

# Radius

## Publish Contracts

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- 7 Unpublish Contract  $\rightarrow$

#### **Publish Contracts (Re-Enrollment)**

The Enrollment and Re-Enrollment process is the same. Re-Enrollment is demonstrated below.

Getting Ready for Enrollment: Set up **Merchant Account** and payment details Set up **Enrollment Years** details by division

#### **Open Enrollment for Each Division**

#### **Function: Enrollment**

• From the SETUP submenu, select Enrollment Years

YOUR FUNCTIONS		
< ENROLLMENT	ADMINISTRATION	PEOPLE
ENROLLMENT CENTER	REPORTS	SETUP
Enrollment	Reports	Enrollment Forms
Re-Enrollment		Master Checklist
Approvals		Master Decision List
Data Explorer		Enrollment Years
PROSPECTS Prospects		See 1
Approvals		
	hatio	it and

- The Search window will open listing each division. You may see multiple seasons. Set the dates for each division.
  - Select a division for upcoming season

Enrollment Year Setup Home / Search	h									
<< Hide	Quick Search:									-
Load Saved Filter 🗸										Search
Save Filter 🗸 Reset 🍄 🗸	۰ 🗴									Copy + Add
Filter by	Division	Year 🚽	ENR Current Year	RE-ENR Current Ye	ENR Open	RE-ENR Open	ENR Visible From	RE-ENR Visible From	ENR Visible To	RE-ENR Visible To
All Enrollment Year Setups	Early Childhood Center	2019-2020	No	No	Yes	Yes	02/01/2019	11/01/2018	08/28/2019	08/01/2019
	Upper School	2019-2020	No	No	Yes	Yes	02/01/2019	11/01/2018	08/28/2019	08/01/2019
	Elementary School	2019-2020	No	No	Yes	Yes	02/01/2019	11/01/2018	08/28/2019	08/01/2019
	Middle School	2019-2020	No	No	Yes	Yes	02/01/2019	11/01/2018	08/28/2019	08/01/2019
	Early Childhood Center	2018-2019	Yes	No	Yes	No	12/13/2017		12/15/2017	

• The window defaults to top menu item, Admission Decisions

#### o Select Re-Enrollment

	Home/Se							
Upper School 201	9-2020						< 2 of 28	<ul> <li>Skip to: Upper School (2019</li> </ul>
	<< Hide							
Admissions	tion							
Decisions	live	Decision Name	Decision Type	Portal Display Name	Abbreviation	Include in ENR	Portal Visible	Checklist Visible
		Prospect	Prospect	Prospect	PR	No	Yes	No
Maintenance		Accepted	Accepted	Accepted	A	Yes	Yes	No
		Cond'l Accept	Cond'l Accept	Cond'l Accept	CA	No	Yes	No
Enrollment		Regret	Regret	Regret	R	No	Yes	No
Do Envellment		Postponed	Postponed	Postponed	Р	No	Yes	No
Re-Enrollment		Withdraw	Withdraw	Withdraw	WD	No	Yes	No
		Incomplete	Incomplete	Incomplete	1	No	Yes	No
	Yes	Declined	Declined	Declined	D	Yes	Yes	No
	Yes	Intl Reject	Intl Reject	Intl Reject	IR	No	Yes	No
	Yes	Waitpool Reg	Waitpool Reg	Waitpool Reg	WR	No	Yes	No
	Yes	Waitpool Special	Waitpool Special	Waitpool Special	WS	No	Yes	No
	Yes	Need Signed Agr	Need Signed Agr	Need Signed Agr	NS	No	Yes	No
	Yes	Need Dep	Need Dep	Need Dep	ND	No	Yes	No
	Yes	Enrolled	Enrolled	Enrolled	E	Yes	Yes	No

