Admissions+

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Key Feature Guide

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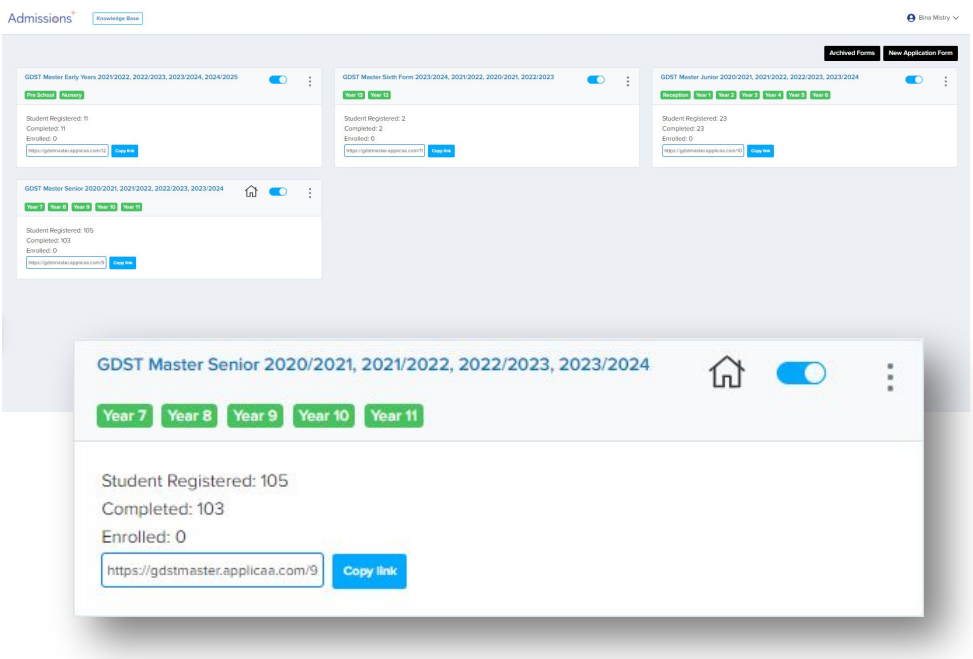
1. Admissions+ Dashboard and System Navigation
2. Parents and Enquiries
3. Student Profiles
4. Advanced Filter, Tags & Student Lists
5. Activities and Tasks
6. Grouping Applications
7. Communications
8. Events

Integrated Admissions

Entry Point

Depending on your role you will see all or the most relevant entry points. Notice the toggle this means it active when blue.

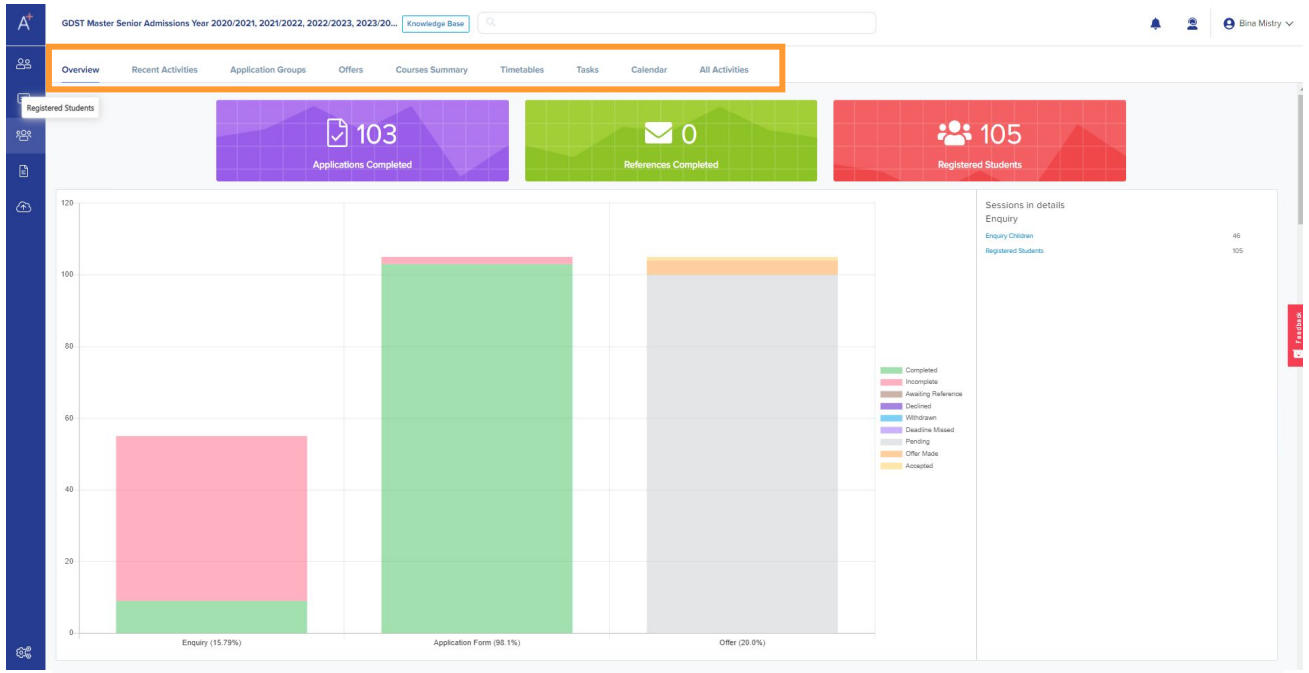


Search bar

Located at the top allows you to search for a child or application number, parent id.

Menu

This menu will help save you time. Instead of scrolling down you can jump to the menu items.



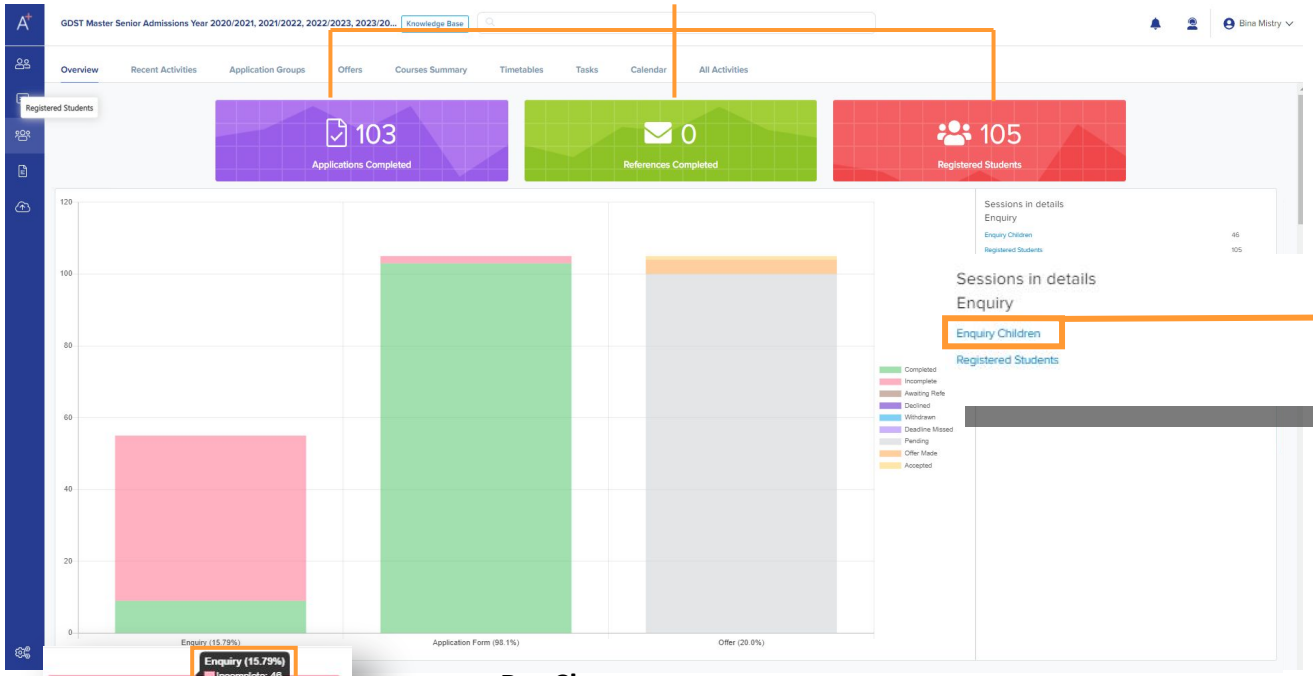
Please note *the system is very interactive allowing you to access relevant information at your ease. When you see text in blue often means there is a link.*

