

Admissions+

Offer Contract





Offer Contract

- Offer Contract Settings
- Offer Phase
- Email templates
- Parent report
- Assessment import
- How to create and make an offer
- Offer Lists

Offer Contract settings



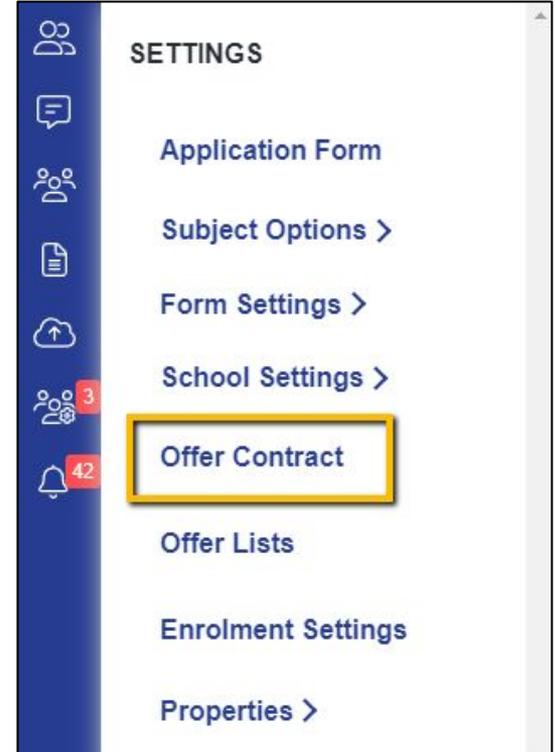
Offer Contract settings

Activating the Offer Contract phase

You will need to ask your CSM to switch on the Offer Contract phase for your platform.

Please note: This is switched on for the entire platform and cannot be switched on for specific forms.

Once the settings are switched on and now visible on your platform, you will see these menu settings.



Offer Contract settings

Phase: Offer Sort Steps + New Step

Step Name	Internal	External	Visible on Student Profile	Actions
Step 1: Offer Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Step 2: Eligibility	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Step 3: Parents & Bill Payers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Step 4: Direct Debit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Step 5: Deposit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Step 6: Contract Signatures	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

You will now have access to these steps in the **Offer Phase** and automated email templates.

	Withdraw Offer	Offer Withdrawn Notice from Wimbledon High School for Girls
	Offer Declined	Offer declined notification
	Offer Accepted	Offer accepted notification
	Make offer to student	Your Offer from Wimbledon High School

Offer Contract settings

Bill Estimate Frequency ⓘ ⓘ

Indicate if your school is eligible to offer the early years grant

Annual



Offer Letter Checking ⓘ



Maximum Bursary Change (%) ⓘ

10

Automatic Deposit waiving ⓘ



Enable Assessment Import ⓘ



Enable Offer Import ⓘ



Allow both Staff Discount and Bursary concessions for one application ⓘ



Bill Estimate Required ⓘ



Show % split, amount payable and frequency on contract for each signatory



Boarder status: normal

Full Time Boarder



Boarder status: full

Day Pupil



Boarder status: part time



Offer Contract settings

Offer Configuration ▾

Add Offer Letter to offer accepted email

Field Name	Description [?]	Options
Offer Status	<u>Offer Status</u>	Options
Offer Sub Status	<u>Offer Sub Status</u>	Options
Bursary Value	<u>Bursary Value</u>	
Head Comment	<u>Head Comment</u>	
Other Comment 1	<u>Art Scholarship</u>	
Other Comment 2	<u>Other Comment 2</u>	
Other Comment 3	<u>Other Comment 3</u>	
Other Comment 4	<u>Other Comment 4</u>	
Deposit New	<u>Deposit New</u>	
Deposit Waive	<u>Deposit Waive</u>	
Deposit Change Authorisation	<u>Deposit Change Authorisation</u>	
Deposit Change Authorisation Comment	<u>Deposit Change Authorisation Comment</u>	

Here you can edit the names of pre-defined properties that you can use later to personalise offers to applicants.

You will see these in appear in the Offer Table.

Offer Contract settings

Contract header Test Header ab 	 Edit note
Contract footer 	 Edit note
Contract Declaration Test Contract Declaration 	 Edit note
Contract Terms and Conditions Test T&C's 	 Edit note

This allows you to set up a contract that will be sent to your applicants once they have accepted their offer.

It should outline your terms and conditions, and any other important information that you may need to refer back to in the future.

Offer Contract settings

Assessment Configuration ▾

Field Name	Description ?
English 1	Art
English 2	History
English 3	English 3
English 4	English 4
English 5	English 5
Maths 1	Maths 1
Maths 2	Maths 2
Maths 3	Maths 3
Maths 4	Maths 4
Maths 5	Maths 5
Standardised 1	Standardised 1
Standardised 2	Standardised 2
Standardised 3	Standardised 3
Standardised 4	Standardised 4
Science 1	Science 1
Science 2	Science 2
Science 3	Science 3

In these sections you will be able to edit the labels of the data you will be using during the offer period and for your offer letters.

Fee Data Configuration ▾

Field Name	Billing Code ?	Description ?	Concession Applies
Deposit		Deposit	
Insurance Premium		Insurance Premium	No
Annual Fees		Annual Fees	Yes
Annual Boarding Fees		Annual Boarding Fees	Yes
Annual International Fees		Annual International Fees	Yes
Annual International Supplement		Annual International Supplement	Yes
Annual Lunch		Annual Lunch	Yes
Annual Extras		Annual Extras	Yes
Autumn Term Fees		Autumn Term Fees	No
Autumn Term Boarding Fees		Autumn Term Boarding Fees	No
Autumn Term International Fees		Autumn Term International Fees	No
Autumn Term Lunch		Autumn Term Lunch	No
Autumn Term Extras 1		Autumn Term Extras 1	No
Autumn Term Extras 2		Autumn Term Extras 2	No

Offer Contract settings

Bill Estimate & Offer Log 

#	Date	Type	Report
1	14/08/2024 - 00:00	Automatic Withdraw Offer	
2	26/07/2024 - 00:00	Automatic Release Offer	
3	23/07/2024 - 00:00	Automatic Release Offer	
4	17/07/2024 - 10:46	Make Offer	
5	17/07/2024 - 08:58	Make Offer	
6	09/07/2024 - 08:19	Make Offer	
7	02/07/2024 - 15:52	Create Offer	
8	02/07/2024 - 15:42	Make Offer	
9	02/07/2024 - 15:40	Make Offer	
10	26/06/2024 - 15:12	Make Offer	

Offer Phase



Offer Phase

Step Name	Internal	External	Visible on Student Profile ⁱ	Actions
Step 1: Offer Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
Step 2: Eligibility	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
Step 3: Parents & Bill Payers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
Step 4: Direct Debit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
Step 5: Deposit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
Step 6: Deposit Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  
Step 7: Contract Signatures	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 



New Step ✕

Name *
Step name should be short

Description

Phase

Template

Show Pop-up

Pop-Up Header

Pop-Up Message

There are a number of steps in the Offer Phase that you will need to edit using the cog icon and you can also add new steps to the process.

Step 1. Offer Letter

← Offer Letter Preview Application Forms

Decline options

Decline options

Decline Instruction

Decline Reason Required?

