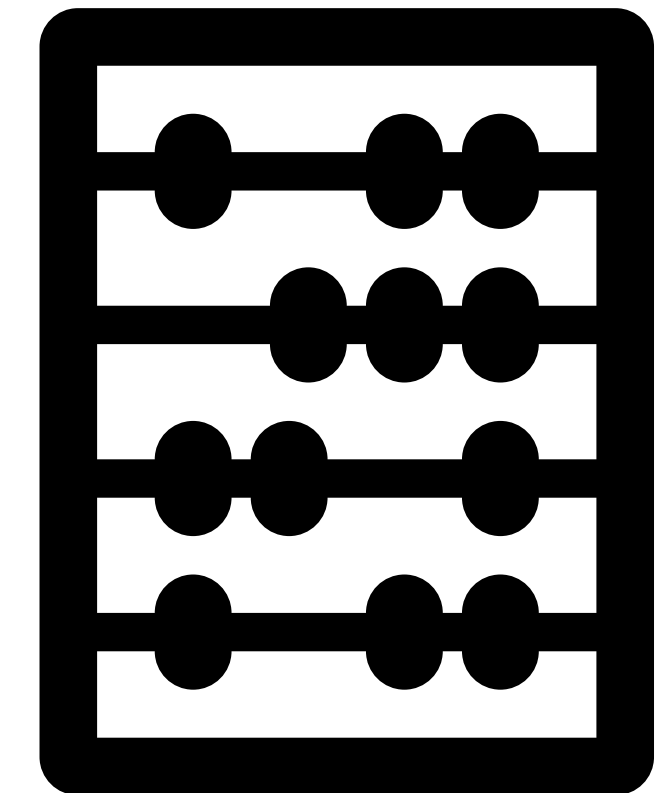


Topic 5 - Online Applications and Enrolments

Online Applications and Enrolments

5.1 Course Forms and
Kanban

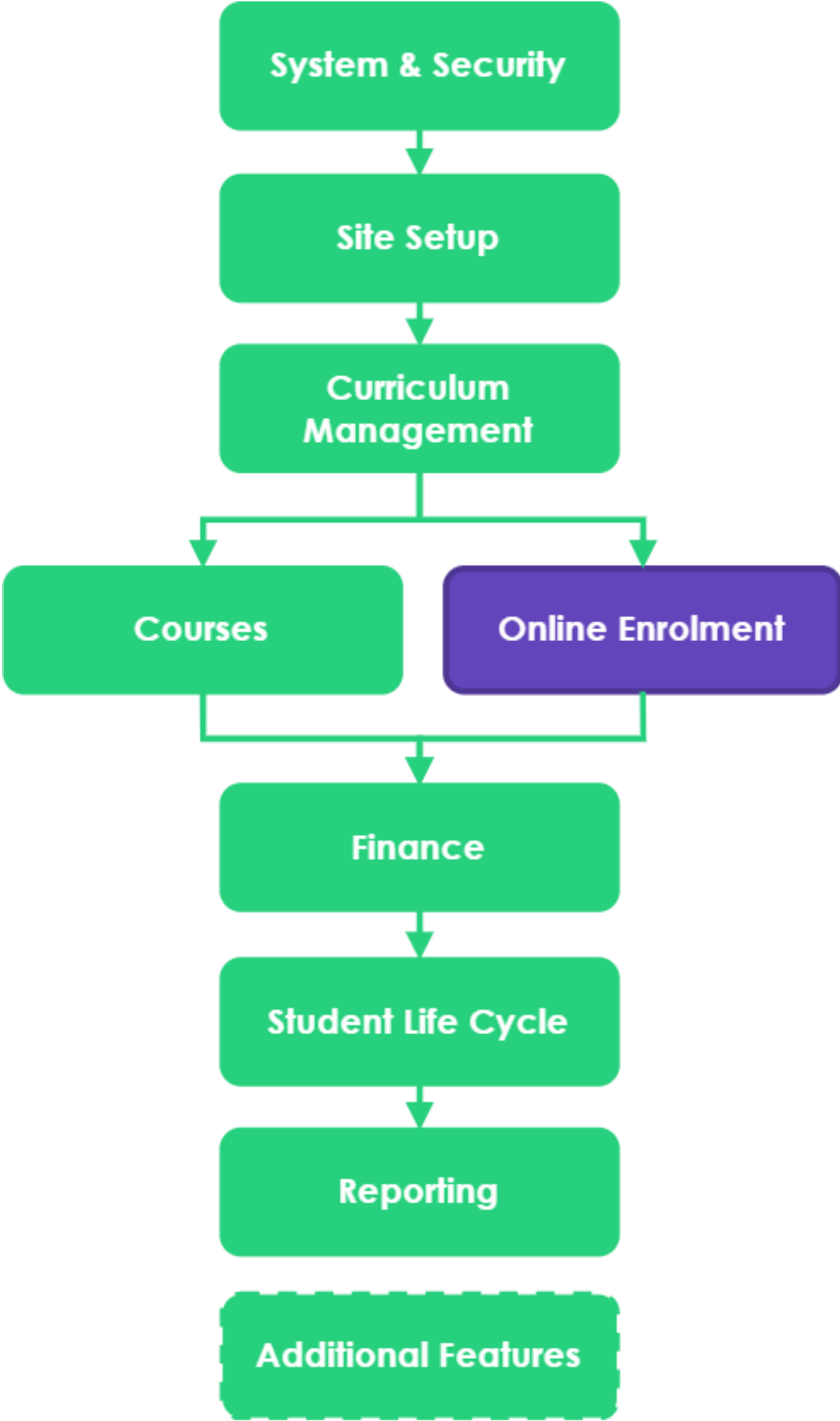
5.2 Feedback Forms and
Additional Settings



Topic 5.1 - Online Applications and Enrolments



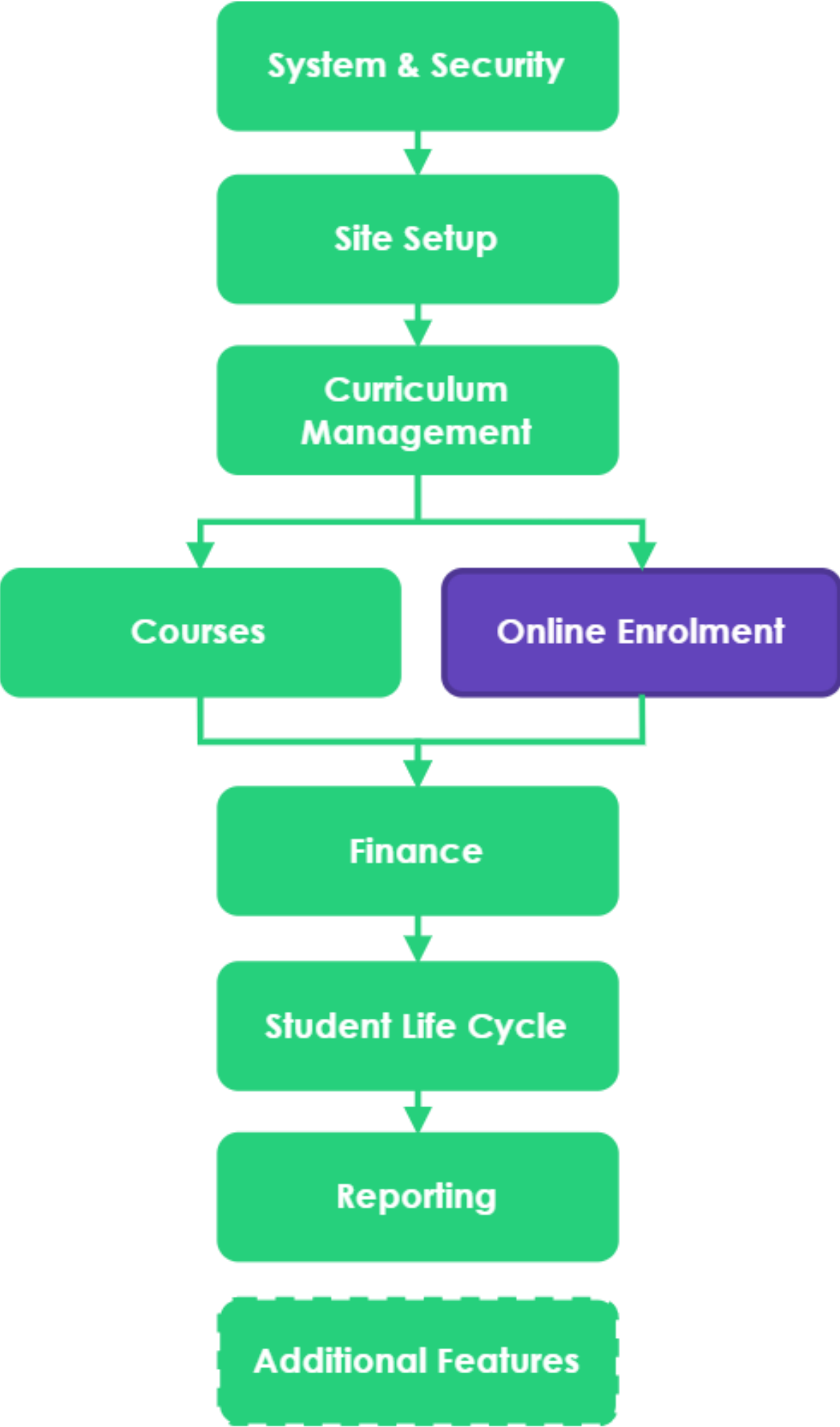
Agenda



Topics Covered

- | | |
|---|----------------------------------|
| 1 | Online Course Forms |
| 2 | Kanban |
| 3 | Automated Communication |
| 4 | Feedback Forms |
| 5 | Staff Notifications |
| 6 | Payments |
| 7 | Duplicate Records |
| 8 | Online Application Demonstration |

Agenda



Learning Objectives

- 1 Create/edit a course form
- 2 Link a course form to a course
- 3 Set up the Kanban status'
- 4 Set up course application status'
- 5 Create and link email templates for the course application status'
- 6 Set up a Feedback Form
- 7 Allow staff notifications
- 8 Understand where payments can be taken (covered in Finance session)
- 9 Merge duplicate records
- 10 Process an application within the course application view