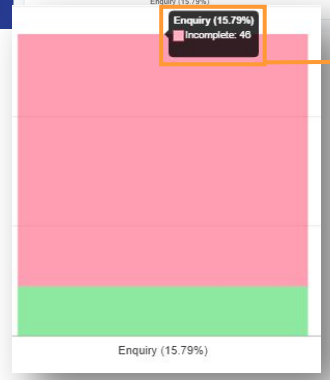
Dashboard

Tiles

Each tiles represent the totals.

Tiles are interactive and when click will lead you a list



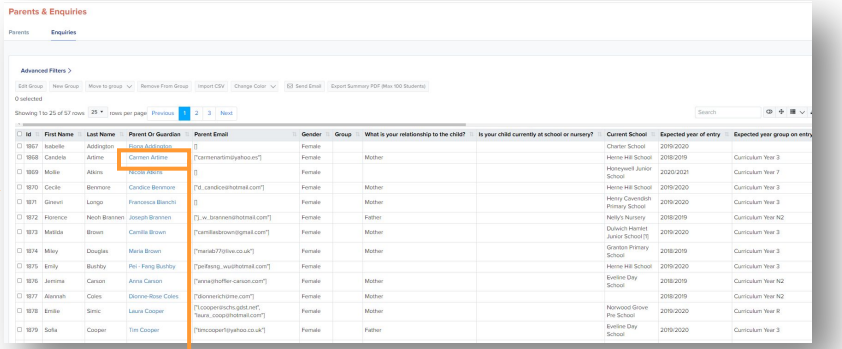


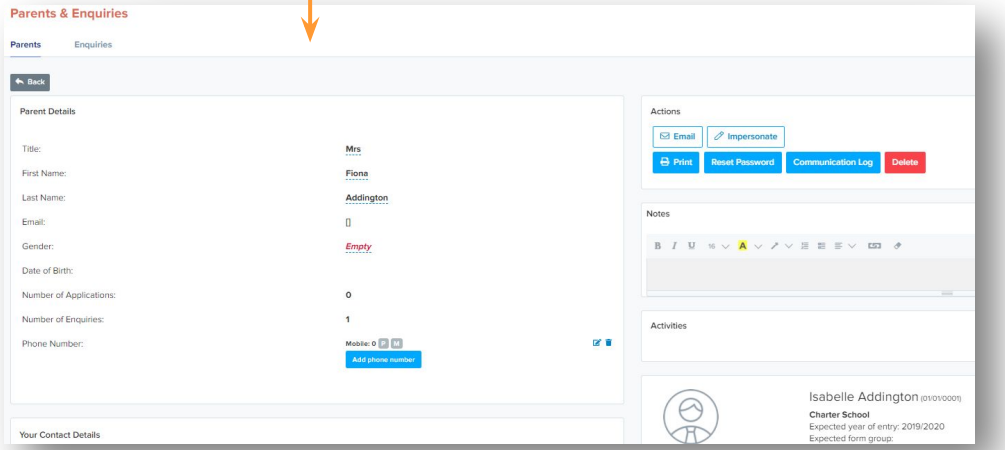
Bar Chart

Clicking on the bar will give you detail according to the key. When clicked on a side menu will change and you can click on the menu option.

Side Menu

This menu will adjusts to bar chart selection. Here you can click on the e.g. Enquiry Children and a full list will appear. Here you can select a parent or child name and profile details will appear.

