How to Create a Prospect Inquiry Form

ACES[2] allows you to create Prospect Inquiry Forms to allow prospects to request information on your website, to allow your staff to quickly create prospect records, to register prospects for a recruiting event your school is holding (such as an open house), and to mark prospects as having attended a recruiting event.

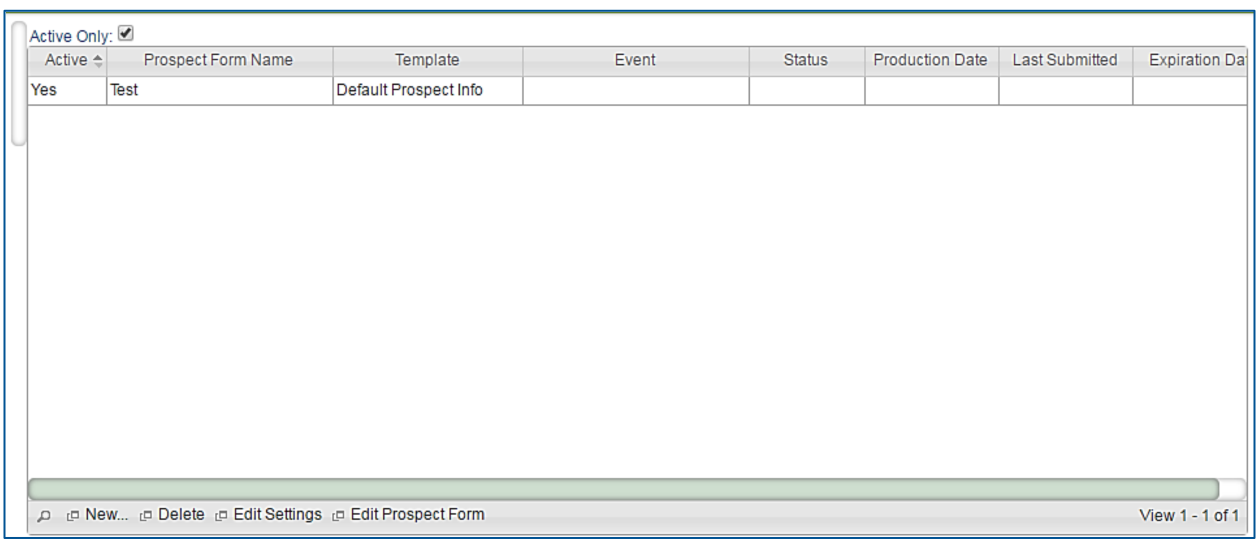
Create a Prospect Inquiry Form

1. From the home page, in the Utilities section, and under Information Exchange Design, select **Prospect Inquiry Forms**.

   OR

   From the menu tab, select **Utilities/Information Exchange Design/Prospect Inquiry Forms**.

   The Prospect Inquiry Form grid will display and show you the forms you currently have in your database.



   The grid will show you the following information:

   a. Active—Designates if the prospect inquiry form is currently active. (Only active forms can be edited.)

b. Prospect Form Name—The name you give the form.

c. Template—If you have created templates, you will see which template the form is based on. Default Prospect Info is the standard template.

d. Event—The recruiting event that this prospect inquiry form is associated with.

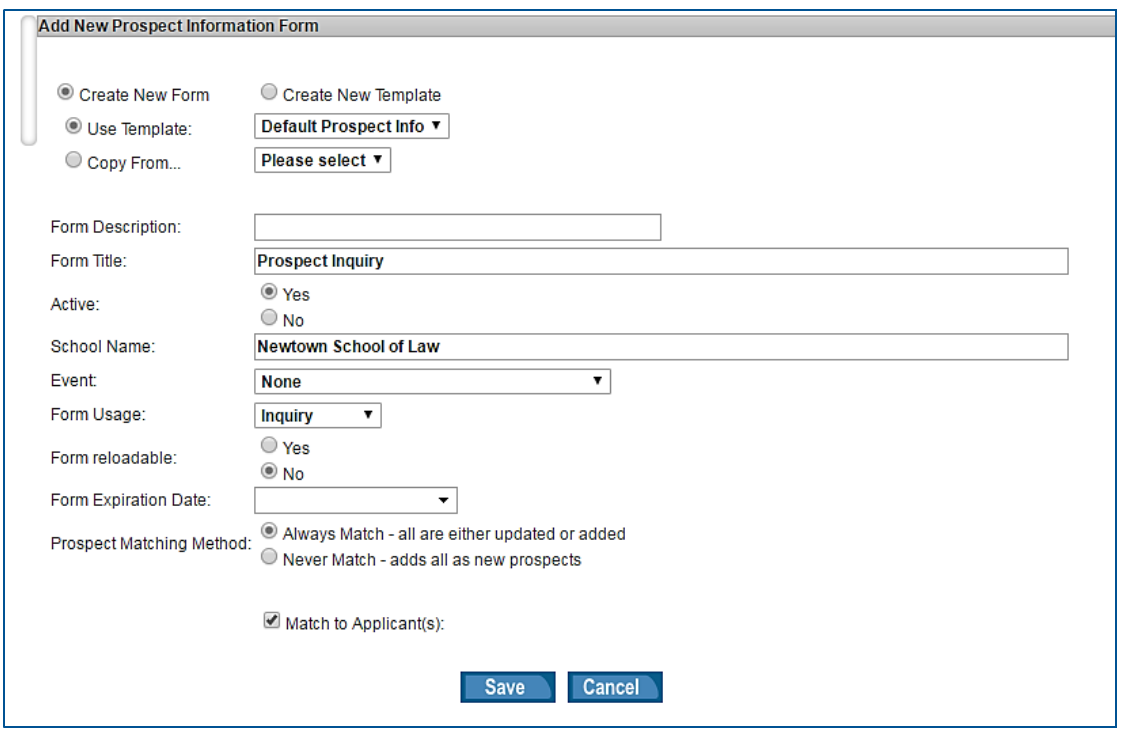
e. Status—Shows if the prospect inquiry form is in production (ready to use) or pending submission.