Workflow Example

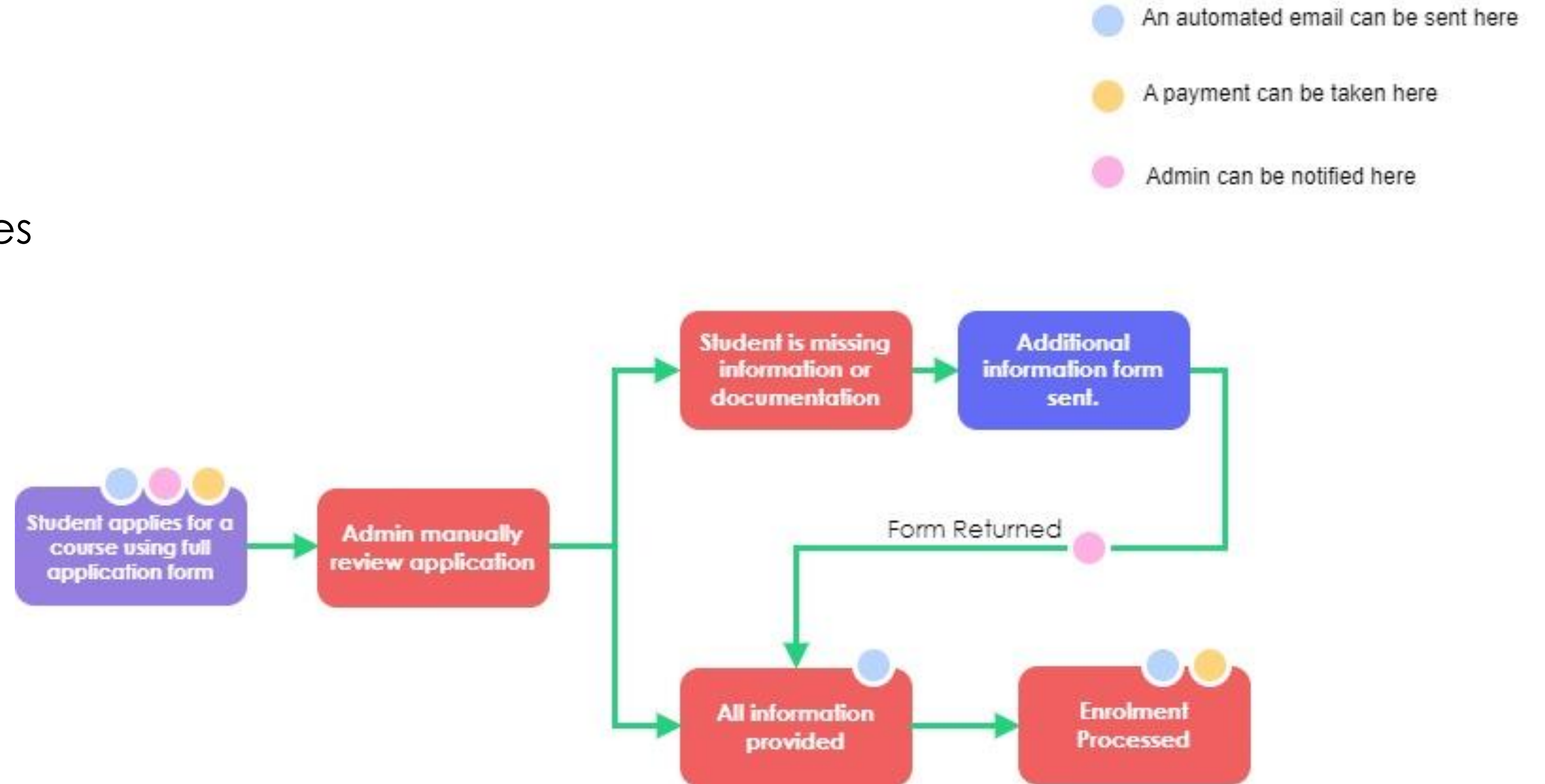


Example Workflow

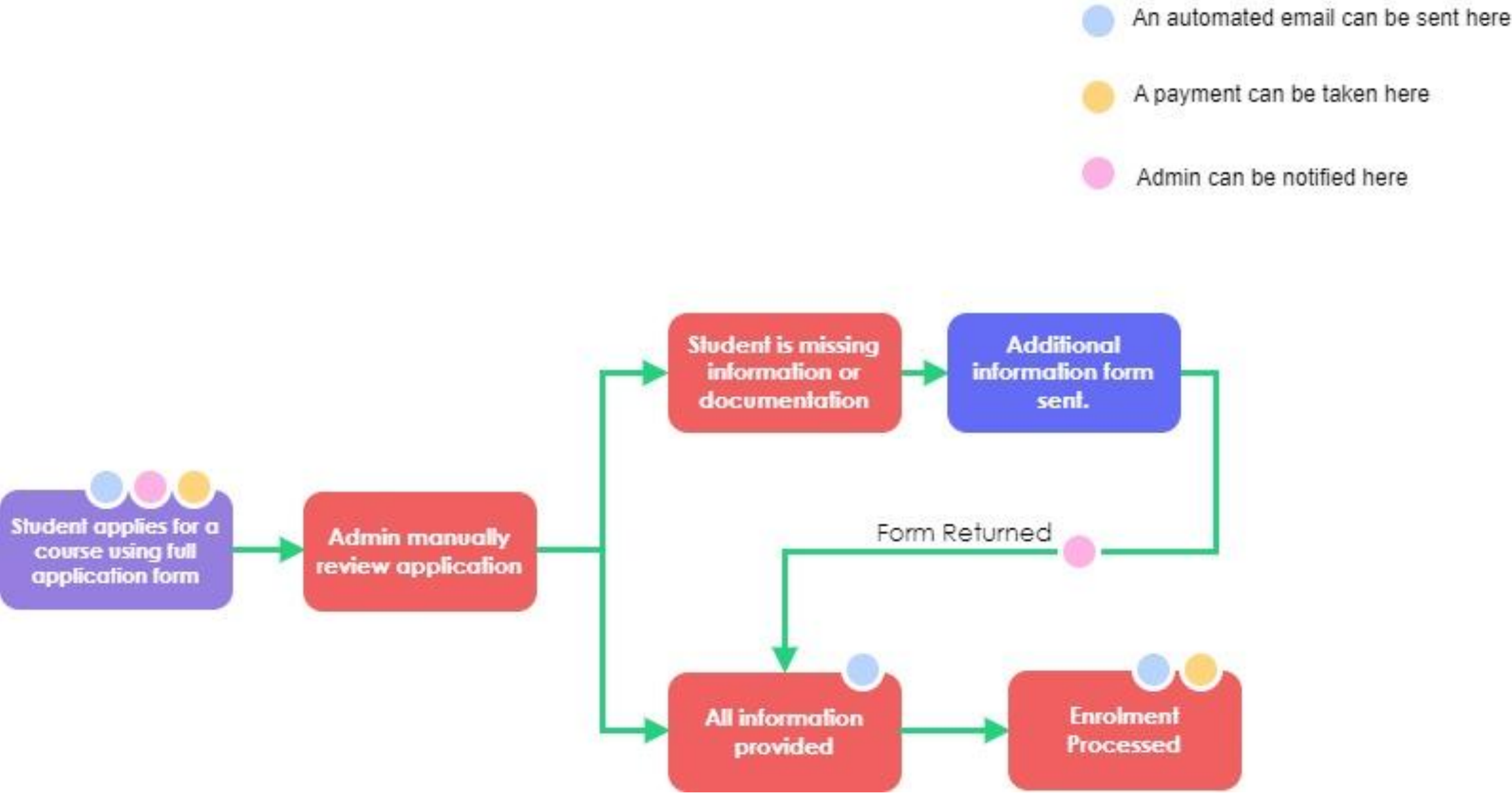
Standard VET Application



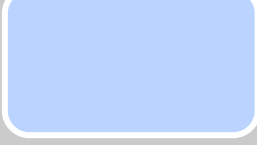



Recommended for:

- The majority of VET courses

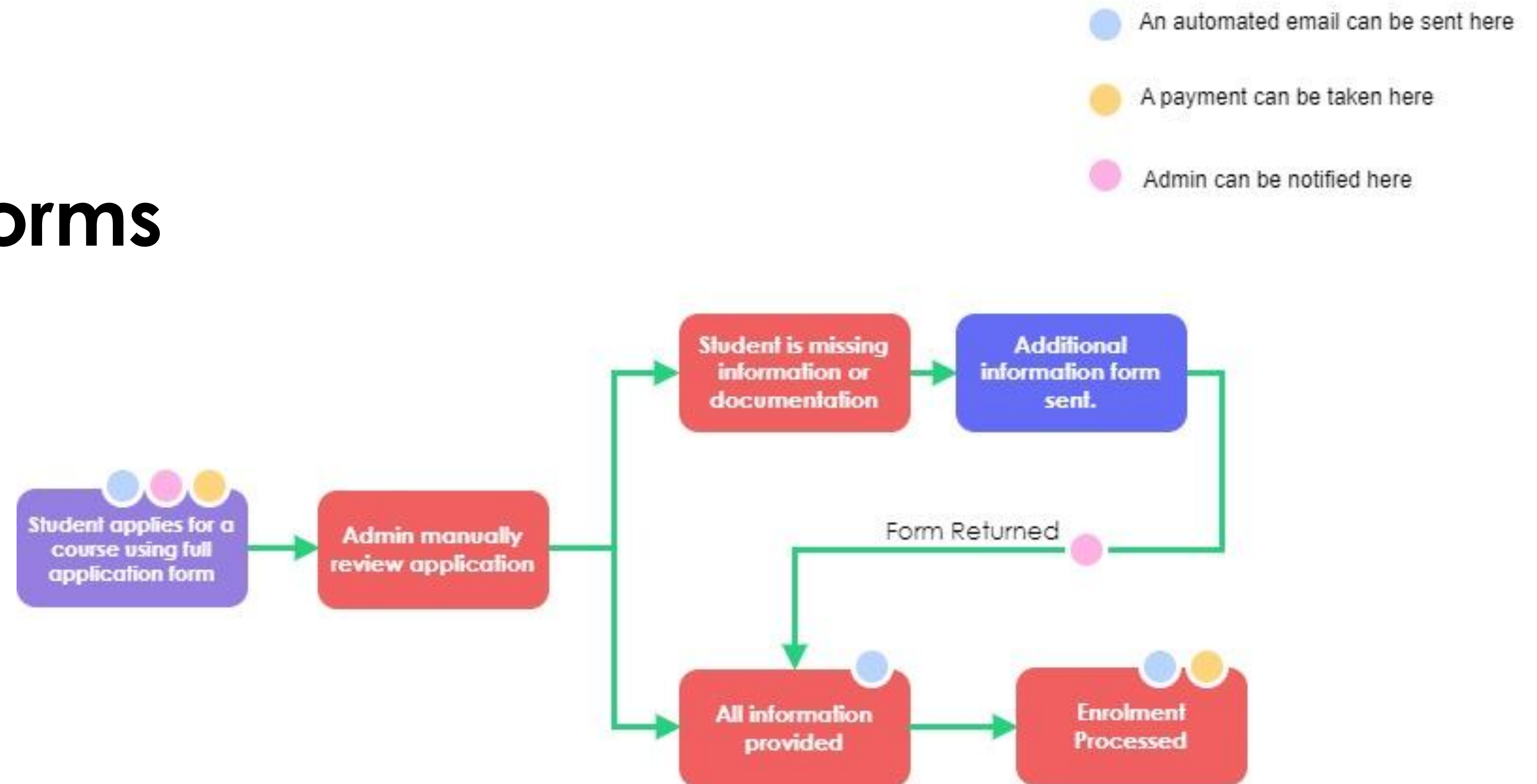


Components of the Workflows



Colour Code	Process
	Online Course Forms
	Kanban
	Automated Communication
	Staff Notifications
	Full AVETMISS/Additional Information Form (feedback form)
	Payments

