

# **The Timeline**

Autumn:

Parents apply via Local Authority

Spring:

- Prepare your Admissions+ form
- Receive your list from the Local Authority
- Import your list straight into Admissions+
- Send welcome emails to parents
- Parents complete your form
- Import your data into your MIS

Summer:

Allocate students to registration/form groups using the Sorting Hat



# 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.



20 00 000

Turn the toggle switch on to make it active - it needs to be active to enable importing/exporting with your MIS.

# How to close your old form

Now that the previous cycle has finished, you don't want parents completing anything on that form, as that data is now in your MIS and managed there.

In your old form: Navigate to settings > application form > phase view and turn on "disable submissions".



External Applicants



	nt Application Form	Lock form after submission			
Customise A	pplication Journey	Step View Phase View		Disable submissions	
All Application Phases				☆ Sort Phas	es + New Phase
Phases	Category	Visible to Students 0	Visible to staff on Student Profile ()	Filter 9	Actions
2. Admission Form	Form Questions				V D
3. Offer	Offer				$\nabla \mathcal{P}$

You can also archive old admissions 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 Reception, this should be set to "students and parents must be imported by staff".

### You can also update any images here as needed.

#### **Configuration Mode**

Choose your landing page configuration mode:

- Only students can register ③
- Students & Parents can register ⑤
- Students and parents must be imported by staff (1)
- Only parents can register ④
- O New Application area hidden completely



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.

3	Parent Homepage Landing Page Application Grou	ps Form Groups Student Profile	
	General Settings		
	Parent Must Accept School's Policy	Parent Must Accept Applicaa Policy	
•	General Welcome Message		Preview Preview
а 10	Messages on parent's homepage	Parent Homepage Ima	ge

The general welcome message is seen by parents across **all intakes**, but there is also a place for you to add a separate, Reception-specific welcome message if desired.

Reception Admissions (2025/2026) Welcome Message	Preview Zedit
Messages on parent's homepage	Parent Homepage Image
Welcome	
↓ Show more	

### You could consider changing your configuration to suit your intake:



### Also turn off:

- Show offer status
- Show courses you wish to study
- Show reference status

# **Checking your email templates**

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



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

You can edit, move to folder and delete using these icons       Image: Construction of the section o	ered when	Repeat	44	Enable	14	Actions	14
to interview N/A I I I I I I I I I I I I I I I I I I I	*			You can edit, move to folder and delete using these icons			
	to interview	N/A		0			Ì

Top Tip: check all active emails to make sure the wording is appropriate for your setting - if your intake is for Reception, ensure there is no "Post 16" wording in your templates.

### Priorities for checking ahead of launch - filter your "send to" column to "parent":

Q Search Showing 1	in table to 9 of 9 entries (filtered	l from 34 total entries)		Show 50 +	entrie	'S		+ Add new message	+ Add new folder
4		-							•
Туре	Template Name	Subject	Send from	Send to	4.	Triggered by	Phase	Triggered when	Repeat
	Search Template I	Search Subject	\$	Parent X	٥	\$	\$	*	

Parent Welcome	Welcome to Applicaa Demo	-	This email contains their system- generated password and will be your first correspondence with them
Notify Parent Application Complete	{[STUDENT_FIRST_N AME]} {[STUDENT_LAST_N AME]} has completed their application to Green Abbey School	÷	This email notifies the parent they have successfully submitted the form - by default, it is configured for Post so consider changing the wording to "we have received the completed admissions form 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!

ළු	Communications						
Ę	Manual Messages Auton	nated Messages	Scheduled Messages Mes	ssages Summary			
<u>بی</u>					+ Ad	ld new message +	Add new folder
	All Manual Messages	Q Search in table		Show To a partico			
Â	Emails	Showing 1 to 50 o	of 56 entries	Show 50 ¢ entries			
218	Notifications	†‡ Type †4	Template Name 14	Subject **	Last Updated 🙌	Times Used **	Actions 👯
2¢9	SMS		Archive		17/03/2022		0 🗈 🗊
	Envoritor		test folder 01		01/10/2021		1 🗈 🗓

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





If you are seeing "admin@applicaa.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!