Decline Options Options

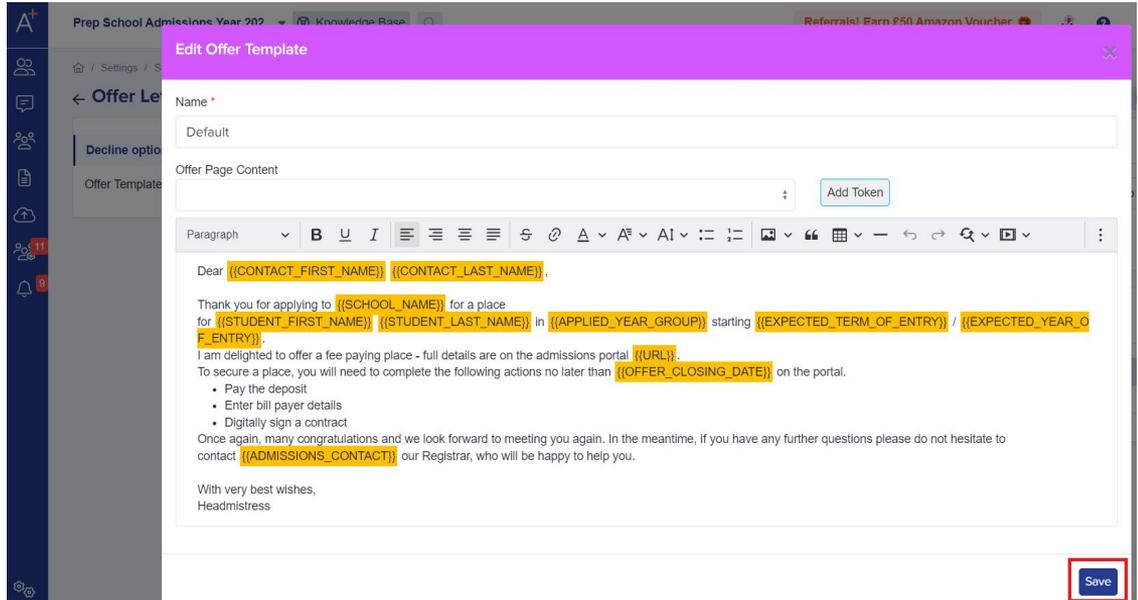
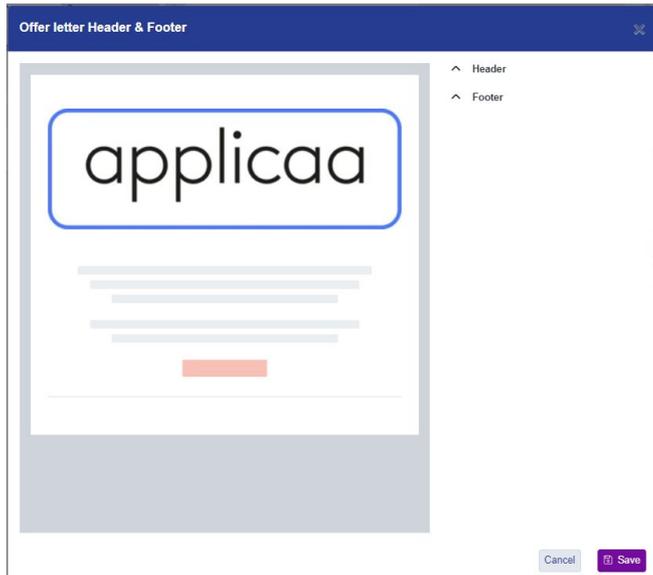
Offer Templates Offer letter Header & Footer + Add Offer Template

#	Name	Last Modified	
1	Test Offer 2	29/07/2024 12:37	
2	Test offer Template	02/07/2024 15:53	

The offer letter is the first step parents see on the online offer form and can also be used as template for your offer emails. The content you add here can advise parents to log into their account to review the offer in full and if they accept, they can continue to complete the offer contract.

Parents are also able to decline their offer within the platform if needed, which you will also be notified of.

Step 1. Offer Letter



Add a header and footer to the template and add your offer content.

You can use tokens, which the system will pre-fill with the relevant information.

Step 1. Offer Letter

Geffie Crowbi

Step 1 Offer Letter Step 2 Eligibility (full) Step 3 Parents & Bill Payers Step 4 Direct Debit Step 5 Deposit Step 6 Contract Signatures

Dear Dr Jef-test,

Geffie Crowbi – Year 8 entry in September 2023

We very much enjoyed meeting Geffie again last week at our entrance examinations and activity afternoon and I am delighted to be able to offer a place in Year 8 for entry on Tuesday 5 September 2023.

It was a pleasure to see Geffie enjoying the team building exercises in the afternoon. We were pleased to see all the girls mixing in their new cohort.

To secure a place, you will need to complete the following actions on the next pages:

- Submit Geffie's eligibility information - passport details or birth certificates where appropriate. If we already have prior passport details for Geffie, these will be displayed for you to confirm or amend.
- Add all parents, select bill payer(s) and percentage of bill payment amounts.
- Enter direct debit account information.
- Pay the required deposit of £ 1,500.00.
- Digitally sign a contract

Your deposit will be held until the end of your daughter's final term in the school and will be refunded within 12 weeks of her leaving, minus any sums owing to the Trust or the school at that time. Alternatively some parents choose to donate their deposit to the school bursary fund and we will send details of this nearer the time.

I should like to offer my congratulations to Geffie who has obviously worked extremely hard.

Yours sincerely

Joe Smith

Save Progress and Close Decline Next

This is how your Offer Letter will look to parents completing the form. This is created using the Offer Template - and can be edited individually.

Step 2. Eligibility

 HOME

 MESSAGES

 DOCUMENTS

 CALENDAR

Geffie Crowbi

! Step 1 Offer Letter ! Step 2 Eligibility (full) ✓ Step 3 Parents & Bill Payers ! Step 4 Direct Debit ! Step 5 Deposit ! Step 6 Contract Signatures

Eligibility 

Does your child have a passport?*

Yes x ⌵

Passport details

Please enter your child's passport details below and upload a copy of the document. The passport can be current or expired.

Nationality	Name On Passport	Passport Number	Passport Issued Date	Passport Expiry Date	Passport Image	

Step 3. Parents & Bill Payers

! Step 1 Offer Letter

! Step 2 Eligibility (full)

✓ Step 3 **Parents & Bill Payers**

! Step 4 Direct Debit

! Step 5 Deposit

! Step 6 Contract Signatures

Please note that the direct debit percentage has no impact on your legal liability for being jointly and severally liable for 100% of the fees and extras. The Actual Bill will be sent out by the GDST Fee Department closer to your child's enrolment date.

Parents & Bill Payers

If you are paying from a joint bank account please select only one person as the bill payer.

[View bill estimate](#) [+ Add Company](#) [+ Add Contact](#)

Name/Email	Bill Payer	Fees (%)	Lunch & extras (%)	Actions
Jef-Test Corb-Test-X1508 geoffx15aug@applicaa.com Parental Account Primary	<input checked="" type="checkbox"/>	<input type="text" value="100"/>	<input type="text" value="100"/>	Edit
P-New P-New-Last geoff+emergency@applicaa.com	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Edit
Crowbi Jim nicola+1959@applicaa.com Parental Account	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Edit
Emma Crowbi nicola+2019@applicaa.com	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Edit
Total		100%	100%	

Type of Payments

Please indicate how you will be paying the school fees:

By monthly direct debit instalments

This will be collected on the 5th of each month.

[Save Progress and Close](#) [Previous](#) [Save & Next](#)

Bill Estimate

Bill Estimate			
Created	16/04/2024 11:52		
Termly Fees	£ 7,718.00		
Termly Lunch	£ 312.40		
Termly Extras	£ 46.33		
Total Cost	£ 8,076.73		
Concessions		Amount	Value
Total Concessions			£ 0.00
Net Fees			£ 7,718.00
Net Extras			£ 358.73
Net Total			£ 8,076.73
Deposit			£ 1,500.00

20% VAT will be added to this bill. [Close](#)

In this step, parents must add the details of the bill payer and assign percentages of the fee breakdown for each bill payer. They can also select the type of payment (monthly, termly or annual for example) and view a Bill Estimate, if you have set this up.

Step 3. Parents & Bill Payers

← Parents & Bill Payers Preview Application Forms

Parent/Guardian Contact Details

Parent/Guardian Address

Phones (for all Contacts)

Other Settings

VAT on Bill Estimate

VAT on Bill Estimate description
This text will appear at the bottom of bill estimates produced on this form only.

20% VAT will be added to this bill.

Bill Payers Requirements

These settings apply to all forms.