Online Course Forms



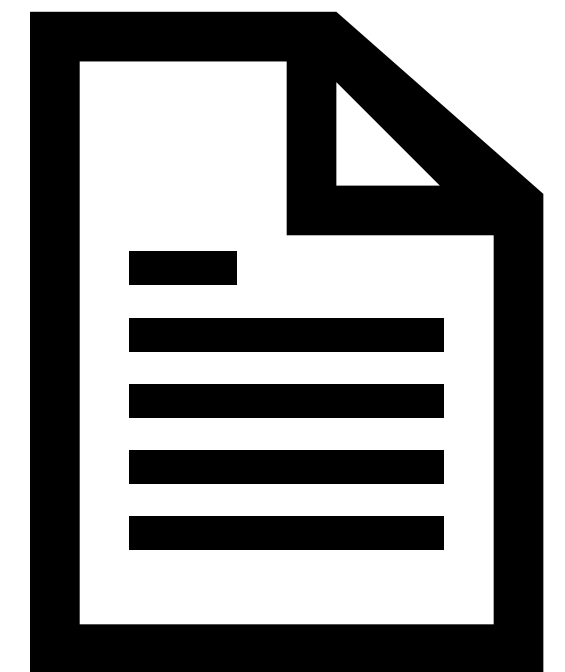
Online Course Forms

What is a Course Form?

Online course forms are digital forms used for course applications

They also:

- Will create a party profile
- Will auto populate data into the profile
- Accessed via a URL

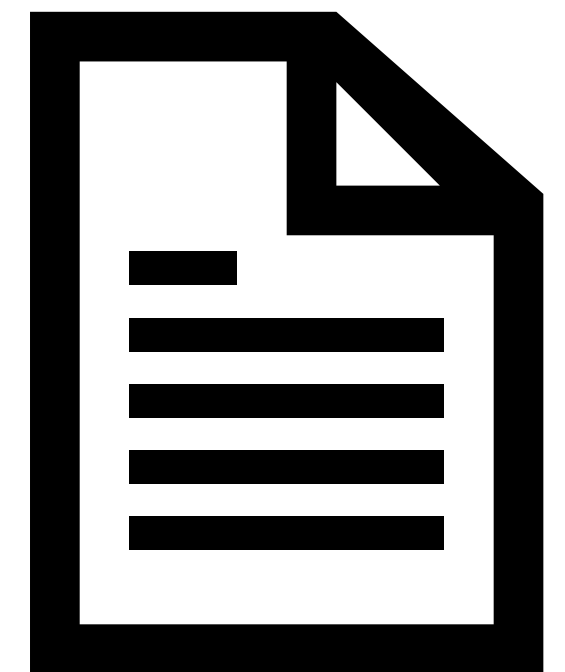


Online Course Forms

How to Create Course Forms

Three parts to this process:

1. Configuring the overarching settings for the forms
2. Creating the forms
3. Linking the forms to courses



Online Course Forms

1. Configuring settings

Course form settings can be created new
OR

Existing full or short application settings can be used

NOTE: settings can also be copied as a template and then altered

Administration > Forms > Course Forms

Search...

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ReadyTech Education

Home

Community

Enrolments

Courses

Scheduling

Services

Sales

Communications

Reports

Administration

Help

Course Forms

+ New

Search

Enter Form Name (Eg:Course Form)

Search

Clear

Search Results

1 - 2 of 2

1 Page

Name	Form Branding	Created by	Created on	Updated on	Enabled	
Full Application Form	Form Branding	jobready.support	9 August 2018 2:06 PM	9 August 2018 2:06 PM	<input checked="" type="checkbox"/>	<div><div></div><div></div><div></div></div>
Short Application Form	Form Branding	jobready.support	25 September 2017 4:30 PM	7 February 2023 1:55 PM	<input checked="" type="checkbox"/>	<div><div></div><div></div><div></div></div>

1 - 2 of 2

1 Page

Online Course Forms

1. Configuring settings

Add/Edit a Course Form

Auto Confirm Enrolments - automatically enrolls any application into a course

Enable Payments – check if taking a payment during application

Link Courses – add any courses you wish to use this application for

The screenshot displays the 'Edit Form' interface in the ReadyTech system. The interface is divided into several sections: Details, Settings, Finance, and Link Courses. The 'Details' section includes fields for Name (Full Application Form), Location, and Branding (RT). The 'Settings' section contains checkboxes for Enabled, Login (Optional), and Disable Party Data Update, along with checkboxes for Auto Confirm Enrolments, Auto Confirm Services, and Hide from Student Portal. The 'Finance' section has a checkbox for Enable Payments. The 'Link Courses' section includes a checkbox for Link Multiple Courses, a URL field (https://onboarding.jobreadyplus.com/apply_to_courses/), and a Courses dropdown menu. Red boxes highlight the 'Auto Confirm Enrolments' checkbox in the Settings section, the 'Enable Payments' checkbox in the Finance section, and the 'Link Courses' section header.

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Search... 22 Gemma Cameron ReadyTech Education

Home Community Enrolments Courses Scheduling Services Sales Communications Reports Administration Help

Edit Form

Save Cancel

Details

Name: Full Application Form Location: Branding: RT

Settings

Enabled: ☒ Login: Optional Disable Party Data Update: ☐ Auto Confirm Enrolments: ☐ Auto Confirm Services: ☐ Hide from Student Portal: ☐

Finance

Enable Payments: ☐


Link Courses


Link Multiple Courses: ☒ URL: https://onboarding.jobreadyplus.com/apply_to_courses/ Courses: Start Typing...


Online Course Forms


2. Create the form


Hit the pencil icon to create/edit the web form


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 Home


 Community


 Enrolments


 Courses


 Scheduling


 Services

 Sales

 Communications

 Reports


 Administration


 Help

✓ Course Application Form was successfully updated

Full Application Form

Course Form

 Edit

 Copy

Details


Name:

Full Application Form

Branding:

RT

Location:

Web Form: 

Settings


Enabled:

☒


Login:

Optional


Disable Party Data Update:

☐ 

Auto Confirm Enrolments:

☐ 

Auto Confirm Services:

☐ 

Hide form Student Portal:

☐

Online Course Forms

2. Create the form

Form Builder allows you to edit the web form

Ensure your forms collecting all information necessary for your reporting requirements

Fields

Styles

Tools

Basic

Short Answer

Radio buttons

Dropdown

Date

Digital Signature

Star Rating

Properties

Paragraph

Checkboxes

Smart Question

File

Tags

Slider

Party Entity Data

Profile

Contact

Contact - Work

Address - Home

Address - Billing

AVETMISS

Service

Identification

Contact - Home

Address

Address - Postal

Contacts

Agent

Logistics

Compliance Data

TAS/VIC

AVETMISS Application Form

[Click to Add Form Header]

Course

1

2

3

4

5

Success

Course

[Click to Add Page Description]

Search with Course Name or Code

Location

From

To

Search

Course Start Date

Ascending

CSEREA00006

Certificate III in Business (2023 Cert III Business)

16 Jan 2023

16 Jan 2024

Melbourne CBD Office

28 places available

CSEREA00018

Diploma of Accounting (2023 Diploma of Accounting)

07 Feb 2023

31 Dec 2023

27 places available

Next

Online Course Forms

2. Create the form

5 types of data you can add to a form:

1. Basic: For customised data. Not linked to any part of the SMS. Not used for reporting.
2. Party Entity Data: Used for party profiles. Used for reporting
3. Compliance: Used for state reporting/funding
4. International: collect data for an international student
5. Reference Data: Not linked to any part of the SMS. Uses data preformatted in Reference Data Tables

The screenshot displays the AVETMISS Application Form interface. On the left, a sidebar menu lists five data types: Basic, Party Entity Data, Compliance Data, International, and Reference Data. The 'Basic' option is highlighted with a red rectangular box. The main form area on the right is titled 'AVETMISS Application Form' and includes a progress bar with steps 'Course', '1', '2', '3', '4', '5', and 'Success'. Below the progress bar, the 'Course' section contains a search bar with the placeholder 'Search with Course Name or Code', a location dropdown, and date pickers for 'From' and 'To'. At the bottom, there is a checkbox, the course code 'CSEREA00006', and the course name 'Certificate III in Business (2023 Cert III Business)'.

Online Course Forms

2. Create the form

Short application form

Fields

Styles

Tools

Basic

Short Answer

Radio buttons

Dropdown

Date

Digital Signature

Star Rating

Properties

Paragraph

Checkboxes

Smart Question

File

Tags

Slider

Party Entity Data

Profile

Contact

Contact - Work

Address - Home

Address - Billing

AVETMISS

Service

Identification

Contact - Home

Address

Address - Postal

Contacts

Agent

Logistics

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Application Form

[Click to Add Form Header]

Course1Success

Course

[Click to Add Page Description]

Search with Course Name or Code

Location

From

To

Course Start DateAscending

CSEREA00009

Advanced Diploma of Building Design (2023 AdDip Building Des

24 Jan 202318 Jun 2024

29 places available

Next

Online Course Forms

3. Linking the forms

Two options:

Option 2 – Single Course Form

Course > Course List > select course
> Admin > Application Forms > +
new

Will generate a unique URL

The screenshot displays the ReadyTech Education web application interface. At the top, the 'readytech' logo is visible on the left, and a search bar, notification bell, and user profile (Gemma Cameron, ReadyTech Education) are on the right. A navigation menu below the header includes links for Home, Community, Enrolments, Courses, Scheduling, Services, Sales, Communications, Reports, Administration, and Help. The left sidebar contains a list of application areas: Course, Students (1), Timetable, Notes / Checklists (0), Email, SMS, Documents (0), Letters & Forms, Certificates (0), Bulk Actions, Finance, Admin, and Application Forms (1). The 'Application Forms' item is highlighted with a red box. The main content area is titled 'Course Forms > Edit'. It features a 'save' and 'cancel' button at the top. Below this is a 'Course Form' section with a dropdown menu for 'Form:' showing three options: 'Short Application Form', 'Long Application Form', and 'Individual Long Application Form' (the last one is selected and highlighted with a red box). Other fields in the form include 'Enabled:', 'Start Date:', 'End Date:' (set to 28/4/2023), 'Allow Saving:' (checked), 'Require mobile number to save:' (unchecked), 'Save Expires After (h):' (with a dropdown for hours), and 'URL:' (showing a unique URL: https://onboarding.jobreadyplus.com/apply_to_course/?class=edit-a804c7f08fcc013baeb90654cacf565e). 'save' and 'cancel' buttons are also present at the bottom of the form.