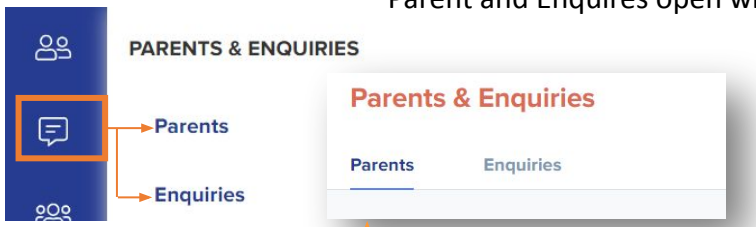


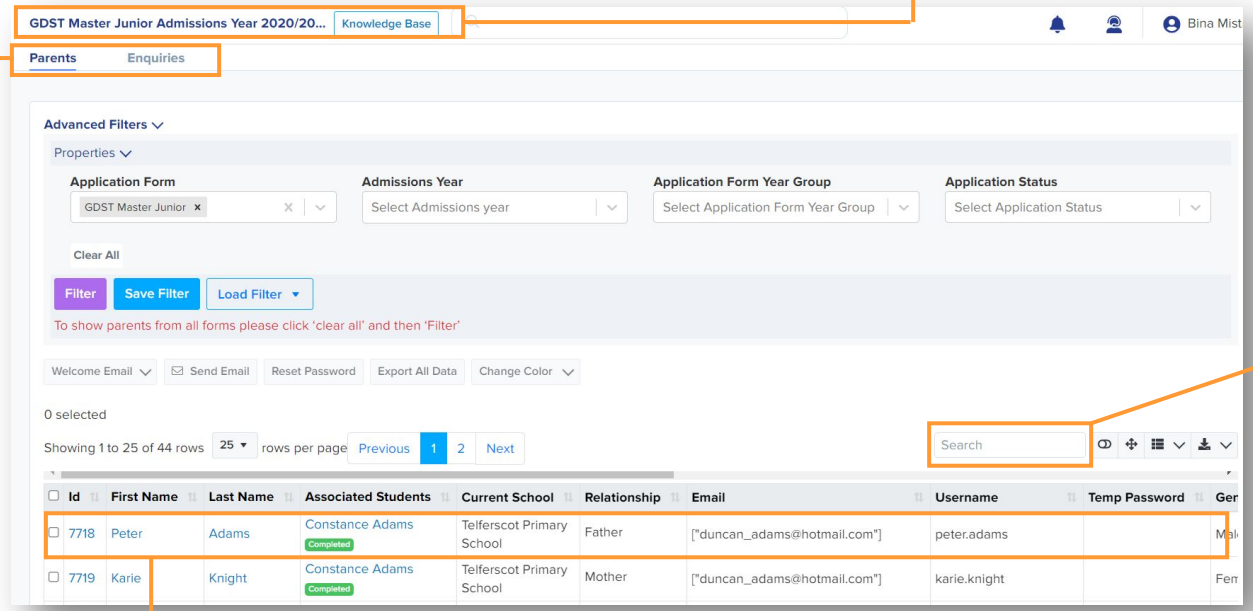


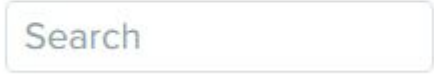
Parent & Enquiries

Allows you to change forms

Parent and Enquires open within the window

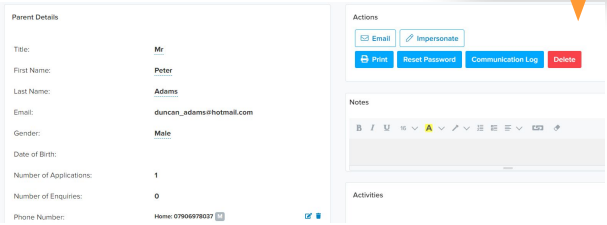






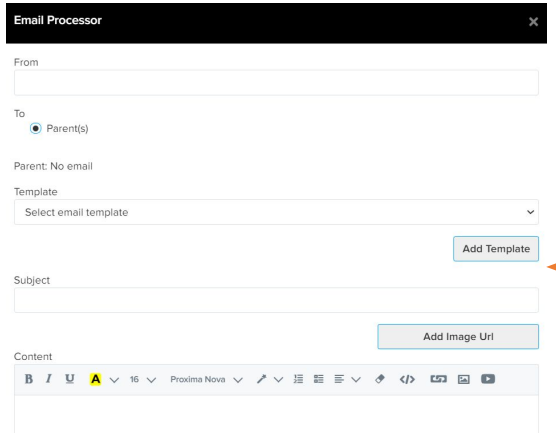
Search for parent using ID or Name

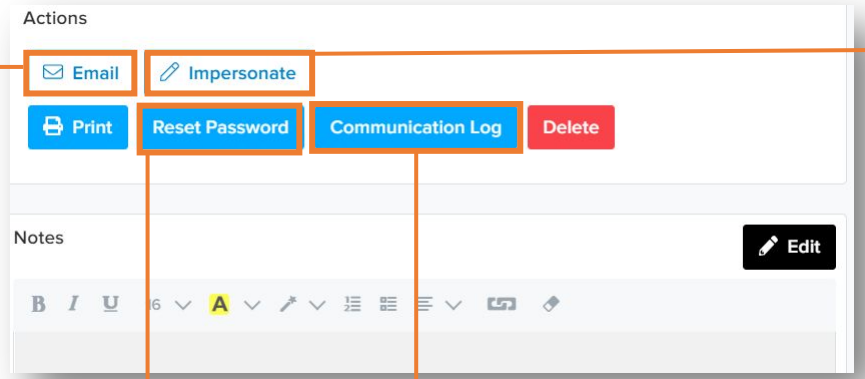
Details highlighted in Blue
open to parent profile details

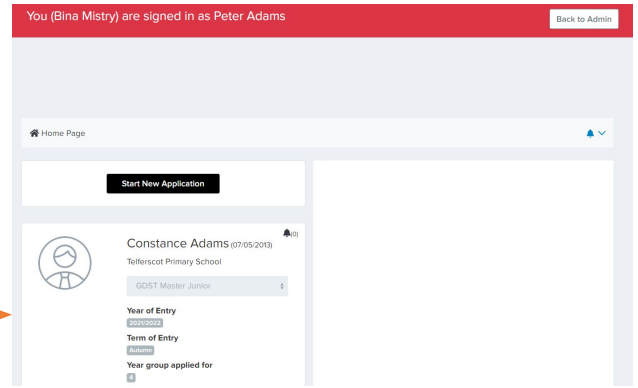


Parent Profile – Actions

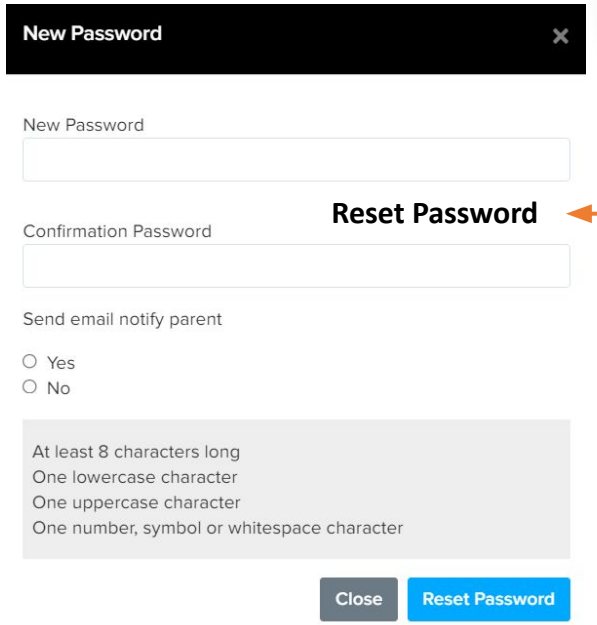
Email
Emailing parent from profile.



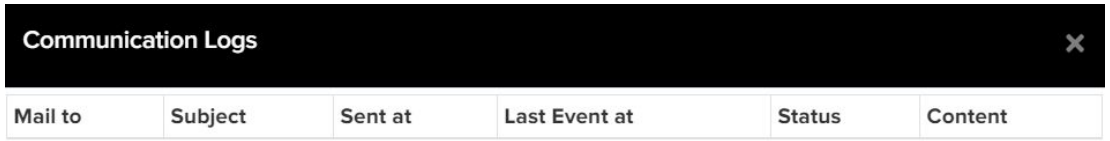




Impersonate
Allows you to view as the parent. If a parent calls with an enquiry. This tool can be used to impersonate them identifying and resolving their issue.
Ability to edit and make changes on parents behalf.

