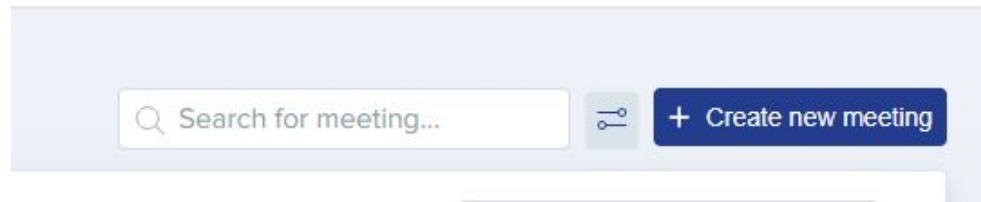# Meetings, Offers & Timetabling

# CONTENTS

1. Setting up a meeting

2. Adding applicants to application groups

3. Inviting applicants to meetings

4. Tracking responses to invitations

5. Conducting your meetings

6. Adding courses to the offer list

7. Making offers to students

8. Tracking responses to offers

9. Using the Options module to build your timetable

# Setting up a Meeting

**Communications & Events > Meetings**

Click to **Create new meeting.**



Complete the initial setup step by adding the title and description of the meeting. You also have the option to add an **Internal Meeting Name** - visible to staff only.

Decide how you would like appointments to be scheduled, and configure the corresponding email templates:

**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

---

**Invitation Email** * ⓘ                              ☐ CC Parent

**Email Subject Header**

Invitation to Guidance Meeting

Customise invitation message to your recipients, by using personalisation tokens

**Mail Merge Field**   [Type here to select token ▾]   **Insert Field**

⚠ **Important:** Changes made to the email templates in this section will only apply to this meeting. To update the master template (used across all new meetings), please go to the Automated Messages area in Communications.

Paragraph ▾ | **B** U *I* | ≡ ≡ ≡ ≡ | S⃨ ⊘ A ▾ A⸃ ▾ | ⋮

Dear {{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}},

Your Sixth Form Guidance Meeting has been scheduled as below:

Time: {{START_TIME}}

Date: {{START_DATE}}

Location: {{LOCATION}}

Description: {{DESCRIPTION}}

Add to Calendar: {{ADD_TO_CALENDAR}}

---

**Confirmation Email** * ⓘ                              ☐ CC Parent

**Email Subject Header**

Guidance Meeting Confirmation Details

Customise invitation message to your recipients, by using personalisation tokens

**Mail Merge Field**   [Type here to select token ▾]   **Insert Field**

⚠ **Important:** Changes made to the email templates in this section will only apply to this meeting. To update the master template (used across all new meetings), please go to the Automated Messages area in Communications.

Paragraph ▾ | **B** U *I* | ≡ ≡ ≡ ≡ | S⃨ ⊘ A ▾ A⸃ ▾ | ⋮

Dear {{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}},

Thank you for accepting your meeting invitation.

For your reference, please see the details below.

Time: {{START_TIME}}

Date: {{START_DATE}}

Location: {{LOCATION}}

Description: {{DESCRIPTION}}

Add to Calendar: {{ADD_TO_CALENDAR}}

Note that in the configuration which allows applicants to choose their own appointment, you are also able to set whether or not they are able to reschedule their slots themselves.

**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

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You can also set reminders to go to those who have booked, and those who have not:

**Reminder email to confirmed students** ⓘ

**Email Subject Header**

Meeting Reminder

Customise invitation message to your recipients, by using personalisation tokens

**Mail Merge Field**          [                    ▼]   Insert Field

[Paragraph ▼]  **B** U *I*  ☰ ☰ ☰ ☰  S ⊘ A ▼ A̅ ▼ A̅I ▼ ☷ ☷ 🖼 ▼   ⋮

This is a reminder of your upcoming meeting.

For your reference, please see the details below.

Meeting: {{INTERVIEW_TITLE}}

Time: {{START_TIME}}

**Reminder email to unconfirmed students** ⓘ

**Email Subject Header**

Meeting Reminder

Customise invitation message to your recipients, by using personalisation tokens

**Mail Merge Field**          [                    ▼]   Insert Field

[Paragraph ▼]  **B** U *I*  ☰ ☰ ☰ ☰  S ⊘ A ▼ A̅ ▼ A̅I ▼ ☷ ☷ 🖼 ▼   ⋮

Dear {{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}}

Thank you for applying to {{SCHOOL_NAME}}.

**This is a reminder email for a meeting to which you have been invited.**

When you customise the email templates within a meeting, those changes are applied to that specific meeting only.

You can check and amend the <u>master copies</u> of your invitation templates by navigating to **communications and events > communications > automated messages.**

Decide whether or not to include a list of preset questions for staff to ask during the meetings.

**Create Question Lists**

🔖 Save as questions list template      + New questions

Would you like to specify particular questions to be asked or completed by the staff **during** the meeting?

🔘 Yes, I would like to create a list of questions                    ⚪ No, I want to skip this step

| | Questions | Required & Visible | Action |
|---|---|---|---|
| ✛ | Interested Course 1<br>(interview_template_35_interested_course_) | ☑ 🔵 | ✏ 🗑 |
| ✛ | Interested Course 2<br>(interview_template_35_interested_course_22) | ☑ 🔵 | ✏ 🗑 |
| ✛ | Interested Course 3<br>(interview_template_35_interested_course_33) | ☑ 🔵 | ✏ 🗑 |
| ✛ | Do you think the student is eligible to take the selected courses?<br>(interview_template_35_do_you_think_the_student_is_eligible_to_take_the_selected_courses)<br>Yes  No | ☑ 🔵 | ✏ 🗑 |

Any questions you add can be saved as a template, for you to use again in subsequent meetings.

**These questions are visible to the staff conducting the meetings, and are not shared with the applicant at any time.**

You can also view question templates you have previously made (from last year, for example) and assign those questions to any new meetings you are creating.