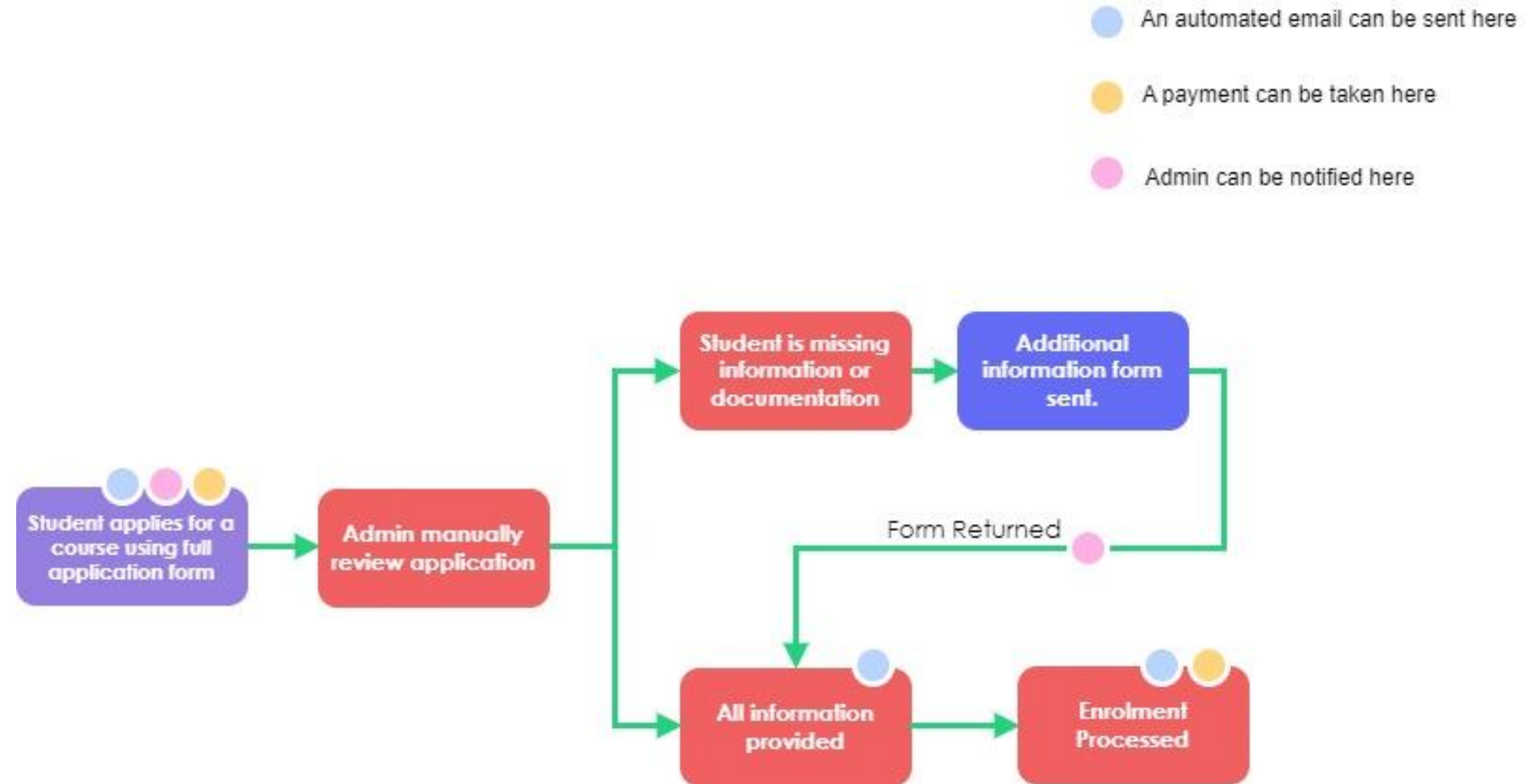
Lets go do it!

Let's take a look at:

- Configuring the overarching settings for the forms
- Creating the forms
- Linking the forms to courses



Kanban



Kanban

Kanban View

You can view submitted applications ready for manual review

Courses > Applications

Kanban

- Visually displays the process
- Can be altered and switch on/off
- Can have search filters applied
- Uses ‘drag and drop’

HomeCommunityEnrolmentsCoursesSchedulingServicesSalesCommunicationsReportsAdministrationHelp

Course Applications

+ New Application

Course

Filters

Saved Filters

SearchSaveClear

Interview TimetableExport

Applied: 3Offers sent: 0Offers accepted: 0Offers declined: 0Offers deferred: 0

Search Results (Kanban)

Switch to List View

1 - 15 of 151 Page

New Applications 4	Under Review 2	Application Incomplete 3	Complete 6
<div>CA00016 OFR00016Stella Stone</div> <div>CSEREA00006</div> <div>Certificate III in Business</div> <div>Partial</div>	<div>CA00013 OFR00013Sam Smitherson</div> <div>CSEREA00025</div> <div>Certificate II in Government</div> <div>Prof Tom Thomas</div> <div>Interview</div>	<div>CA00011 OFR00011Sam Stark</div> <div>CSEREA00025</div> <div>Certificate II in Government</div> <div>Mr Theodore Alan</div> <div>Payment Pending</div>	<div>CA00014 OFR00014Sonny Scott</div> <div>CSEREA00020</div> <div>Diploma of Accounting</div> <div>Enrolled</div>
<div>CA00015 OFR00015Margret Stewart</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div>	<div>CA00004 OFR00004Salazer Smith</div> <div>CSEREA00009</div>	<div>CA00006 OFR00006Sam Stark</div> <div>CSEREA00009</div>	<div>CA00012 OFR00012Sonny Scott</div> <div>CSEREA00021</div> <div>Diploma of Accounting</div>

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ReadyTech Education

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Kanban

Viewing the Course Application

Enrol – Progresses the application to the enrolment wizard

Offer – Progresses application to formal offer wizard (if organisation utilises this process)

Forms – Shows responses from course application

Communications – Templated or custom email

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Home

Community

Enrolments

Courses

Scheduling

Services

Sales

Communications

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Help

CA00015Margret Stewart (00020032) | Course Application

Edit

Enrol

Offer

Express Offer

Applicant

Applicant:Margret Stewart

Party ID:00020032

Application

Application ID:CA00015

Offer Number:OFR00015

Status:Applied

People

Assignee:None

Agent:None

Employer:

Course

Course:Advanced Diploma of Building Design (2023 AdDip Building Design)

Location:

Study Mode:

Admin

Created On:17/2/2023 02:44:06 PM

Offer Accepted On:

Send Email:☐

Archived:☐

Conditions on Offer:☐

Forms

Entry Requirements

Communications

Notes

Documents

Interview

Progress

Short Application Form

Page 1: Applicant Details

Title

Kanban

Kanban Status

Kanban status = headings at the top of the Kanban columns

Can be customised

Administration > Lookups > Course Application Setup > Kanban Settings

Search Results (Kanban)

Switch to List View

1 - 15 of 151 Page

New Applications4

CA00016 | OFR00016Stella Stone
CSEREA00006
Certificate III in Business
Partial

CA00015 | OFR00015Margret Stewart
CSEREA00009
Advanced Diploma of Building Design
Applied

CA00009 | OFR00009Spencer Smith
CSEREA00024
Advanced Diploma of Building Design
Prof Tom Thomas
Applied

Under Review2

CA00013 | OFR00013Sam Smitherson
CSEREA00025
Certificate II in Government
Prof Tom Thomas
Interview

CA00004 | OFR00004Salazer Smith
CSEREA00009
Advanced Diploma of Building Design
In Progress

Application Incomplete3

CA00011 | OFR00011Sam Stark
CSEREA00025
Certificate II in Government
Mr Theodore Alan
Payment Pending

CA00006 | OFR00006Sam Stark
CSEREA00009
Advanced Diploma of Building Design
ID Documents

CA00002 | OFR00002Glenda Green
CSEREA00009
Advanced Diploma of Building Design
Compliance Info

Complete6

CA00014 | OFR00014Sonny Scott
CSEREA00020
Diploma of Accounting
Enrolled

CA00012 | OFR00012Sonny Scott
CSEREA00021
Diploma of Accounting
Ms Gemma Cameron
Ineligible

CA00010 | OFR00010Satvika Smith
CSEREA00024
Advanced Diploma of Building Design
Dr Tyler Trent

readytech

Search...Q

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ReadyTech Education

HomeCommunityEnrolmentsCoursesSchedulingServicesSalesCommunicationsReportsAdministrationHelp

Course Application

Kanban StatusesList

Course application status

Name	Description	Enabled	Order number	Created at	Updated at	
New Applications		<input checked="" type="checkbox"/>	1	2017-09-25 16:26:59 +1000	2023-02-17 10:54:29 +1100	
Under Review		<input checked="" type="checkbox"/>	2	2017-09-25 16:27:05 +1000	2023-02-16 13:25:02 +1100	
Application Incomplete		<input checked="" type="checkbox"/>	3	2023-02-16 13:27:08 +1100	2023-02-16 13:27:08 +1100	
Complete		<input checked="" type="checkbox"/>	5	2023-02-16 13:31:33 +1100	2023-02-16 13:31:33 +1100	

Kanban

Course Application Status

Course application status = status' within each column (e.g. applied, awaiting info, missing data, enrolled)

Can be customised

Search Results (Kanban)

Switch to List View

1 - 15 of 15 1 Page

New Applications 4	Under Review 2	Application Incomplete 3	Complete 6
<div>CA00016 OFR00016 Stella Stone</div> <div>CSEREA00006</div> <div>Certificate III in Business</div> <div>Partial</div>	<div>CA00013 OFR00013 Sam Smitherson</div> <div>CSEREA00025</div> <div>Certificate II in Government</div> <div>Prof Tom Thomas</div> <div>Interview</div>	<div>CA00011 OFR00011 Sam Stark</div> <div>CSEREA00025</div> <div>Certificate II in Government</div> <div>Mr Theodore Alan</div> <div>Payment Pending</div>	<div>CA00014 OFR00014 Sonny Scott</div> <div>CSEREA00020</div> <div>Diploma of Accounting</div> <div>Enrolled</div>
<div>CA00015 OFR00015 Margret Stewart</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>Applied</div>	<div>CA00004 OFR00004 Salazer Smith</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>In Progress</div>	<div>CA00006 OFR00006 Sam Stark</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>ID Documents</div>	<div>CA00012 OFR00012 Sonny Scott</div> <div>CSEREA00021</div> <div>Diploma of Accounting</div> <div>Ms Gemma Cameron</div> <div>Ineligible</div>
<div>CA00009 OFR00009 Spencer Smith</div> <div>CSEREA00024</div> <div>Advanced Diploma of Building Design</div> <div>Prof Tom Thomas</div>		<div>CA00002 OFR00002 Glenda Green</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div>	<div>CA00010 OFR00010 Satvika Smith</div> <div>CSEREA00024</div> <div>Advanced Diploma of Building Design</div>



Search...

