

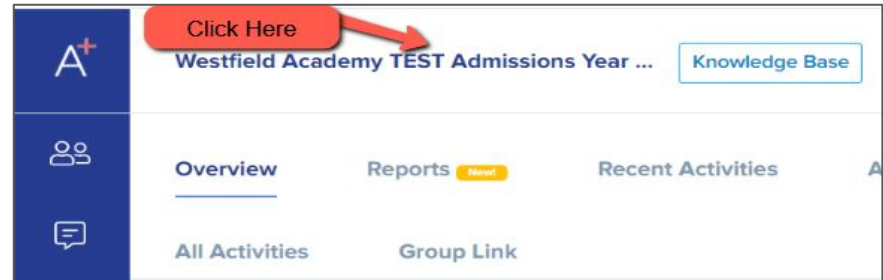
# Setting up your new cycle

In Year

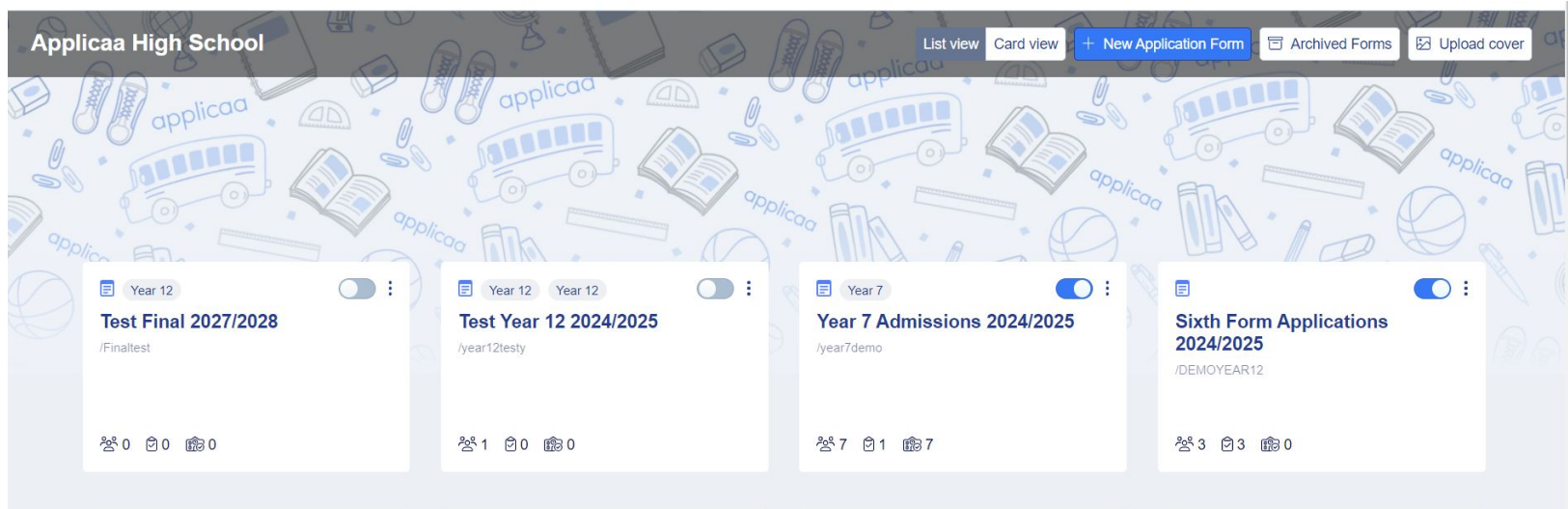


# How to see your new form

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

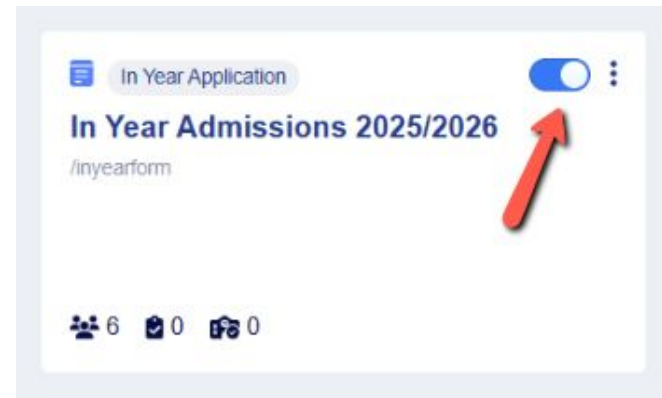


Your forms area will appear and will look something like this:



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

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

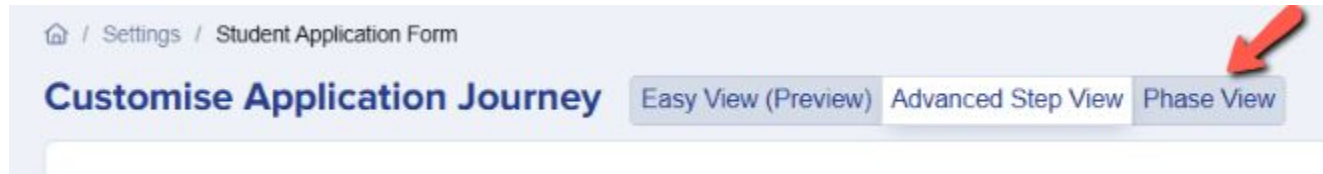
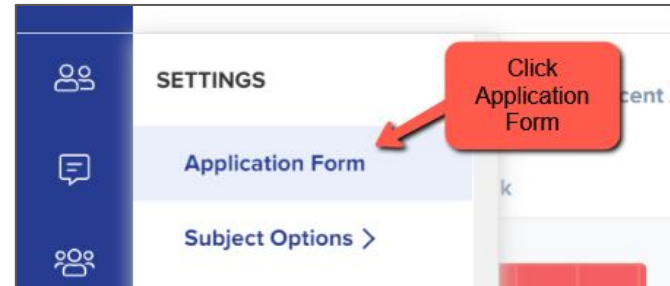
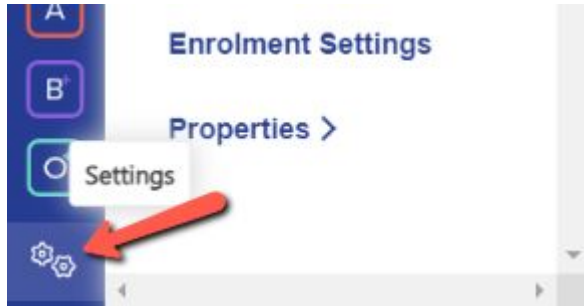


# How to close your old form

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

Click on the name of your old form in your forms area to access the dashboard.

Navigate to **settings > application form > phase view**.



Within phase view, click the pencil icon for your application form; turn on “disable submissions”.

This will ensure no existing forms can be edited on your old form - that data is now all managed within your MIS.

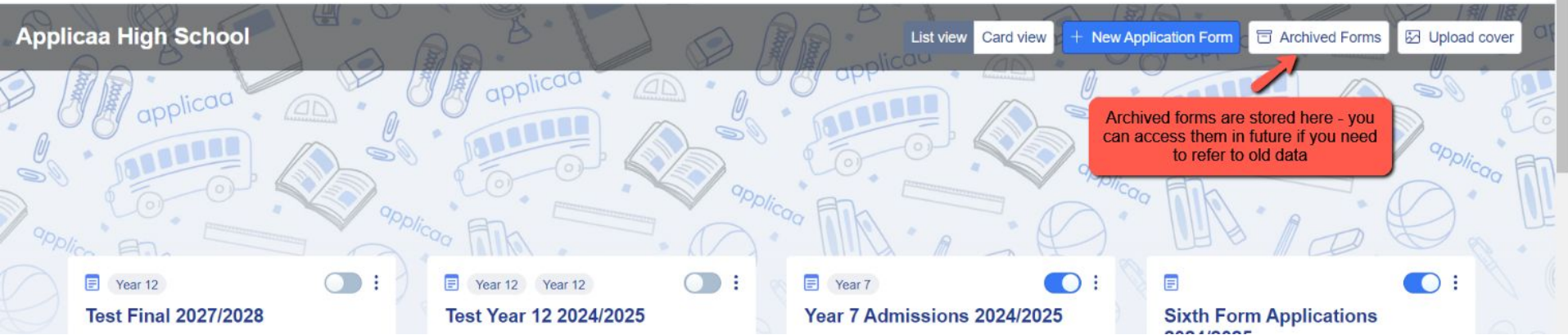
You could also turn all phases off if you wish, using the toggle switches.

The screenshot displays the 'Customise Application Journey' interface. At the top, there are tabs for 'Step View' and 'Phase View', along with links for 'Global Form Settings', '+ New Phase', and '+ Create Test Application'. Below this is a section titled 'All Application Phases' with a 'Sort Phases' button. A table lists the phases:

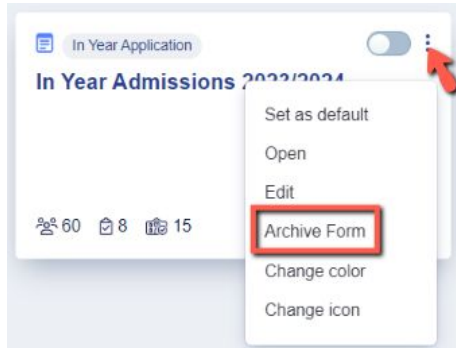
Phase	Category	Visible to Applicants	Visible to staff on Applicant Profile	Filter	Action
2. Application Form	Form Questions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Filter Summary: Updated Students	

A red box highlights the '2. Application Form' phase, and a red arrow points to the pencil icon with the text 'click the edit button'. Below the table, a detailed view of the '2. Application Form' phase is shown, featuring a 'Disable submissions' toggle switch (currently off) and a 'Stand alone' checkbox. A red box highlights the 'Disable submissions' toggle, and a red arrow points to it with the text 'Click to turn on'.

