

My BackPack™



FormBuilder



SeniorSystems

Introduction

We're pleased to introduce a totally new product: the FormBuilder. This product is designed to be a comprehensive form publishing tool, managed and distributed via My BackPack.

Features

- Collect payments for events, trips, and so much more with our new payment option, which can be posted to Accounts Receivable in Advantage
- Ability for My BackPack faculty and admin users to create online forms
- Ability for My BackPack faculty and admin users to accept documents and other files submitted online via a drop box
- Include information from the database via merge fields on forms and form-related notifications
- Update the database via merge fields
- Send form notifications and links
- Create templates for quick and easy repeated tasks
- Customize form approval workflow, including custom status definitions and field-by-field review options
- Archive submitted forms to your Advantage database, including Student, Applicant, Alumni, and Faculty



- Easy, user-friendly interface, fully integrated with My BackPack and Advantage
- Ability for Parent, Student, Applicant, Faculty, and all Communities to submit forms
- Reporting tools within both the FormBuilder and your Advantage applications, providing real-time updates on form submission status, response tallies, and more in PDF and Excel format!

How It Works

The FormBuilder allows faculty and admin users to create ad-hoc online forms, publish them to any My BackPack user, then optionally archive the form to the database and update database fields based on form responses.

For example, the entire third grade is taking a field trip. The Dean wants to make sure the school has up-to-date contact information for all students. The Dean creates a form for all parents whose children are participating in the activity, using the FormBuilder. The Dean uses merge fields to pull parents' contact information based on the address information on record in the database. The Dean publishes the form, and then sends parents an email with a link to the form.

The parent will receive an email notification that a form is available in My BackPack, and should be submitted by a certain date. The parent can click a link from the email and go directly to the form (after logging into My BackPack for secure access). The parent will be able to confirm their contact information, update it if needed, then submit the form back to the Dean in a matter of minutes.

The Dean can review form submissions in Advantage, and accept contact information updates to be stored in the database.

In addition, the Dean can collect a small fee for this trip by adding a payment option to the form.





Feature Spotlight: Updating the database

The FormBuilder is fully integrated with your Advantage database. This means that certain merge fields available in the FormBuilder are directly linked to the information on record in the database. Some merge fields can even be updated in the database via a submitted form! Note that not all merge fields update the database. Select fields are available, and some simply display field values on the form.

Field Listings

STUDENT

Students can update general information about themselves, their primary residential address including phone numbers, and all custom fields.

Name: First Middle Last Suffix Preferred

General Info: DOB Tel. No. Email

Address: Home Address

Other: All Custom Fields Homeroom Advisor

PARENT

Parents can update general information about their student (or students). Parents can also update their own name and address information.

Student Name: First Middle Last Suffix Preferred

Student General Info: DOB Tel. No. Email

Name 1 & Name 2: Title First Middle Last Suffix Preferred Relation

Address: Home Address

Other: All Custom Fields

APPLICANT

Applicant parents can update general information about their applicant (or applicants), as well as their own name and address information. Additionally, applicants have access to visit data, alumni connection fields, and sibling connection fields.

Applicant Name: First Middle Last Suffix Preferred

Applicant General Info: DOB Tel. No. Email

Name 1 & Name 2: Title First Middle Last Suffix Preferred Relation

Address: Home Address

Admissions Fields: Attending (All three visits) Applying for Aid

Alumni Connection: Name Relation Grad Year

Sibling Connection: Name Grade Attending Applying No. of Siblings

Other: All Custom Fields Visits Financial Aid

Field Listings (Continued)