24

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ReadyTech Education

Home Community Enrolments Courses Scheduling Services Sales Communications Reports Administration Help

Course Application Course Application Status > List

Online Forms

Statuses

Kanban Settings

Brands

Form Preferences

Search:

Search

1 - 19 of 19 1 Page

ID	Name	Colour	Kanban Status	Email Template	Duplicate Status	Enabled	System
2	Applied	Applied	New Application	General: Application Received Email	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
15	Awaiting Info	Awaiting Info	Under Review		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10	Conditional Offer	Conditional Offer			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12	Enrolled	Enrolled	Complete		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Interview Booked	Interview Booked	Under Review		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
14	Invitation	Invitation	Under Review		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	Offer Accepted	Offer Accepted	Under Offer		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>


Kanban

Course Application Status


Kanban Status – links to specific Kanban Status (column)


Duplication Status - Will flag if two similar applications are submitted in the Kanban at the same time

Default Email Template – Allows automated sending of a pre-set email when this course application status is applied



Search...

23

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HomeCommunityEnrolmentsCoursesSchedulingServicesSalesCommunicationsReportsAdministrationHelp

Course Application

Course Application Status > Edit

Online Forms

Statuses

Status Details

Kanban Settings

Brands

Form Preferences

savecancel

Status

Name:

Applied

Colour:

Applied

Kanban Status:

New Application

Default Email Template:

General: Application Received Email

Require Reason:

☐

Duplicate Status:

☐

Offer Accepted Status:

☐

Attach Invoice on Email:


☐

Attach Payment on Email:

☐

Enabled:

☒



Presentation Name 167

Kanban

Status' example

Making efficient use of your Kanban will save you time and effort

e.g.

A Kanban Status named 'Application Incomplete'

Can have course application status' of

- ID Documents
- Compliance Info
- Payment Pending

Search Results (Kanban)			
<div>Switch to List View</div>			
1 - 15 of 151 Page			
New Applications4	Under Review2	Application Incomplete3	Complete6
<div>CA00016 OFR00016Stella Stone</div> <div>CSEREA00006</div> <div>Certificate III in Business</div> <div>Partial</div>	<div>CA00013 OFR00013Sam Smitherson</div> <div>CSEREA00025</div> <div>Certificate II in Government</div> <div>Prof Tom Thomas</div> <div>Interview</div>	<div>CA00011 OFR00011Sam Stark</div> <div>CSEREA00025</div> <div>Certificate II in Government</div> <div>Mr Theodore Alan</div> <div>Payment Pending</div>	<div>CA00014 OFR00014Sonny Scott</div> <div>CSEREA00020</div> <div>Diploma of Accounting</div> <div>Enrolled</div>
<div>CA00015 OFR00015Margret Stewart</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>Applied</div>	<div>CA00004 OFR00004Salazer Smith</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>In Progress</div>	<div>CA00006 OFR00006Sam Stark</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>ID Documents</div>	<div>CA00012 OFR00012Sonny Scott</div> <div>CSEREA00021</div> <div>Diploma of Accounting</div> <div>Ms Gemma Cameron</div> <div>Ineligible</div>
<div>CA00009 OFR00009Spencer Smith</div> <div>CSEREA00024</div> <div>Advanced Diploma of Building Design</div> <div>Prof Tom Thomas</div> <div>Applied</div>		<div>CA00002 OFR00002Glenda Green</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>Compliance Info</div>	<div>CA00010 OFR00010Sativika Smith</div> <div>CSEREA00024</div> <div>Advanced Diploma of Building Design</div> <div>Dr Tyler Trent</div> <div>Withdrawn</div>
<div>CA00007 OFR00007Mark Kehoe</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>Ms Gemma Cameron</div> <div>Applied</div>			<div>CA00008 OFR00008Spencer Smith</div> <div>CSEREA00018</div> <div>Diploma of Accounting</div> <div>Enrolled</div>

Kanban

Course Application Status

NOTE: Any application saved by the applicant will fall into Kanban as partial

This is a default setup and cannot be changed

An email is sent to the student sending a link to continue their application

Search Results (Kanban)

Switch to List View

1 - 15 of 151 Page

New Applications 4	Under Review 2	Application Incomplete 3	Complete 6
<div>CA00016 OFR00016Stella Stone</div> <div>CSEREA00006</div> <div>Certificate III in Business</div> <div>Partial</div>	<div>CA00013 OFR00013Sam Smitherson</div> <div>CSEREA00025</div> <div>Certificate II in Government</div> <div>Prof Tom Thomas</div> <div>Interview</div>	<div>CA00011 OFR00011Sam Stark</div> <div>CSEREA00025</div> <div>Certificate II in Government</div> <div>Mr Theodore Alan</div> <div>Payment Pending</div>	<div>CA00014 OFR00014Sonny Scott</div> <div>CSEREA00020</div> <div>Diploma of Accounting</div> <div>Enrolled</div>
<div>CA00015 OFR00015Margret Stewart</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>Applied</div>	<div>CA00004 OFR00004Salazer Smith</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>In Progress</div>	<div>CA00006 OFR00006Sam Stark</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>ID Documents</div>	<div>CA00012 OFR00012Sonny Scott</div> <div>CSEREA00021</div> <div>Diploma of Accounting</div> <div>Ms Gemma Cameron</div> <div>Ineligible</div>
<div>CA00009 OFR00009Spencer Smith</div> <div>CSEREA00024</div> <div>Advanced Diploma of Building Design</div> <div>Prof Tom Thomas</div> <div>Applied</div>		<div>CA00002 OFR00002Glenda Green</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div>Compliance Info</div>	<div>CA00010 OFR00010Satvika Smith</div> <div>CSEREA00024</div> <div>Advanced Diploma of Building Design</div> <div>Dr Tyler Trent</div> <div>Withdrawn</div>
<div>CA00007 OFR00007Mark Kehoe</div> <div>CSEREA00009</div> <div>Advanced Diploma of Building Design</div> <div></div>			<div>CA00008 OFR00008Spencer Smith</div> <div>CSEREA00018</div> <div></div> <div></div>

Kanban

Archive Course Applications

- Right click on individual applications and click archive
- Switch to list view and archive in bulk

CA00008 | OFR00008

Spencer Smith

CSEREA00018

Diploma of Accounting

Enrolled

CA00003 | OFR00003

Sam Stark

CSEREA00006

Certificate III in Business

Enrolled

CA00001 | OFR00001

Sam Stark

CSEREA00002

Certificate III in Bread Baking

Ms Gemma Cameron

Unsuccessful

Update

Assignee

Status

Other Actions

Archive

Search Results

Bulk Actions

Switch to Kanban

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1 Page

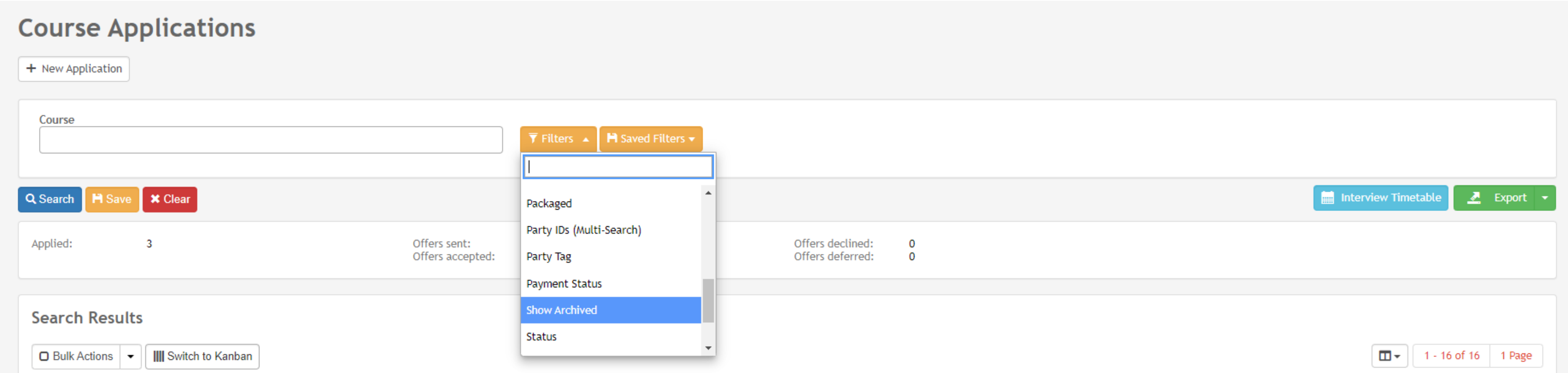
	App Number	Applicant	Course	Enrolled	Location	State	Study Mode	Created On	Updated On	Status	Last Updated By	
<div>Assignee</div>	00016	Stone, Stella	2023 Cert III Business - CSEREA00006	2/30	Melbourne CBD Office			17/2/2023 02:48:54 PM	17/2/2023 02:48:54 PM	Partial	Stone, Stella	<div><div></div><div></div><div></div><div></div></div>
<div>Enrol</div>	00015	Stewart, Margret	2023 Addip Building Design - CSEREA00009	1/30		Tasmania		17/2/2023 02:44:06 PM	17/2/2023 02:44:06 PM	Applied	Stewart, Margret	<div><div></div><div></div><div></div></div>
<div>Status</div>	00014	Scott, Sonny	Automatic Smart Fees - CSEREA00020	1/0		Victoria		17/2/2023 02:33:32 PM	17/2/2023 03:15:43 PM	Enrolled	Cameron, Gemma	<div><div></div><div></div></div>
<div>Email</div>	00013	Smitherson, Sam	Feb2022 - CSEREA00025	0/10		New South Wales		17/2/2023 02:13:28 PM	17/2/2023 02:55:18 PM	Interview	Cameron, Gemma	<div><div></div><div></div><div></div></div>
<div>Archive</div>	CA00012	OFR00012	Scott, Sonny	Linking Smart Fees to a Course - CSEREA00021	0/0	Victoria		17/2/2023 02:10:29 PM	17/2/2023 02:58:50 PM	Ineligible	Cameron, Gemma	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>	CA00011	OFR00011	Stark, Sam	Feb2022 - CSEREA00025	0/10	Queensland		17/2/2023 02:07:55 PM	17/2/2023 02:58:14 PM	Payment Pending	Cameron, Gemma	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>	CA00010	OFR00010	Smith, Satvika	2023 Addip Building Design - CSEREA00024	0/30	Victoria		16/2/2023 04:06:41 PM	16/2/2023 04:08:07 PM	Withdrawn	Kaminski, Bridgette	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>	CA00009	OFR00009	Smith, Spencer	2023 Addip Building Design - CSEREA00024	0/30	Victoria		16/2/2023 01:35:34 PM	16/2/2023 01:37:15 PM	Applied	Cameron, Gemma	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>	CA00008	OFR00008	Smith, Spencer	2023 Diploma of Accounting - CSEREA00018	3/30	Victoria		7/2/2023 02:54:40 PM	7/2/2023 02:59:12 PM	Enrolled	Cameron, Gemma	<div><div></div><div></div></div>
<input type="checkbox"/>	CA00007	OFR00007	Kehoe, Mark	2023 Addip Building Design - CSEREA00009	1/30			7/2/2023 02:01:08 PM	20/2/2023 10:10:42 AM	Applied	Cameron, Gemma	<div><div></div><div></div><div></div></div>
<input type="checkbox"/>	CA00006	OFR00006	Stark, Sam	2023 Addip Building Design - CSEREA00009	1/30	Queensland		2/2/2023 02:24:54 PM	20/2/2023 10:10:54 AM	ID Documents	Cameron, Gemma	<div><div></div><div></div></div>

