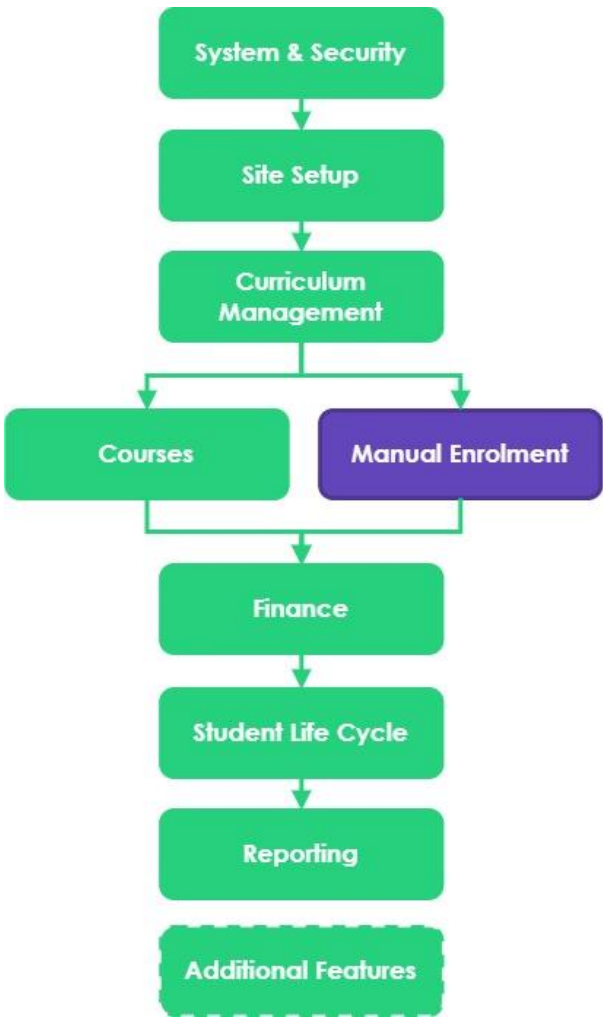




ReadySMS Manual Workflows

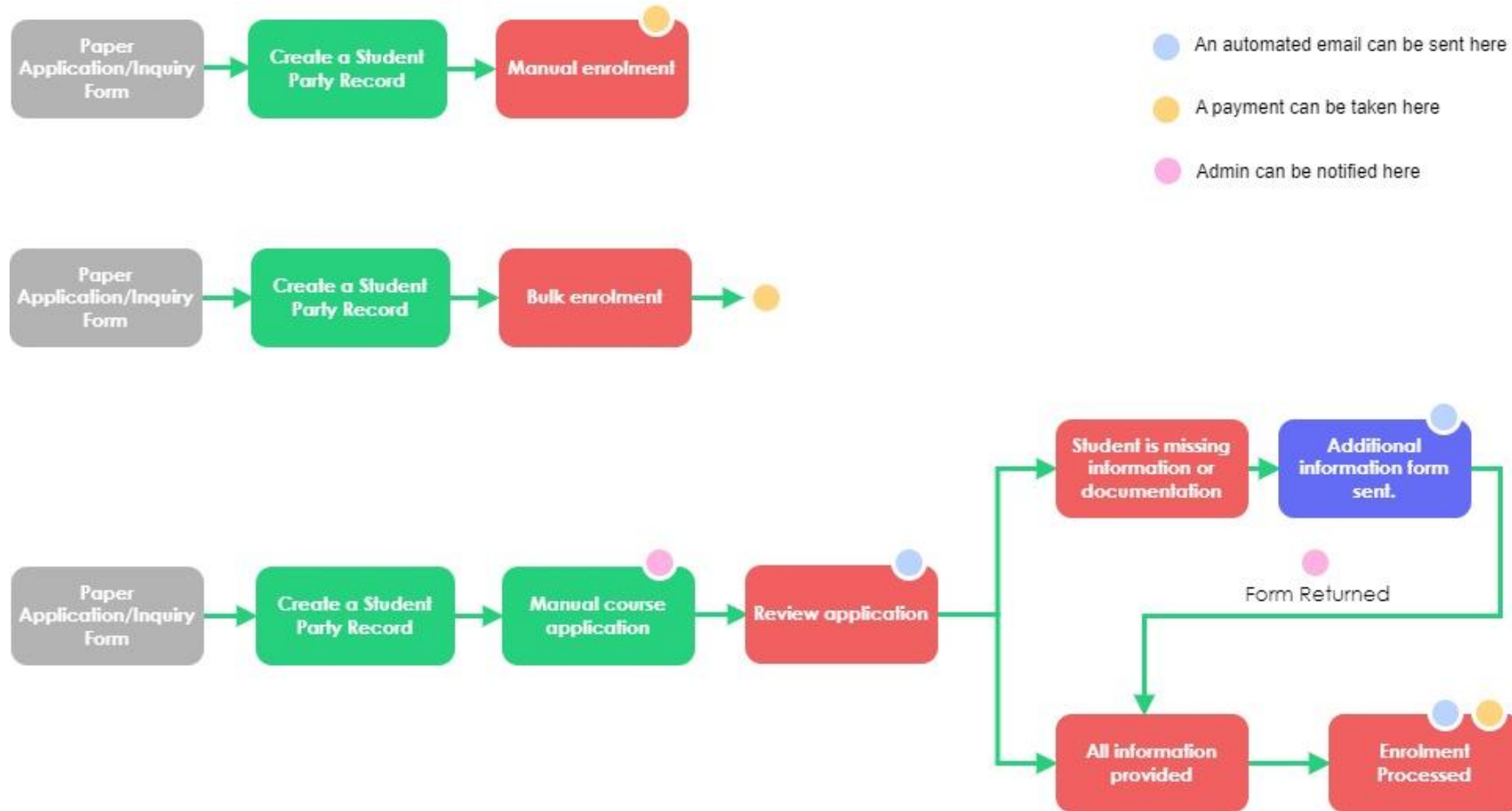
Agenda



