged -> if the stude...', and 'Student Code' dropdowns, stating: 'These are the correct values to use in these fields'.
- A callout box at the bottom right points to the 'Test Result' row in the table, stating: 'The only field(s) you need to map here are for the new data you are importing - results'.

The Test Results Phase

3. TEST RESULTS

1 steps



Step 1: Test Scores



This is an "office use" phase; it is configured so that you can add data to it (their results) but that the parents can only view this information; **they cannot make changes to it.**

Edit Field: UGS Score



This question represent the property `ugs_score`

Title / Question *

UGS Score

Description

open in a new tab

Paragraph



B

U

I



⋮

Activate Word Limit



Activate Character Limit



500

Parent can view but cannot amend this data



Locked if value is present

Save

You can choose whether or not to have the Test Results phase active by navigating to **Settings > Application Form**. If you activate it, you can then invite parents to log into their accounts and they will be able to click and view their child's results.

If you do not want parents to see the results in this way, do not turn on the phase.



You can create a **Manual Message** email template to send the results to the parents by email.

The screenshot shows the 'Communications' interface. At the top, there are four tabs: 'Manual Messages' (highlighted with a yellow box), 'Automated Messages', 'Scheduled Messages', and 'Messages Summary'. Below the tabs, there is a search bar labeled 'Search in table' and a 'Show 50 entries' dropdown. On the right side, there are two buttons: '+ Add new message' (highlighted with a yellow box) and '+ Add new folder'. On the left side, there is a sidebar with three options: 'All Manual Messages' (selected), 'Emails', and 'Notifications'. Below the sidebar, there is a table with the following columns: 'Type', 'Template Name', 'Subject', 'Last Updated', 'Times Used', and 'Actions'. The table is currently empty, showing 'Showing 0 to 0 of 0 entries'.

When creating the email, ensure to use the mail merge fields for any data you wish to share with the parents. You can then send the test results email to parents of all children who sat the test and for whom you have received and imported results.

The screenshot shows the 'Mail Merge Field' selection interface. A dropdown menu is open, showing 'AGSB Score' as the selected field. To the right of the dropdown is a blue 'Insert Field' button with an information icon. Below this is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, text color, background color, and list creation. The editor contains the following text:

Dear **[[CONTACT_FIRST_NAME]]** **[[CONTACT_LAST_NAME]]**

Please see below for the results of the 11+ examination for **[[STUDENT_FIRST_NAME]]** **[[STUDENT_LAST_NAME]]**

[[UGS_SCORE]]

[[SGC_SCORE]]

[[AGSB_SCORE]]

Update Staff Users

Check your list of staff users, particularly if you have had a change in personnel.

Ensure any staff who no longer work there are removed, and that new colleagues are added.

Set your Key Contacts - anyone set as a Key Contact will receive information from us such as important system updates, invitations to events etc (we send these by email).

Settings > School Settings > Users:

Users

Permission Reset password Send Welcome Email Disable Enable Delete Import users + Add User Manually

Search in table Show 50 entries 1 to 45 of 45 entries Prev 1 Next

	Name	Email Address	Job Role	Role	Key Contact	Status	Welcome Email
<input checked="" type="checkbox"/>	Test: A1	oanh+1staffa@applicaa.com	Admissions Manager / Director	View All		Deactivated	Not sent

Job Role: Admissions Manager / Director

Permission: Admissions

Key contact

Enable staff

Form types they can access

all

specific

Cancel Update



Do you have any questions?



THANK YOU