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



Archived forms are stored here - you can access them in future if you need to refer to old data



# Editing your landing page and other messages

---

## SETTINGS

Application Form

Subject Options >

Form Settings ▾

Dashboard Settings

Student Homepage

Parent Homepage

Landing Page

Application Groups

Form Groups

Student Profile

School Settings >

Enrolment Settings

Properties >

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

Click the **“edit”** button to make changes.

Here you can edit your initial message to parents by clicking **“customise texts and buttons”**.

You can also update any images here as needed, under **“general settings”** - ensure your logos and images are up-to-date.



# If parents apply via the Local Authority:

Choose the setting shown here on your landing page - it should already be selected if you have cloned from a Year 7 or Reception form, or from last year's In Year form.

### Landing Page Settings

**First of all, choose your landing page configuration mode:**

- Only students can register ?
- Students & Parents can register ?
- Students and parents cannot self register, they must be imported by staff ?
- Only parents can register ?
- New Application area hidden completely

# If parents apply directly to your school:

Choose the setting shown here on your landing page - this will enable them to create their own accounts.

## Landing Page Settings

First of all, choose your landing page configuration mode:

- Only students can register ?
- Students & Parents can register ?
- Students and parents cannot self register, they must be imported by staff ?
- Only parents can register ?
- New Application area hidden completely

# Editing your Parent Homepage

Home / Settings / Form Settings / Parent Homepage

## Form Settings

Dashboard   Student Homepage   **Parent Homepage**   Landing Page   Application Groups   Form Groups   Student Profile

(settings > form settings > parent homepage)

On the Parent Homepage you can add a general message, and a welcome message specific to the intake you are currently working on.

Parent Homepage   Landing Page   Application Groups   Student Profile

Parent must Accept School's Policy   Parent must Accept Applicaa Policy

### General Welcome Message

Seen by parents across all intakes

Preview   Edit

#### Messages on parent's homepage


Welcome to our school!

We are delighted your child has been offered a place in our thriving community.

Please click to read our [Uniform Policy](#).

↓ Show more

### Parent Homepage Image



### In Year Admissions (2024/2025) Welcome Message

Seen only by parents who are completing an in-year admission form

Preview   Edit

#### Messages on parent's homepage

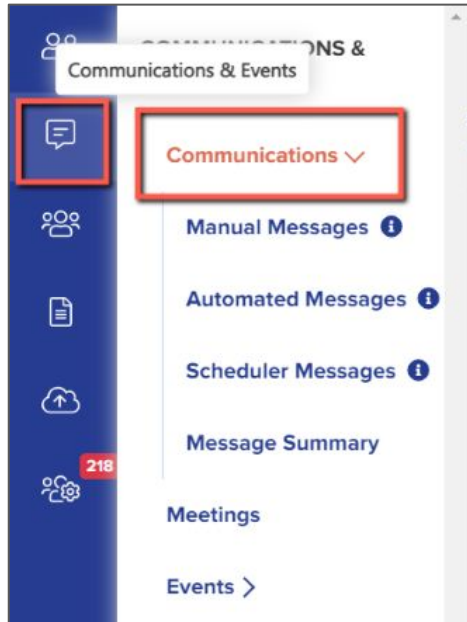
We are delighted your child has been offered a place at our school.

Please complete our Data Collection process.












### Parent Homepage Image

# 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

Created when	Repeat	Enable	Actions
			  
			  
to interview	N/A		   

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

Top Tip: check all active emails to make sure the wording is appropriate for your setting - ensure there is no "Post 16" wording in your templates and that emails are being sent from an appropriate address.

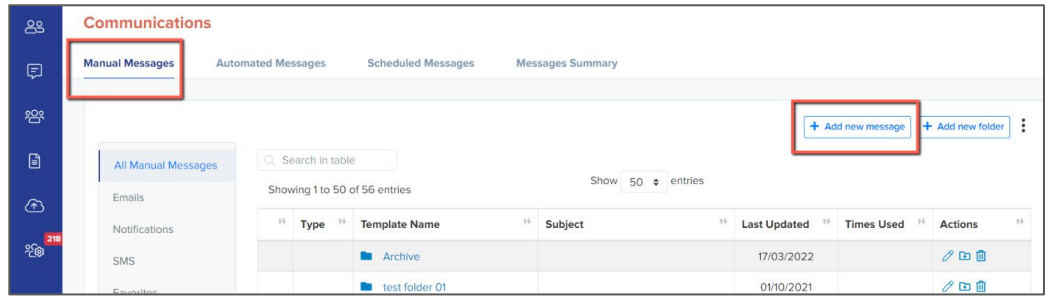
## Priorities for checking ahead of launch:

✉	Parent Confirmation Instructions	Welcome to Green Abbey School's Online Application Form	admin@applicaa.com	Parent	Parent	Registration	Parent confirmation instructions
✉	Parent Welcome	Welcome to Putney High School	test@applicaa.com	Parent	Staff	Registration	Parent welcome
✉	Notify Parent Application Complete	{{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}} has completed their application to Green Abbey School	admin@applicaa.com	Parent	Parent, Applicant	Application Form	Notify parent application complete

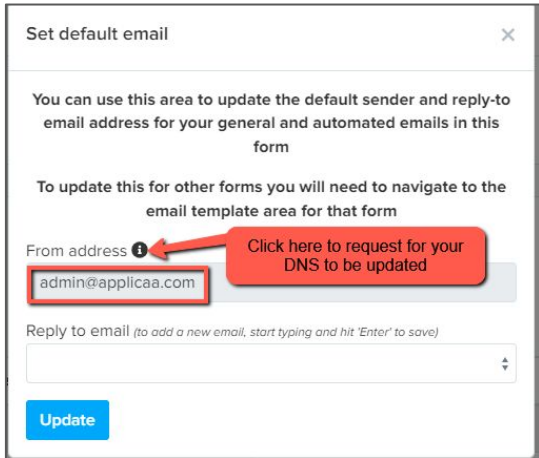
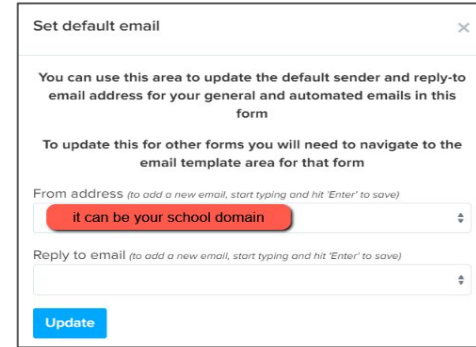
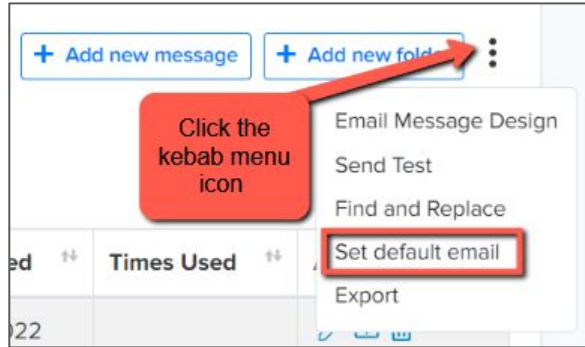
**Parent Confirmation Instructions** would be sent to a parent if your setup is that they apply directly to you; they would self-register and verify their account.

**Parent Welcome** would be sent to a parent if your setup is that parents apply via the Local Authority and would only be given access to your system once a place has been confirmed. You would create their account for them and send them this email, which contains their login credentials.

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

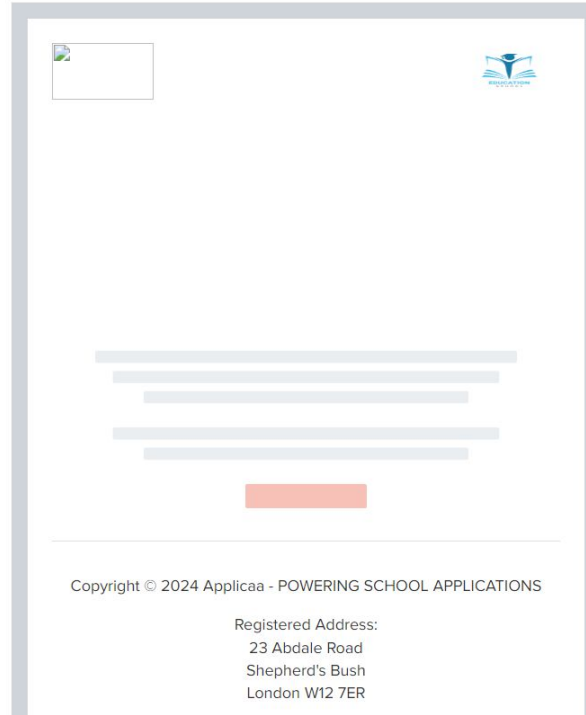
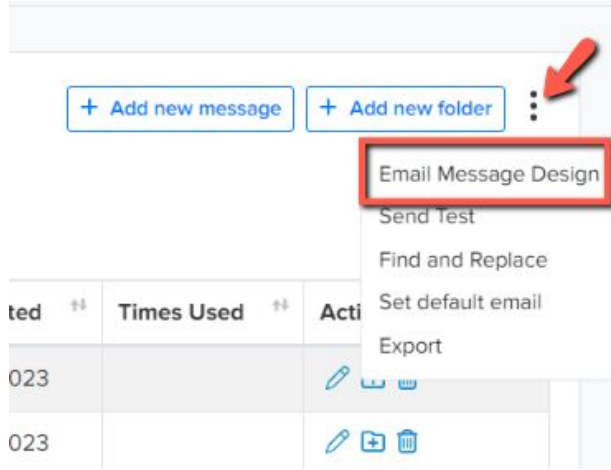