#### Click on the EDITING button to toggle edit mode on/off



Contrastive School - Settings Contrast				
<ul> <li>Select Current Year</li> <li>Select Current Year</li> <li>Select Student Enrollment Status <ul> <li>See details below</li> <li>Require profile Update</li> <li>Secure all contract signatories to sign</li> <li>Require any contract signatories</li> <li>Set the Contract status values</li> <li>The following status values will be used for tracking contracts:</li> <li>After publishing the contract to the signatories</li> <li>The signatory has started progress:</li> <li>In Progress</li> <li>While the submitted contract is proving i. Awaiting Approval</li> </ul></li></ul>	<e hide<br="">Admissions Enrollment Re-Enrollment Settings Contracts Checklass Re-Enrollment Custom Fields Re-Enrollment Contract urtsh</e>	Community School - Settings The following settings apply to all divisions in Community School - Sun Valley: Open for Re-Enrollment: Contract Visible Dates: Visible From: 11/01/2018  Visible Fro: 08/01/2019  Current Year:	The following statuses c	<ul> <li>Re-Enrollment  Settings</li> <li>Check 'Open for Re-Enrollment' box</li> <li>Set Contract Visible Dates</li> </ul>
After the signatory has started progress*:       In Progress         While the submitted contract is pending approval*:       Availing Approval	HTML	Upper School Settings The following settings only apply to Upper School: Require profile update:		<ul> <li>Select Current Year</li> <li>Select Student Enrollment Status <ul> <li>See details below</li> </ul> </li> <li>Require Profile Update</li> <li>Determine Signatories</li> <li>Set the Contract status values <ul> <li>These will display</li> <li>graphically in widgets</li> </ul> </li> </ul>
		After the signatory has started progress*: In Progress While the submitted contract is pending approval*: Awaiting Approval		

In Registrar, set the Next Year Enrollment Status to the school defined value indicating a contract will be prepared for the student. (Pending, Invite Back, Send Contract, etc.)

Student Enrollment Status

- These options will match the statuses you use in Ascendance
- These will differ between school
- Values with checkmarks will be visible in drop down
  - Status values must match the values you have established in Ascendance.

9 checked	~		
clined			
olled			
aduate			
d-Academic			
)			
Returning			
ding			
Enrolled			
hdrawn			

- Select the Save button when you are finished
- Success message will appear

Success	×
Record Saved!	

Save

#### **Use the Search Window**

#### **Function: Enrollment**

• From ENROLLMENT CENTER submenu, select Re-Enrollment

YOUR FUNCTIONS			
< ENROLLMENT	ADMINISTRATION	PEOPLE	>
ENROLLMENT CENTER Enrollment Re-Enrollment Approvals	REPORTS Reports	SETUP Enrollment Forms Master Checklist Master Decision List Enrollment Years	ADMISSIONS Ravenna
PROSPECTS Prospects Approvals			

<< Hide	Quick Sean	ch:			Year:			Division:		G	rade:				
Saved Filter 🗸 🗸					Current: 201	8-2019 🗸		All	~	A	All	~			Sea
re Filter 🗸 Reset 🗘 🗸								Enrollment Stat	us:	C	ontract Status:		Student Group:		C
								All	~	4	All	~	All	~	
by									_					_	
Students	• 🕅								Po	st Re-Enrollmen	nt Data 📔 Publis	h Contract 🛛 🖂 Send E	mail 💿 View Saved	Contracts D	Unpublish C
Enrollment Information	Select 4	21 students							_						
ents	SEAR			U.F.											
triculation		Last Nat	ne	First Name	e Grade 🛦	Year	Division	Enrollment St.	. Contract Statu	Student Grou	p Has Signatories	Contract Name	Published Date	Deposit Paid	Signatu
ecklist Item	BEGA	012 Begamania		arol	PK	2018-2019	Lower School	Re-Enrolled	In Progress	Student	Yes	reenrollment	10/08/2018	Walved	No
	LERO	012 Lerondar	Jh Li	isa	PK	2018-2019	Lower School	Re-Enrolled	Approved	Student	Yes	reenrollment	01/26/2018	Walved	Yes
	STON	012 Stonnagan	S	amantha	PK	2018-2019	Lower School	Pending	In Progress	Student	Yes	reenrollment	07/27/2018	No	No
	BECK	012 Beckswith	Ja	ason	PK	2018-2019	Lower School	Pending	No Data Posted	Student	Yes				
	WEIX	011 Weixetter	т	imothy	PK	2018-2019	Lower School	Re-Enrolled	Approved	Student	Yes	reenrollment	01/26/2018	Walved	Yes
	QUIN	011 Quinnlivan	N	/lelissa	РК	2018-2019	Lower School	Pending	No Data Posted	Student	Yes				
	LAWR	1013 Lawreston	S	arah	к	2018-2019	Lower School	Re-Enrolled	Approved	Student	Yes	reenrollment	01/26/2018	Walved	Yes
	GREE	012 Greenfield	C	olleen	к	2018-2019	Lower School	Re-Enrolled	Approved	Student	Yes	reenrollment	01/26/2018	Waived	Yes
	BROV	V013 Brown	Jo	ohn	к	2018-2019	Lower School	Re-Enrolled	Approved	Student	Yes	reenrollment	01/26/2018	Waived	Yes
	JOSEC	Joselton	N	Aark	К	2018-2019	Lower School	Withdrawn	No Data Posted	Withdrawn	Yes				
	PARK	013 Parker	N	Aary	к	2018-2019	Lower School	Pending	In Progress	Student	Yes	reenrollment	01/26/2018	Walved	Yes
	MILLO	12 Millston	N	AcKenna	к	2018-2019	Lower School	Re-Enrolled	Approved	Student	Yes	reenrollment	01/26/2018	Walved	Yes
	YACU	012 Yacumatto	A	nn	К	2018-2019	Lower School	Re-Enrolled	Approved	Student	Yes	reenrollment	01/26/2018	Walved	Yes
	YACU	013 Yacumatto	С	harles	К	2018-2019	Lower School	Re-Enrolled	Approved	Student	Yes	reenrollment	01/26/2018	Waived	Yes
	FICH0	021 Ficherman	D	Daniel	К	2018-2019	Lower School	Withdrawn	No Data Posted	Withdrawn	Yes				
	-														
	144 44	1 2 3 4	5 6	7 8 9	10 _ 🍽	<b>H</b> 1	5 Titems per	page							1 - 15 of 421