f. Production Date—The date the prospect inquiry form was originally finalized and made live.

g. Last Submitted—The most recent date the prospect inquiry form was edited, finalized, and put into production.

h. Expiration Date—The prospect inquiry form's expiration date (if applicable). If a date is entered, the link to the prospect inquiry form will no longer be valid as of that date. If users attempt to access an expired form, they will receive a message indicating it has expired.

2. Select **New** in the lower-left corner of the grid to create a new prospect inquiry form. This will display the settings window for the new form.



a. Choose **Create New Form** or **Create New Template**. A new template will allow you to choose your questions or form information once and reuse it for forms in the future without going through the question selection step. The default is Create New Form.

b. Choose **Use Template** or choose **Copy From** to copy an existing form. The default template is Default Prospect Info.

c. Create a name for your form. This is the name you will see on the grid, not the text on the actual form. The name can be up to 40 characters. This is required.

d. Create a form title. This is the title of the form that will appear on the form itself. The default is Prospect Inquiry. The title can be up to 180 characters and is optional.

e. Choose if you want the form to be active or not. If you deactivate a form, you will need to reactivate it before you can change or add questions or otherwise edit your form.

f. Choose how you want the name of your school to appear on the form. The default will be the standard school name from LSAC's records.

g. Choose a recruiting event you would like to associate with the prospect inquiry form. If you associate a recruiting event with a prospect information form, any prospects that complete the form will be associated with that recruiting event in ACES^2. You must create the recruiting event in your database before creating the prospect information form for the recruiting event to appear in the drop-down field.

h. Choose the Form Usage which most accurately reflects how you are using the prospect inquiry form. A prospect record will be created (or updated if matched to an existing record) for each option.

   - Inquiry—When paired with a recruiting event, ACES^2 will associate the prospect record with that recruiting event but will not mark the Registered or Attended checkboxes for the prospect.

   - Registration—Allows you to register prospects for your recruiting events. Prospects that complete the form will be associated with the recruiting event and the registered checkbox will be checked.

   - Attendance—Allows you to mark prospects as attended for your recruiting events. Prospects who complete the form will be associated with the recruiting event and the attended checkbox will be checked.

i. Choose if you would like the form to be reloadable or not. A reloadable form will automatically reload a blank form after a prospect completes and submits his or her information. This is useful when your staff is using the form to create new prospect records or when using the form to mark attendance at a recruiting event.

j. Select an expiration date to make the prospect inquiry form expire on a certain date.