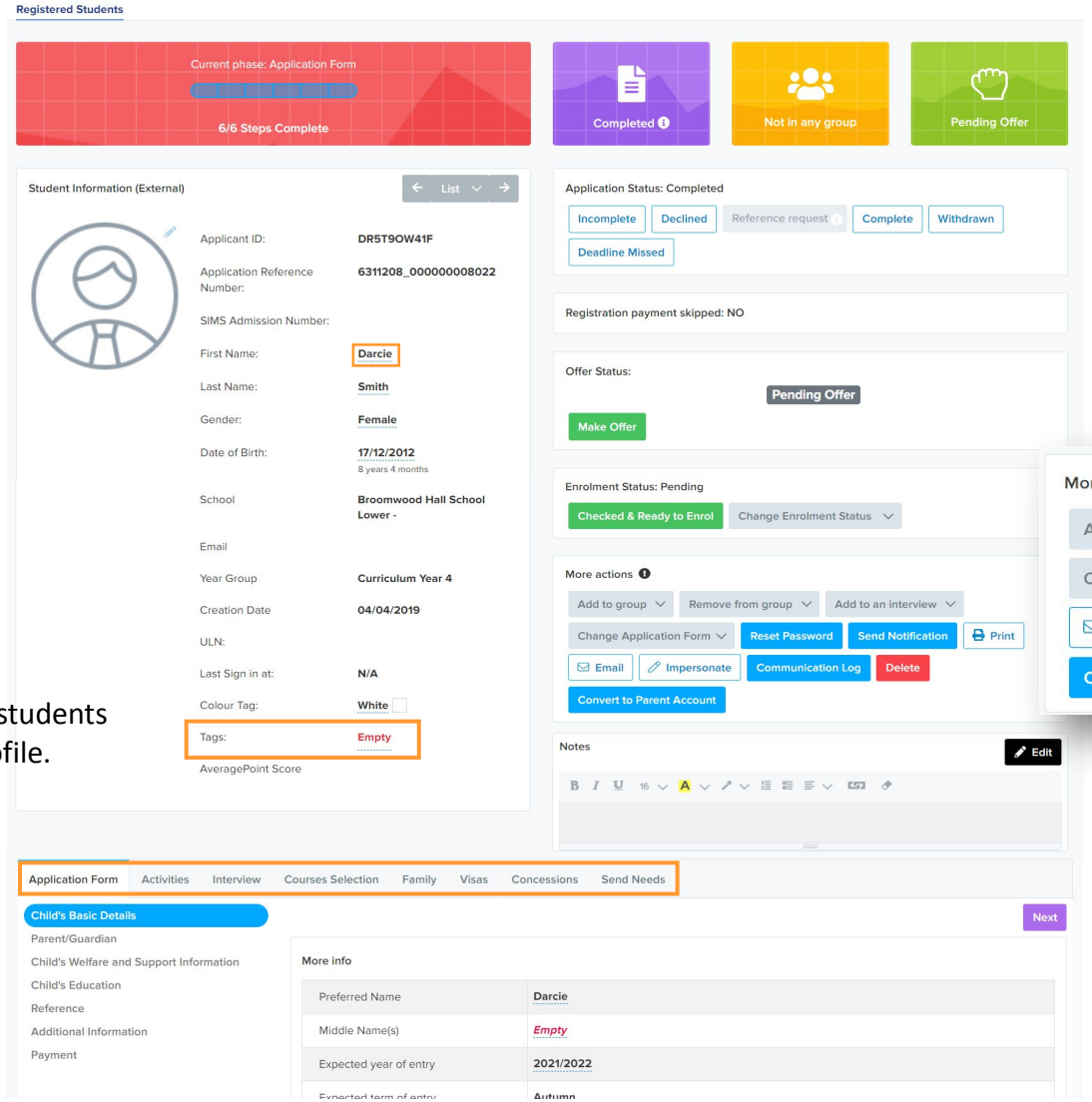


Reset Password



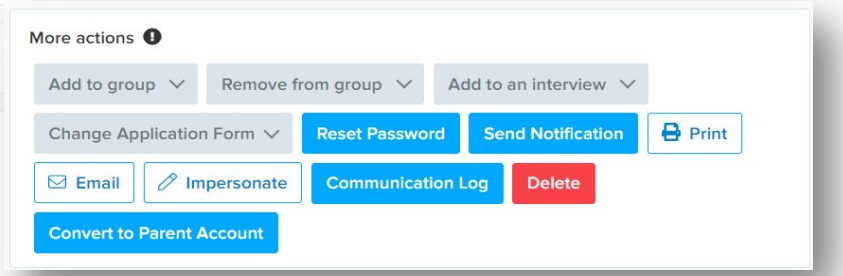
Communication log
Shows fill log of all communication with that parent

Student Profile Features



Tags can be selected for students to appear in student profile.

Application details can be found here. Details can be amended

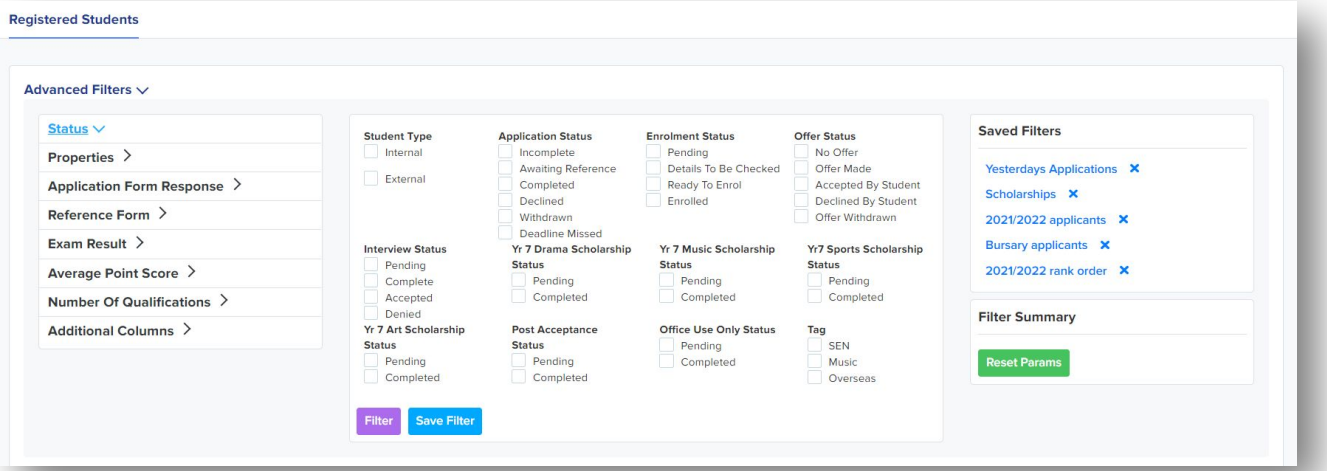


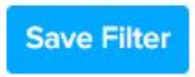
Actions for students can be access from the profile. Here you can reset passwords, send a notification, access The communication log, add the student to a group.

Email and Impersonate are also useful features here.

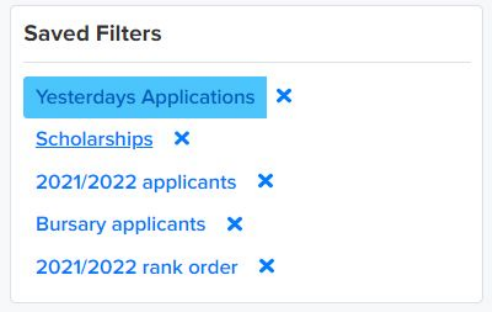
Note: Reference once uploaded or sent can be viewed when selected here.

Advance Filter





Frequently used filters can be **saved**



The advance filter allows you to filter and create lists.

- Status – allows you check the boxes bases on the criteria you will want to generate a list
- Application from response – filter based on a response to a question. e.g. Would you like to apply for a scholarship. This will bring up a list of application that responded with a Yes. You can also add additional questions.
- Reference form – Yes/No filters to produce a list
- Exam result – Exam results define list
- Average point score - Points greater/less than list
- Number of qualification Additional column – select question for lists

Advance Filter

Create and build on filtering

You can generate specific lists by filtering. All the components are built through the filter. For example if you select a group and click on advance filter you will see item check that apply to that group.

Create lists for quick analysis:

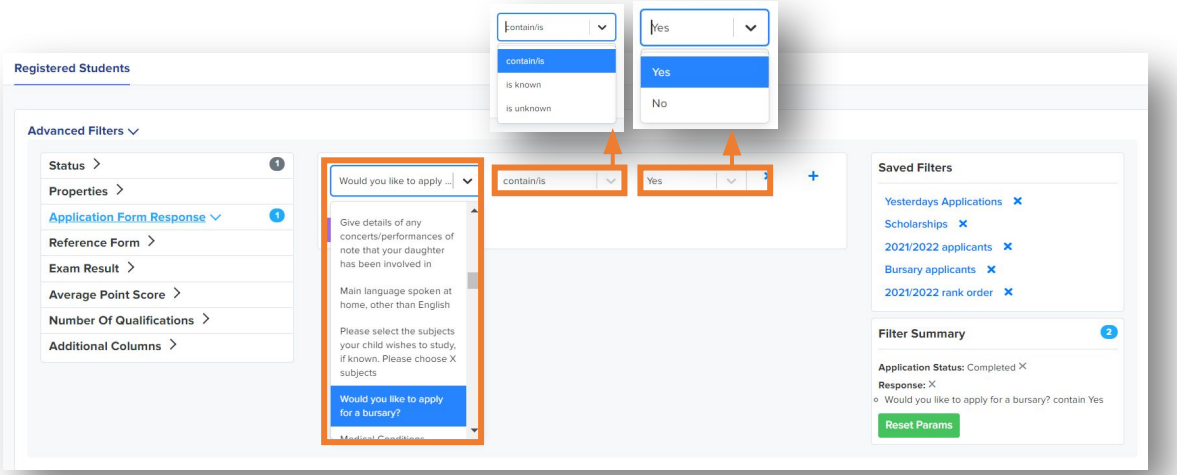
- base filters on schools – Where applications are from?
- Submission dates – who submitted before or after particular dates
- Response to questions
- Senior bursary filter applicants with a Yes then add more options like scholarships in all or specific area.