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

	Student First Name	click "Insert Field"	
Paragraph 🗸	<b>B</b> <u>∪</u> <i>I</i> <b>≡ ≡ ≡ ≡</b>	≣ S ② A × A≣ × A1 × ≔ ≟ III × ¥ III × → ↔ ↔ ♀ > Source II ×	
Hi ;[[STUDENT_F	IRST_NAME}],		
Congratulations.			
Thank you for co	mpleting your application for 6th	i form.	
We would like to	invite you to enroll on {{DATE}}.		
On this day you n	nust be here in person and you	will be asked to select your subjects. You will only be able to enroll on courses where you have meet the entry requirements.	
You will need to	on that day:		
1. Check your per	sonal details.		
2. Select your sub	ojects		
3. Meet with our s	senior member of staff on your e	nrolment will start on {{TIME}} and it will take place in {{ROOM}} If you have any questions please contact Mr Brown.	
This can be done	by phone on 5555 5555 55 ex	t 555 or you can email on admin@demoschool.com	
2 A.L. J			
Attachments Add Attachment			

You can also preview the email template if you want to see how it looks.



review Communication	×
Dear {[STUDENT_FIRST_NAME]} {[STUDENT_LAST_NAME]} Below is your login details for {[SCHOOL_NAME]} Email: {[STUDENT_EMAIL]} Password: {[PASSWORD]} {[LINK]}	
Log in to your account · Visit School Website Copyright © 2019 Applicaa - POWERING SCHOOL APPLICATIONS Registered Address: 23 Abdale Road Shepherd's Bush London W12 7ER Powered by applicaa	
Clo	se

# Your application phases and settings

Navigate to **settings > application form > phase view** and turn off any phases not in use (offers).





### Customise Application Journey Easy View (Preview) Advanced Step View Phase View

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



Name	Admission Form	
Description	1	
Internal Appli	cants	
Lock form after	submission ()	
Disable submis	isions 0	
External Appl	icants	
Lock form after	submission 0	
Disable submis	isions O	
Stand alone	0	
Trigger by co	ondition	

Phase: Admission Form	
Step Name	
Step 1: Child's Basic Details	
Step 2: Parent/Carer	
Please list parent or carers in o	rder of priority, starting with the contact that should be contacted first in th

Within step view, make any changes to questions/fields - have you got new User Defined Fields to add in? Are there questions you wish you'd asked applicants 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.

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

UDFs can write back to your MIS, so they are great for capturing extra data that you don't have to manually input - you'll find them under "Pre-defined questions and fields".

You can also add questions in as "Custom Questions" - these will NOT write back to your MIS.

Here is a link to our form customisation guide.

Add a new question



Not seeing your **User Defined Fields**? This will mean you need to make an update in your MIS first and then re-integrate!

Add your UDFs in your MIS, then:

For SIMS, log into the A+ SIMS App - it will scan for updates and ask you to carry the updates over into A+.

For cloud-based MIS, go to settings > school settings > integration and click to Import UDFs.





### SIMS In Touch:

This field is NOT active by default on Admissions+

If you use In Touch and would like to activate that field so it writes back to SIMS:

- go to the Parent/Carer step of your application form
- Click + New Question
- Click parent/carer contact details and select the In Touch question to add it to your form

Add New Field		Properties Calculat	ted Properties Property Groups		New Property
Existing Properties	Show long text	1			in touch
Search existing fields		Showing 1 to 1 of 1 enti	ries (filtered from 322 total entries)	Show 50 ¢ entries	
Addresses >		Category ++ App	oly For 🕫 Name 🕫 Code	14 MIS 14 Lookups impo	rted? ++ Used in number of fields ++ Actions ++
Please specify your relationship (	Work Phone Number +	Parent/Carer Gua contact details Oth	ardian, After the child in_touch_communication	Sims Yes	
Phone Work +	Should this contact be provided w	Pan	should		
Should this contact be provided w	Contact priority source +		communicatio		
Translator required +	Place of work +		parent mail system ie.	Chec	k in settings > properties
After the child starts school, this c	Job title +		emails and SMS text	> pro	perties to see what the
Contact first language +	National Insurance number +		messages (for example	name	of your In Touch field is.
Priority +	Does this contact have legal pare		absence messages, trip	and y	whether it is already
Relationship +	Authorized to Collect student fro		notifications, general		in your form
Parent/Carer address > Telephones and Email Addresses >			information emails etc)	active	

Check the links to any policies in your Agreement and Consent step - sometimes it is necessary to remove old policies and add new ones to ensure the links are accurate.



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

Note: If you also have a nursery, any students progressing to reception from your nursery setting will be classed as internal students.