| FACULTY | |
|---|--|
| Faculty can update general information about themselves and their spouse, their addresses, and all custom fields. | <p>Applicant Name: <input type="text"/> First <input type="text"/> Middle <input type="text"/> Last <input type="text"/> Suffix <input type="text"/> Preferred <input type="text"/></p> <p>Applicant General Info: <input type="text"/> DOB <input type="text"/> Tel. No. <input type="text"/> Email <input type="text"/></p> <p>Name 1 & Name 2: <input type="text"/> Title <input type="text"/> First <input type="text"/> Middle <input type="text"/> Last <input type="text"/> Suffix <input type="text"/> Preferred <input type="text"/> Relation <input type="text"/></p> <p>Address: <input type="text"/> Home Address <input type="text"/></p> <p>Admissions Fields: <input type="text"/> Attending (All three visits) <input type="text"/> Applying for Aid <input type="text"/></p> <p>Alumni Connection: <input type="text"/> Name <input type="text"/> Relation <input type="text"/> Grad Year <input type="text"/></p> <p>Sibling Connection: <input type="text"/> Name <input type="text"/> Grade <input type="text"/> Attending <input type="text"/> Applying <input type="text"/> No. of Siblings <input type="text"/></p> <p>Other: <input type="text"/> All Custom Fields <input type="text"/></p> |
| CONSTITUENT | |
| Constituents can update general information about themselves, their primary home address, and all custom fields. | <p>Constituent &</p> <p>Spouse Name: <input type="text"/> Title <input type="text"/> First <input type="text"/> Middle <input type="text"/> Last <input type="text"/> Preferred <input type="text"/> Maiden <input type="text"/></p> <p>Primary Home Address: <input type="text"/> Full Name <input type="text"/> Line1 <input type="text"/> Line2 <input type="text"/> Line3 <input type="text"/> City <input type="text"/> State <input type="text"/></p> <p><input type="text"/> Zip <input type="text"/> Country <input type="text"/> Region <input type="text"/> DNP <input type="text"/> Tel. No. <input type="text"/> Fax No. <input type="text"/> 4 Phone# Fields <input type="text"/></p> <p><input type="text"/> DNP for all phone# fields <input type="text"/> Name1 Email <input type="text"/> Name2 Email <input type="text"/> DNP for Emails <input type="text"/></p> <p>General Info: <input type="text"/> Class Year <input type="text"/> DOB <input type="text"/> Birthplace <input type="text"/> Parent Year <input type="text"/> Home Page <input type="text"/></p> <p>Custom: <input type="text"/> All Custom Fields <input type="text"/></p> |