**Question Templates**

| Title | Description | Creator | Questions | Actions |
|-------|-------------|---------|-----------|---------|
| STUDENT INTERVIEW | Student's Interview | Demo Applicaa | 0 | 👁 View  ✎ Edit  🗑 |

Search in table      Show 25 ⬍ per page. 1 to 25 of 41 entries      Prev 1 2 Next

Move on to schedule the appointment slots and assign staff using the **New meeting slots** button.

**Schedule Slots & Assign Staff**          Add Students

> 

+ New meeting slots

| THU | FRI | SAT |

**Add new meeting slots**

| | | |
|---|---|---|
| Start date ⓘ | 31/10/2023 | |
| Start time ⓘ | 16 ▾ : 51 ▾ | |
| End time ⓘ | 16 ▾ : 51 ▾ | |
| Set up as repeating slots? | Yes ▾ | |
| Repeat on | Tuesday ✕  Thursday ✕ | ✕ ⬍ |
| Repeat ends | 22/12/2023 | |
| Length of each slot | | minute(s) |
| Gap between slots | | minute(s) |
| Number of attendees per slot ⓘ | 1 | student(s) |

SAT

Add the date of the meeting, and set the session start and end times as well as how long each appointment is, and how many students can be seen simultaneously.

If your meetings will repeat in subsequent weeks, you can set them to repeat and set an end date.

You'll then be able to assign staff to each slot, and add locations. You can update this row by row, or in bulk by selecting using the checkboxes.

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

| ☐ | Meeting date | Start time | End time | Assigned staff | Location | Maximum Attendees |
|---|---|---|---|---|---|---|
| ☐ | Wednesday, 13/12/2023 | 15:30 | 15:45 | ⬍ | | 1 |
| ☐ | Wednesday, 13/12/2023 | 15:45 | 16:00 | ⬍ | | 1 |

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The meeting will then be displayed on the calendar, and you can repeat the process to add as many more meetings as needed (perhaps each member of staff has their own series of appointments, and/or you are holding your meetings over multiple days and times).

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.

## December 2023

|  | WED |  |
|---|---|---|
| 13 |  | 14 |
| **15:30 - 18:30** |  |  |
| ⏱ 12 | 1 |  |

**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**

Type here to search for students  ▲▼

**Group**

Type here to search for groups  ▲▼

**Filter**

Select a filter  ▲▼

**Add to meeting**

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

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

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# Adding students to application groups

You can either add students to a meeting one by one, or in groups. To add a group, you first need to assign students to that group on your main dashboard.

To create an application group, click the "application groups" tab and then click the settings cog on the top right of the table:
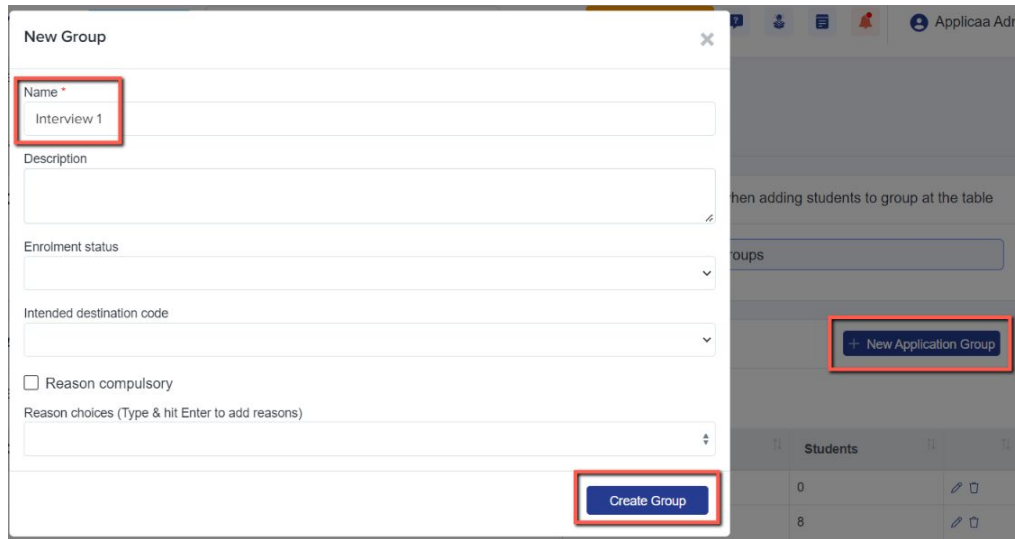
Then click "+ New Application Group", give it a name and press "create group".

Go back to your main dashboard and click to view a list of students. Select those who you wish to add to the group using the checkboxes on the left of the table (or select them all) and then use the "add to group" button to add them to the group you created:



Return to the meetings area to add your group to the meeting - this does not send an invitation to them automatically, so you can add students in prior to being ready to invite them!

# Adding students to a meeting from your main dashboard

Select a tile or a category, to load a list of students.
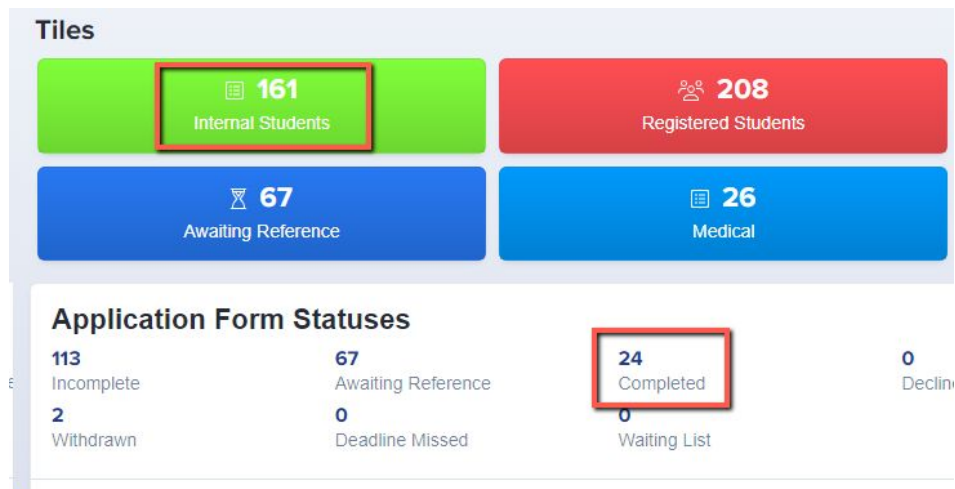
Select the students you want to add to a meeting and choose "add to meeting".