TOP PANE: Quick Filters allow for quick sort of records.

- Enter the word Brown in Quick Search field to list students in Search Grid whose name contains 'Brown'.
- Use Year, Division, Grade, Enrollment Status, Contract Status and Student Group alone or in combination, to search for a subset of students

Quick Search:	Year:	Division:		Grade:				
	Current: 2018-2019 🗸	All	~	All	~			Search
		Enrollment Status:		Contract Status:		Student Group:		Clear
		All	~	All	~	All	~	

#### LEFT PANE: Filters allow for more refined searches or queries

- Example: search for boarding students:
  - Expand Matriculation menu by clicking + icon
  - $\circ$  Select Board/Day from the list
- Refine the filter
- Select an operator: Is Equal To
  - Select a value: Board

	<< Hid
Load Saved Filter	~
Save Filter 🗸 Rese	st 🌣 🗸
Filter by	
🗄 All Students	
Re-Enrollment Informa	tion
Parents	
Matriculation	
Checklist Item	

o Select Apply button



- Save frequently used filters
  - Select 'Save Filter'
  - Enter a name for the filter
  - Select Save icon

	<< Hide
Load Saved Filter	~
Save Filter 🗸 Reset	••
Board	
🗄 All Students	
Re-Enrollment Information	
⊕ Parents	
Matriculation Board / Day is Board	<i>∢</i> ×
🗄 Checklist Item	

- Load Saved Filter
  - Select down arrow to search for saved filters
  - Select 'Board'



Use the Reset button to remove loaded filters

Expand the gear button to set, clear and manage filters

Re-enrollment Task Buttons (common tasks used throughout the season)





#### **Tool icons: Settings and Export**

- Settings
  - $\circ~$  Select 'Columns' to add columns to the search grid (shown below)
  - $\circ\;$  Select 'Settings' and select Restore Default Settings button to reset default columns for the search screen.



- Export data for all students included in latest search (i.e. 44 Boarding students on search window)
  - Select 'Export Visible' to download only columns that the user has selected
  - o Select 'Export All Data' to download all columns available in Re-enrollment



Selecting checkboxes next to a student name does not affect exported data. If you select two students on the list and export there will be 44 names in Excel file.