Kanban

View Archived Applications

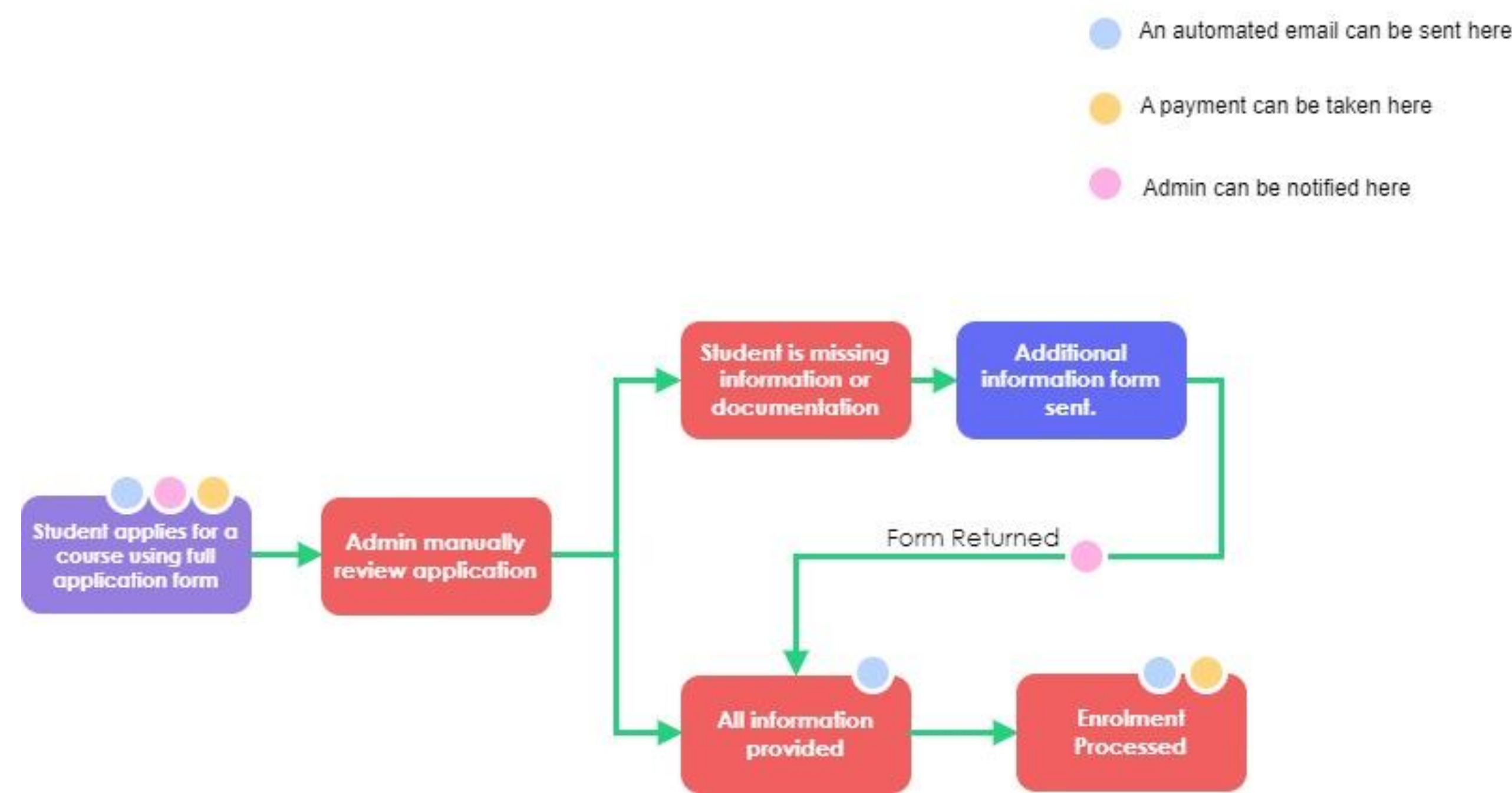
Switch to list view

Use the ‘show archived’ filter



Suggested Setup

Standard VET Course



Kanban Status	Course Application Status
New Applications	Applied
	Duplicate
	Partial
Under Review	Interview
	In Progress
Application Incomplete	Compliance Info
	ID Documents
Complete	Ineligible
	Unsuccessful
	Withdrawn
	Enrolled

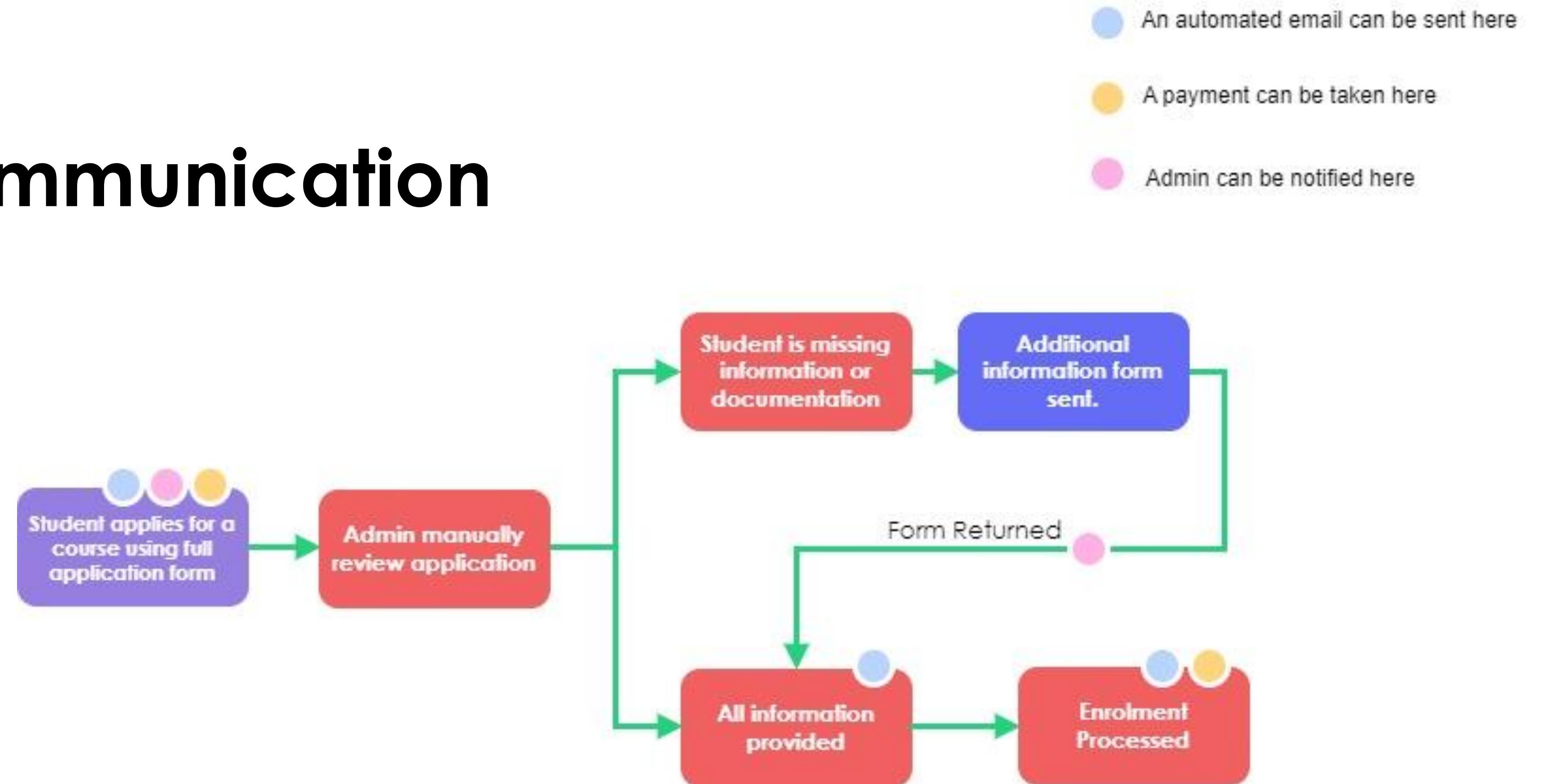
Lets go do it!

Let's take a look at:

- Kanban
- Customising
 - Kanban Status'
 - Course Application Status'



Automated Communication



Automated Communication

Email Template

Communications > Templates > Course Application

Shows all default templates in your system

You can:

- Create new template
- Modify existing template

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Search...

Q

Gemma Cameron
ReadyTech Education

Home

Community

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Courses

Scheduling

Services

Sales

Communications

Reports

Administration

Help

Entity

Entity > Course Application > Letter List

List

Notes

Categories

Templates

Checklist

Letters & Forms

Categories

Templates

Automation

Automations

Conditions

Other

Fields

Search

☐ Include Disabled Templates

Type	Name	Category	Status	System
HTML	Application Received	General	Enabled	<input type="checkbox"/>
HTML	Application Unsuccessful	General	Enabled	<input type="checkbox"/>
HTML	Application Withdrawn	General	Enabled	<input type="checkbox"/>
HTML	Compliance Information	General	Enabled	<input type="checkbox"/>
HTML	Confirmation of Enrolment	General	Enabled	<input type="checkbox"/>
HTML	Eligibility Criteria Not Met	General	Enabled	<input type="checkbox"/>
HTML	Identification Documents	General	Enabled	<input type="checkbox"/>

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Automated Communication

Modifying a Template

Keep it enable if you want to use it

HTML format for emails

Use the dropdown to select the correct entity

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Entity

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Automation

Automations

Conditions

Other

Fields

Compliance Information

Edit | Letters & Forms Template

UpdateCancelDelete

Details

Name

Compliance Information

From

Subject

Application Incomplete - Compliance Information

Status

Enabled

Disabled

Format

HTML

Text

Type

Layout

Clear: A4 Portrait

Category

General

Document Category

Applications

Portal

☐

Authorised User Group

Content

Dear {party[other_name]},

Upon reviewing your application, it has come to our attention that you did not supply all the requested information.