You can then return to the meetings area to invite the students.

# Inviting applicants to meetings

Once you have added students to a meeting, you then need to invite them. 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 to the meeting, who have not yet been allocated and/or invited.



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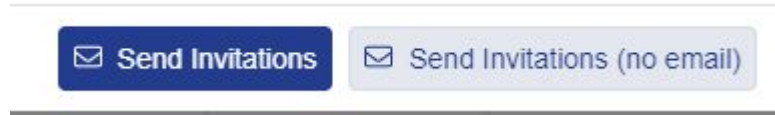
When you are ready to send your invitations, you will be presented with the option to **send invitations** or **send invitations (no email).**

The invitations are linked to the meeting templates you checked and amended when setting up your meeting, so you can send the same invitation to all applicants if that is your process - **but what if you need to send different invitations or information to different groups or individuals?**

This is where the **"send invitations (no email)"** function comes in. It enables you to send the students an invitation (ie put the "accept" and "decline" buttons on the student's homepage), without sending them the invitation email template.

You are then free to send them a bespoke email from the manual messages area instead if you need to!

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

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

You can also see a log of activities relating to meetings on the profiles of the applicants, under the **Meetings** tab.

On your dashboard, access a list of students to see the student table. From there you can see their **meeting count** - how many meetings they have been added to. Click on the number to see which meeting(s) they belong to, and the status of each meeting.

Displaying students 1-10 of 25 in total

Show 10 ⌄ entries

| ☐ | Id | First Name | Last Name | User code | [Telephones and Em... | Meeting Count |
|---|---|---|---|---|---|---|
| ☐ | 0199ddd9-5 977-7ef9-a3 | Test Leighann | Test Sauer | U-1F2ZW | student39b29d9b4fc6d10d@ admp.uk | 0 |
| ☐ | 01999fff-a2 c2-7604-a2 | TestLucy | TestCurtis | U-BN6P9 | lucy.curtis+7@applicaa.com | 0 |
| ☐ | 01996270-0 fe3-7c8b-80 | Test Victor | Test Swift | U-BU96T | student39d939de72b4a746 @admp.uk | 1 |

**Meetings for Test Victor Test Swift**                                           ✕

| Date | Time | Meeting | Location | Teachers | Status |
|---|---|---|---|---|---|
| 12 Jan 2026 | 11:15 - 11:30 | Guidance Meetings<br>Meet with the Sixth Form team to discuss your subject choices and career aspirations. | Sixth Form Office | Test Staff | Not confirmed |

# Tracking responses to invitations

## Hello Test Victor,

**Test Victor Test Swift** Student Code: U-BU96T
School: student39d939de72b4a746@admp.uk / 30927608512

Form Status
Completed

Subjects you wish to study
A Level PE, A Level Sociology, A Level Psychology

Offer status
Pending

Reference Status
Incomplete

**GUIDANCE MEETINGS**
Meet with the Sixth Form team to discuss your subject choices and career aspirations.
📅 **12/01/2026 11:15 - 11:30**
📍 Sixth Form Office

Decline    Accept

**Guidance Meetings** ↗

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

You can track their responses using the coloured boxes in your meetings area.

## Hello Test Brigitte,

**Test Brigitte Test Stoltenberg** Student Co

Form Status
Completed

Offer status
Pending

Reference Status
Not Sent

**GUIDANCE MEETINGS**
These meetings will be to discuss your subject choices and suitability based on predicted grades

Decline

Choose a time & accept invite

All | 12    Added | 6    Invited | 6    Confirmed | 0    Completed | 0    Incomplete | 0    Not Attended | 0    Not Confirmed | 6    Canceled | 0

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Based on your meeting configuration, applicants may have the option to cancel their meeting, and/or reschedule their appointment (this is available in meetings where you allow them to choose their own date and time).

**GUIDANCE MEETINGS** Accepted

Meet with the Sixth Form team to discuss your subject choices and career aspirations.
🗓 **12/01/2026 09:00 - 09:15**
📍 Sixth Form Office

Cancel Meeting

**Cancel Meeting** ✕

Reason for cancellation (required)

Please type YES in the box to confirm.

Confirm  Cancel

**GUIDANCE MEETINGS** Accepted

Meet with the Sixth Form team to discuss your subject choices and career aspirations.
🗓 **13/01/2026 09:40 - 10:00**
📍 Sixth Form Office

Cancel Meeting    Reschedule

**Reschedule Meeting** ✕

Please select a new date

Select a date ⬍

Select a new time

Select a time ⌄

Reason for rescheduling (optional)

Reschedule  Cancel

# How to proceed if a student declines the invitation

**Did the student decline because they cannot make it on the day/time you invited them to?**

You can remove them from the original meeting and add them to a new one instead.

**Are they declining because they no longer wish to continue their application to your school?**

Here's how to update a student's status to withdrawn, or delete their account from your system.

**MR JONES**   `Declined`

Appointments for Maths
📅 31/01/2024 14:31 - 14:33
📍 Not available

Mr Jones ↗

| All 19 ⓘ | Allocated 5 ⓘ | Invited 4 ⓘ | Not Confirmed 4 ⓘ | Confirmed 0 ⓘ | Completed 0 ⓘ | Incomplete 0 ⓘ | Did not attend 0 ⓘ | Cancelled 0 ⓘ | Declined 1 ⓘ |

| 📅 Friday 24th, November 2023 | 🕐 13:00 - 15:00 | Maru Alliroz | | 👤 4/6 |
| 📅 Wednesday 31st, January 2024 | 🕐 14:31 - 14:56 | | | 👤 1/13 |

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# Conducting your meetings

You can search for the applicant in the search bar and load their profile, and then click on their **Meeting** tab to see their meeting(s) and access their meeting notes.



The meeting note contains the questions you added in your meeting template (if applicable).

Staff can type or select the answers for each question and then click to mark the meeting as complete.

