



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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