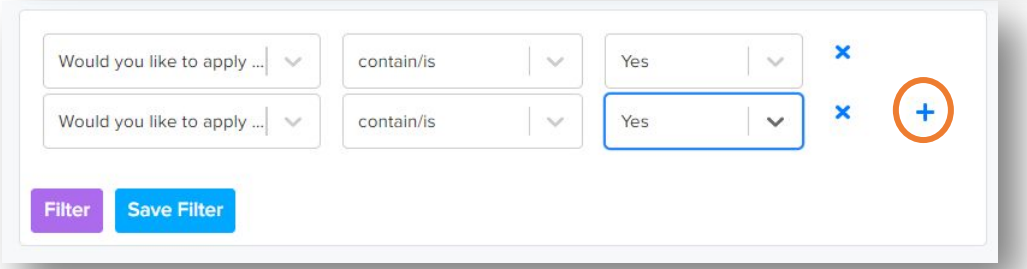
All filter lists allow you to communicate. An email can be sent from here or a quick reminder message.

Application Form Response

Select a question from the application
e.g. Would you like to apply for a Bursary?

Select outcome criteria

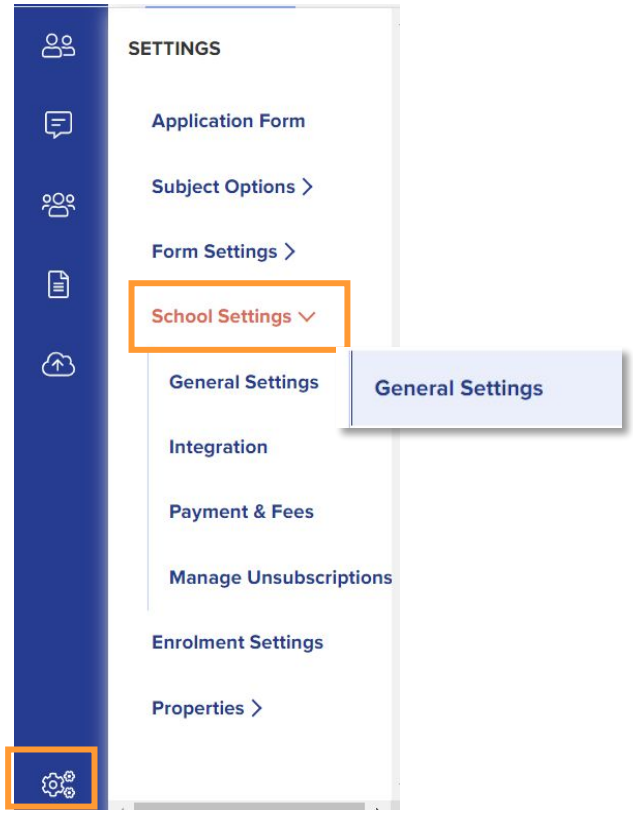


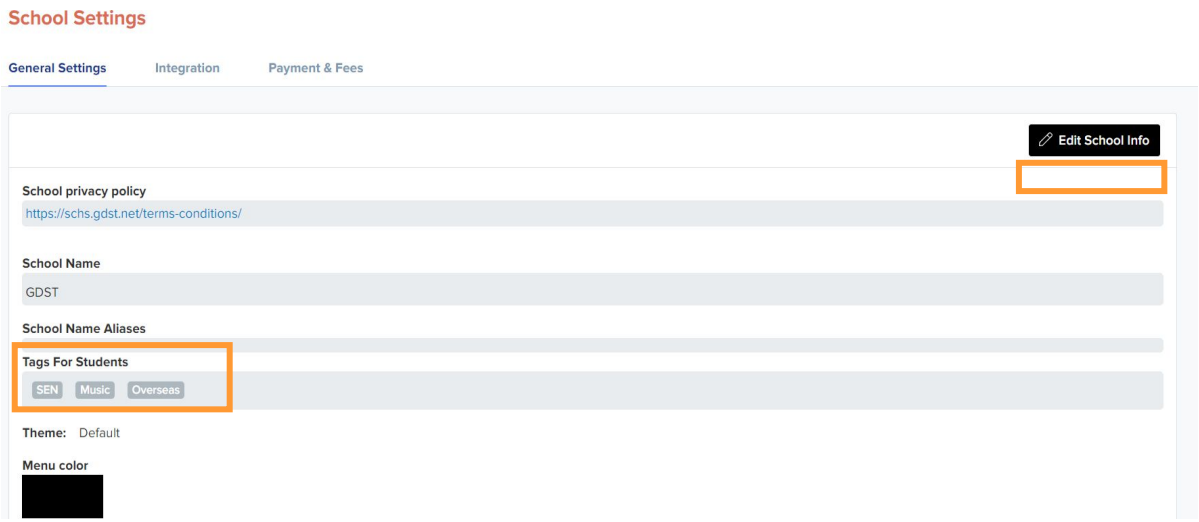


Select the + additional questions for more specific lists.

Tags

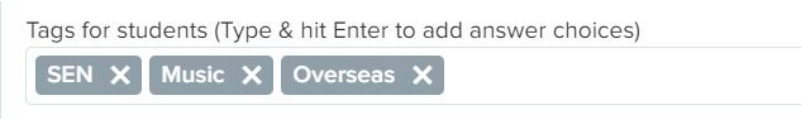
Create tags e.g. SEN, Music, Oversea etc. To create Tags click in the settings icon then select School Setting and General Settings.



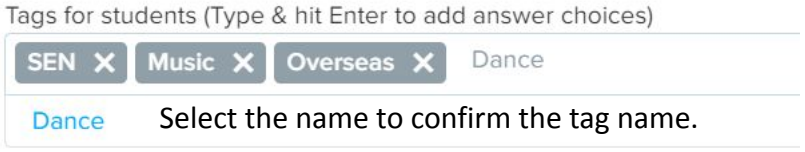


Here you will find Tags for Students. To add more Tags click on Edit School Info

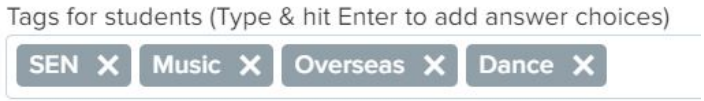
Once clicked the Tag for students will appear larger and grey.



Click in the bar and type the desired Tag name e.g. Dance you notice the word appears in Blue once typed in.



Select the name to confirm the tag name.