You can also complete other actions, such as marking them as a no-show and making them an offer.

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You can also access their 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 ⓘ

Make Offer   Change Offer Status   Communications   Reset meeting status   Add to group   Remove from group   Remove students   ⚙ Configure Meetings Settings   + Add students

🔍 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 | ✉ ✏ 📅 ✕ |

If you have lots of appointments scheduled, on various days and for multiple staff, make use of the **filter** function to narrow the list, to see only the relevant appointments.

⇄   + Create new meeting

View details

ot attend 0 ⓘ   Cancelled 0 ⓘ   Declined 1 ⓘ

Add to group   Remove from group   Remove students

⚙ Configure Meetings Settings   + Add students

🔍 Search in table   ⬇ Export

| Student Code | Email/Username | Action |
|---|---|---|
| J-IG1QJ | testfrederick.testjohn ston_87d040 | ✉ ✏ 📅 ✕ |

Staff member:

Type here to search for teacher name ▲▼

Date range:

| 28/10/2025 | → | 28/01/2026 |
|---|---|---|
| --:-- 🕐 | → | --:-- 🕐 |

Porter Osinski ▼

✈ Resend invitation    Meeting cancelled    ▤ Mark as No-show    🖐 Pending

📌 Manage pins    👤 View full application

## Application Form

### Education

**School History**

**Swallows Nursery (current)**
25/02/2024 -

Please enter your predicted GCSE grades. You can get these predicted grades by speaking with your subject tutors, your form tutor or Head of Year

| Exam | Grade | Status | Grade by Referee |
|---|---|---|---|
| Polish | 9 | Predicted | |
| English Language | 8 | Predicted | |
| Engineering | 7 | Predicted | |
| Creative Digital Media Production | L2M | Predicted | |
| Biology | 6 | Predicted | |

**State exam results**

**First Media Reference Details**

### Courses

**Course Options**

**Subjects you wish to study**

1 A Level Physics

2 A Level Chemistry

3 A Level Law

**Offer List**

Add to offer list ▼    +

### Meeting Questions

Are we the first choice for this student? *

Where else have they applied to study? *

What is their career aspiration? *

Have they chosen subjects suitable for their career aspiration? *

Are any course changes needed? Please detail any to remove/add *

Save for now    Save & mark as completed

See their meeting details including their appointment time, and the questions you have set for your staff members to ask during the session (if applicable).

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**Test Consuelo Test Schulist** ▼

✐ Resend in

⊥ Manage pins    ⊠ View full application

**Application Form**

| Courses |
|---|
| **Course Options** |

**Subjects you wish to study**

| 1 | A Level Product Design |
| 2 | A Level Drama |
| 3 | A Level Chemistry |
| 4 | A Level Biology |

**Offer List**

| 1 | A Level English Literature | 🗑 |
| 2 | A Level French | 🗑 |
| 3 | A Level Chemistry | 🗑 |

| Add to offer list | ⬍ | + |

Control what is visible on the meeting area using the **manage pins** button.

You can display the subjects they applied for, and also confirm which subjects you are willing to offer to them, and then make them their offer, as part of your meeting process.

Mark as No-show    ᛙ Pending

Offer Status: Pending

Make Offer

You are able to mark meetings as complete as a bulk action if required, from your meetings area.

# Add the Meeting phase to your application journey

You have the option to make meetings a necessary part of the application cycle, so that applicants who do not complete a meeting are unable to proceed any further (to Offers, Taster Days, Enrolment, for example).

Navigate to **settings > application form** and you can enable the meeting phase.
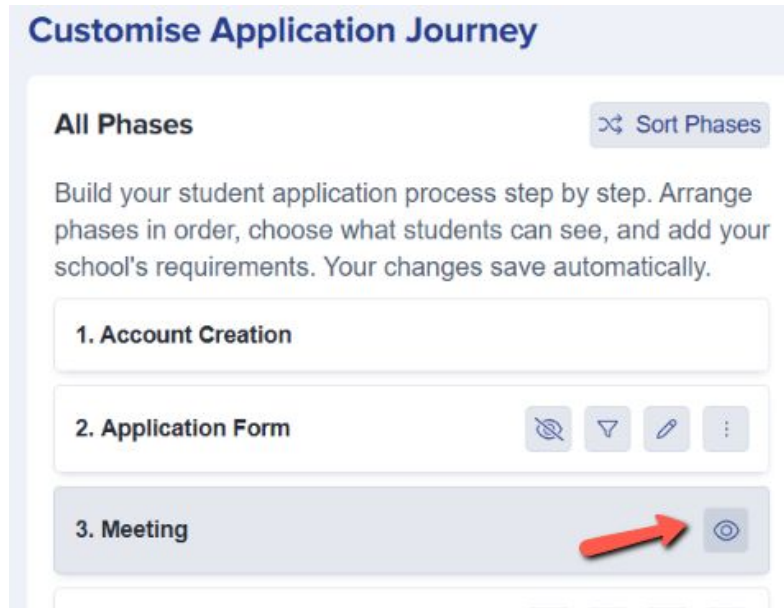
**3. MEETING** ^

ON ◯ Visible to Student ⚙ Configuration + Create new meeting

---

ON ◯ **Enable Meeting Phase**

→ When the Meeting phase is enabled, any student who has been added to one or more meetings must have their meeting marked as Completed before they can move on to the next stage in the process.

→ If the Meeting phase is disabled, it will no longer appear on the student homepage and students will not be required to complete a meeting to progress.