Please click the following link and fill in all the required fields [https://onboarding.jobreadyplus.com/survey/69234?party_identifier={party\[party_identifier\]}](https://onboarding.jobreadyplus.com/survey/69234?party_identifier={party[party_identifier]})

As we continue to review your application, please access our online Student Portal, where you can view documents related to your application, as well as view your Course Application progress.

Click the below link to activate your account on the student portal:

{party[student_portal_activation_link]}

If you have any questions relating to your application, or the use of the Student Portal, please contact one of our friendly staff on {system[primary_phone]}.

Course

assessment_method

assessor_email

assessor_name

assessor_phone

coordinator_email

coordinator_name

coordinator_phone

course_code

course_employer

course_end_time


Automated Communication

Template Fields

Template Field Mappings Index



Template Field Mappings - Party Records

 **Ash Wayling**
Modified on: Wed, 1 Mar, 2023 at 10:53 AM

The following is a list of available Template Fields for Party Record information.

NAME OF FIELD	RELEVANT ENTITY	SYSTEM LOCATION / NOTES
abn	Party ABN	Party profile > Details <i>Note: shows ABN listed on details page and not what is displayed in international settings</i>
address_list	Full Address list	Party profile > Details page > Address <i>Note: only includes street number, Street name and suburb</i>
anzsic_description		
contact_email	Party Primary Email	Party profile > Details
contact_firstname	Party First name	Party profile > Details
contact_method	Preferred Contact Method	Party profile > Details page > Admin

Automated Communication

Linking Templates

Link email templates to Course Application Status

Administration > Lookups > Courses Application Setup > Statuses

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Course Application

Course Application Status > Edit

Online Forms

Statuses

Status Details

Kanban Settings

Brands

Form Preferences

save

cancel

Status

Name:

Compliance Info

Colour:

Compliance Info

Kanban Status:

Application Incomplete

Default Email Template:

General: Compliance Information

General: Compliance Information

General: Application Received

General: Application Unsuccessful

General: Application Withdrawn

General: Compliance Information

General: Confirmation of Enrolment

General: Eligibility Criteria Not Met

General: Identification Documents

Require Reason:

Duplicate Status:

Offer Accepted Status:

Enabled:

Email Templates

Automated Communication

Linking Templates

New Applications4

CA00016 | OFR00016Stella Stone

CSEREA00006

Certificate III in Business

Partial

CA00015 | OFR00015Margret Stewart

CSEREA00009

Advanced Diploma of Building Design

Applied

CA00007 | OFR00007Mark Kehoe

CSEREA00009

Advanced Diploma of Building Design

Ms Gemma Cameron

Applied

Under Review2

CA00013 | OFR00013Sam Smitherson

CSEREA00025

Certificate II in Government

Prof Tom Thomas

Interview

CA00004 | OFR00004Salazar Smith

CSEREA00009

Advanced Diploma of Bu

In Progress

Application Incomplete3

CA00011 | OFR00011Sam Stark

CSEREA00025

Certificate II in Government

Mr Theodore Alan

Payment Pending

CA00006 | OFR00006Sam Stark

Glenda Green

Spencer Smith

Complete6

CA00014 | OFR00014Sonny Scott

CSEREA00020

Diploma of Accounting

Enrolled

CA00012 | OFR00012Sonny Scott

CSEREA00021

Diploma of Accounting

Ms Gemma Cameron

Ineligible

CA00010 | OFR00010Sativika Smith

CSEREA00024

Advanced Diploma of Building Design

Dr Tyler Trent

Withdrawn

CA00008 | OFR00008Spencer Smith

CSEREA00018

Diploma of Accounting

Enrolled

CA00003 | OFR00003Sam Stark

Application Status

Set application status to:Compliance Info

Set Assignee:Tom Thomas

Send Email:☒

Save

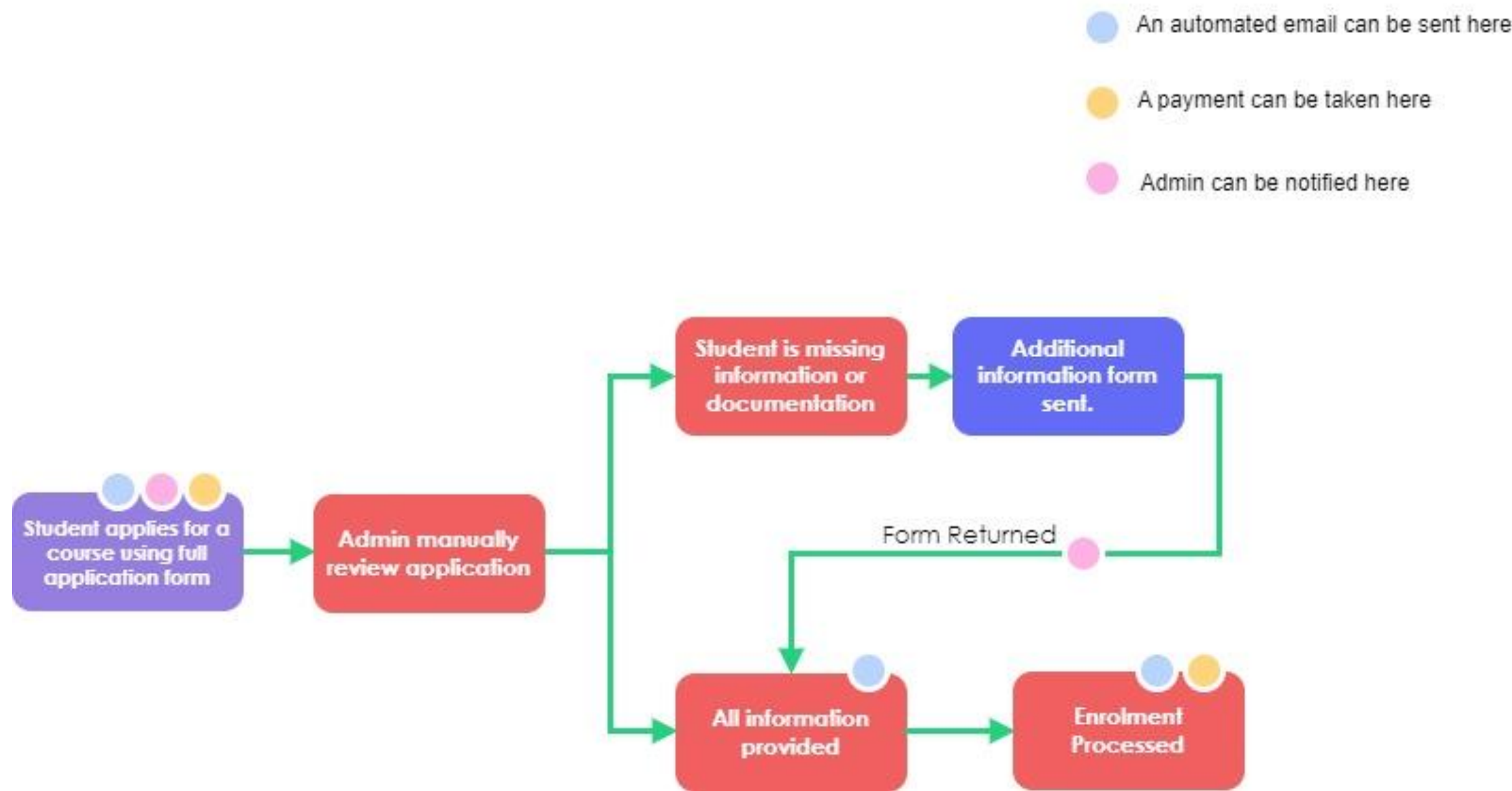
Advanced Diploma of Building Design

Prof Tom Thomas

Applied

Suggested Setup

Standard VET Course



Kanban Status	Course Application Status	Default Email Template
New Applications	Applied	Application Received
	Duplicate	
	Partial	The system sends this automatically
Under Review	Interview	
	In Progress	
Application Incomplete	Compliance Info	Compliance Information Missing
	ID Documents	Identification Documents Missing
Complete	Ineligible	Eligibility Criteria Not Met
	Unsuccessful	Application Unsuccessful
	Withdrawn	Application Withdrawn
	Enrolled	Confirmation of Enrolment

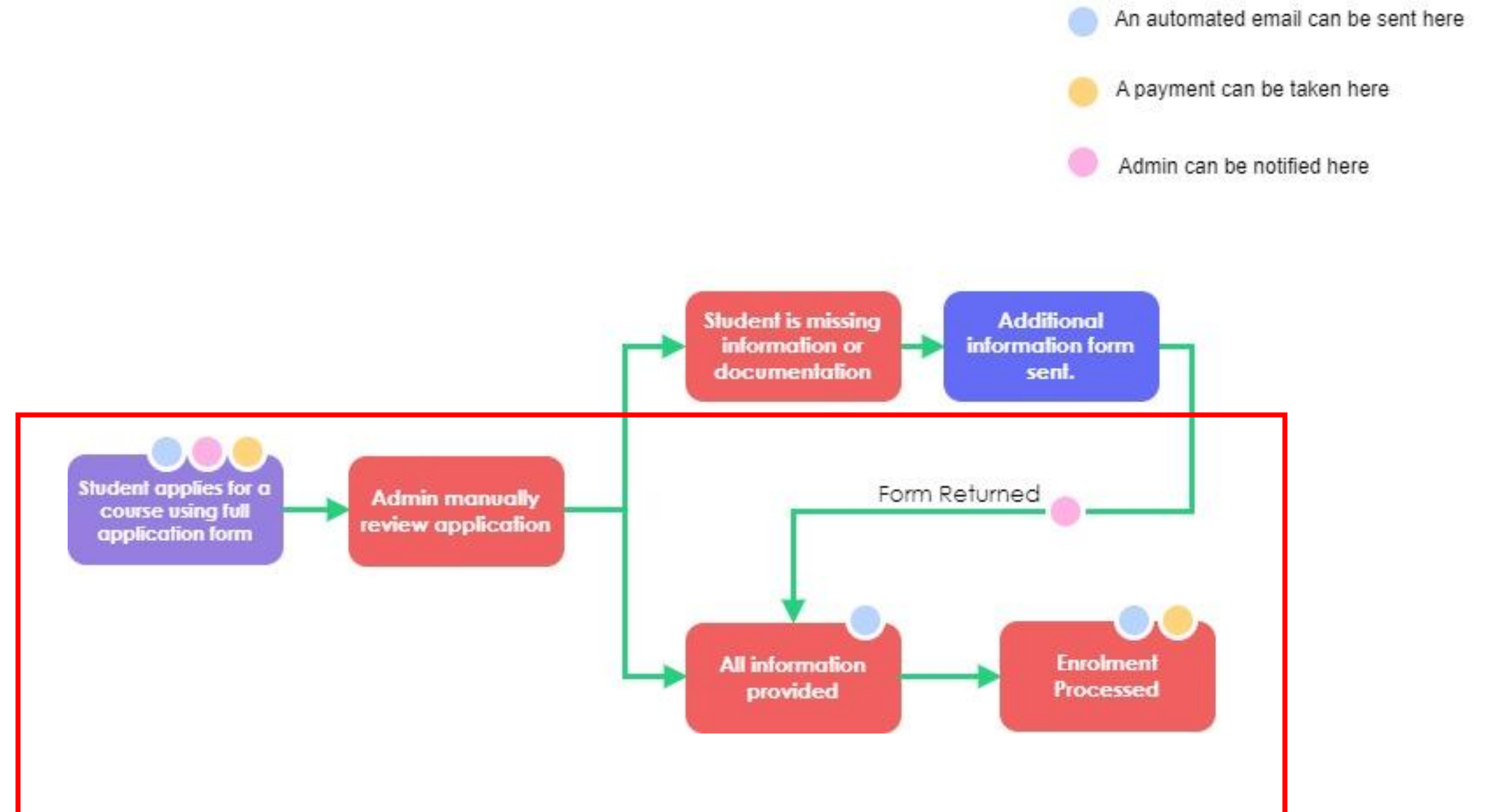
Lets go do it!

