Advanced Forms

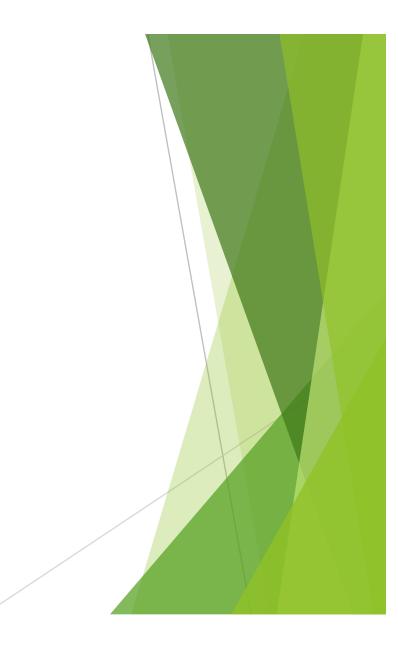
SchoolSpeak Seminar Series

Thank you!



This session will cover

- Office Use Only section
- Adding spice to your forms Plus special surprise!!
- How to assess a fee in the form
- Linking forms to the profile fields
- Making a resource available to the public
- Using a landing page with a form and how to use links



Office Use A Special Forms Section

- Allows schools to track various types of data
 - **Examples:**
 - Application status
 - Approved
 - ► Tour completed
 - PE clothes delivered
 - Documents submitted
- Create a new section in your form and name it Office Use Properties -
 - Make not visible
- Access the fields by using More Options in your admin view of the form

Let's add a little spice to your form

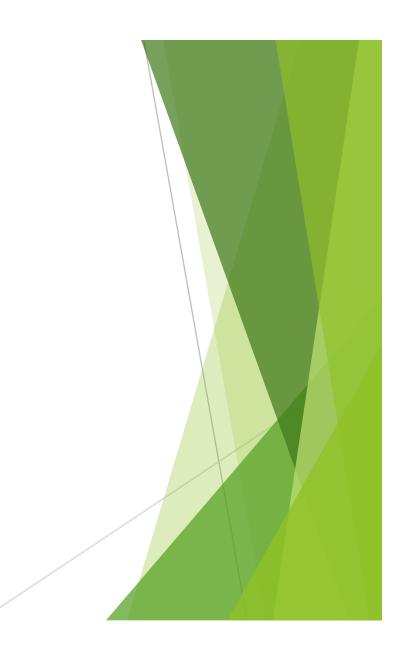
- Using comments and headers allows you to share information about a specific section or provide instructions
 - Also can be used for form organization
- New Editor for Help area in form fields
 - *Help box is not just for help!
 - Change fonts/colors
 - Add links to pdf files on line
 - Use basic editing capabilities
 - Lists
 - Change formatting of the text added
 - Cut/paste directly into the help box

What is a landing page?

- A landing page is typically a webpage resource that schools use to provide information to members. It may contain links to other resources within SchoolSpeak or other external sites.
 - ▶ Example
 - > Re-Enrollment Current families visit the landing page to view the steps that are required
 - Re-Enrollment is a multi step process
 - Step 1- Form 1 asks about the student
 - Step 2 Confirm your external payment processor
 - Step 3 Tuition Contract
 - Use the "landing page" to share information about the process
 - Use links within the form to move members from form to form

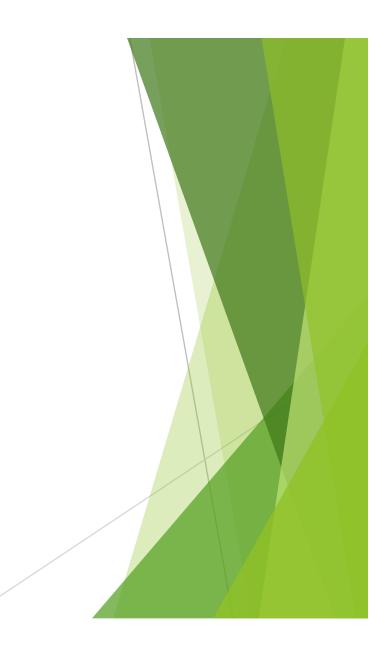
Let's link a page

- Create the landing page with all of your instructions
- Go to the page that you would like to push the member to
- Copy the URL from the web browser
- Go to your landing page and locate the 'click here'
- Click on the icon to link in the editor tool bar
- Paste the new link
- Click update on link and update in webpage
- Test!!!



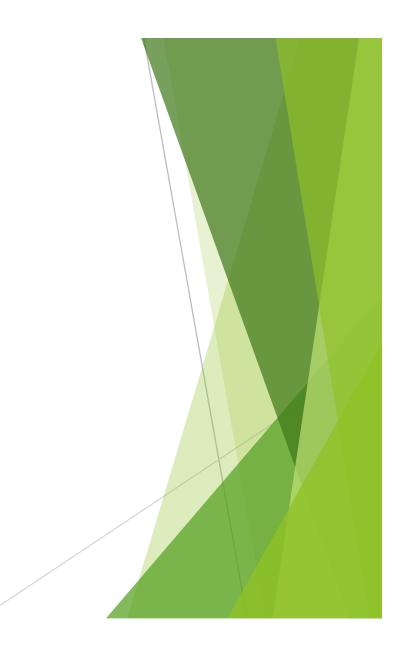
Public Access

- Can make specific resources available to the public
 - Link to the public website
 - Master switch needs to be set by SchoolSpeak Support
 - Group allow to be open
 - Resource allow (forms resource, landing page if applicable)
 - Examples
 - Calendar
 - ► Forms
 - Announcements
 - Webpages
 - > Not all resources can be made available to external site



Payments in Forms

- Allows administrators to collect fees or payments
- ▶ 3 Basic Options
 - Fixed
 - ► Each form requires \$100 fee
 - ▶ From Field
 - Formula
 - ▶ Multiple fields influence the fee
 - New Student Applications
 - Registration Fee
 - Book Fee
 - ► Candy orders, clothing/spirit wear, other fees



Linking Form Fields to the Profile

- Forms fields may be linked to the fields in the profile
 - Allow admissions directors to send the information directly into SchoolSpeak
 - ► NO RETYPING!!!
- Profile fields must be setup before linking to profile
 - Contact SchoolSpeak Support to help!
- Use the More Options link in Admin view to access Add Family link
- Add Family may be used for new families or to add a new student to current family
 - ▶ Don't forget to use your New Family, New 1, New 2, New 3 groups

Questions

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