Bill payer header

Bill payer description

Bill payer extra fee header

Collection type of payment

Collect type of payment description

Other payment options button text

Other payment options >

Termly description

Monthly description

Collect Split of Lunch & Extra fee

Type of payment monthly

Type of payment termly

Type of payment advanced_payment

Enable types of payment

Required Phone numbers ⓘ

Bill Payers	Internal	External
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>
Mobile Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work Phone	<input type="checkbox"/>	<input type="checkbox"/>

Parents & Bill Payers

If you are paying from a joint bank accc

Lunch & extras

Please indicate how you will be paying

Other payment options

This will be collected on the first day of

This will be collected on the 5th of each

Monthly Direct Debits × ↓

Termly Direct Debits × ↓

Cash or Cheque × ↓

monthly × termly × advanced_payment ×

Step 4. Direct Debit

Setup Payment ✕

Direct Debit Details

Please provide details for the bank account you wish for your payments to be deducted from.

Your payments are estimated to be £ 2,019.18 per month

Names and account holder(s) *

Bank name *

Bank/Building Society account number * Branch sort code *

joint

Please wait...

Step 5. Deposit

Geffie Crowbi

! Step 1 Offer Letter ! Step 2 Eligibility (full) ✓ Step 3 Parents & Bill Payers ! Step 4 Direct Debit **! Step 5 Deposit** ! Step 6 Contract Signatures

IMPORTANT NOTICE

Please note, the deposit is not refundable if you subsequently choose not to take up the place at the school. Should your child proceed to attend the school however, the deposit will be refunded when your child leaves the school.

Amount

First name *

Last name *

Email

[Save Progress and Close](#) [Previous](#) [Continue to Payment](#)

The deposit shown here will come from the fees import file (shown later).

Step 5. Signatures

! Step 1 Offer Letter

! Step 2 Eligibility (full)

✓ Step 3 **Parents & Bill Payers**

! Step 4 Direct Debit

! Step 5 Deposit

! Step 6 Contract Signatures

Please note that the direct debit percentage has no impact on your legal liability for being jointly and severally liable for 100% of the fees and extras.

Parents & Bill Payers

If you are paying from a joint bank account please select only one person as the bill payer.

[View bill estimate](#) [+ Add Company](#) [+ Add Contact](#)

Name/Email	Bill Payer	Fees (%)	Lunch & extras (%)	Actions
Jef-Test Corb-Test-X1508 geoff+x15aug@applicaa.com Parental Account Primary	<input checked="" type="checkbox"/>	<input type="text" value="100"/>	<input type="text" value="100"/>	Edit
P-New P-New-Last geoff+emergency@applicaa.com	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Edit
Crowbi Jim nicola+1980@applicaa.com Parental Account	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Edit
Emma Crowbi nicola+2019@applicaa.com	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Edit
Total		100%	100%	

Type of Payments

Please indicate how you will be paying the school fees:

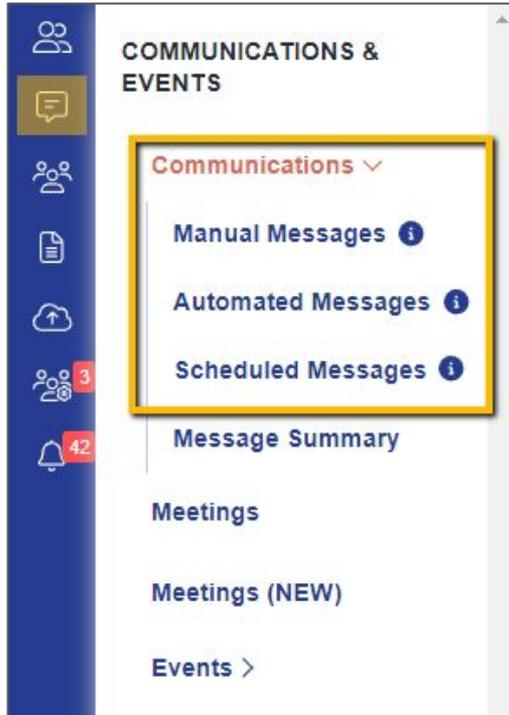
This will be collected on the 5th of each month.

[Save Progress and Close](#) [Previous](#) [Save & Next](#)

Email templates



Email templates



To access email templates, navigate to the “**Communications & Events**” area.

From here, you will see there are different types of email which are:

- **Manual messages** - email templates you've created
- **Automated messages** - preset templates stored on your system
- **Scheduled messages** - email templates set up to be sent at a particular date and time.

Email templates

Template Name	Subject	Send from	Send to	Triggered by	Phase	Triggered when	Repeat	Enable
<input type="text" value="offer"/>	<input type="text" value="Search Subject"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Decline offer	Declined offer	admin@applicaa.com	Parent	Applicant		Parent decline offer	N/A	<input checked="" type="checkbox"/>
Offer Automatically Withdrawn	Offer Automatically Withdrawn	admissions@put.gdst.net	Parent			Offer automatically withdrawn	N/A	
Withdraw Offer	Offer Withdrawn Notice from Putney High School for Girls	admissions@put.gdst.net	Student	Staff	Email Subscription	Withdraw offer	N/A	
Offer Declined	Offer declined notification	admissions@put.gdst.net	Staff			Offer declined	N/A	<input type="checkbox"/>
Offer Accepted	Offer accepted notification	admissions@put.gdst.net	Staff			Offer accepted	N/A	<input type="checkbox"/>
Make offer to student	Your Offer from Putney High School	admissions@put.gdst.net	Parent	Staff	Email Subscription	Make offer to student	N/A	
Bill payer step saved	Application to Putney High School for Girls updated	admissions@put.gdst.net	Parent			Bill payer step saved	N/A	<input checked="" type="checkbox"/>
Contract Signatories Notification	Offer accepted confirmation	admissions@put.gdst.net	Parent			Contract signatories notification	N/A	<input checked="" type="checkbox"/>

Email templates

The screenshot displays the 'Automated Messages' section of a communications management system. It features a navigation bar with tabs for 'Manual Messages', 'Automated Messages' (selected), 'Scheduled Messages', and 'Messages Summary'. Below the navigation bar, there are buttons for '+ Add new message' and '+ Add new folder', along with a search bar and a 'Hide system messages' toggle. The main content area shows a table of automated messages with columns for 'Phase', 'Triggered when', 'Repeat', 'Enable', and 'Actions'. A red box highlights the 'Actions' column, which contains icons for editing (pencil), deleting (trash), and viewing (eye). A red arrow points from the top of the table to the 'Actions' column.

Phase	Triggered when	Repeat	Enable	Actions
				[Pencil] [Trash] [Eye]
				[Pencil] [Trash] [Eye]
	Notify teacher about task	N/A	[Info]	[Pencil] [Trash] [Eye]
Email Subscription	Declined applicant	N/A	[Info]	[Pencil] [Trash] [Eye]
Registration	Email unsubscription notification	N/A	[Toggle]	[Pencil] [Trash] [Eye]
Reference	Forwarded reference request	N/A	[Info]	[Pencil] [Trash] [Eye]
	Invite parent to interview	N/A	[Info]	[Pencil] [Trash] [Eye]