Let's take a look at:

- Creating an email template
- Attach email template to a Course Application Status
- Show template being used in Kanban view



Walk Through



Lets go do it!

Let's take a look at:

- Online applications process





ReadySMS Automated Workflows



ReadyTech Education

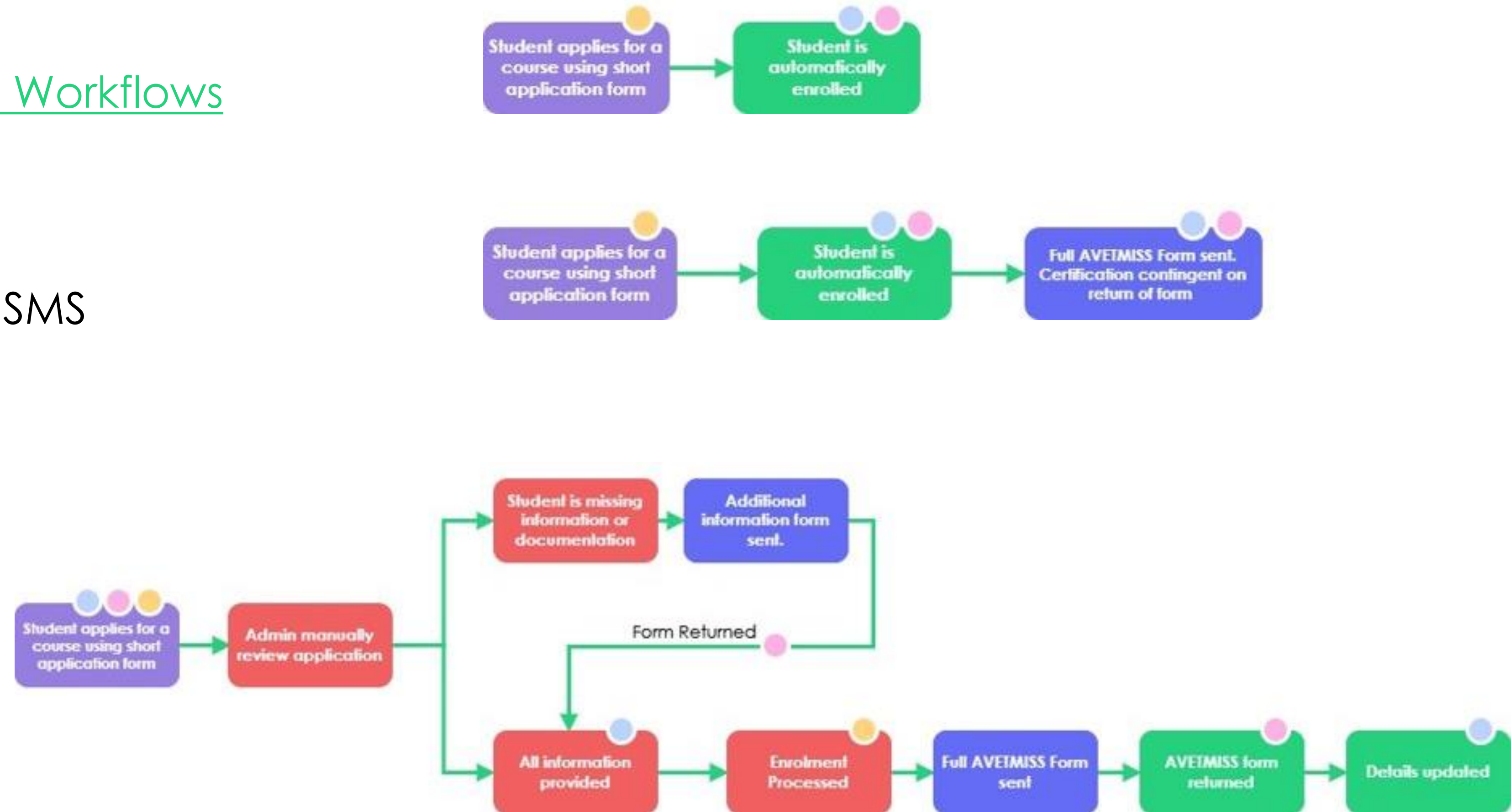


ReadySMS Automated Workflows

Where to from here?

Read the [ReadySMS Automated Workflows article](#)

- How to select your workflow
- Setting up the workflow in the SMS



Lets go do it!

Let's take a look at:

- Take a look at workflows
[ReadySMS Automated Workflows article](#)



Summary

What have we done today?

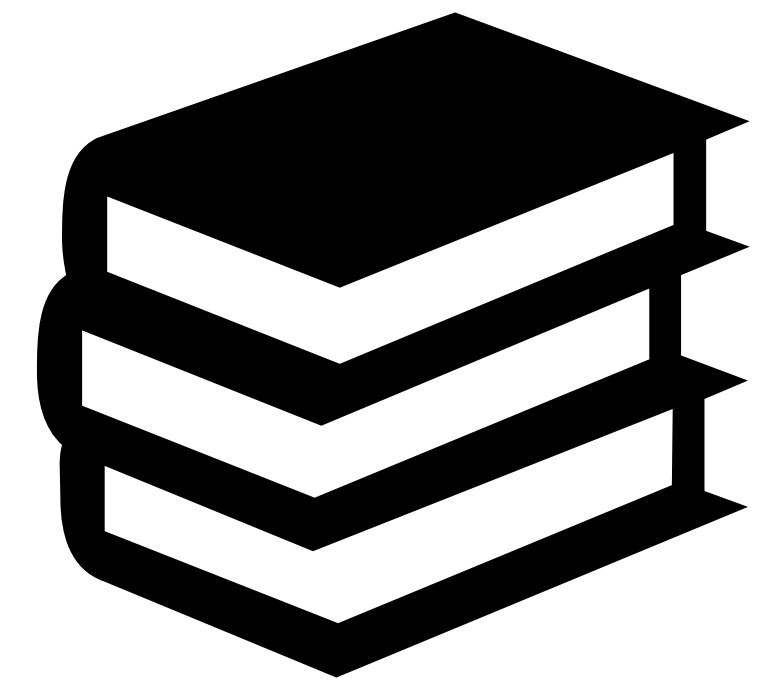
- Example workflow
- Practically setting up the workflow
 - Online course forms
 - Kanban
 - Automated Communication
 - Additional Forms (Information/AVETMISS)
 - Staff Notifications
 - Payments
- Duplicate records



Action Items

What do I need to do after today's session?

- Work through the [ReadySMS Automated Workflows article](#)
- Bookmark the [Template Field Mappings Index](#)
- Start considering which workflow is most appropriate for your organisation
- If you're using, set up:
 - Online course form/s
 - Kanban status'
 - Course application status'
 - Email templates to link to course applications
 - Additional forms (Information/AVETMISS)
 - Staff Notifications – if required

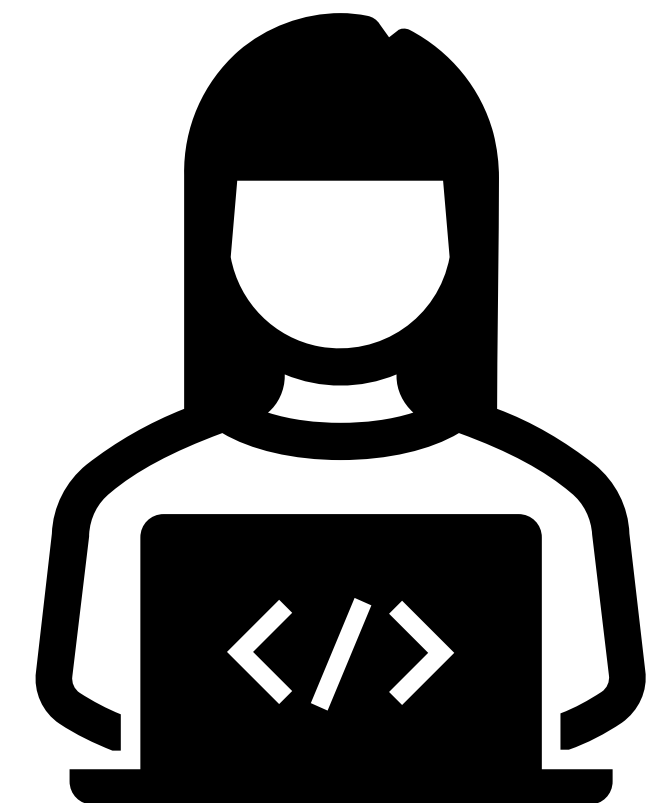


Enjoyed today's session?

[Please navigate to article here](#)

Here you will find all the information and resources for this series

- A copy of the PowerPoint slides
- Links for resources relevant to today's session
- Details on the materials required for upcoming sessions
- Booking links for upcoming sessions
- Recordings from today and previous sessions



Thank you

For more information please contact:

Support

- E: support@ewp.readytech.io
- P: 02 9018 5525

Onboarding

- E: customeronboarding@ewp.readytech.io