● All Meetings          ◯ Specific meetings only

Save

+ Create New Meeting

Your view on the Student Profile would look like this if the meeting phase is enabled:

**Porter Osinski #U-DP7E9** ⧉

< Select student ⌄ >

Phone  42177210673
School  Swallows Nursery
Email

✉ 📥 🖨 🗨 👓 more ▾

| APPLICATION STATUS 📷 Demo | ENROLMENT STATUS 📷 Demo | MEETING STATUS 📷 Demo | OFFER STATUS 📷 Demo |
| --- | --- | --- | --- |
| 📄 Completed  4/4 | 📄 Pending | 🗓 Incomplete | 📷 Offer Made |

Overview   Application Form   Enrolment Form   Concessions and Bursary   Activities   **Meeting**   Courses Selection   Family

⚙

# Hello Porter,

**Porter Osinski** Student Code: U-DP7E9
School: studentb046e52a6514c90d@admp.uk / 42177210673

Form Status
`Completed`

Subjects you wish to study
A Level Physics, A Level Chemistry,
A Level Law

Offer status
`Offer Made`

Reference Status
`Incomplete`

**GUIDANCE MEETINGS** `Accepted`
Meet with the Sixth Form team to discuss
your subject choices and career
aspirations.
📅 **13/01/2026 09:40 - 10:00**
📍 Sixth Form Office

Cancel Meeting    Reschedule

Currently unavailable to the
applicant

✓ Application Form 🔒 → 📅 Meeting → 📄 Offer ⓘ

Even if you make them an offer, or open up the next phase of
your process, the applicant is unable to proceed because
their meeting has not been marked "completed".

MEETING STATUS 🎬 Demo
📅 **Completed**

# Hello Porter,

**Porter Osinski** Student Code: U-DP7E9
School: studentb046e52a6514c90d@admp.uk / 42177210673

Form Status
`Completed`

Subjects you wish to study
A Level Physics, A Level Chemistry,
A Level Law

Offer status
`Offer Made`

Reference Status
`Incomplete`

**APPLICATION OFFER**
You received an offer on 28/10/2025.
Please respond below:
Decline Offer    Accept Offer

**GUIDANCE MEETINGS** `complete`
Meet with the Sixth Form team to discuss
your subject choices and career
aspirations.
📅 **13/01/2026 09:40 - 10:00**
📍 Sixth Form Office

✓ Application Form 🔒 → ✓ Meeting → 📄 Offer ✏️

Once you have marked the meeting as completed,
the applicant is then able to move onto the next
phase of your process.

30
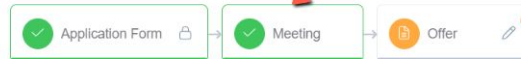
# Adding courses to the offer list

As part of your process, you can make offers to your applicants.

If you enable the offer courses listing, this will allow you to make a subject-specific offer to applicants - you could either confirm the courses they applied for, or offer them something else if their choices are not appropriate.

Navigate to **settings > application form > courses** and activate this option:

# Test Victor Test Swift #U-BU96T ⧉

Phone 30927608512
School
Email

✉ 📥 🖨 💬 👓 more ▾

| APPLICATION STATUS 🎬 Demo | |
|---|---|
| 📄 **Completed** | 2/4 |

| ENROLMENT STATUS |
|---|
| 📄 **Pending** |

⋮  Overview   Application Form   Enrolment Form   Concessions and Bursary   Activities   Meeting   **Courses Selection**

---

**Application Form Subjects**

| A Level PE (Block ) | + |
|---|---|
| A Level Sociology (Block ) | + |
| A Level Psychology (Block ) | + |

**Enrolment Form Subjects**

**Add to offer list**

| A Level PE | + 🗑 |
|---|---|
| A Level Sociology | + 🗑 |
| A Level Drama | + 🗑 |

| Select a Course | ⌄ | + |
|---|---|---|

On a student's profile, click on their "courses selection" tab and you will see the subjects they applied for.

You can then add the courses you wish to offer the applicant in the offer list.

Note: you'll add them to "confirm subjects" at enrolment.

**Application Form Subjects**            **Confirm Subjects**

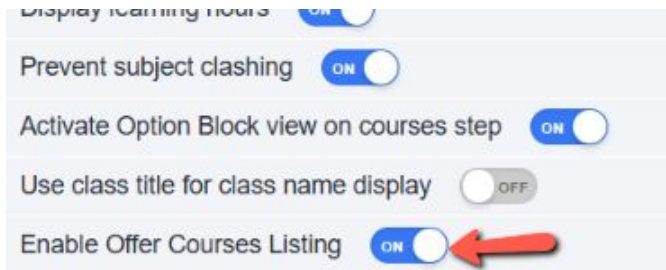| A Level PE (Block ) | + |
|---|---|
| A Level Sociology (Block ) | |
| A Level Psychology (Block ) | |

Select a Course

Move to Offer List
Move to Confirm Subjects

**Enrolment Form Subjects**

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# Making offers to students

Navigate to **settings > application form** and make your offer phase visible to applicants.



The offer phase acts as a gate at enrolment; only students who have been made (and have accepted) an offer will be able to access and complete any further phases (Taster Day, Enrolment Form, etc.)
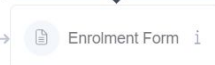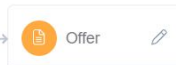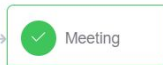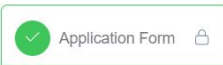
Aside from the phase view settings, you can also check the offer status is visible to students on their homepage by navigating to **settings > form settings > student homepage** and activating this switch:

**Settings**

Button text for continue application button — Continue Form

Show Student Code — ON

Show Application Status — ON

Show Offer Status — ON

**Test Brigitte Test Stoltenberg** Student Code: U-E55F

Form Status
Completed

Offer status
Pending

Reference Status
Not Sent

**GUIDANCE MEETINGS**
These meetings will be to discuss your subject choices and suitability based on predicted grades

Decline

Choose a time & accept invite

This is how it will appear to an applicant prior to making them an offer.

This is how it will appear to an applicant once an offer is made to them.

**Test Brigitte Test Stoltenberg** Student Code: U-E55F

Form Status
Completed

Offer status
Offer Made

Reference Status
Not Sent

**APPLICATION OFFER**
You received an offer on 14/11/2023.
Please respond below:

Decline Offer    Accept Offer

Check your offer email template by navigating to **communications and events > communications > automated messages** and locating this template:

| | Triggered by | Phase | Triggered when | Repeat | Enable | Actions |
|---|---|---|---|---|---|---|
| | Staff | Email Subscription | Withdraw offer | N/A | ⓘ | ✏️ ➕ 👁 🗑 |
| | Staff | Email Subscription | Make offer to student | N/A | ⓘ | ✏️ ➕ 👁 🗑 |

🔍 offer

Showing 1 to 2 of 2 entries (filtered from 36 total entries)   Show 50 entries

Hide system messages

click to edit or preview

**Mail Merge Field**   Subject Applied for 5   × ⯆    **Insert Field** ⓘ

Paragraph   **B** _U_ _I_  ≡ ≡ ≡ ≡  S̶ 🔗 A⯆ A⯆ AΙ⯆ ⋮≡ ⋮≡ 🖼⯆ 66 ⊞

Thank you for your application to [[SCHOOL_NAME]].