#### Search Window Views: Search Grid and Pivot Table

Toggle between Search Grid and Pivot Table to explore your data

	SEARCH GRID													
I		ID	Last Name	First Name	Grade 🔺	Year	Division	Enrollment						
(		BEGA012	Begamanian	Carol	РК	2018-2019	Lower School	Re-Enrolle						
(		LERO012	Lerondar	Lisa	PK	2018-2019	Lower School	Re-Enrolle						
(		STON012	Stonnagan	Samantha	PK	2018-2019	Lower School	Pending						

Search Grid is standard list view

- Pivot Table allows for multiple ways to view the data.
  - Select a View on the left (Heatmap, Table and Charts)
  - Select a Function on the right(defaults to Count)
    - Drag and drop fields from left to right

Load Saved Pivot Table	~	Save Pivot Table	✓ Rese	t					
SEARCH GRID									
Table 🔻		Count	▼ \$ ↔	Gender	٣				
Re-Enrollment Deposit Paid	•	Board Day *				Gender	Female	Male	Totals
Re Enronnene Deposier and				Board Day	Grade		T CHIMIC	1-narc	Totals
Re-Enrollment Signature Complete *		Grade *			9		1	5	6
				Deced	10		4	4	8
Enrollment Status *				Board	11		8	7	15
Division *					12		4	11	15
Briblen						Totals	17	27	44
Age *	i.								
Grade Type *									
City *									

#### **BOTTOM Navigation**

- Use page numbers and controls to scroll through pages
  - Set Items per page to 15, 25, 50 or 100
    - Image: Market with the state of the sta

#### TIP: Set Items per page to 15 for fastest load time

#### Post Re-Enrollment Data

From the Search Grid

- Select the checkbox next to each student for whom you want to prepare contracts
- Select the 'Post Re-Enrollment Data' button
- Windows will take you through each step