Check who the emails are being sent from and who the replies will come to - set your defaults here:



If you are seeing “[admin@applicaa.com](mailto: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!

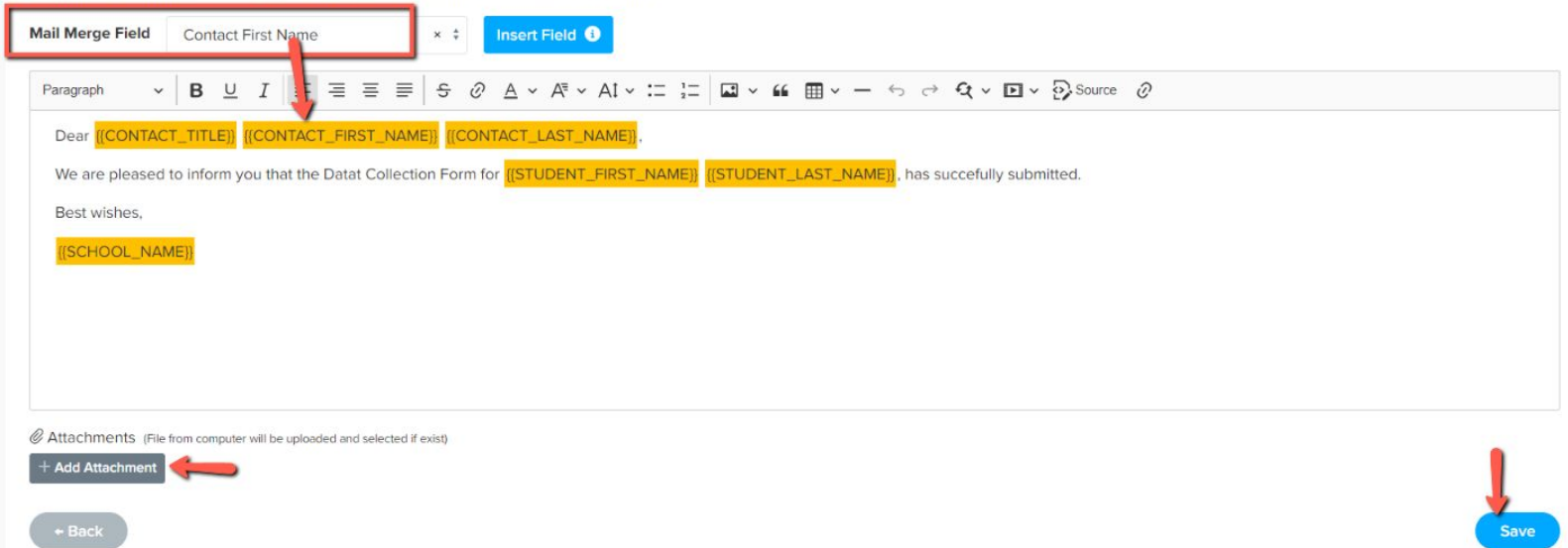
## Customise your email templates in bulk - add a header and footer, and your school logos.



- ▼ **School logo(s)**
  - Logo Left
    - Choose file No file chosen
    - Remove?
  - Logo Right
    - Choose file No file chosen
    - Remove?
- ^ **Email Header**
- ^ **Email Footer**

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

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



The screenshot displays an email editor interface. At the top, a red-bordered box highlights a 'Mail Merge Field' dropdown menu with 'Contact First Name' selected and an 'Insert Field' button. A red arrow points from the dropdown to the text editor. The text editor contains the following content:

Dear **[[CONTACT\_TITLE]]** **[[CONTACT\_FIRST\_NAME]]** **[[CONTACT\_LAST\_NAME]]**,

We are pleased to inform you that the Data Collection Form for **[[STUDENT\_FIRST\_NAME]]** **[[STUDENT\_LAST\_NAME]]**, has successfully submitted.