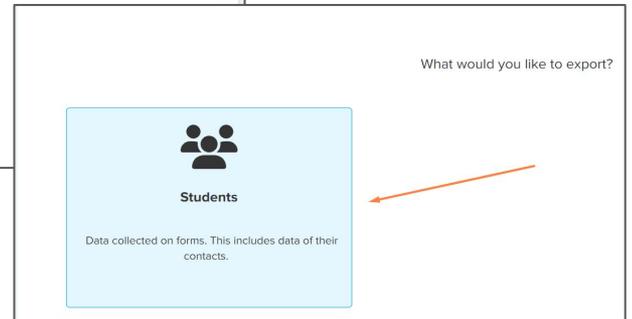
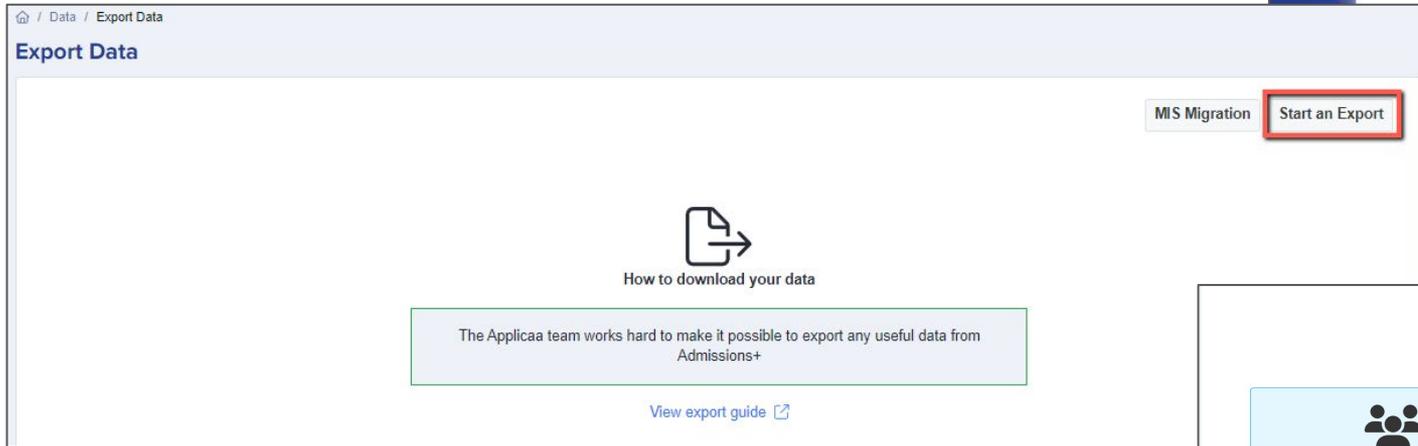
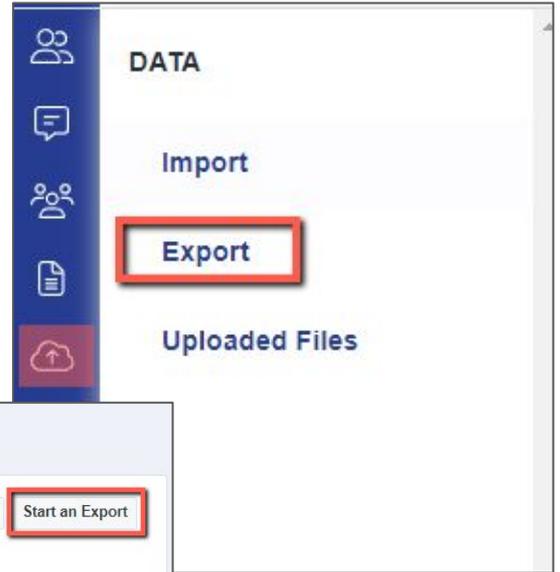
Once you're in the messages area, you can do a keyword search in the search bar at the top or search template in the table. To edit any of the templates, click on the pencil icon.

Parent report



Parent report

Before you send offers, it's useful to review your parent data. To do this, click on **"Data"**, select **"Export"**, and click on **"Start an Export"**.



Parent report

Select a category and the fields you wish to include in the report and click **“Next”**. You can search for specific fields or look through each section.

Popular Fields (Preselected): Legal First Name, Legal Last Name, Date Of Birth, Gender, Student Email Address, Application Status, Offer Status, Enrolment Status, Student Code

Select a category.

Selected

All

Additional Information

Agreement

Parent report

You will then see the list of students who will be included in the report.

Use the filters to narrow down your criteria and export the relevant applicants.

Select Students

Column visibility Export **Select all** Deselect all

Showing 1 to 4 of 4 entries 4 rows selected Show 10 entries Search:

#	Id	Student Code	First Name	Last Name	Email	
1	14896	U-90EE	Test Buddy	Test Lesch		<input checked="" type="checkbox"/>
2	14892	U-7911	Test Garrett	Test Wisoky		<input checked="" type="checkbox"/>
3	14894	U-2D0B	Test Isai	Test Olson		<input checked="" type="checkbox"/>
4	14890	U-FE89	Test Kelli	Test Stokes		<input checked="" type="checkbox"/>

Showing 1 to 4 of 4 entries 4 rows selected Previous 1 Next

New Filter

Student properties

Search for properties...

Status

Application Status (application_status)
is any of X | v

Offer Status (offer_status)
is any of | v

Enrolment Status (enrolment_status)
is any of | v

Interview Status (interview_status)
is any of | v

Are you an internal applicant? (internal)

Bursary Status (bursary_status)
is any of | v

Finish Taster Day (taster_day_submitted)

Properties

Exam result properties

Cancel **Add filter(s)**



Parent report

To ensure parents receive their offers, make sure that **“RECEIVE PARENTAL COMMUNICATION”** question is NOT set to “FALSE” - meaning it has not been answered - or “NO”. You will need to update this on the Student Record before you send offers.

< Geffie Crowbi #U-96A0 > Select student

Child's Basic Details

Parent/Guardian

Child's Welfare and Support Information

Child's Education

Reference

Additional Information

Payment

Parent/Guardian Contact Details

Jef-Test Corb-Test-X1508

Title	Dr
Surname	Corb-Test-X1508
Forename	Jef-Test
Sex	Empty
Please give your relationship to the child	Mother
Do you have legal responsibility for the child?	Yes
Email Address	geoff+x15aug@applicaa.com <small>This email belongs to a verified parental account with log in access. Click here to view the profile and make updates.</small>
Priority	
Should this contact be provided with a parental account so they can login and update this application?	Yes
Postcode	AB21 0SR
Flat name and/or number	Empty
House name and/or number	Ardina
Street	Kinellar
District	Aberdeenshire
Town/City	Aberdeen
County	Aberdeenshire
Country	United Kingdom
Same Address	no
Receive Parental Communication	Yes
Court Order	+ Add court order
Phone Number	Mobile phone 07884554  
	+ Add phone number

Fees import



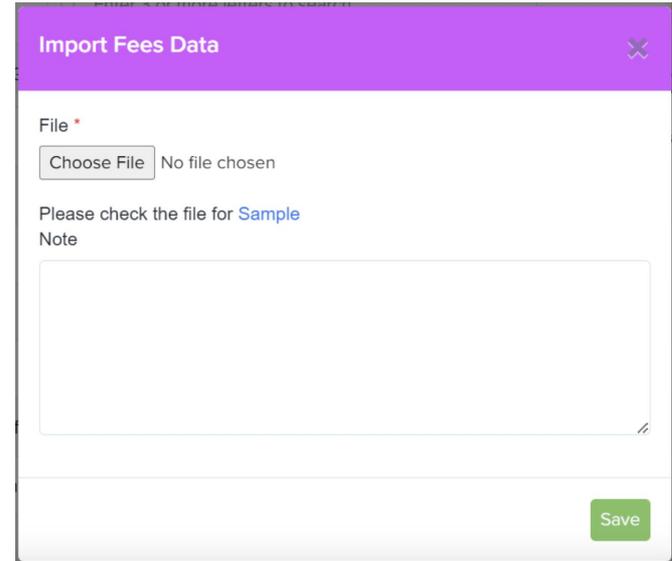
Fees import

When you are ready to set the fees and deposit data ahead of making your offers, you can import them into A+.

Go to **“Settings”** > **“Schools Settings”** > **“Payment & Fees”**, and scroll down to **“Fees Data”**.

You will then need to click on **“Import Fees Data”**, then on the **Sample** link.

This will open up a spreadsheet that you can use as a template.



The screenshot shows a web form titled "Import Fees Data" with a purple header bar. Below the header, there is a "File" label with a red asterisk. A "Choose File" button is present, followed by the text "No file chosen". Below this, there is a note that says "Please check the file for [Sample](#)". Underneath the note is a large, empty text area. At the bottom right of the form, there is a green "Save" button.

Fees import

Make sure you download the file in .CSV, as you will need to upload it back to A+ as a .CSV.

Add the fee data in for each year group. If you do not want to use the **"Bill Estimate"** feature, then you will only need to complete the academic years, year groups and deposit and annual fees.

Once you have completed the spreadsheet, save it and then upload it to A+ by clicking on **"Import Fees Data"**. Choose your file then click **"Save"**.