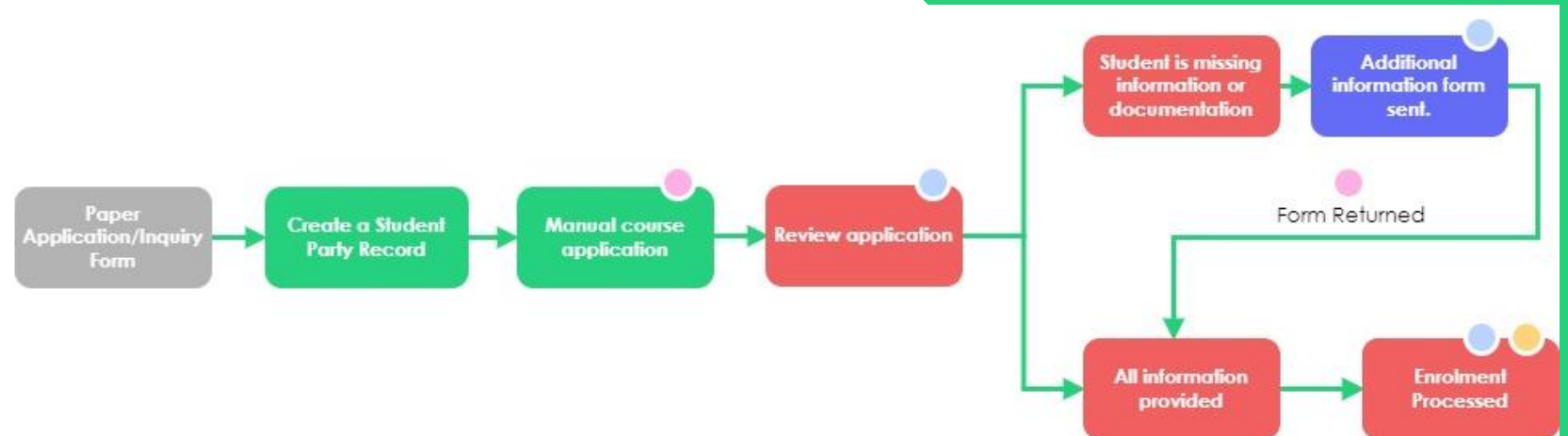
Topics Covered

- | | |
|---|---------------------------|
| 1 | ReadySMS Manual Workflows |
| 4 | Kanban Enrolment |