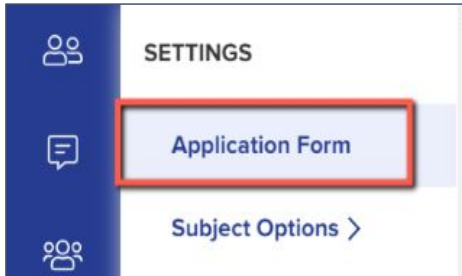
Best wishes,

**[[SCHOOL\_NAME]]**

Below the text editor, there is an 'Attachments' section with the text '(File from computer will be uploaded and selected if exist)'. A red arrow points to the '+ Add Attachment' button. At the bottom left, there is a '← Back' button. At the bottom right, there is a blue 'Save' button with a red arrow pointing to it.

# Your application phases and settings

Navigate to **settings > application form** and disable any phases not in use (offers/meetings if not using).



## Customise Application Journey

### All Phases

Sort Phases

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

#### 1. Account Creation

Disable this phase

#### 2. Offer



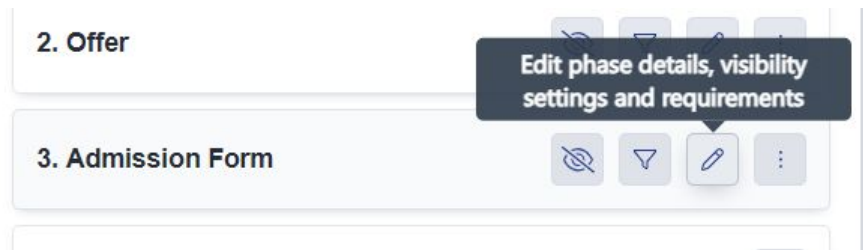
#### 3. Admission Form



#### 4. Meeting



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



### Edit Phase: Admission Form



Name

Visible to Staff on Student Profile

#### Internal Applicants

Lock form after submission ⓘ

Disable submissions ⓘ

#### External Applicants

Lock form after submission ⓘ

Disable submissions ⓘ

Stand alone ⓘ

Trigger by condition

Close

Update Phase

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, and then select **I want to make more changes** in order to add or amend.

**Customise Application Journey**

Switch to old view

**All Phases** Sort Phases

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

1. Account Creation
2. Offer
3. Admission Form
4. Meeting

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

1. ACCOUNT CREATION 3 steps
2. OFFER 0 steps
3. ADMISSION FORM 9 steps

Visible to Student

- Step 1: Student Basic Details
- Step 2: Support Information
- Step 3: Agreement

### Student Basic Details

Enable for

Internal External

#### Settings that apply to ALL applicants

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

Internal External  
 Yes  Yes  
 No  No

2. Which number would you like to collect from

Allowing new registrations  Open Full View

Preview this step Internal Student External Student

#### Student Basic Details

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



Legal First Name\*

Legal Last Name\*

I want to make more changes

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

Pre-defined questions and UDFs can write back to your MIS, so they are great for capturing data that you don’t have to manually input.

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

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

**Pre-defined Question & Fields**

**MIS Compatible**

**Custom Question**

**Non-MIS Compatible**

**Explanation Text Block**

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

▼ Sims User Defined Fields

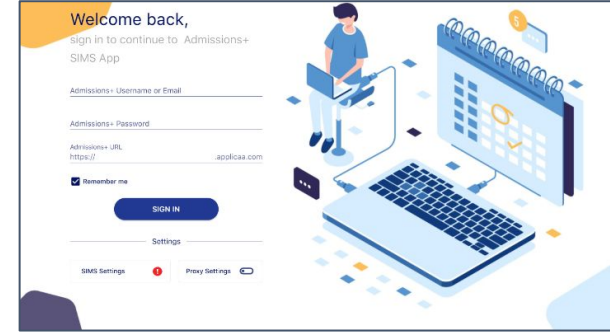
<input type="checkbox"/> student date	sims_udf_45	Date Picker	
<input type="checkbox"/> Test UDF	sims_udf_4018	Dropdown Single Select	

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

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.



General Settings   Staff Management   Role Management   **Integration**   MIS Settings

Bromcom credentials are valid.

Authorized READ permissions: Students YearGroups StudentContacts People Emails PersonAddresses Classes PreAdmission SurgeryDoctors UserDefinedFields UserDefinedFieldInstanceOptions CollectionAssociates YearGroupSubjectalConditions PreAdmissionStudents Languages StudentSchoolTransportInformation SENStudentNeeds SEN

Please make sure you also granted WRITE permissions:  
Third Party Write Back - Pre-Admission Students  
Third Party Write Back - Student Groups  
Third Party Write Back - User Defined Fields Data

The instructions can be found in this document:  
[View Document](#)

[Download Lookup Values](#)   [Verify Bromcom Credentials/Permissions Again](#)

Bromcom User Defined Fields

[Import UDFs](#)

General Settings   Staff Management   Role Management   **Integration**   MIS Settings

MIS Setting

**Integration Platform**

Arbor

Import new MIS lookups as visible

Enable saving to MIS School Names typed by applicants

MIS Credentials Validation

Arbor credentials are valid.