You will see the fees data import in the table below:

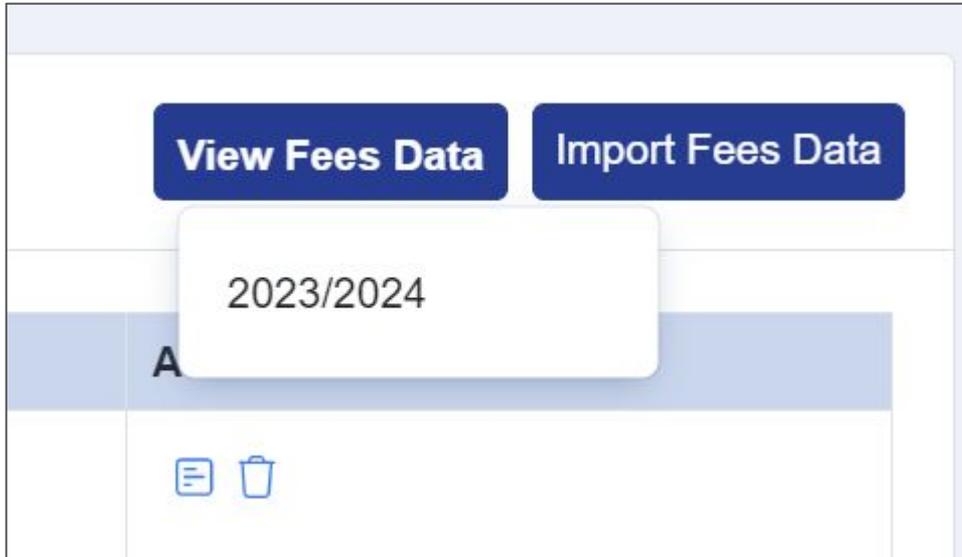


The screenshot shows a web interface for managing fees data. At the top left, the text 'Fees Data' is displayed. To the right of this text are two buttons: 'View Fees Data' and 'Import Fees Data'. Below this is a table with five columns: 'Name', 'User', 'Created', 'Notes', and 'Actions'. The table contains one row of data representing an imported file.

Name	User	Created	Notes	Actions
fees.csv	Applicaa Admin	21 December, 2023 16:04	Fees Data imported 2023/2024	 

Fees import

You can also click on "**View Fees Data**" to review the fees that have been imported for the various years:



A screenshot of a table titled "Fees Data for 2023/2024". The table has five columns: "Academic Year", "Year group", "Deposit", "International Student Deposit", and "Insurance premium". There are two rows of data. Below the table, it says "Showing 1 to 2 of 2 entries" and "Previous 1 Next".

Academic Year	Year group	Deposit	International Student Deposit	Insurance premium
2023/2024	Curriculum Year 10	500	1000	1
2023/2024	Curriculum Year 11	500	1000	1

[Here is a video for this process](#)

Creating and Making offers



Creating an offer

Before you create individual offers, you can update an application with any data you need to add to the offer letter (such as assessment results or scholarship % offers). Go to the relevant student profile and click on **"Offer"** > **"Offer Data"**:

Senior Admissions Year 2023/202... Knowledge Base

Registered students / Student profile

Mercedes Surrall #U-7621

Application Status: Completed

Enrollment Status: Pending

Offer Status: Offer Made

Navigation: Overview, Application Form, Offer, Activities, Interview, Courses Selection, Family, Visas, Concessions, Send Needs, Assessment

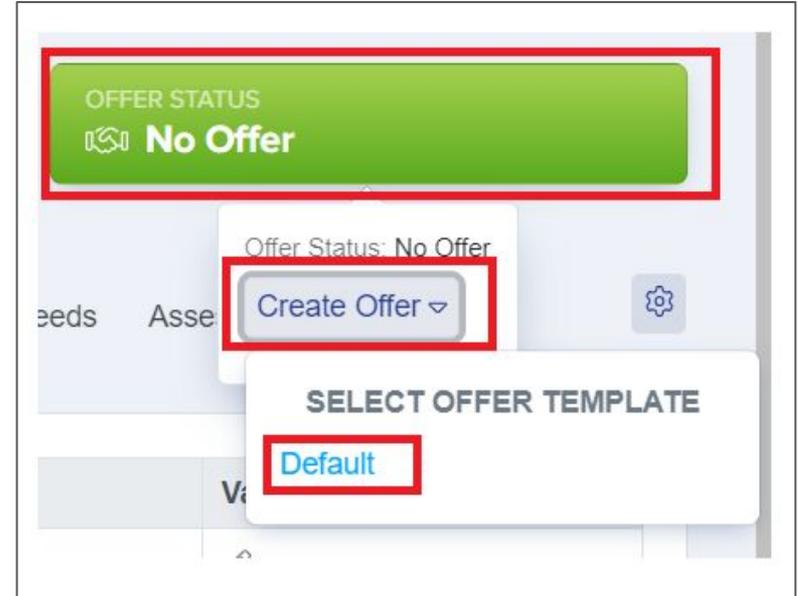
Left Sidebar: Offer Letter, Eligibility, Parents & Bill Payers, Direct Debit, Deposit, Contract Signatures, Offer Data, Bill Estimate, Offer Video

Offer	Value
Offer Sub Status	
Deposit Change Authorisation	
Deposit Change Authorisation Comment	
Deposit Waive	No
Deposit New	0
Deposit Changed At	
Bursary Value	
Head Comment	
Other Comment 1	
Other Comment 2	
Other Comment 3	

Creating an offer - individual

Navigate to the profile of the student you would like to create an offer for.

Click the **“Offer Status”** button on the top right of the profile (which should currently say **“No Offer”**), select **“Create Offer”** from the drop down that appears and click the name of the offer template you created earlier.



Creating an offer - individual

A preview of how the offer will look to the parent/guardian will appear - here you can ensure that all tokens have worked successfully and that the offer displays correctly.

If you are happy with the preview, click **“Create”** at the bottom right of the preview window.

Offer Letter Preview ✕

Dear Emma Ward,

Thank you for applying to GDST for a place for Ava Ward in Year 5 starting Autumn / 2024/2025.

I am delighted to offer a fee paying place - full details are on the admissions portal <https://andytestgdst.applicaa.com>.

To secure a place, you will need to complete the following actions no later than on the portal.

- Pay the deposit
- Enter bill payer details
- Digitally sign a contract

Once again, many congratulations and we look forward to meeting you again. In the meantime, if you have any further questions please do not hesitate to contact {{ADMISSIONS_CONTACT}} our Registrar, who will be happy to help you.

With very best wishes,

Headmistress

You are about to create an offer for the students. Parents will not see this offer yet. You will be able to change the offer. Are you sure you would like to continue?

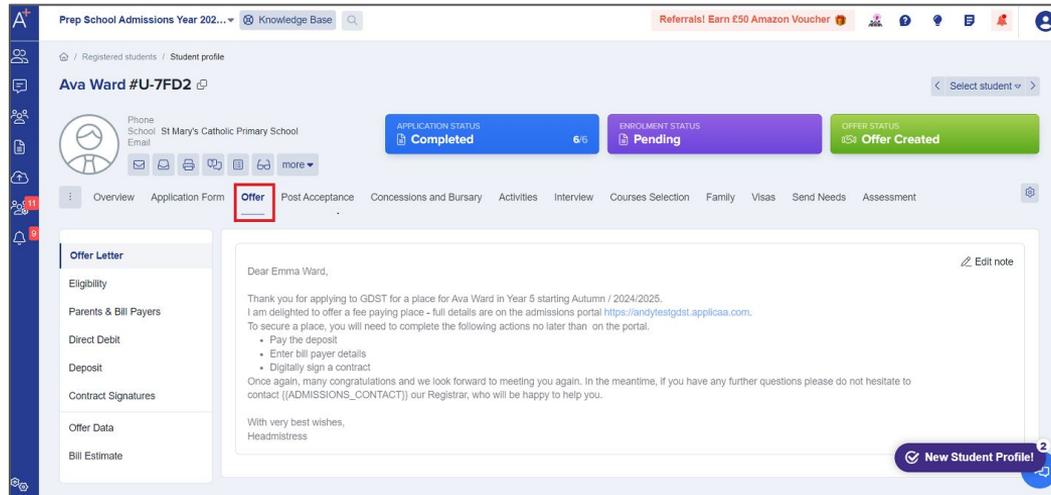
Create

Making an offer - individual

You can review the offer by going to the **“Offer”** tab on the Student Profile.