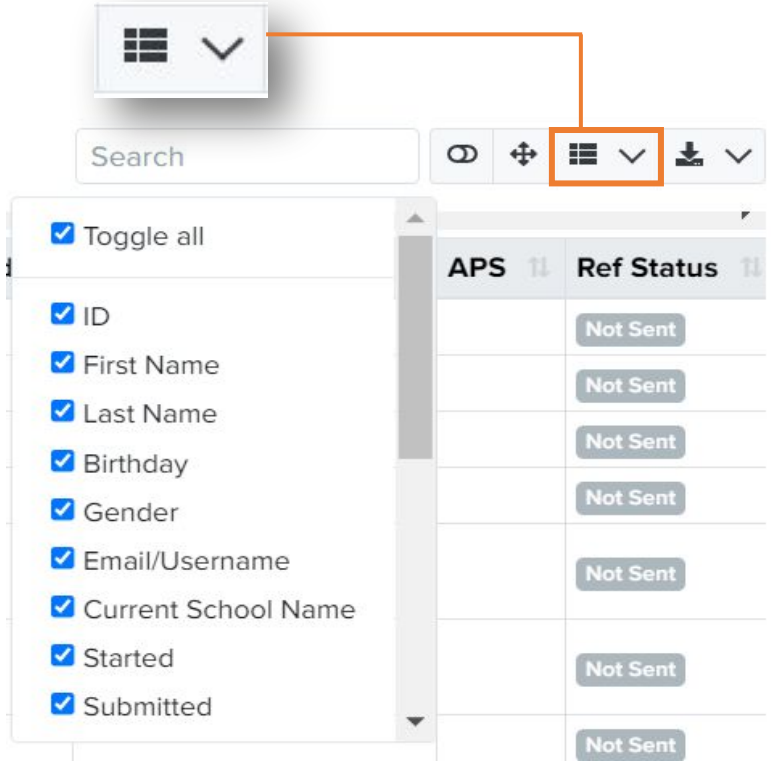


Click Save Save

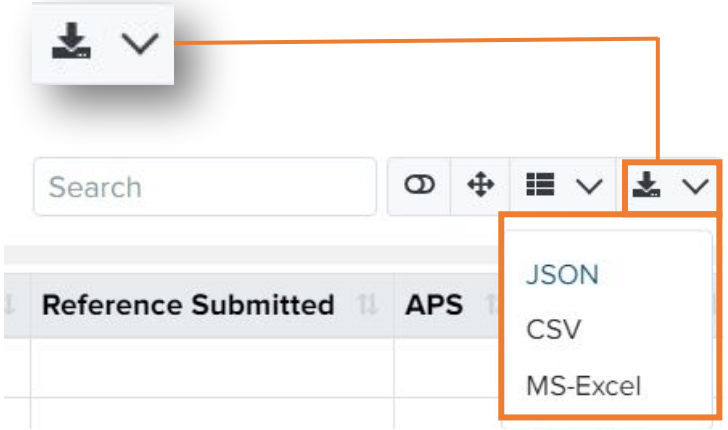
Lists features

List toggle is a handy feature. Here you are able to reduce number of columns By deselecting the columns names that are not needed.

Select the list icon and uncheck the tick boxes for the columns you would like Hide. This allows you to view the information required on your screen.



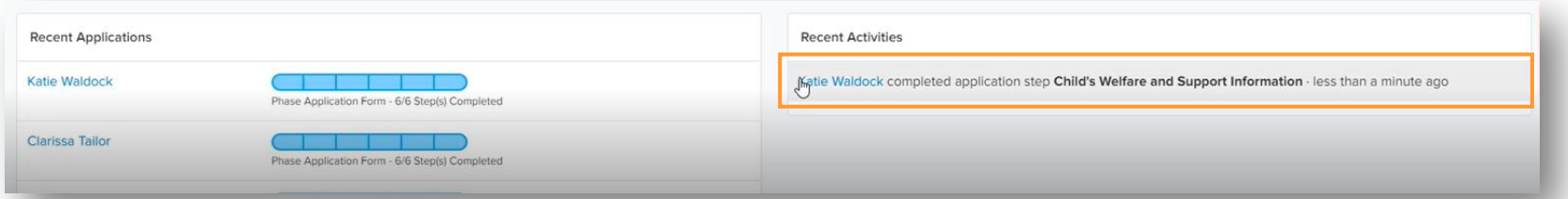
The down facing arrows allows you to export the list into the following Formats.



Activities

Recent Application can be found on the main Dashboard. You will see application forms status and brief recent activities.

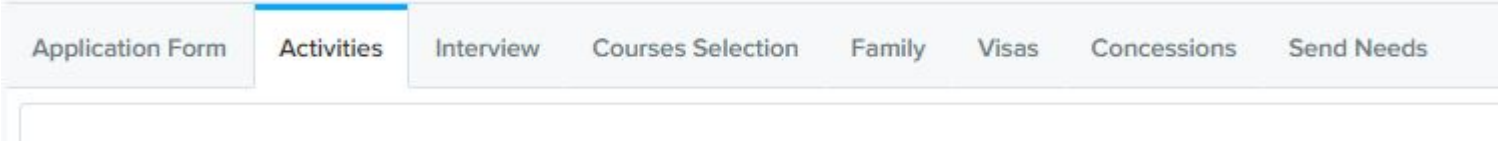
Any recent changes are recorded including updates made after application is complete.

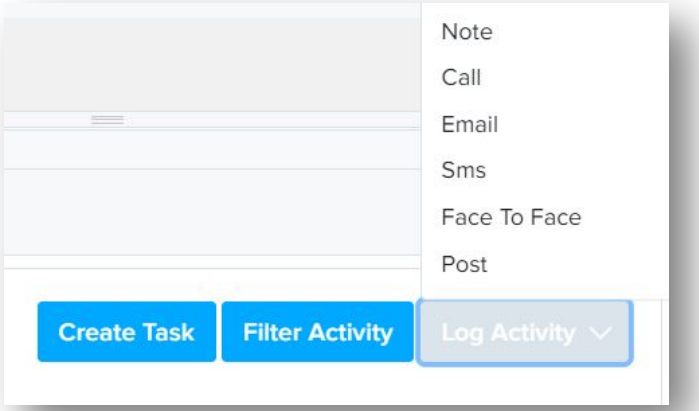


For more detailed activities and a full record. This can be found in the applicants profile.

Found on the sub-menu Activities.
Here you are able to:

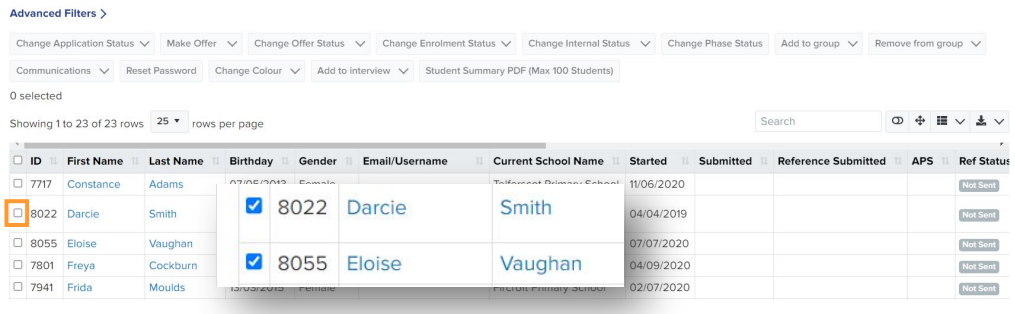
- View all tasks
- Create Tasks
- Log Activity – allows you to add a Note, Call, Sms, Face to Face, Post





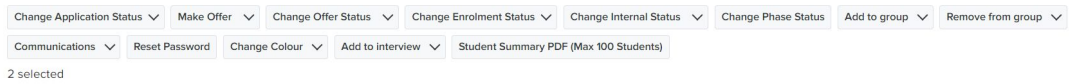
Groups

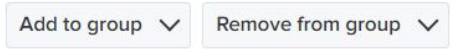
Adding applicants to groups



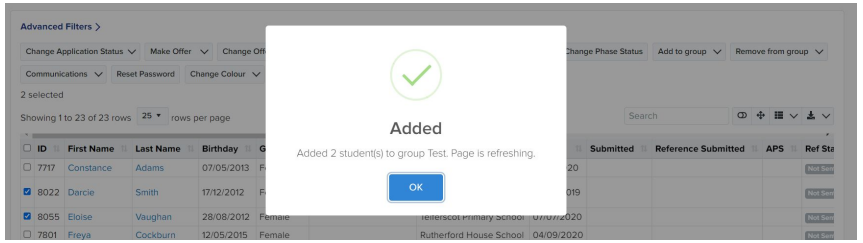
Select the applicants you would like to group

Notice once boxes are ticked the menu at the top becomes active.