Dulck Sourch	Year: 2017- Decisio	2018 🗸	Post R	Re-Enro	Division:	Data		G				
Subt Souch	Year: 2017- Decisio	-2018 ¥			Division:			G				
Zufak Search	Year: 2017- Decisio	-2018 🗸			Division:			G	and a			
Quick Search	Year: 2017- Decisio	-2018 🗸			Division:			G	mla			
2ulck Search	Year: 2017- Decisio	-2018 🗸			Division:			G	under.			
2ulck Search	2017- Decisio	-2018 🗸							raue.			
Suick Search	Decisio				All	~		1	NI	~	Se	
		on:			Contract Sta	us:						
	Ali	~			All	~						
						1	1.00			10.44	1	
6						Se 54	nd Email 🔯 Post	Enrollment Data	View Saved Cont	racts 📝 Publish	Contract O Unpublish	
elect 6 prospects												
Last Name First Name	Grade	Year D	ivision	Decision	Contract Status	Published Date	Deposit Paid	Signature Comp	le Checklist Comple	Tuition Amount D	eposit Amount Applyin	
Boffone Terry F	PR2 201	17-2018 Prim	ary School A	Accepted	Awaiting Approva	01/24/2017	Yes	Yes	Yes	\$12,500.00	\$2,000.00 No	
Bumstead Christopher 7	7 20:	17-2018 Midd	le School /	Accepted	In Progress	01/26/2017	No	No	Yes	\$12,500.00	\$2,000.00 No	
Caldwell Joshua d	5 20	17-2018 Midd	le School E	Enrolled	Approved	02/16/2017	Yes	Yes	Yes	\$30,000.00	\$2,000.00 No	
Kobza Kendall F	PR1 20:	17-2018 Primi	ry School /	Accepted	In Progress	02/16/2017	No	No	Yes	\$30,000.00	\$2,000.00 No	
Lawrence Joshua 7	7 20:	17-2018 Midd	e School /	Accepted	In Progress	01/25/2017	No	No	Yes	\$11,000.00	\$2,000.00 No	
Manning Caitlin 8	3 20:	17-2018 Midd	e School A	Accepted	No Data Posted					\$0.00	\$0.00 No	
Bo Bu Ca Ko La Mi	16 prospects ast Name Pint Name frone Terry I matead Christopher : Meel Johns I bzs Kendall I vernce Johna I vernce Calific I I IP M 15 V II	1.6 prospects ast Name First Name Grade frone Terry PR2 20 matead Christopher 7 20 Christopher 7 20 beze Kendall PR1 20 versce Joshua 7 20 Califin 0 20 1 1 M M 15 T Rem per page	16 prospects         First Name         Grade         Year         DI           ast Name         First Name         Grade         Year         DI           ffone         Terry         PIR2         2017-2018         Pinn           metasd         Christopher         7         2017-2018         Midd           beel         Joshua         6         2017-2018         Midd           beal         Kendall         PE1         2017-2018         Midd           wrence         Joshua         7         2017-2018         Midd           wrenge         Catitin         8         2017-2018         Midd           1         IM         15         Terms per page         Midd	If & prospects         First Name         Grade         Year         Division           ast Name         First Name         Grade         2017-2018         Mixade School           from         Terry         FIR2         2017-2018         Mixade School           metaid         Christopher         7         2017-2018         Mixade School           bias         Kendult         FIR1         2017-2018         Mixade School           bias         Kendult         FIR1         2017-2018         Mixade School           wring         Catifin         8         2017-2018         Mixade School           wring         Catifin         8         2017-2018         Mixade School           4         1         W M         15<*	Té proportis         First Name         Grade         Year         Division         Decision           ast Name         First         PFI2         2017-2018         Primary School         Accepted           metada         Christopher         7         2017-2018         Middle School         Accepted           Midel         Johna         6         2017-2018         Middle School         Accepted           Midel         Johna         7         2017-2018         Middle School         Accepted           wrence         Johna         7         2017-2018         Middle School         Accepted           4         1         Middle         35         Term parage         Middle School         Accepted	16 prospects         First Name         Grade         Year         Division         Decision         Contract Status           Anno 100         Terry         PR2         2017-2018         Privacy School         Accepted         Amilting Approv.           metad         Christopher         7         2017-2018         Middle School         Accepted         Ini Progress           Meel         Johna         6         2017-2018         Middle School         Accepted         In Progress           wrence         Johna         7         2017-2018         Privary School         Accepted         In Progress           wrence         Johna         7         2017-2018         Middle School         Accepted         In Progress           wrence         Johna         7         2017-2018         Middle School         Accepted         In Progress           wrence         Johna         7         2017-2018         Middle School         Accepted         In Progress           wrence         Johna         7         2017-2018         Middle School         Accepted         No Dute Posted           4         W JW         15         Terms per case         Middle School         Accepted         No Dute Posted	36 prospects     35 prospect     35 prospects     35 prospect     35 prospects     35 prospect     35 prospect	If & prospects         First Name         Grade         Year         Division         Decision         Contract Status         Published Date         Deposit Paid           st Name         First Name         Grade         Year         Division         Decision         Contract Status         Published Date         Deposit Paid           from         Terry         FR2         2017-2018         Prismary School         Accepted         Ammiting Approved         Division         First Name         Paid Name         First Name	Send Email         Open Envolvement Data           16 prospects         Send Email         Image: Part Envolvement Data           st Name         First Name         Grade         Vair         Division         Contract Status         Published Data         Decosit Paid         Signature Composition           fflore         Terry         FR2         2017-2018         Model School         Accepted         Amilting Approved D1/26/2017         Vies         Vies           Medial         Only Association         6         2017-2018         Model School         Accepted         Im Progress         01/26/2017         No         No           Medial         Only Association         7         2017-2018         Model School         Accepted         Im Progress         01/26/2017         No         No           Medial         Only Association         7         2017-2018         Model School         Accepted         Im Progress         01/25/2017         No         No           watering         Johnua         7         2017-2018         Model School         Accepted         Im Progress         01/25/2017         No         No           watering         Califin         8         2017-2018         Model School         Accepted         No Data Posted <td>Image: Send Email         Image: Send Email         <th co<="" td=""><td>Image: Send Ernal         Image: Send Ernal         Decision         Contract Status         Published Date         Decision Contract Status         Published External         Decision         Contract Status         Published External         Decision         Contract Status         Published External         Decision         Contract Status         Published External         Published External         Decision         Contract Status         Published External         Published External         Published External         Published External         Published External         Published External         Published External</td></th></td>	Image: Send Email         Image: Send Email <th co<="" td=""><td>Image: Send Ernal         Image: Send Ernal         Decision         Contract Status         Published Date         Decision Contract Status         Published External         Decision         Contract Status         Published External         Decision         Contract Status         Published External         Decision         Contract Status         Published External         Published External         Decision         Contract Status         Published External         Published External         Published External         Published External         Published External         Published External         Published External</td></th>	<td>Image: Send Ernal         Image: Send Ernal         Decision         Contract Status         Published Date         Decision Contract Status         Published External         Decision         Contract Status         Published External         Decision         Contract Status         Published External         Decision         Contract Status         Published External         Published External         Decision         Contract Status         Published External         Published External         Published External         Published External         Published External         Published External         Published External</td>	Image: Send Ernal         Decision         Contract Status         Published Date         Decision Contract Status         Published External         Decision         Contract Status         Published External         Decision         Contract Status         Published External         Decision         Contract Status         Published External         Published External         Decision         Contract Status         Published External         Published External         Published External         Published External         Published External         Published External         Published External