If you are happy with the offer that you created select the large green **“Offer Status”** button (which should now say “Offer Created”) and select **“Make Offer”**.

This will allow you to send an email to the parent to notify them to sign into the A+ platform to review the offer.



The screenshot displays the A+ platform interface for a student profile. The top navigation bar includes 'Prep School Admissions Year 202...', 'Knowledge Base', and a notification for 'Referrals! Earn £50 Amazon Voucher'. The main header shows the student's name 'Ava Ward #U-7FD2' and a 'Select student' dropdown. Below this, the school information 'St Mary's Catholic Primary School' is listed, along with three status buttons: 'Completed' (6/6), 'Pending', and 'Offer Created' (1/5). A horizontal menu contains various tabs, with 'Offer' highlighted in red. The left sidebar lists options like 'Offer Letter', 'Eligibility', 'Parents & Bill Payers', 'Direct Debit', 'Deposit', 'Contract Signatures', 'Offer Data', and 'Bill Estimate'. The main content area displays an offer letter addressed to Emma Ward, thanking her for applying and offering a place for Ava Ward in Year 5 starting Autumn / 2024/2025. The letter includes instructions to complete actions on the portal, such as paying the deposit, entering bill payer details, and digitally signing a contract. A 'New Student Profile' notification is visible in the bottom right corner.

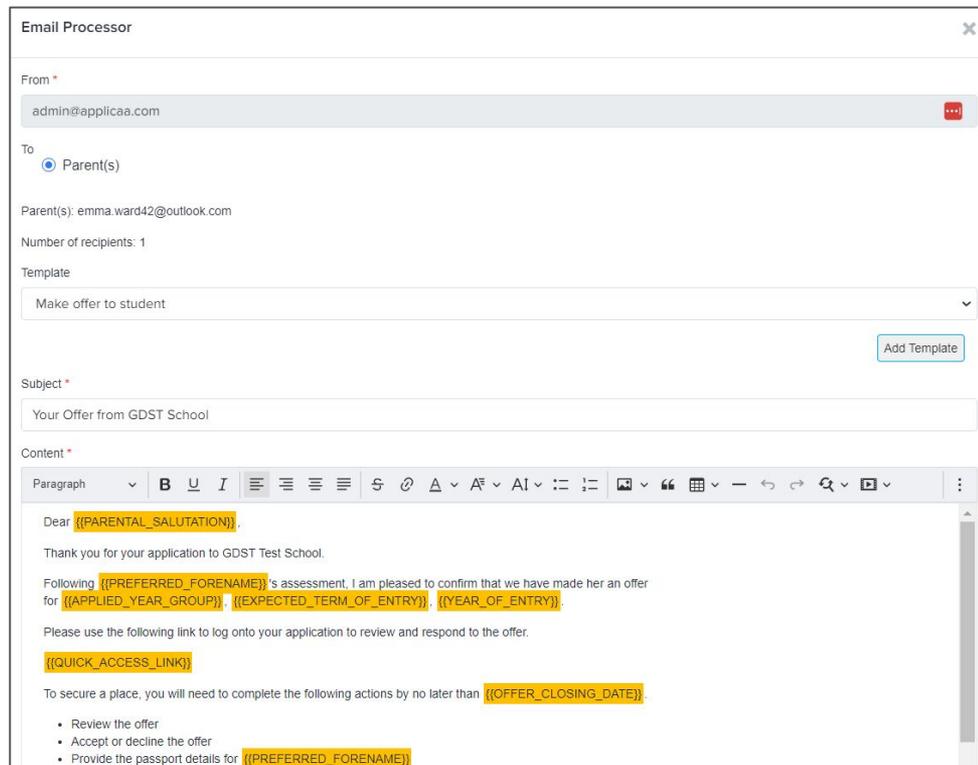
Making an offer - individual

You will see a new window called “**Email Processor**” appear, which will detail:

- who the email is coming from
- who the recipients are
- which template is being used
- subject and content of your email

You are still able to make adjustments to the email at this stage if needed.

Once you have sent your offer email, you will see that the “**Offer Status**” on the Students Profile has changed to “**Offer Made**”.

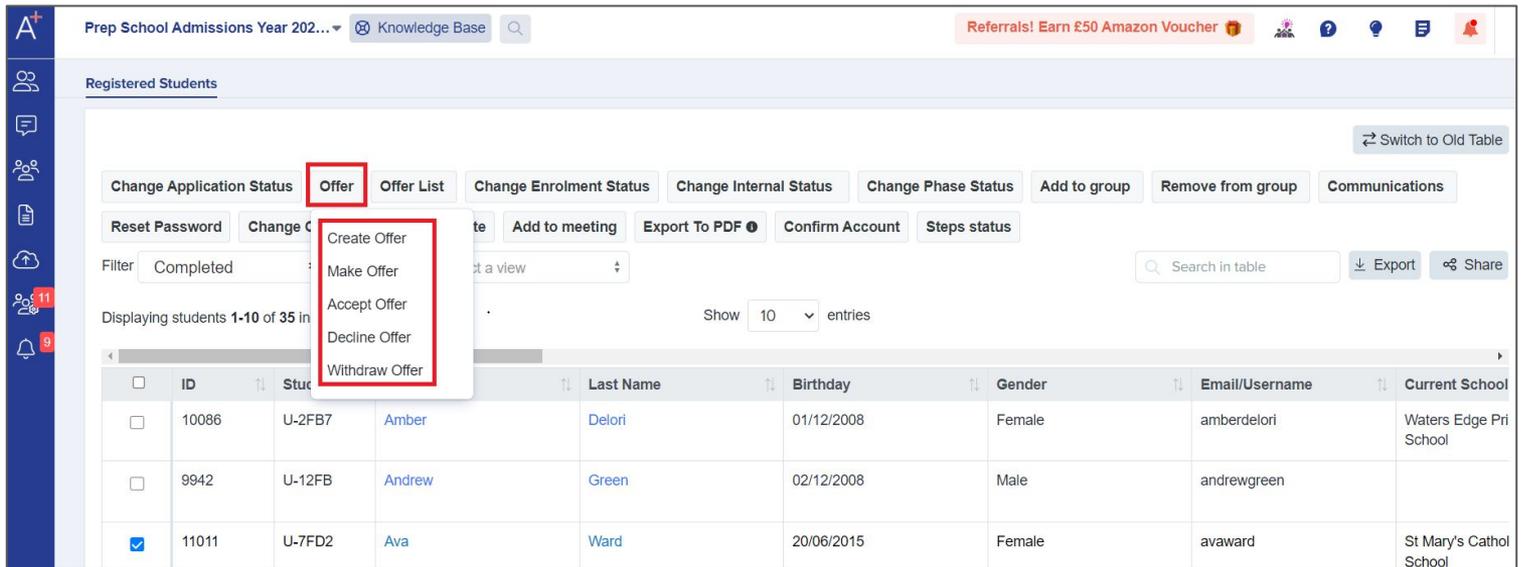


The screenshot displays the 'Email Processor' window with the following configuration:

- From:** admin@appliance.com
- To:** Parent(s)
- Parent(s):** emma.ward42@outlook.com
- Number of recipients:** 1
- Template:** Make offer to student
- Subject:** Your Offer from GDST School
- Content:** Dear {{PARENTAL_SALUTATION}}, Thank you for your application to GDST Test School. Following {{PREFERRED_FORENAME}}'s assessment, I am pleased to confirm that we have made her an offer for {{APPLIED_YEAR_GROUP}}, {{EXPECTED_TERM_OF_ENTRY}}, {{YEAR_OF_ENTRY}}. Please use the following link to log onto your application to review and respond to the offer: {{QUICK_ACCESS_LINK}}. To secure a place, you will need to complete the following actions by no later than {{OFFER_CLOSING_DATE}}:
 - Review the offer
 - Accept or decline the offer
 - Provide the passport details for {{PREFERRED_FORENAME}}

Making an offer - bulk

In the **“Registered Students”** list, tick the boxes to select the students you're going to create or send the offer to (a menu at the top will appear once you tick a box). Select 'Offer' which shows the offer options. **“Create Offer”** and **“Make Offer”** will follow the same steps as for sending individual offers.