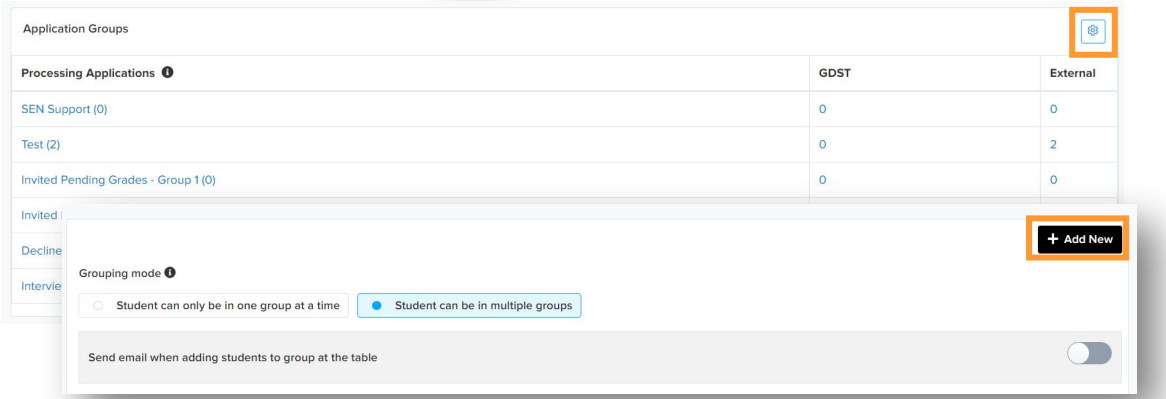


The option to add the selection to a group is available. The same principle is applied to remove applicants from a group.



Application Groups

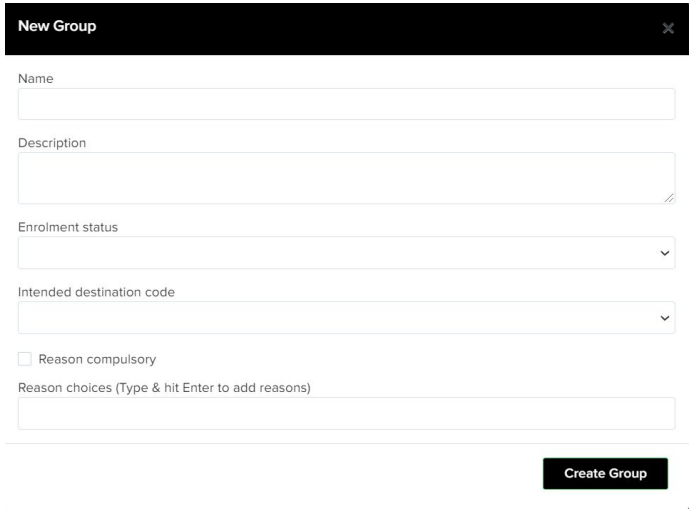
To add a new group click on the Settings icon to add new Group



Click on Add new

Note: Default set to multiple groups but this can be changed. Allows students to be in multiple groups

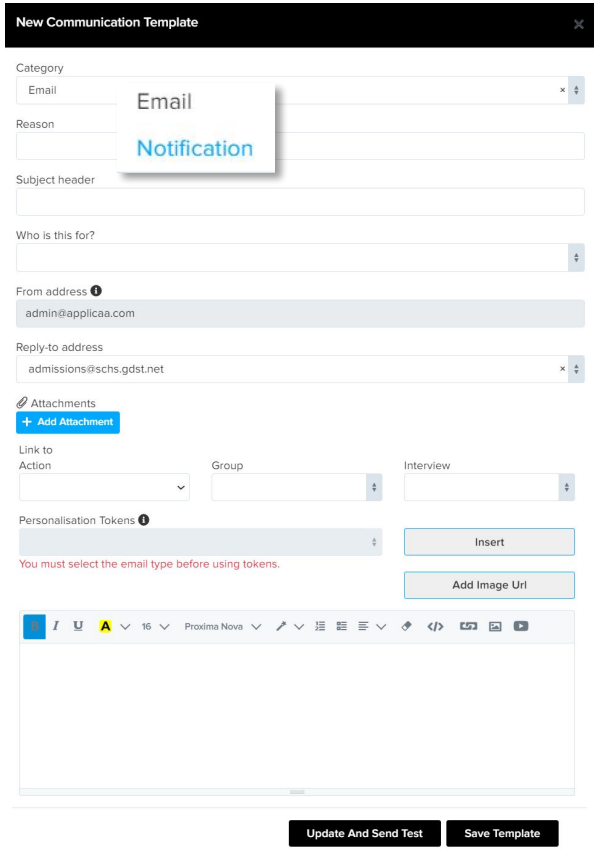
Add your new Group details and click on Create Group



Communication Templates

Email template

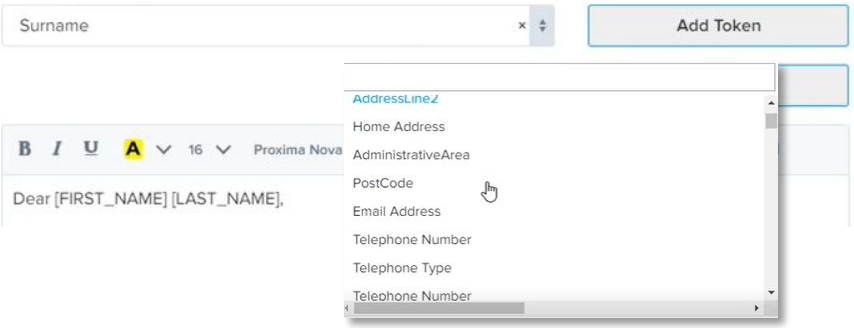
To create a new Email Template. Select Communication icon and select + Add New



You can choose between an email or notification template

Tokens

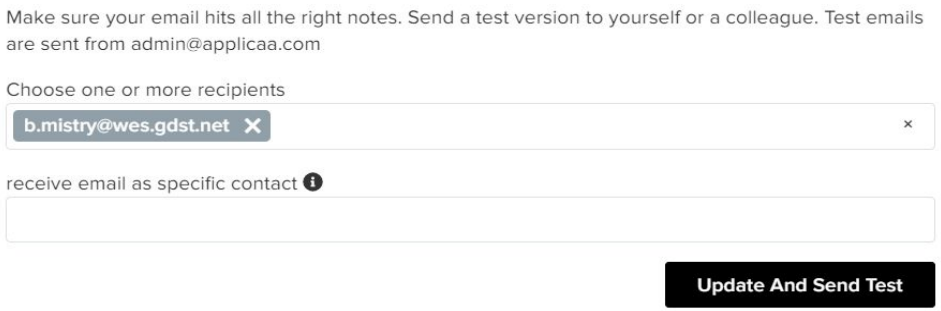
Add Token – think of a mail merge field. Select the field name from the drop down menu and Click on Add Token. This adds the field to the text box.



Once template text is ready. You have two options: Save Template is just that.

Update And Send Test **Save Template**

Update and Send Test email will allow you to test the template to yourself but also allows you select a student. This will show a full test of how the email would appear to a student.



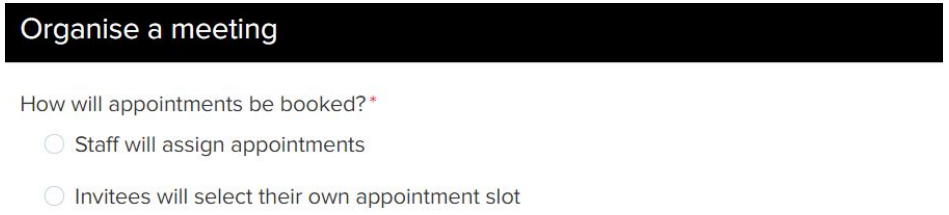
Note: for the test email the students do not receive the email its only for test purpose

Meetings

To organise a meeting it is worth creating some meeting templates.