- Enter data necessary to populate contract
- Two 'Other Amt' fields available. (i.e. New student Fee, Teacher Fund)
- Two Date fields available for contract (i.e. First installment, Teacher Fund)
- Select Next

-Enrollment Da	ata Posting					
	Re-Enrollme	nt Data			Actions	
Tuition Amt:	\$	24,000.00	Dollars	Update	Do Not Update	
Deposit Amt:		\$2,000.00	Dollars	Undete	De Net Hedete	
or	% of (	Tuition - Av	wards)	Update	Do Not Update	
Other Amt 1:		\$500.00	Dollars	Update	Do Not Update	
Other Amt 2:		0.00	Dollars	Update	Do Not Update	
Deposit Due:	02/15/2019	Ê		Update	Do Not Update	
Installment 1 Due:	05/01/2019	<b>m</b>		Update	Do Not Update	
Installment 2 Due:	07/01/2019	Ê		Update	Do Not Update	
				N		Next Car

#### A blank field will default to "Do Not Update".

If you want to clear any data in an existing field you can leave the data field empty and select Update.

Re-Er	nrollment Data Posting								8
Total	l students selected: 2								
Warr	nings: None								
Clic	k Confirm to post enrolli	ment data	for the selected stud	lents.					
✓ Se	elect all 2 students								
~	Last Name	~	First Name	~	Contract Status	~		Year	~
-	Lane	J	bhn		No Data Posted		2019-2020		
	Luppert	Ja	ine		No Data Posted		2019-2020		
144	<b>€ 1 → →</b> 10	<ul> <li>items per</li> </ul>	r page					1-2 of 2 iter	ms
							Previous	Confirm Ca	incel

- Confirmation box
  - o Select Confirm
  - A Success message will appear

Success	×
Successfully posted for 2 students	

Note the Tuition Amount and other posting details in the table.

SEARCH C	RID II PIVOT	T TABLE					
luition Amoun	Deposit Amoun	Deposit Due Date	Other Amount 1	Other Amount	Installment 1 Due Date	Installment 2 Due Date	Scholarship An
\$24,000.00	\$2,000.00	02/15/2019	\$500.00	\$0.00	05/01/2019	07/01/2019	
\$24,000.00	\$2,000.00	02/15/2019	\$500.00	\$0.00	05/01/2019	07/01/2019	

#### **Publish Contracts**

- Choose student(s) who need contracts and select Publish Contract
- Step through Wizard

Step 1: Select Students

		ante Gono	2	-3	
	5.00	General General	ate contract	review & Publish	
tal students selected: 2					
Marninge: Nono					
varmigs. None					
warnings. None					
Select all 2 students					
Select all 2 students					
Select all 2 students	First Name	Grade	Year	Division	Contract Status
Select all 2 students  Last Name Lane	First Name John	Grade 12	Year 2019-2020	Division Upper School	Contract Status Data Posted
Select all 2 students           X           Last Name           Lane           Luppert	First Name John Jane	Grade 12 12	Year 2019-2020 2019-2020	Division Upper School Upper School	Contract Status Data Posted Data Posted

#### Step 2: Generate Contract

- Choose Contract
- Select Signature requirement
- $\circ$  Next



Gene

2019-2020

2019-2020

Previous

3

Previ

& Publish

Open "Send email" wizard after publish process is complete

Upper School

Publish Now

8

Q

Q

Save & Publish Later

1-2 of 2 items

Cancel

#### Step 3: Preview & Publish

- Check the box to Open "Send email" wizard after publish process is complete
- Update Publish Date
- Deselect a student if necessary
- Set Columns (Gear)
- Export to Excel (Excel)
- Preview contract
  - If you use conditional statements in your contracts you need to publish before you can preview