Step 8

Courses

× ‡

÷

Next

Education



# Configure your **address settings** so they migrate correctly into your MIS as per your school's setup.

Address Block Co	onfiguration 🕄			Apply to Existing Addresses Report
Address 1	<line 1=""></line>	Set to the format that works		Preview
Address 2	<li>line 2&gt;</li>	options shown and then click	Address	2 Weetfield Baad
Address 3	<line 3=""></line>	test	Address 1	2 Westneid Road
Town/City	<post_town></post_town>	\$	Address 2	Wigginton
		O ALL CAPS 🜒 🛞 Normal Case	Address 3	
County/State	<postalcounty></postalcounty>	\$	Town/City	York
Country	<country></country>	;	County/State	North Yorkshire
Postcode	<postcode></postcode>	\$	Country	United Kingdom
Enter a postcode	to test:		Postcode	Y032 2JF
2 Westfield Roa	d, Wigginton, YORK, Y	/032 Test		

Navigate to **settings > school settings > address mapping.** 

### Here is a link to our <u>guide</u>.

You will see the option to configure your address format, test how it appears and apply it to all addresses already in your system to ensure they are formatted correctly ahead of your import!

### Configure your **properties** so they are correctly formatted for transfer to your MIS.



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.

# Setting up open evenings and events

We have updated the Events area significantly and the new functionality is now available.

See our updated guides here

### **Key features include**

Set sessions within Events Cover multiple times and days View registrants View total attendees Track which events are published/ unpublished Customisable question on registration Filter based on question responses Email templates & automated emails

### **Accessing the Events module**





### Navigate to **communications and events > events.**

Click to create a new event and set your parameters: are you ready to publish the event and share the URL?



#### Events

You can show events on your landing page, on student and parent homepages and can also share the link on your website or email it to people directly!

Visibility	
Which forms does this event relate to?	
Apply for *	
Test Year 12 (2024/2025) 🗙	
Message to show when the event is fully booke	ed
This event is fully booked!	
Display number of tickets remaining Show the event form	
(Click here to see example)	
Login page for related forms	<ul> <li>Parent's nomepage for all parents</li> </ul>
Student homepage	<ul> <li>Parent's homepage based on application form</li> </ul>
	Parent's homepage based on the child's application form I
	Parent's homepage based on enquiry child's suggested form ()
Show popup for the event on (Click here to see example)	
Login page	
Student homepage	
Parent homepage	

To link an email to your event, navigate to your email templates area and go to "manual messages". Create a new message and ensure the target audience is "**Event**".

Manual Messages 🧲	Automated Messages	Scheduled Messages	Messages Summary			
Edit Email Templat	e					
			<b>0</b>		<b></b>	
			Set Up	Advance	ed Settings	Email Template
Communication Type			Set Up	Advance	ed Settings Template Name 🚯 *	Email Template
Communication Type Email			Set Up	Advance × \$	ed Settings Template Name ①* Event Email	Email Template

Then, go back into your events area and you will be able to link the email template to your event

### Email & questions

Enable prospective pupil question when parent apply

Mandatory

#### **Automated Email**

Send automated event confirmation email to event registrants ()

Thank you for your registration to our Open Evening

# Importing your Local Authority file

There is a guide to importing parents into Admissions+ on our Knowledge Base and you will find it <u>here</u>.

On the **imports** area of your platform, you will see a sample CSV file which you can download and populate with your LA data.

You will then be able to import your data and this will create a system-generated password for each parent, which you will send to them in the Parent Welcome email.

Parents of twins will have one login, and will have access to forms for both children.

fear 7 Data Collection Admissions F * 🔞 Knowledge Base			
Imports Exports Uploaded Files			
		Import Data	
0			
Select Type of Data	Select the Import Method	Source of Data	
		Admissions+ Import Guides	
	U	ser guide for importing LA Offers for Year 7 Data Collection 🗹	
	G	eneral video guide - updating existing applications via CSV 🗹	
	<u>General video</u>	<u>. guide - Importing.new applicants.(e.g. external Sixth Form Ap</u>	olicants) 🖸
		Give your import a name *	
		Type name of import here	
		What would you like to update or import?	
		Users	
		Students, parents and enquiries	
	Download this file and add	0	
	your data to it	import parent sample.csv	

Important: you MUST import your LA data straight into Admissions+. Please don't import the file into your MIS!