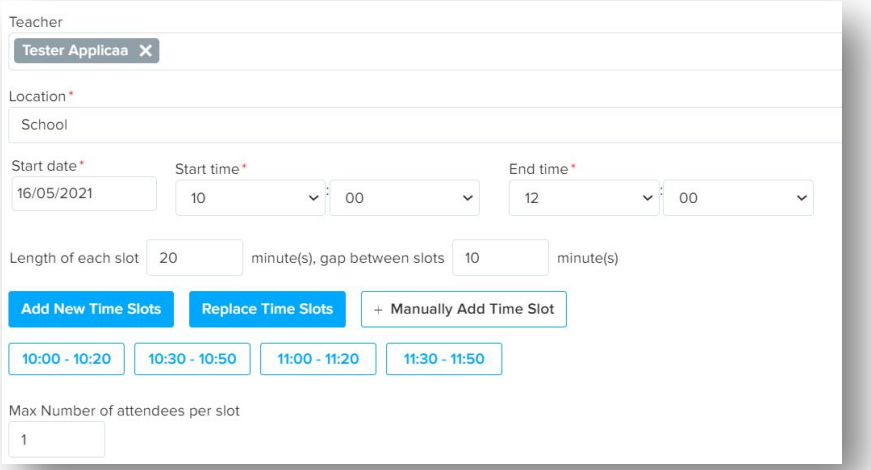
Select: + Create new meeting template

Add the title and description. You can also add questions if it is an interview. Multiple questions can be added. Just select Add new Question and Save.



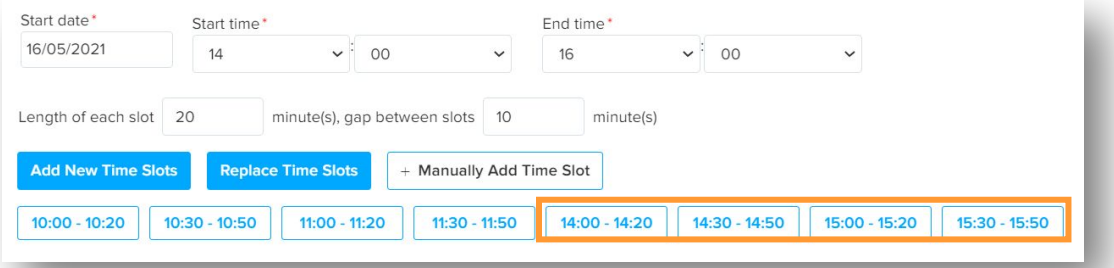
You must select how the appointments will be booked. Staff assigning appointments or the invitees to select their own appointment slots.

Example: Booking in Meeting and school tour.
Add your team member, Location, the date of the event and timings.
Add the length of time for each appointment and gap.
The system will work out the timings for you.



Additional days can be added.

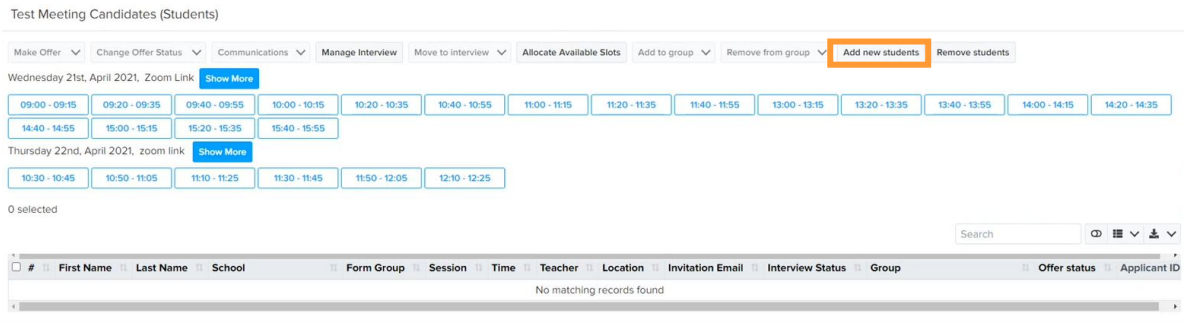
If you wanted then add timings for later in the afternoon. All you need to do is go back to start time and add your new afternoon start and end timings and Click Add New Time Slots.



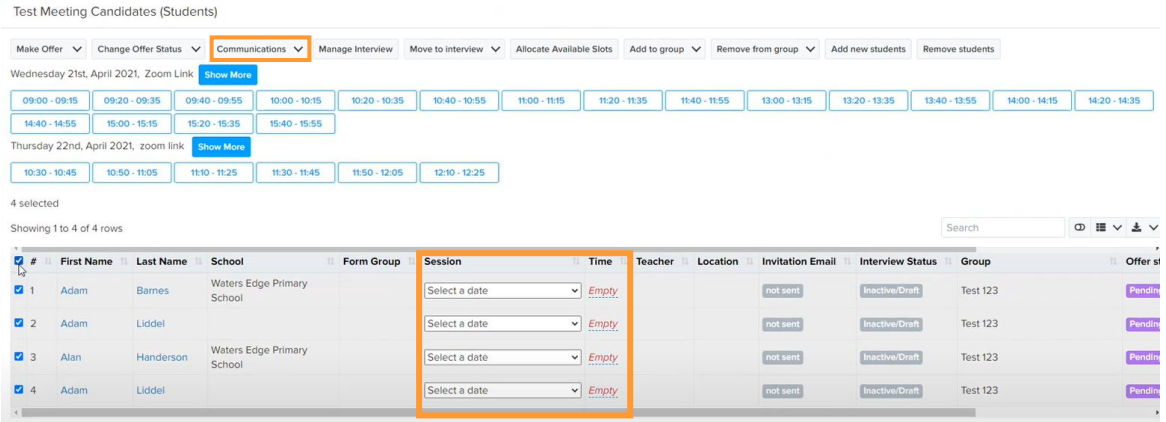
Note: The system gives you ability to set whatever times you want. You can keep adding in different times.

Allocating time slots for meetings or visit

Allocating times to students. This can be done when creating the meeting. Another method would be to click save and you can add you list of students.

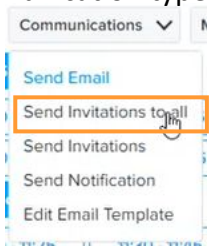


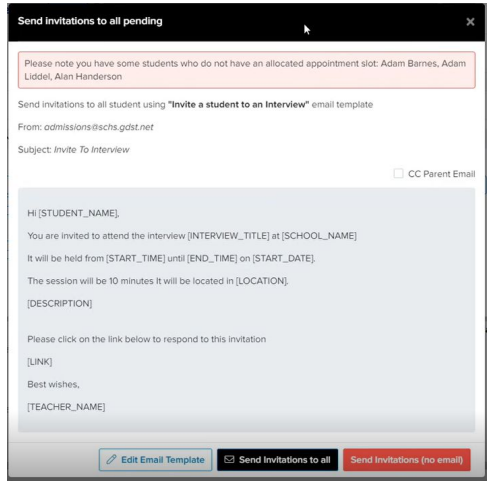
Students added

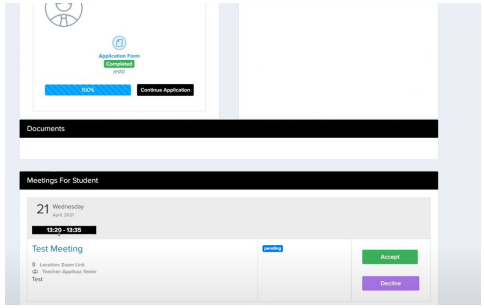


Select time slots for students.

Once all time slots have allocated. Select the communication tab and this allows you select a communication type. In this instant we will select Select Invitations to all





Here you can edit the template, Send Invitations to all or Send Invitations (no email)

To test if the invitation is available to the student. You can select a student and use the impersonate feature on their profile to view the meeting is appearing for them to accept.