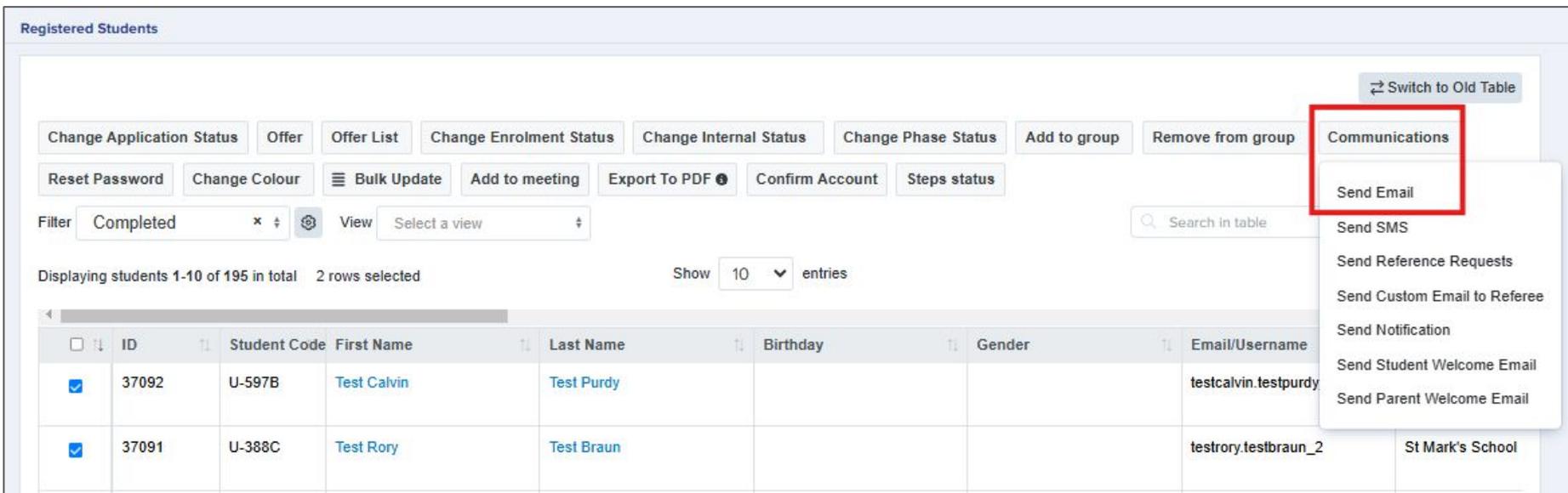


The screenshot shows the 'Registered Students' interface. At the top, there are navigation tabs for 'Prep School Admissions Year 202...' and 'Knowledge Base'. A notification banner for 'Referrals! Earn £50 Amazon Voucher' is visible. The main area is titled 'Registered Students' and includes a 'Switch to Old Table' button. Below this, there are several action buttons: 'Change Application Status', 'Offer' (highlighted with a red box), 'Offer List', 'Change Enrolment Status', 'Change Internal Status', 'Change Phase Status', 'Add to group', 'Remove from group', and 'Communications'. A secondary row of buttons includes 'Reset Password', 'Change C...', 'Add to meeting', 'Export To PDF', 'Confirm Account', and 'Steps status'. A filter dropdown is set to 'Completed'. A search bar and 'Export'/'Share' buttons are also present. The table shows 35 students, with 1-10 displayed. The 'Offer' menu is open, showing options: 'Create Offer', 'Make Offer', 'Accept Offer', 'Decline Offer', and 'Withdraw Offer' (all highlighted with a red box). The table columns are: ID, Student ID, Student Name, Last Name, Birthday, Gender, Email/Username, and Current School.

ID	Student ID	Student Name	Last Name	Birthday	Gender	Email/Username	Current School	
<input type="checkbox"/>	10086	U-2FB7	Amber	Delori	01/12/2008	Female	amberdelori	Waters Edge Pri School
<input type="checkbox"/>	9942	U-12FB	Andrew	Green	02/12/2008	Male	andrewgreen	
<input checked="" type="checkbox"/>	11011	U-7FD2	Ava	Ward	20/06/2015	Female	avaward	St Mary's Cathol School

No offer emails

To inform any applicants who you will not be making an offer by email, go to the “**Student List**”, select the relevant students and then click “**Communications**”. In the “**Email Processor**” you can either select a template you have made earlier or type in your email.



The screenshot displays the 'Registered Students' management interface. At the top, there are several action buttons: 'Change Application Status', 'Offer', 'Offer List', 'Change Enrolment Status', 'Change Internal Status', 'Change Phase Status', 'Add to group', and 'Remove from group'. Below these are more buttons: 'Reset Password', 'Change Colour', 'Bulk Update', 'Add to meeting', 'Export To PDF', 'Confirm Account', and 'Steps status'. A filter is set to 'Completed' and the view is 'Select a view'. The table shows 2 rows selected out of 195 total students, with 10 entries per page. The table columns are: ID, Student Code, First Name, Last Name, Birthday, Gender, and Email/Username. Two students are listed: Test Calvin Purdy (ID 37092, Student Code U-597B) and Test Rory Braun (ID 37091, Student Code U-388C). A 'Communications' dropdown menu is open, showing options like 'Send Email', 'Send SMS', 'Send Reference Requests', etc. The 'Communications' button is highlighted with a red box.

Registered Students

Switch to Old Table

Change Application Status Offer Offer List Change Enrolment Status Change Internal Status Change Phase Status Add to group Remove from group Communications

Reset Password Change Colour Bulk Update Add to meeting Export To PDF Confirm Account Steps status

Filter Completed View Select a view Search in table

Displaying students 1-10 of 195 in total 2 rows selected Show 10 entries

ID	Student Code	First Name	Last Name	Birthday	Gender	Email/Username
37092	U-597B	Test Calvin	Test Purdy			testcalvin.testpurdy
37091	U-388C	Test Rory	Test Braun			testrory.testbraun_2

St Mark's School

Offer Lists



Offer Lists

Offer Lists are a useful tool for managing offers when you have multiple groups in one cohort who need to receive different type of offers.

For example, you may have a cohort where some applicants will get a full fee offer, some will have scholarships and others will have bursaries.

Offer Lists give you an easy way to segment your applicants, personalise their offer details (such as assessment data or scholarship offers), and track their progress - all from one place.

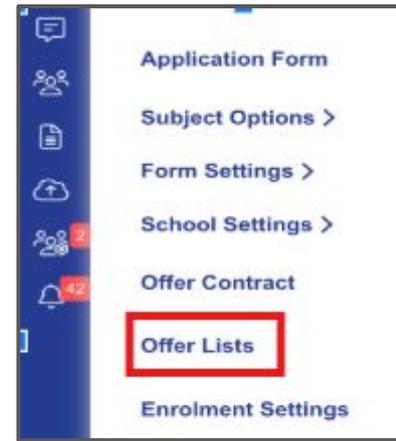


Offer Lists	Students	Closing Date	Auto Release Date	Auto Withdraw	
Year 7 - Music Scholarships	4	31/12/2024 00:00		Yes	 
Year 7 - Full Fee Offers	4	21/12/2024 00:00	09/12/2024 00:00	Yes	 