[Download Lookup Values](#)   [Import UDFs](#)

## SIMS In Touch:

This field is NOT active by default on Admissions+ but if you use it, it is available to add into your application form - once you have added it once, it will remain there year after year.

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 an MIS compatible question ×

#### 1 results found

Please select question type to add, you can also select multiple options:

Question	Property Code	Question Type	MIS
▼ Parent/Carer contact details			
<p><b>After</b> the child starts school, this contact should receive school communications via our parent mail system ie. emails and SMS text messages (for example absence messages, trip notifications, general information emails etc)</p> <input type="checkbox"/>	in_touch_communication	Dropdown Single Select	

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 and up-to-date.

**Policies** 

**Internal**  ON  OFF

**External**  ON  OFF

Policies that student must read

Policy title \*

IT policy

Agreement text \*

I have read and agree to the above policy

Terms and Conditions Example.docx

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.

Enable for  Internal  External

#### Settings that apply to ALL applicants

1. Would you like applicants to agree to specific policies (e.g., Home School Agreement, Uniform Policy, ICT Policy)? If you select "yes," you will be able to upload the policies below.

Internal

Yes

No

External

Yes

No

Preview this step Internal Student External Student

#### Additional Questions

Please select the parental consent given for the applicant\*

##### Intimate Care [\(see here for details\)](#)

test. I consent for intimate care to be provided to my child when needed in the event that my child needs to be c  
soil themselves in school or during any other school activities like Trust/School visits/trips. This will only extend t  
change of clothing. Different procedures will be in place for children with Intimate Care Plans.

Yes  No



##### Name - Social Media

Yes  No

##### Video

Yes  No

##### Photograph - Social Media

Yes  No

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

Address Block Configuration ⓘ

Apply to Existing Addresses Report

Address 1 <line 1>

Address 2 <line 2>

Address 3 <line 3>

Town/City <post\_town>

ALL CAPS ⓘ  Normal Case

County/State <postalcounty>

Country <country>

Postcode <postcode>

Enter a postcode to test:

2 Westfield Road, Wigginton, YORK, YO32

Test

Preview

Address 1 2 Westfield Road

Address 2 Wigginton

Address 3

Town/City York

County/State North Yorkshire

Country United Kingdom

Postcode YO32 2JF

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

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

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.

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

Show  entries

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



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

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

Title \*

Text format ⓘ \*

Capitalise First Letter of Every Word

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

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

Title \*

Phone format ⓘ \*

XXXXX-XXXXXX

Unique Code: ⓘ \*

Default value: ⓘ

Do not include spaces in the number.

Configure your **Feeder Schools** to minimise instances of parents selecting the wrong school from the list!

Navigate to **settings > form settings > feeder schools**.

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

You can control which schools are visible to parents completing your forms, to ensure they choose the correct school (local to you), rather than a similarly-named school elsewhere!

**Feeder Schools** Import from CSV + New School

Only show feeder schools  OFF

Search for school by Name, Postcode...

Show 25 per page. 1 to 25 of 32,358 entries

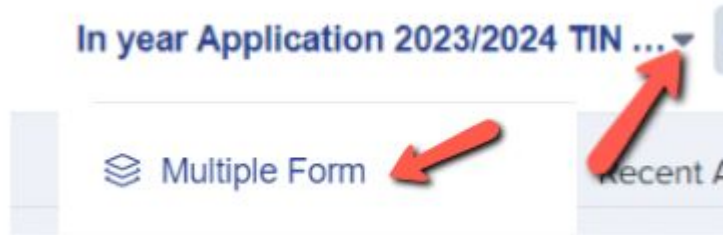
Prev 1 2 3 4 5 ... 1295 Next

School Name	Establishment Number	Establishment Status	Local Authority Name	Local Authority Code	Postcode	Contact Email	Is feeder school?
16-19 Abingdon Feeder School	4901	Open	Oxfordshire	931			ON
1st Place Children and Parents' Centre Feeder School		Open	Southwark	210	SE5 0RN		ON

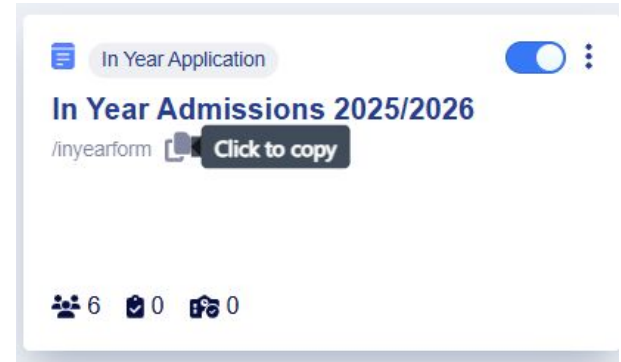
# Adding the new link to your website

You can obtain the link to your new form and add it to your website - this will be particularly helpful if parents apply directly to you.

