

Onward Israel CRM Update - 24.03.2021

Program Decisions (Opt-In /Opt-Out)

1. Mechanism that determines what type of "Decision letter" goes out to applicants on a specific program
 2. Updating refund issued per applicant by organizer
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The Program Decisions mechanism is run mostly by the OI team.
There is only 1 field that is editable to Organizers (and partners) and that is: "Refund Issued".
This field will be managed by organizers.

The process:

When a program announcement date is set up by the partner and Onward Israel team, the OI AM is putting in the date on the field on program page called: **OI Announcement Date**

Then, the following field is automatically updated with a date (+7 days forward) **Applicant Response Deadline**

The Onward Israel team is responsible to update the program details and mark the relevant field for sending out the relevant letter for applicants (In-person/Remote/Cancellation).

Four days after sending out this letter, an automatic reminder will be sent out to applicants that didn't submit an answer.

On the 8th day, the form to submit the applicant's answer will be closed so they won't be able to submit the answer.

Follow up:

We have created 2 new reports on CRM to follow up the submission of the answers:

The reports appear on this reports folder: *Onward Staff - for portal users*

Reports names:

-Program Announcements follow up

-Program Announcements -didn't answer yet

Refund issues:

When the time comes for the organizer to deal with the refunds, they must update on application page, when they issued the refund for this applicant, on the field: Refund Issued.

Below you can see the new fields on the Program and Application pages on CRM.

On the Application page you can basically see the applicant response and the automatic calculation the performed by the system, that gives us the indication about the refund for the applicant on this specific stage of the process.



See screen shots from the OI CRM:

Program page:

▼ Program Decisions (opt in/out)	
Send In-Person Decision Letter <input type="checkbox"/>	OI Announcement Date 4/7/2021
Send Remote Decision Letter <input type="checkbox"/>	Applicant Response Deadline 4/14/2021
Send Cancellation Decision Letter <input type="checkbox"/>	

Application page:

▼ Program Decisions (opt in/out)	
In-Person Opt-In by Applicant	Organizer Refund Date
Remote Opt-In by Applicant	Refund Needed
Cancellation Confirmed by Applicant <input type="checkbox"/>	Refund Issued <input type="checkbox"/>

For any further questions feel free to reach out directly.
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