Feature Spotlight: Archiving forms

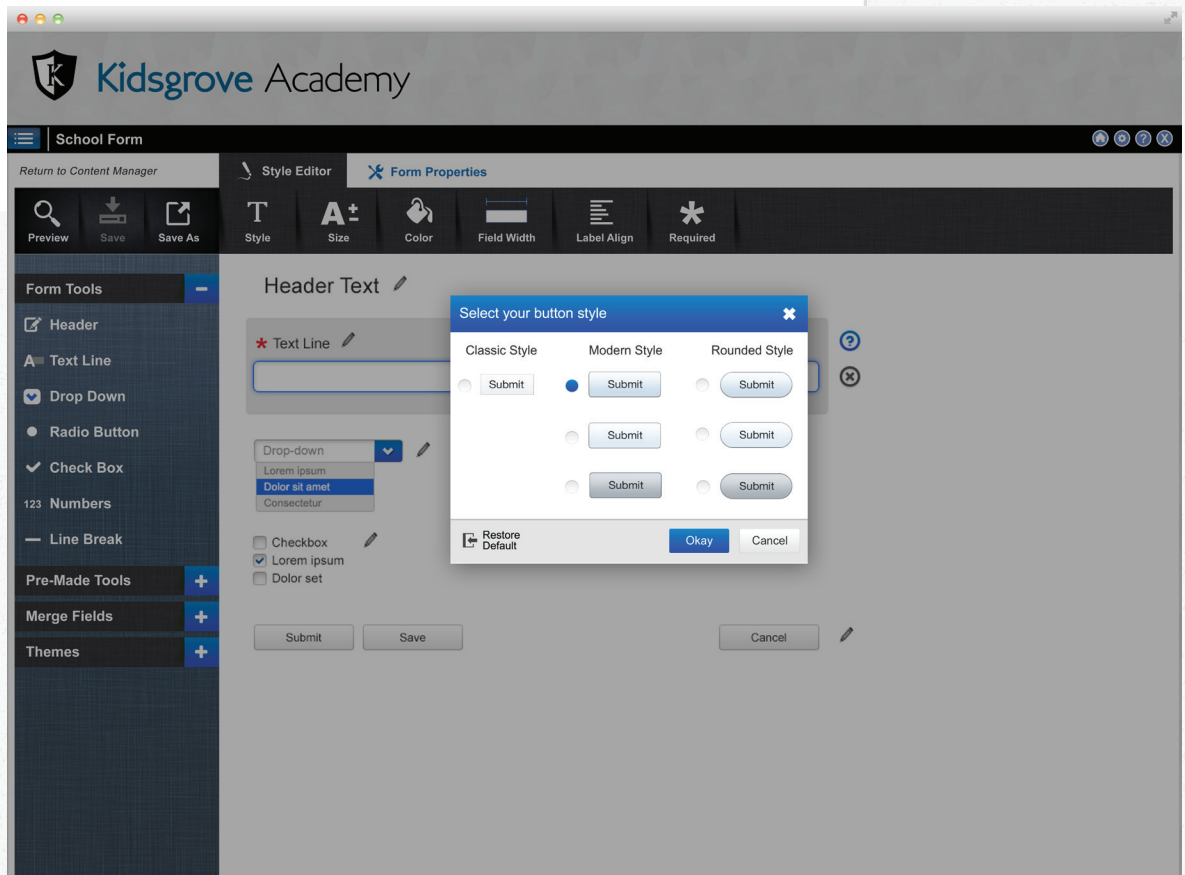
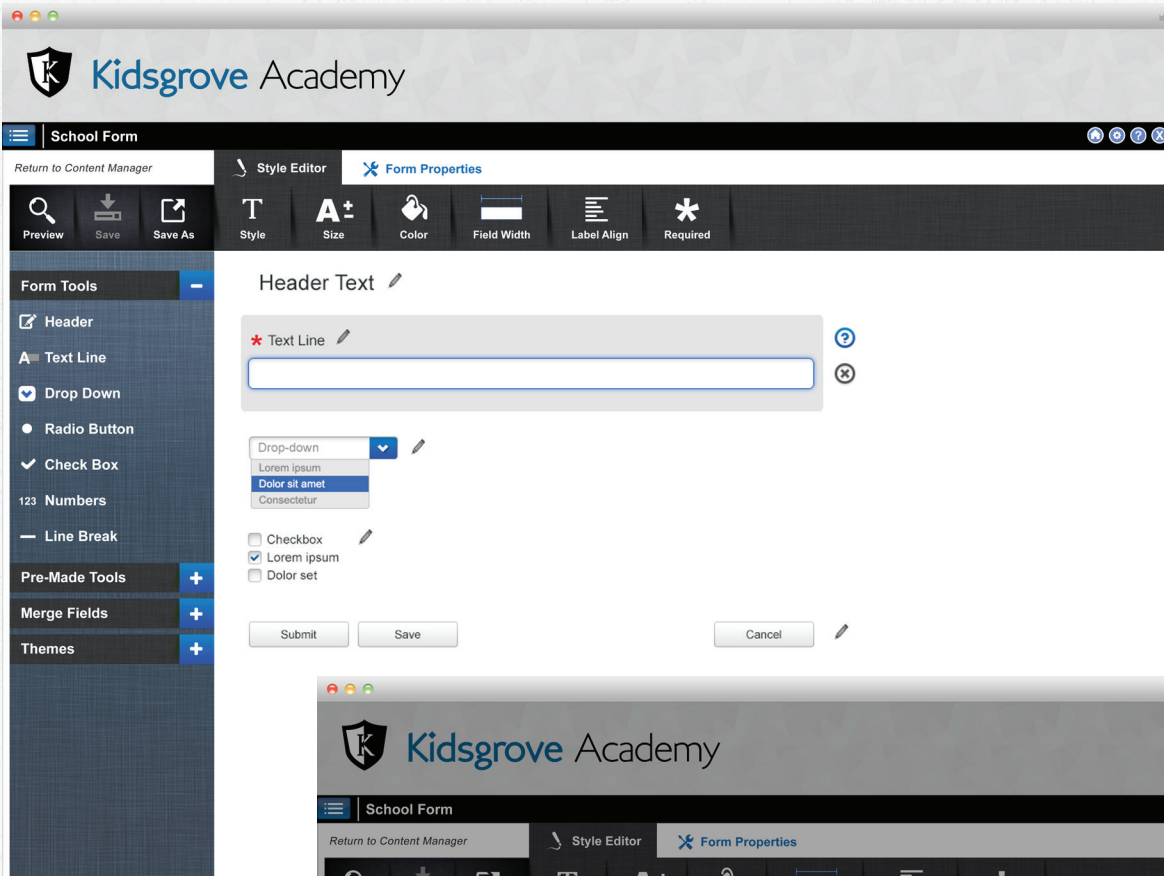
Forms can be archived to the database upon submission (archival is available for both forms and file submissions). Forms are archived to a record's Media tab as they were originally submitted. Archival is totally optional – there may be some types of forms that do not need to be stored in the database (for example, a simple RSVP request).

Archiving a form is a three step process.

1. When the form recipient submits a completed form, it becomes available for review in Advantage.
2. As part of the review process, the Advantage user can choose archival and publishing settings, including media security and whether or not the file is available in My BackPack.
3. Upon approval, the form is converted to PDF and stored in the database, on the Media tab.

| Upcoming Events  | |
|---|----------------------|
| For our upcoming event, please submit documentation needed for distribution. | |
| Name | File(s) |
| Jennifer Gates | event_directions.pdf |
| Linda Bahama | dress_code.doc |
| Bill Aruba | event_flyer.jpg |
| Jason Andres | contact_info.pdf |
| Kevin Criox | directory.doc |

Screenshots



Additional screenshots can be found on our website. Go to www.senior-systems.com/fb