Navigate to the blue wording in the upper left hand corner and click to access your forms area



Here, you can “click to copy” and share as needed.



You can chase **incomplete** forms by sending reminders to parents - either manually, or by scheduling an email to go to them every few days.

Nursery Applications Admissions ... Knowledge Base

Overview Reports Recent Activities Application Groups Tasks Calendar All Activities Group Link

Phase status details

Application Offers Enrolments

Status	Internal	External
Incomplete (6)	0	6
Awaiting Reference (0)	0	0
Completed (3)	0	3
Declined (0)	0	0

Click on the word “incomplete” to view the list of students in this status.

Select them all and click “communications” > “send email”.

This will enable you to send an email the parents of the selected students.

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

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

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

<input checked="" type="checkbox"/>	ID	Student Code	First Name	Last Name	Birthday	Gender	Email/Username
<input checked="" type="checkbox"/>	20	NU7M	Deesha	Assani	05/07/2010	Female	kalpnabhudia@yahoo
<input checked="" type="checkbox"/>	21	JQNX	Deesha	Assani	05/07/2010	Female	mitesh.assani@gmail
<input checked="" type="checkbox"/>	22	852X	Deesha	Assani	05/07/2010	Female	kalpna.assani@gmail.com

Send Email  
Send SMS  
Send Reference Requests  
Send Custom Email to Referee  
Send Notification  
Send Student Welcome Email  
Send Parent Welcome Email

To schedule an email to go to them every few days, navigate to **communications and events > communications > manual messages** and click **+ New Message**:

Create New Template Discard & Exit

Progress: Set Up — Advanced Settings — Email Template

**Communication Type \***  
Email

**Template Name \***  
Incomplete

**Subject Header \***  
Please complete admission form

**Target Audience \***  
Parent

**Sender Email \***  
admin@applicaa.com

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

**Template Description**  
Enter a description here to help you remember what this for

**Next →**

Set your parameters and move through the wizard to create the email you would like to send.

The system will then send it for you to anyone who fulfils the criteria.

Set up how would like to send this email here

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

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

**Select phase applied to \***  
Application Form This may say "admission form" depending on your settings from earlier

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

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

**← Back**

**Next →**

# IMPORTING DATA TO YOUR MIS

The process of importing your completed data into your MIS varies, depending which MIS you use.

Check the relevant guide on our [Knowledge Base](#) to follow the steps specific to your MIS.

If you have any difficulties please call us on 020 3667 0764.

applicaa Applicaa Knowledge Base

Search for answers

Course 1 - First Impressions >	<b>Transferring data to and from your MIS</b>
Course 2 - Profiles >	Importing internal students from Bromcom to Admissions+
Course 3 - Application process in detail >	Data Transfer - Cloud School (Progresso)
Sixth Form Only >	How to import incomplete applications to your MIS
Course 4 - Events >	How to import student and contact data into your MIS from Admissions+
Course 5 - Checks, Troubleshooting & Go-Live! >	Adding UDF's and Documents to Admissions+ SIMS Integration (7mins)
<b>Data &amp; Integrations (IT &amp; Data Managers) ▾</b>	Data Transfer - SIMS
Connect to your MIS	Which fields go to which places in SIMS? (PDF)
Transferring data to and from your MIS	Importing students & data from SIMS App into Admissions+ (5mins)
Properties & useful info	Bromcom Training Webinar Recording (1 hr)
Course 6 - Timetable & Options (Yr 9 & 12) >	Bromcom MIS Admissions+ Export Guide (1min) + PDF Guide
Course 7 - Interviews & Offers >	Cloud School Training Webinar
	Cloud School Enrolment Integration Webinar
	Should I import my ATF into MIS first?
	How to tag students with their MIS number - for SIMS, Bromcom & Cloud School (9 mins)

# 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).

## Users

[Permission](#) [Reset password](#) [Send Welcome Email](#) [Disable](#) [Enable](#) [Delete](#) [Import users](#) [+ Add User Manually](#)

Search in table

Show 50 entries 1 to 45 of 45 entries

Prev 1 Next

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

Job Role: Admissions Manager / Director

Permission: Admissions

Key contact

Enable staff

Form types they can access

all  specific

Cancel Update

Year 12 Admissions Admissions Y

### SETTINGS

- Application Form
- Subject Options >
- Form Settings >
- School Settings ▾
- General Settings
- Users**
- Permissions
- Integration
- Payment & Fees
- Unsubscriptions
- FAQs
- Address Mapping
- Enrolment Settings

The background features a central light blue hexagon. To its top-left is a grey hexagon, and to its top-right is an orange parallelogram. Below the central hexagon are three smaller hexagons: a dark blue one on the left, a light blue one on the right, and a very small light blue one at the bottom center.

**Do you have any questions?**



**THANK YOU**