Offer Lists

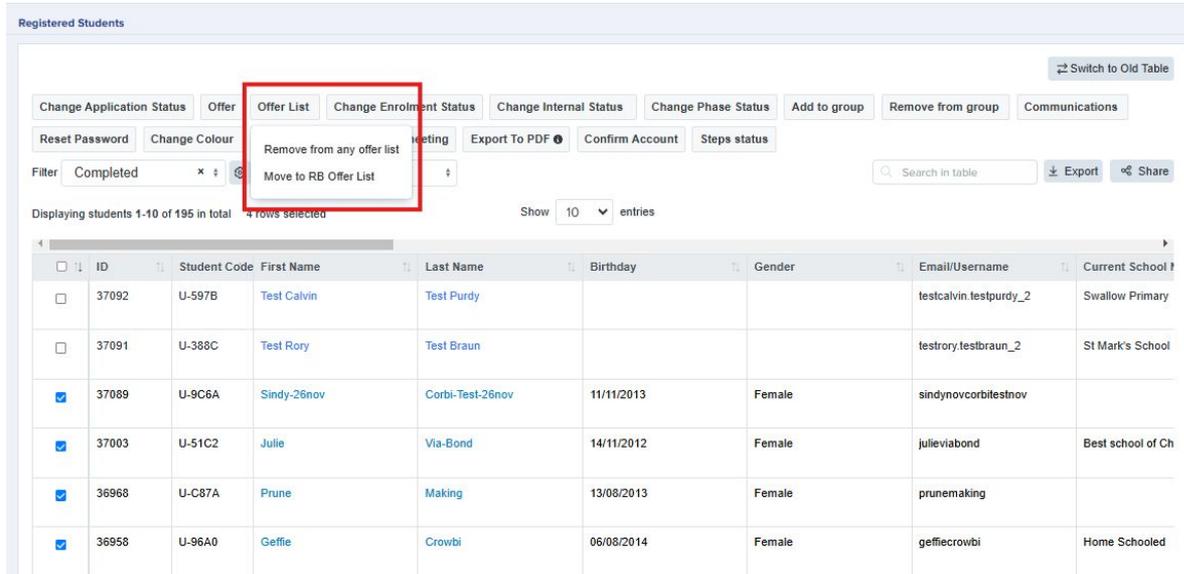
Navigate to **“Settings”** > **“Offer List”** and click **“Add New”**.

- Auto release date: when this date arrives, all offers in the list that are **“Approved”** or **“Created”** or **“Approval not required”** will have their status automatically changed to **“Made”**, thereby making the offer available to parents. The **“Make Offer”** email will also be sent.
- **Auto withdraw:** automatically changes the status of the offer to **“Withdrawn”** and send the **“Offer Withdrawn”** email to parents.

A screenshot of a 'New Offer List' form. The form has a purple header with a close button. It contains several input fields: 'Name *', 'Closing date', and 'Auto release date'. Below the 'Closing date' field is a note: 'This is the default closing date for accepting the offer. It can be updated for any student'. There is a checkbox for 'Auto withdraw' with a sub-note: 'Select auto withdraw to allow the system to automatically change the status of the application to withdrawn and send the offer withdrawn email to parents'. Below that is a dropdown menu for 'Reason for withdrawal'. A green 'Save' button is at the bottom right.

Offer Lists

Go to the “**Student List**” and select the students you would like to add to your offer list. Click on “**Offer List**” and select the list for you have created from the drop down menu.

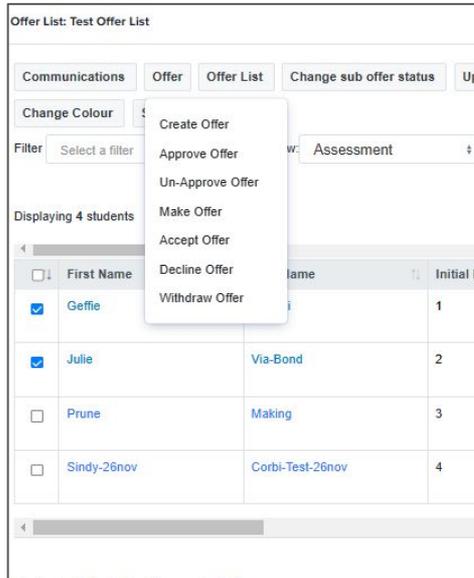


The screenshot displays the 'Registered Students' interface. At the top, there are several action buttons: 'Change Application Status', 'Offer', 'Offer List', 'Change Enrolment Status', 'Change Internal Status', 'Change Phase Status', 'Add to group', 'Remove from group', and 'Communications'. Below these are 'Reset Password', 'Change Colour', 'Remove from any offer list', 'Export To PDF', 'Confirm Account', and 'Steps status'. A filter is set to 'Completed'. A search bar and 'Export'/'Share' buttons are also present. The table shows 4 rows selected out of 195 total. The table columns are: ID, Student Code, First Name, Last Name, Birthday, Gender, Email/Username, and Current School. The data rows are:

ID	Student Code	First Name	Last Name	Birthday	Gender	Email/Username	Current School
37092	U-597B	Test Calvin	Test Purdy			testcalvin.testpurdy_2	Swallow Primary
37091	U-388C	Test Rory	Test Braun			testrory.testbraun_2	St Mark's School
37089	U-9C6A	Sindy-26nov	Corbi-Test-26nov	11/11/2013	Female	sindynovcorbitestnov	
37003	U-51C2	Julie	Via-Bond	14/11/2012	Female	julievibond	Best school of Ch
36968	U-C87A	Prune	Making	13/08/2013	Female	prunemaking	
36958	U-96A0	Geffe	Crowbi	06/08/2014	Female	geffecrowbi	Home Schooled

Offer Lists

These applicants will now appear on this Offer List and from here you can take many actions, including: make offers in bulk (using the steps already discussed), send emails, edit offer data, preview offers and track progress.



Offer List: Test Offer List

Communications Offer Offer List Change sub offer status Up

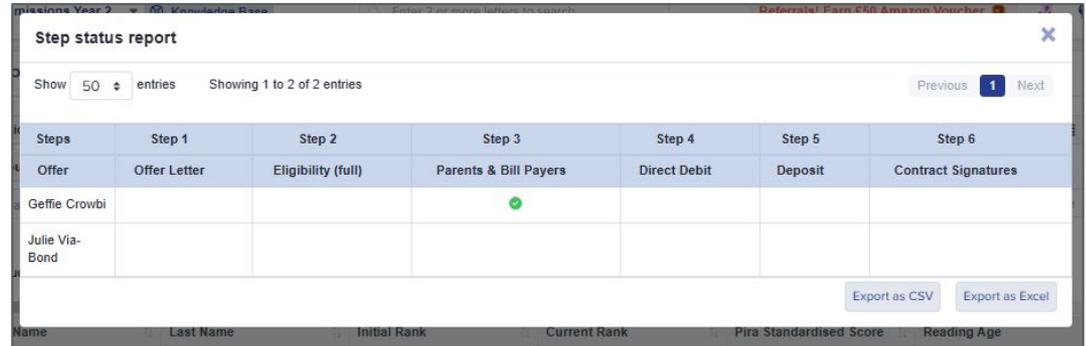
Change Colour

Filter Select a filter

Displaying 4 students

<input type="checkbox"/>	First Name	Last Name	Initial F
<input checked="" type="checkbox"/>	Geffie		1
<input checked="" type="checkbox"/>	Julie	Via-Bond	2
<input type="checkbox"/>	Prune	Making	3
<input type="checkbox"/>	Sindy-26nov	Corbi-Test-26nov	4

- Create Offer
- Approve Offer
- Un-Approve Offer
- Make Offer
- Accept Offer
- Decline Offer
- Withdraw Offer



Step status report

Show 50 entries Showing 1 to 2 of 2 entries

Previous 1 Next

Steps	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Offer	Offer Letter	Eligibility (full)	Parents & Bill Payers	Direct Debit	Deposit	Contract Signatures
Geffie Crowbi			●			
Julie Via-Bond						

Export as CSV Export as Excel

Name Last Name Initial Rank Current Rank Pira Standardised Score Reading Age



Update English 3

Enter 3 as your letter to search

Cancel Save

Useful Information

Support Telephone Number: 0208 762 0882

- [Offer Contract Phase Setup](#)
- [Reopening the “Contract Signature” step of the Offer Contract](#)
- [Offer Contract Phase - Bill Payer Settings](#)
- [Fee Data](#)
- [Adding a Configurable Note to the Footer of Bill Estimate](#)

The background features a central light blue hexagon. To its top-left is a light gray hexagon. To its top-right is an orange parallelogram. To its bottom-left is a dark blue hexagon. To its bottom-right is a light blue hexagon. Below the central hexagon is a small light blue hexagon.

Do you have any questions?



THANK YOU