**IMPLEMENTATION CHECKLIST& UNDERTAKING- ADMISSION MANAGEMENT\***

**Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name of In-Charge: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Designation & Contact No.: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Training Attended (Yes/No): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ My User id is working (Yes/No):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**I have checked the software functionality with sample/live Data (Yes/No):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Note:** All the points to be verified by Module In-charge/School Authority

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| --- | --- | --- |
| **Check list** | **Status (Y/N)** | **Implementation Consultant’s Remarks** |
|  |
| Online Enquiry & Registration form Integration with website |  |  |
| Auto No. Scheme for Enquiry, Form Sale, Registration, Admission No |  |  |
| Receipt No. Scheme for Enquiry, Form Sale, Registration, Admission No |  |  |
| Admission Initiation |  |  |
| Letter to Parent configured |  |  |
| Auto Enquiry SMS & Email Application SMS & Email Registration SMS & Email Confirmation SMS & Email |  |  |
| Initiate Admission for next academic session |  |  |
| Age Criteria Mapping |  |  |
| Admission Documents Mapping |  |  |
| Admission Payment Process (Linking with Fee Management) |  |  |
| Registration Schedule |  |  |
| Follow Ups for all Forms |  |  |
| Payment Gateway Integration for Registration Form Fee |  |  |
| Enquiry Dataport |  |  |

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| **Training Part** | | |
| Brief understanding of View Field Setup |  | Excellent Very Good Good Average |
| Brief understanding of Admission Notification |  | Excellent Very Good Good Average |
| Process of Admission Initiatation |  | Excellent Very Good Good Average |
| **Dashboard** \* Admission Summary \* Enquiry Dashboard \* Follow Up Dashboard \* Enquiry Analysis \* YOY Analysis |  | Excellent Very Good Good Average |
| Enquiries - Procedure explained |  | Excellent Very Good Good Average |
| Form Sale - Procedure explained |  | Excellent Very Good Good Average |
| Registration Forms |  | Excellent Very Good Good Average |
| Admission Payment |  | Excellent Very Good Good Average |
| Admission Confirmation |  | Excellent Very Good Good Average |
| **Communication** \* Send SMS \* Send Email \* SMS History \* Email History |  | Excellent Very Good Good Average |
| Admission Campaigns |  | Excellent Very Good Good Average |
| **Reports** \* Fee Day Book \* Admission Summary \* Admission Status Report \* Criteria Status Report \* Admission Report \* Interaction Report \* Document Report |  | Excellent Very Good Good Average |
| **Set Up** \* Admission Status \* Admission Follow Up Remarks \* Admission Instructions \* Source of Information \* Discard Reasons \* Prefer Mode of Communication |  | Excellent Very Good Good Average |

**Remarks by Module in charge (also mention if issue/requirements):**

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**Remarks by Implementation Consultant:**

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**DISCUSSION POINTS**

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**Signature of Implementation Consultant School Seal**