# All fields on the sample CSV can be useful to import, but the ones shown in bold are **mandatory.**

A	В	C	D	E	F	G	Н		J
Child First Name	Child Last Name	<b>Child Birthday</b>	Child Gender	Child Current School	Child Unique Pupil Number	First Name	Last Name	Relationship	Email
Child 1 First Name	Child 1 Last Name	31/12/2006	Female	Demo School	1234567890	Parent 1 First Name	Parent 1 Last Name	Father	father1@applicaa.com
Child 2 First Name	Child 2 Last Name	31/12/2006	Male	Demo School	12345678956	Parent 2 First Name	Parent 2 Last Name	Mother	mother1241@applicaa.com

### **Importing - step by step:**

- 1. Click Data > Import > Start an import
- 2. Name your import, select "users" and "next"
- Select "new users" (you will be prompted to select this) and "next"
- 4. Select parents (again, you will be prompted) and "next"
- Choose "CSV", then "next", and then upload your file and click "next"
- 6. Complete the mapping step and click "next" to review the data and commence the import

	Parents			
	*Use this selection for importing LA Offers for <b>Year 7 Dat</b> <b>Collection</b> or <b>Reception Admissions</b> .	a		
1 C	olumn header below should be mapped to a property in Admission+. Some of these may be already been mapped bas If you decide to not import a property just	ed on their names. Anythin leave it unmapped and it w	ig that i vill be iç	hasr
	Select type of children	Students	×	\$
	Select application form	Test v7 (2023/2024)	×	\$

			Students	° *			
	Data from your CSV needs to	Select application form	Test y7 (2023/2024)	× \$	Tell the system where to put		
	field on the right	You are importing Internal/External	External	× \$	your CSV file		
MATCHED	COLUMN HEADER FROM FILE	PREVIEW INFORMATION			ADMISSIONS+ PROPERTY		
Ø	Child First Name	Child 1 First Name Child 2 First Name			Child's First Name	×	+
Ø	Child Last Name	Child 1 Last Name Child 2 Last Name			Child's Last Name	×	\$
Ø	Child Birthday	31/12/2006 31/12/2006			Child's Date of Birth / Birthday	×	\$
Ø	Child Gender	Female Male			Child's Gender	×	¢

nything that hasn't been mapped yet can be manually mapped to a property with the drop down me

The import will then be complete and you'll be able to select all parents and click to "send welcome email" - this is the Parent Welcome email template which you checked earlier.

Parents will log in and complete your form, and you can track progress on your dashboard.



# Tiles <sup>AS</sup> 30 Registered Students Ease Image: Students

# **Manually Adding Extra Parents and Children**



Often, extra students are offered places as the appeals process gets underway and offers are accepted/declined elsewhere.

You can either **manually add** extra parents and their children, or **import them via CSV** via the same method previously used.

The process for manually adding is covered step by step in the next slide.

	Require
Add Parent	First Name*
	Last Name*
Email	Optiona
Enter the parent's email address	Title
_	Gender
Back	Next Date Of Birth

#### equired

-	Of the parent	

The system will detect any users who already exist, so if you do opt to import new parents via CSV you can add their data to your existing file and re-import it - only the new parents will have accounts created and **no duplicates will be made.** 

Once you have added the parent, don't forget to add the child!

#### A Back Contact Code: U-4D7E Parent Details Actions 🖾 Email Impersonate Add Student Add Enguin Title Empty Confirm This Account Communication Log First Name Paren Last Name Test hanny+ent@annlicaa.com

Add Student		
Required		
First Name*	Child	
Last Name*	Test	
Application Form*	Test y7	× ¢
Optional		
Preferred First Name		
Date Of Birth		
Sender		•
Current School		;
JPN		
Link student to a	in existing parent?	
Linking to a parent will give the	m full access to the student's profile and data	

### Manually adding, step by step:

- Click "manage users" and select "manually add people" 1.
- 2. Click "parent" and add their email address
- 3. Click "next" and add the parent's first and last name, plus any optional fields if known
- 4. Click "save" and then "send welcome email", followed by "done"
- 5. Search the name of the parent in the search bar at the top of your dashboard and click on them to load their profile
- Click the "add student" button to add their child' details and link them to 6. the child
- Click "save" and "done" 7.

# **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	Applicati	ion Status	Make Of	ffer Change (	Offer Status	Change Enrolment Status	Change Internal Status	Change Phase Status	Add to group	Remove from group	Communications	Reset Passv
Change Showing	<b>Colour</b> g 1 to 7 o	Bulk	Update 7 rows sele	Add to interview	Export To F	Confirm Account	Show 10	entries			Send Email Send SMS Send Reference R	equests
	ID	1. St	udent Code	n n	First Name	1) Last Name	1) Birthday	1. Gende	r	1. Email/Username	Send Custom Ema	ail to Referee
	20	NU	J7M		Deesha	Assani	05/07/2010	Femal	e	kalpnabhudia@yahoo	Send Student Wek Send Parent Welco	come Email
	21	JC	NX	l	Deesha	Assani	05/07/2010	Femal	e	mitesh.assani@gmail	L School	

To schedule an auto-chaser, navigate to communications and events > communications > manual 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.