10 • items ner nage

V

Ê

12

• Conditional Example: show Family Fee only shows if Other Amount 2 is >0

Publish Contract

Total students selected: 2

Select all 2 students

₩ ₩ 1 >> >>

Last Nan

🖌 Luppert

🌣 🕅

Contract Publish Date: 1/25/2019

 $\circ~$  Select Publish Now

*TIP: Contracts that use conditional statements must be published to render accurately. During the testing period you change the visible date to be a date in the past so the contract is not visible to any parent.* 

Jane

If you choose Save & Publish Later use the View Saved Contracts button when you are ready to



#### **Send Email**

Step through Email Wizard

#### Step 1: Pick Template

- Check Signatories
- $\circ$  Select Next



#### Step 2: Recipient List

 $\circ \, \text{Select Next}$ 



#### Step 3: Preview/Edit Email

• Use Edit icon to personalize



- Use arrow in blue header to advance through recipients
- o Select Send

#### Step 4: Results Log

- o Review Recipients
- o Select Close



	Pick Template	Recipient List	Preview/EditEmail	Results Log	
umber of Successful emails:	2				
mber of Failed emails: 0					
X					
Contract Signatory	Primary Emai	il Student	Name Contract S	itatus Email Status	
ohn Lane	1000-000-000-000	John Lane	Published	Successful	
ohn Lane Jison Luppert		John Lane Jane Luppert	Published Published	Successful Successful	
ohn Lane Jison Luppert	10 Theme are not	John Lane Jane Luppert	Published Published	Successful Successful	2 itoms

#### **Review Student Re-Enrollment Details**

- From the Search Grid select a student name
- Turn edit mode to on as needed
- 4 menu items on left navigation: General, Contract, Transaction, Approval

#### **General view**

- o Re-enrollment Info
- o Student Info
- o Financial Aid

EDITING	arch/Re-Enrollment			< 13 of 19 > Skip to: John Lane	~
Q. View Full Record 10/28/2001 (Age 17) Male	12 2019-2020 ID Grade Year	Upper School Invite Back Division Enrollment Status	Data Posted Contract Status		
<< Hide	Re-Enrollment Info		Student Info		
Contract	Tuition Amt:	Deposit Due:	Student Group:	Enrollment Status:	
Transactions	\$25,000.00	02/15/2019	Student	Pending 🗸	- 1
Approval	Deposit Amt:	Installment 1 Due:	Division:	Board/Day:	- 1
	\$2,500.00	MM/dd/yyyy	Upper School 🗸	Day 🗸	
	% of (Tuition - Awards)	Installment 2 Due:	Grade:	Repeating:	
	Other Amt 1:	MM/dd/yyyy 🛗	12 🗸		
	0.00	100	Grade Type:	Faculty/Staff Child:	
	Other Amt 2:		~		
	0.00		Admission Year:	Mid Year:	
				Save	Cancel

#### Contract view (two tabs): ACTIVE CONTRACT | ARCHIVED CONTRACT(S)

- ACTIVE CONTRACTS tab shows contract progress
  - Turn edit mode on to override a setting
  - Scroll down to see signatories and checklist progress

#### **Note:** Options for View and /or Unpublish a contact from Active Contract tab.

	Home / Sea	rch / Re-Enrollment		
	<< Hide	ACTIVE CONTRACT ARCHIVED	D CONTRACTS (1)	
General				
Contract		Contract Information		
Transactions		Contract Name:	Deposit Paid:	Q View Contract
Approval		19BRD-FA_SCHOL	⊘ No	C Unpublish
		Published Date:	Override and mark as Paid	
		11/26/2018 09:29 PM	Signature Complete:	
		Received Date:	No	
		<b>m</b>	Override and mark as Complete	
		Contract Portal Visibility:	Checklist Complete:	
		• contract of the visibility.	⊘ No	
			Override and mark as Complete	

Visible To: 8/1/2019	<b>**</b>								
ontract Signa	atories								
Send Ema	il			Contract Signature: Any	One		Total Deposit:	\$2,000.00	
			Total Sig	gnature(s) Required: 1			Amount Received:	\$0.00 Pending	
			Si	ignature(s) Pending: 1			Balance:	\$2,000.00	
Actions	Name	Relation	Relationship Group	Contract Signature	Amount Received	Signed	Signature Date	User ID	Note
Ø	John Lane	Father	Parent/Guardian	Optional	\$0.00	No			
0	Alison Lane	Mother	Parent/Guardian	Optional	\$0.00	No			