ReadySMS Manual Workflows



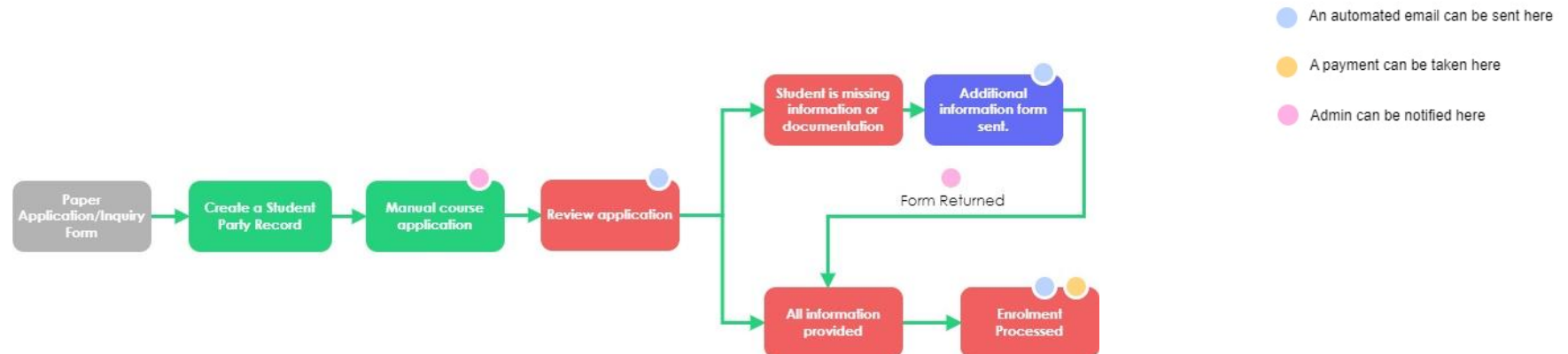
Kanban Enrolment



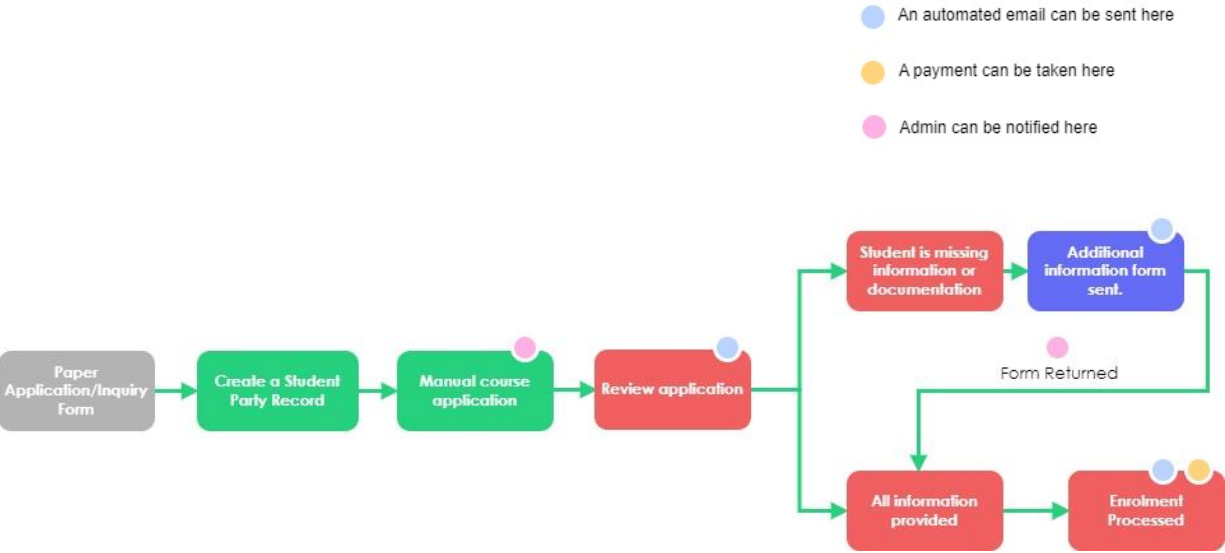
Kanban Enrolment



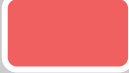


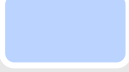

Summary

- Leverages some automations
- Students apply using a manual application and party records are manual added to the system
- The manual course application feature is used to add applications into the Kanban for processing
- Automated emails can be sent based on student's position in the application process
- Recommended when you have to take manual applications for large numbers of students
- Applications can be assigned and processed later





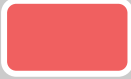
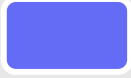

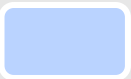

Kanban Enrolment



Colour Code	Process
	Paper/Manual Application Form
	Student Party Profile
	Kanban
	Feedback Forms
	Staff Notifications
	Automated Communication
	Payments

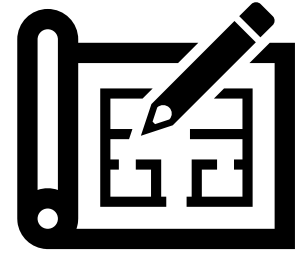
Kanban Enrolment

For details on how to perform each of these steps, see [Session 5](#)

Colour Code	Process
	Paper/Manual Application Form
	Student Party Profile
	Kanban
	Feedback Forms
	Staff Notifications
	Automated Communication
	Payments

Steps

Kanban Enrolment



1. Setup Kanban view and status
[Administration > Lookups > Course Application Setup > Kanban Settings](#)
2. Setup Feedback Form
[Administration > Forms > Feedback Form > +](#)
3. Create or edit an email template to be used for automated (linking feedback form URL)
[Communications > Templates > Course Application](#)
4. Link email templates to Course Application Status
[Administration > Lookups > Courses Application Setup](#)

When you have an enrolment:

1. Create Party
[Community > Add new Party](#)
2. Create Course Application
[Courses > Applications](#)
3. Make use of Kanban
[Courses > Applications](#)
4. Process enrolment
[Courses > Applications](#)

Lets go do it!

Let's take a look at:

- Kanban Enrolment Setup
- Kanban Enrolment Demo



Thank you

For more information please contact:

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Onboarding

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