I am pleased to confirm that we can make you a conditional offer on the following courses you applied for:

[[GET_OFFER_COURSE_1]]     [[GET_INTERESTED_COURSES_1]]
[[GET_OFFER_COURSE_2]]     [[GET_INTERESTED_COURSES_2]]
[[GET_OFFER_COURSE_3]]     [[GET_INTERESTED_COURSES_3]]
[[GET_OFFER_COURSE_4]]     [[GET_INTERESTED_COURSES_4]]
[[GET_OFFER_COURSE_5]]     [[GET_INTERESTED_COURSES_5]]

use whichever fields are most appropriate for your process

Please use the following link to log onto your application to review and respond to your offer.

[[LINK]]

Amend your template to reflect your process.

**If you are using the offer list**, use the "offered courses" merge fields.

**If you don't use the offer list**, use the "applied for" merge fields. These fields are linked to the courses the student chose on their application form.

Alternatively you could opt not to use any courses mail merge fields and just make them a general offer of a place (without adding specified courses in).

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You can make offers **individually** or in **bulk**.

To send them **individually**, navigate to the student's profile and click the green "offer status" tile to bring up the "make offer" button (or you can complete this action as part of the meetings process).



To send them in bulk, access a list of students from your main dashboard. Select them using the checkbox on the top left of the table and then click the "make offer" button.

Making offers **with** or **without** sending email:

The "make offer" button is linked to the offer template in your automated emails area, so you can send the same offer letter to all applicants if that is your process - **but what if you need to send different offers to different groups or individuals?**

This is where the **"make offer: without sending email"** function comes in. It enables you to make the students an offer (ie put the "accept" and "decline" buttons on the student's homepage), without sending them the master template.

You are then free to send them a bespoke email from the manual messages area instead!
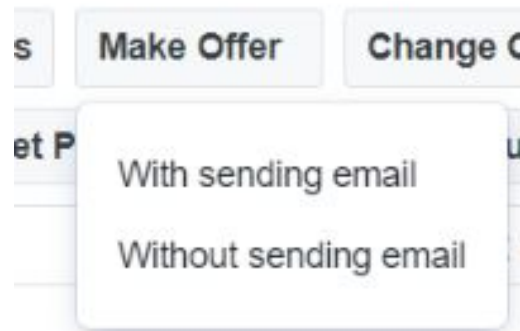
# Tracking responses to offers

From your main dashboard, you can track the status of your offers by navigating to the **Phase Status Details** table and clicking the "offers" tab.

## Phase status details

| Application | Offers | Enrolments |
|---|---|---|

| Status | | Internal | External |
|---|---|---|---|
| Pending (1571) | pending = students you have not yet made an offer to | 227 | 1344 |
| Offer Made (92) | offer made = students have been made an offer | 4 | 88 |
| Accepted (7) | accepted = students have logged in and accepted their offer | 1 | 6 |
| Declined (3) | declined = students have logged in and declined their offer | 1 | 2 |
| Offer Withdrawn (14) | offer withdrawn = you made this student an offer but have now made the decision to withdraw it from them | 2 | 12 |

# Creating Your Timetable

Our Options module enables you to build a best-fit model for your timetable, based on the combination of subjects chosen by your applicants.
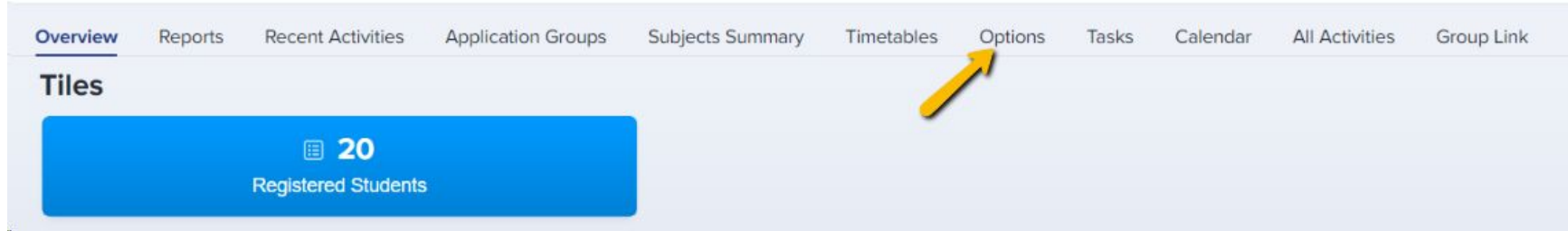
Tell the wizard the names of your blocks, for example A, B, C, D, E - add a new row for each block.
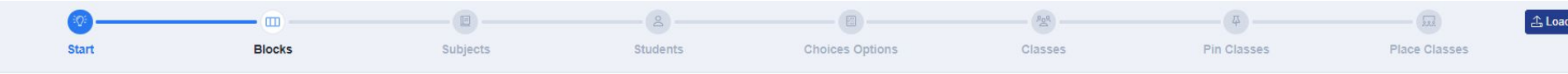


**Blocks**

To get us started, please tell us how many timetable blocks are used for your options subjects

| Block order | Block's name in timetable |
| --- | --- |
| 🗑 1 | |

Add the name of each block; for example: A

Click to add a new row for each block, then confirm and continue

← Back    + Add new row    ✓ Confirm and continue

**Blocks**

To get us started, please tell us how many timetable blocks are used for your options subjects

| Block order | Block's name in timetable |
| --- | --- |
| 🗑 1 | A |
| 🗑 2 | B |
| 🗑 3 | C |
| 🗑 4 | D |
| 🗑 5 | E |

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Next, the wizard will show the list of your courses - it will need to know the **shortcodes** for these courses (for example, Art may be Ar, Business might be Bu, etc.) and each course will need a unique code.