	0	00		
	Set Up Advan	ced Settings Email Template		
ommunication Type *		Template Name 0 *		
Email	× \$	Incomplete		
ubject Header *		Target Audience *		
Please complete admission form		Parent		
ender Email 🟮 *		Reply-To Email (to add a new email, start typing and hit 'Enter' to save)		
admin@applicaa.com		admin@applicas.com X		
emplate Description				
P	Cot up how would like to cond this	anal bara		
	When applicant does what? *	esitar neve		When applicant does what? "
	Automatically when an applican	t does something	× \$	Has been incomplete for certain amount of time
	Select phase applied to *	This may say "admission form" depending o		
	Application Form	your settings from earlier	* *	
	Send after 5 day(s) 0	hour(s) 0 minute(s)		
	Repeat email after every 5	dav(s) until they submit		

# **Importing data to your MIS**

### Transferring data to and from your MIS

Importing internal students from Bromcom to Admissions+

Data Transfer - Cloud School (Progresso)

How to import Incomplete applications to your MIS

How to import student and contact data into your MIS from Admissions+

Adding UDF's and Documents to Admissions+ SIMS Integration (7mins)

Data Transfer - SIMS

Which fields go to which places in SIMS? (PDF)

Importing students & data from SIMS App into Admissions+ (5mins) Bromcom Training Webinar Recording (1 hr) The process of importing the completed data to your MIS varies.

Check the relevant guide on our <u>Knowledge</u> <u>Base</u> to see the steps specific to your MIS.

If you have any difficulties transferring your data, call us on **020 3667 0764**.

# **Transition Features**

These features are in the Post-Enrolment area of your platform, and though there are three features, the one most relevant for a Reception intake will be our **Sorting Hat** feature.

You'll find the comprehensive guide to our Transition Features <u>here.</u>

Join me for training & a demo of these features!



The sorting hat enables you to sort students into form groups and transfer those form group allocations to your MIS.

You can configure it to balance groups by a range of factors including gender, ethnicity, current school, SEN status and more.

You can also set parameters to pair certain students together, or set an "avoid" clause to keep particular students apart.

The feature calculates the best fit, based on the criteria you have set and you can manually move students to different groups or rerun the wizard as much as needed.

Ethnicity

WROM

BOTH

WBRI

Current School

Applicaa Demo

Applicaa Demo

**Group Allocations** 

Student Name

Test Karianne Test

Test Spencer Test

Test Vince Test Jones

Dickinso

Once you've set your conditions, select all

students using the checkbox

Gender

Female

Male

Male

# Sorting Hat

÷



Empty

## **Update Staff Users**

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

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 pass	word Send Welcon	me Email	Disable En	able 🗍 Delete	은 Import us	sers + Add	Jser Manually
Q Search in table		Show 50 \$ entries 1 to 45 of 45 entries						Prev 1 Next		
-	Name	Email Address	ţ1	Job Role	11	Role	11	Key Contact	Status 1	Welcome
-	Test: A1	oanh+1staffa@applica	a.com	Admissions Manager / D	virector	View All	× ‡		Deactivated	Not sent
			Job Role: Permission: Vermission: Enable staff Form types they can access	Admissions Manae Admissions	ger / Director 🕻	3	Cancel Update	•		0

A <b>+</b>	Year 12 Admissions Admissions				
ő	SETTINGS				
Ę	Application Form				
2 	Subject Options >				
Ð	Form Settings >				
2	School Settings ∨				
بِ <mark>56</mark>	General Settings				
	Permissions				
	Integration				
0	Payment & Fees				
<b>A</b> <sup>+</sup>	Unsubscriptions				
B	FAQs				
0	Address Mapping				
©@	Enrolment Settings				

# **Earn Rewards**

Use your Referrals button to introduce us to other schools, and we will reward you!

For every school you refer, who then joins us:

Your school will receive 10% discount on their next renewal, and the school you refer will receive a 10% sign-up discount.

### You will personally receive a £50 Amazon voucher!



# Do you have any questions?



# THANK YOU