**Note:** The user can email Signatories directly from Active Contract tab.

**Note:** The user can mark an item Complete from Active Contract tab.

E-ENI	ROLLMENT CHECKLIST	PROC	RESSION				✓ Mark Required	Com
<u>2</u> ctions	Checklist Item	R	Status	Completed	Ľ	Media	Notes	
	Checklist Item Student Parent Handbook	R	<b>Status</b> Not Submitted	Completed	ü	Media	Notes	

ARCHIVED CONTRACTS tab will show history of unpublished contracts

 You cannot delete a contract

ACTIVE	CONTRACT	ARCHIVED CONTRACTS (3)		
Contract:	2017-18 FIXED	COND Non-Faculty Pre-Rollover (04/07/20 🗸	1	
Contract	2017-18 FIXED 04/07/2017 09:34	COND Non-Faculty Pre-Rollover AM		
2017	2017-18 FIXED 04/03/2017 03:46 2017-18 FIXED	COND Non-Faculty Pre-Rollover PM COND Non-Faculty Pre-Rollover	Paid: Yes lete: Yes	Q View Contract Note: This is an unpublished Contract
Rollo	04/03/2017 03:14 Published [	PM	lete: 🕑 Yes	Archived Date:

#### **Transactions view**

Details about online payments\will be listed here. The user can also manually add a payment here, ex: if a check was mailed to the school or payment by credit card over the phone.

<< Hide								
General	Radius/Portal User	Paver Name	Amount Received	Payment Date 👻	Payment Method	Transaction ID	Payment Source	Notes
Contract		Paver Count: 0	\$0.00					
Transactions		Tuyer count.o	\$0.00					
Approval								

#### **Approval view**

- Enrollment Status must be changed on approval. Note the red text!
- Responses to any custom fields used in the contract will be listed here

<< Hide	Canaral Information					
General	Contractillana		Descript Pold		0	
Contract	reenroliment		Deposit Paid:		ų	View Contract
Approval	Received Date: 01/28/2018		Signature Complete:		Appr	oved By:
			Yes     Chacklist Complete:		Appr 02/0	oved Date: 1/2018
			Yes			
	Student Group:	Division:	Grade:	Repeating:	International:	Enrollment Status*:
	Student	Lower School	1	No	No	Re-Enrolled 😪
						You must update the Envolment Status to a valid Enrolled status before you can approve this contract.
	Year:	Board/Day:	Faculty/Staff Child:		Grade Type:	
	2018-2019		No			
	Custom Fields			Add	itional Fields	
	Label 🔺		Value		Label	Value
		No data available.			No	o data available.

#### Unpublish a Student Contract

- Open a student record and Select 'Unpublish' Contract button
  - o Review the message
  - o Option to open Send Email if you need to update parent

Unpublish Contracts	8
Note: Contracts will be unpublished for (1/1) selected prospects.	
Unpublished contracts cannot be republished.	
You can access unpublished contracts in Archived contracts tab.	
✔ Open "Send email" wizard after unpublish process is complete	
	Unpublish Cancel

- Select Unpublish and will receive success message
- If you select Open "Send email" follow the wizard
  - $\circ$  pick the template, review the recipients, preview email, send, log

Pick from existing template: Unpublish Enrol (Note: Email will	Contract     Preview Email     Results Log  ment Contract     Add New Template resent to contract signatory and not to prospect)  metaries who have not signed the generalized contract.	
Name: EnrollmentUnpublishContract Display Text: Unpublish Enrollment Contract Subject: Enrollment Contract Unpublish	Type: System Sender's Email: ed Sender's Name:	
Attachments: Dear John, We have unpublishe Parent Portal, and v You can access your Thank you. Attachments: Pick Tr Pick Tr Communication Category Documents: Communication Category	BCC:	
Contract Signatory       Julie Manning	Pick Template Recipient List Preview Email Julie Manning - Enrollment Contract Unpublishe Dear Julie, We have unpublished the Enrollment Contract for Cait that was published earlier. This means that the in the Parent Portal, and you no longer have access to the Contract's details. You can access your Parent Portal online here. Thank you,	Results Log d
		Previous Send Cancel