Apply the **thresholds** for your courses - the minimum and maximum numbers in order to safely and effectively run - you can set a different threshold for each course and you can apply these values in bulk by selecting multiple subjects, and choosing the **Edit class size** option.





## Subjects

Tell us about the subjects you will be including in this model.

We have already loaded in your existing subjects. You can add new subjects and also choose which should be 'ignored' when timetabling later.

🎓 Edit class size (18 selected)

| ☑ | Subject | Short code (upto 4 letters) ❶ | Warn me when class size exceeds | Warn me when class size is below | Number of blocks per class ❶ |
|---|---|---|---|---|---|
| ☑ | A Level Art and Design | Ale1 | 20 | 5 | 1 |
| ☑ | A Level Biology | Ale2 | 20 | 5 | 1 |
| ☑ | A Level Chemistry | Ale3 | 20 | 5 | 1 |

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Set the **width** of your courses. This means how much weight the course has; is it a single A Level? If so, add the number 1. If the course is a double, add the number 2, or 3 for a triple.

| Subject | Short code (2 letters) | Warn me when class size exceeds | Warn me when class size is below | Number of blocks per class |
|---|---|---|---|---|
| Art and Design | Ar | 20 | 5 | 1 |
| Biology | Bi | 30 | 8 | 1 |
| BTEC Applied Science (Triple) | Ap | 25 | 6 | 3 |
| BTEC Business (Double) | B2 | 28 | 10 | 2 |

Once your settings are in place, click "confirm and continue". It will check for any errors before allowing you to move on, for example if you have not used a unique code for each subject or have failed to set class sizes.

| | |
|---|---|
| Spanish | Sp |
| | This code is not unique. Please choose another. |

Move onto the students step, to decide which filters you would like to apply: do you only want to build the timetable based on **completed applications**? Or maybe only on those you have made **offers** to? Leave everything blank if you want to see what would happen if all of your applicants enrolled or click "filter" to apply any settings required.



Once your filters are in place, "select all" students and click to "confirm and continue".

On the "Choices Options" step, you can set which subject choices to build the model on.

## Choices Options

Select students' options to build the model:

○ Interested and Reserve subjects

◉ Interested subjects

Please select the number of ranked subjects to be included in the modelling

◉ Utilise all of the subjects selected by the applicant

○ Only use their top [ ] choices. The rest will be treated as reserve choices.

Ignore ranked options

[ ]

☑ Include reserve choices in the modelling

○ Offered subjects ⬅ Only works if you have used the "offer courses list" function to prepare a list of offered subjects.

☑ Allow Partial Allocation of Students' Classes ⓘ

On the "classes" screen, you will see the number of students per subject based on the filters you applied, and can specify how many **teaching groups** you would be able to offer (based on your current staffing).

This will then show you how many students would be in each class for that particular course/subject.

You can also add a "projected number" calculation, which will apply a conversion rate to your numbers.

If you want, we can reduce the 'projected number' of students for each class by a certain percentage which you can enter here.

For example, if you know that only 80% of your applicants end up attending in September, you can enter '80' in this box, and we will adjust the projected class sizes below accordingly.

When calculating class sizes, assume that [ 100 ] percent of internal applicants and [ 100 ] percent of external applicants will attend in September.

The average class size column will be colour-coded to highlight any classes which would be too big or too small, based on the settings you have added earlier on in the wizard.

| Subject | Students wanted | Teaching groups | Average class size |
|---|---|---|---|
| Art and Design | 52 | 1 | 52 |
| Biology | 323 | 3 | 108 |
| BTEC Applied Science (Triple) | 29 | 2 | 15 |
| BTEC Business (Double) | 33 | 2 | 17 |
| BTEC Business (Triple) | 18 | 1 | 18 |
| German | 1 | 1 | 1 |
| Government and Politics | 84 | | |

Here, 1 class is not enough for Art, based on your maximum class sizes (so you might need to consider hiring another Art teacher)

This helps you to see which classes would not be cost-effective to run

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Click to **Allocate students and classes** to generate your model.

Students who have been allocated to their main choices will show as **excited**.

The next face shows students who are **happy** - they got most of their choices, but one is a reserve subject (if you used reserves at application stage).

The **sad** face shows students who are allocated to something which they had not originally chosen (you've allocated them to a new subject).

The **devastated** face indicates students have not been able to be completely accommodated, based on the current model being projected.



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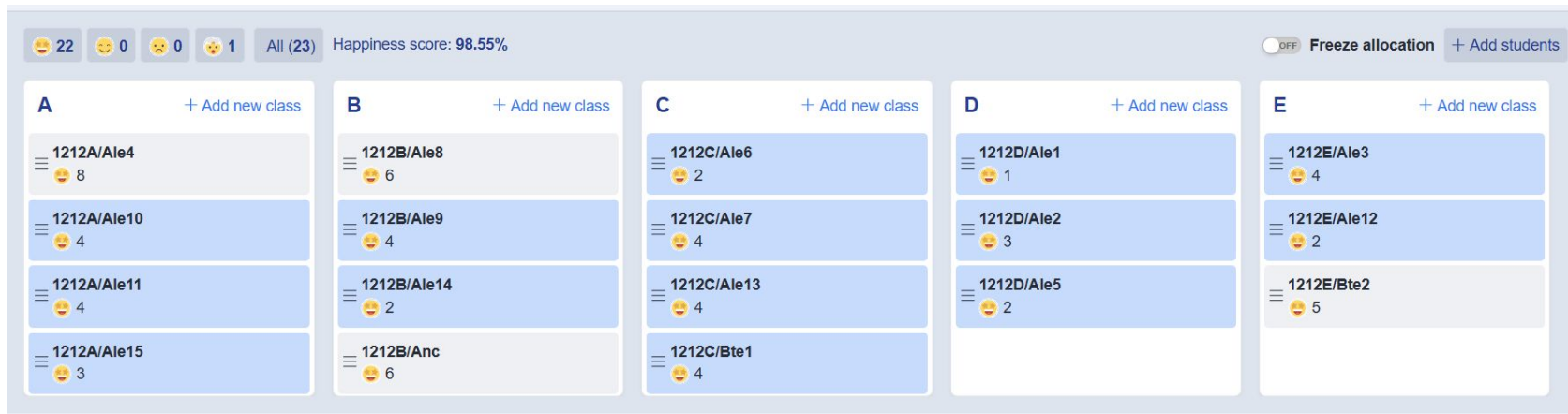
Click to the **devastated** face to view the students who haven't been able to be fully accommodated in your model, to see what else is available to them and you can allocate them using the "select classes" button.

| # | First Name | Last Name | Choices | Could have been allocated | Could not have been allocated | |
|---|---|---|---|---|---|---|
| 1 | Test Sherlene | Test Hammes | Main choices<br>• A Level PE ✓<br>• A Level Drama<br>• A Level English Language ✓ | • A Level PE<br>• A Level English Language | • A Level Drama | ⊞ Select classes |

Click **Allocate** to recalculate class allocations for the students - you can do this individually, just for those who are unfrozen, or for all.

Use the **Update Offers** function to update the Offer Courses Listing for every student who has been allocated within the model - saves you having to do this individually. Useful if you build your model prior to making offers.

Use **Duplicate** to **make copies** of the model, so you can play around in your clones, but keep the master copy undisturbed.

Allocate ⌄ | ⎙ Duplicate | ✎ Update Offers | ⬓ Report | ☑ Publish

◯OFF **Freeze allocation** | + Add students
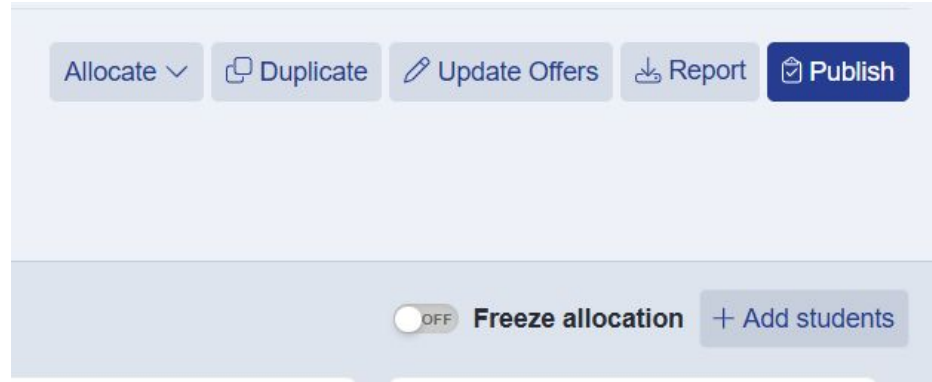
Run a **report** to download a CSV and see which classes each student would be allocated to, based on your model.

You can **Freeze** and **Unfreeze** your model; this allows you to lock/unlock classes and students in place.

Use the **Add Students** function to add students not already included in the model, so you can take them into consideration without having to go back to the Students step.

When you are satisfied with your model, click to **publish**. This will add the classes from your model to your **Timetable**, ready for Enrolment.

On each block, you have the function to manually add extra classes.

You can also click on each class to view who is allocated to it, and which other subjects they are also allocated to.



You can **pin any classes you are happy with**, so their position is retained when making other changes. Hover over a class to **pin**, **duplicate** or **remove** a class, or use the **smart allocation** feature.

If you duplicate a class, it will create a copy of it underneath, and will automatically divide the number of students between the two groups.

Use the **Smart Allocation** feature to test a subject out in different blocks, and see what that does to the percentage of students allocated - this lets you test things out before you move them!

**A Level Drama - 1212A/Ale4**                                    ✕

**Smart class allocation**

Click 'Test in other blocks' to see how moving the class to another blocks will affect student allocation

| Block | Score |  |
|-------|-------|--|
| A | 98.55 % | Current block |
| B |  | Move it here |
| C |  | Move it here |
| D |  | Move it here |
| E |  | Move it here |

Close    **Test in other blocks**

**A Level Drama - 1212A/Ale4**                                    ✕

**Smart class allocation**

Click 'Test in other blocks' to see how moving the class to another blocks will affect student allocation

| Block | Score |  |
|-------|-------|--|
| A | 98.55 % | Current block |
| B | 91.3 % | Move it here |
| C | 92.75 % | Move it here |
| D | 95.65 % | Move it here |
| E | 95.65 % | Move it here |

**Publish** your model to update your **Timetable** (this is in readiness for Enrolment).

Offers    ⬇ Report    ☑ Publish

Published at 28/10/2025 14:49

Overview    Reports    Recent Activities    Application Groups    Subjects Summary    Timetables 📅 Demo    Options 📅 Demo    Tasks    Calendar    All Activities    Group Link

Timetable Overview    Forecasting    Unallocated Applicants

## Class Timetable

⤴ Publish to *ApplicaaOne*    🠒 Export    + Add New

Filter Timetable:

Type here to select    ⬍

Subject Filter:

Filter for subjects    ⬍

Showing 1 to 10 of 18 entries      Show 10 ⬍ entries

| ☐ | Course | Available on Application Form ℹ | Available on Enrolment Form ℹ | Interested | Enrolled | Waiting List | Offered | Block A | Block B | Block C | Block D | Block E |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | **A Level Art and Design** ✏ Edit | ON ⬤ | ON ⬤ | 1 | 0 | 0 | 0 | | | | 1212D/Ale1 (0 max) 0 interested 0 enrolled | |
| ☐ | **A Level Biology** ✏ Edit | ON ⬤ | ON ⬤ | 3 | 0 | 0 | 0 | | | | 1212D/Ale2 (0 max) 0 interested 0 enrolled | |

**Create the classes in your MIS!**

# Useful Information

**Support Telephone Number:** 020 3667 0764

**Access all [Meetings and Offers guides](#)**

**Access [Timetabling and Options guides](#)**

**Do you have any questions?**