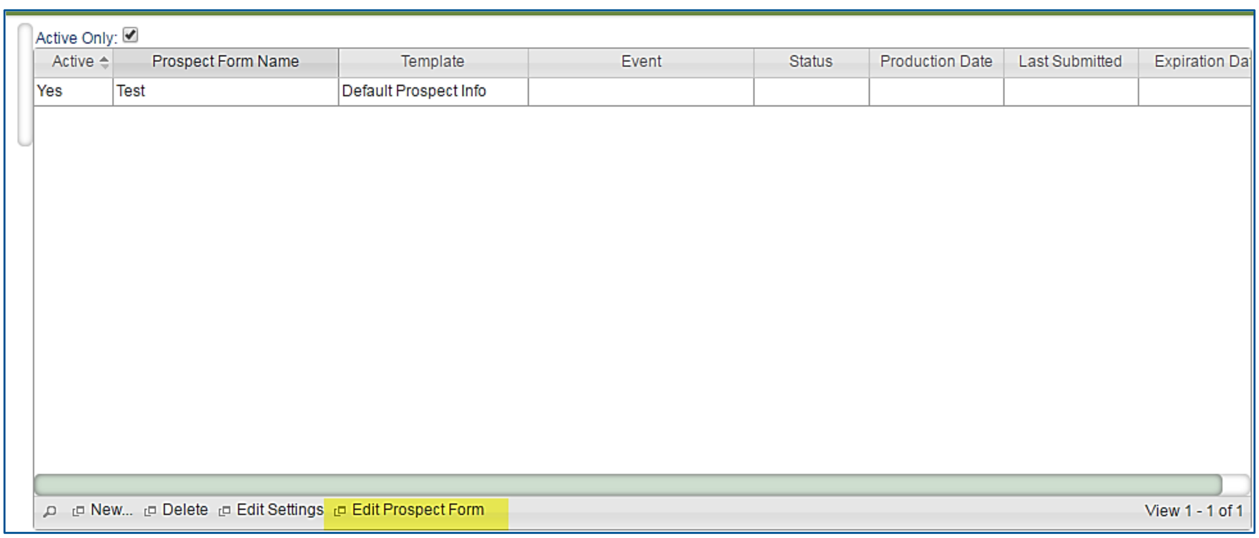
k. You can choose your Prospect Matching Method to determine if ACES^2 will match prospects to existing records in your database.

l. Checking the Match Applicant box at the bottom of the settings screen will tell ACES^2 to also attempt to match and update existing applicant records. When you select **Match Applicant**, both the prospect and applicant record receive notes indicating that a prospect record was created by the prospect inquiry form and promoted to the applicant record.

3. Once you have finished creating your prospect inquiry form settings, select **Save.**

Create Questions for your Prospect Inquiry Form

From the Prospect Inquiry Form grid, select the form name and click **Edit Prospect Form** to create or edit the actual form.



- The Status, Production Date, and Last Submitted columns will be blank when you create a new form as the form has not yet been completed and submitted. Only the form's settings have been created.

- The main form editing screen will display.

Prospect Inquiry Form: Test (Default Prospect Info)

Component	Include	
Instructions	☐	Edit
Questions	☑	Edit
Logo	☐	Edit
Thank You Email	☐	Edit

Edit Form Settings

Preview Submit

Here, you can see if instructions, questions, a form-specific logo, and a thank-you email are included. If any item is included, you will see a check in the box in the Include column.

1. Select **Edit** to edit or add any information to your instructions, questions, your logo, or thank-you email.

    - When you choose to edit your Instructions, a text editor will display. This editor allows you to include any instructions you want prospects to see at the top of your form.

2. When you choose to edit your questions, a list of 58 questions will display.

Active	Display Order	Short Description	Required	
☑	1	*Prospect Last Name*	☑	Edit
☑	2	*Prospect First Name*	☑	Edit
☑	3	*~~Prospect Middle Name~~*		
☑	4	Prospect Address	☐	Edit
☑	5	*Prospect Day Phone*	☑	Edit
☑	6	*~~Prospect Day Phone Ext~~*		
☑	7	Prospect Evening Phone	☐	Edit
☑	8	*~~Prospect Eve Phone Ext~~*		
☑	9	Prospect Email	☐	Edit
☑	10	*JD Coursework*	☑	Edit
☑	11	Prospect DOB	☐	Edit
☑	12	Prospect Gender	☐	Edit
☑	13	Prospect Entry Year	☐	Edit
☑	14	Prospect Time	☐	Edit
☑	15	Prospect Undergrad Study	☐	Edit
☑	16	Prospect Undergrad Degree School	☐	Edit
☑	17	Prospect Undergrad Degree Year	☐	Edit
☑	18	Prospect Undergrad GPA	☐	Edit
☑	19	*~~Prospect Ethnicity~~*		
☑	20	*~~Prospect Number In Party~~*		
☑	21	Prospect Account Number	☐	Edit
☑	22	*~~Prospect Degree Applied~~*		
☑	23	Prospect Residency	☐	Edit
☑	24	*~~Prospect Permanent State or Province~~*		
☑	25	*~~Prospect Preferred Method of Contact~~*		
☑	26	*~~Prospect Fax Number~~*		

- All 58 questions are selected for you and marked Active as the default.

- To make a question active or inactive, select or deselect the **Active** checkbox to the left of the question.

- The Display Order shows the numerical order in which the questions will appear on the form. You can change the order by dragging and dropping the questions in the order you want them to display on your form.

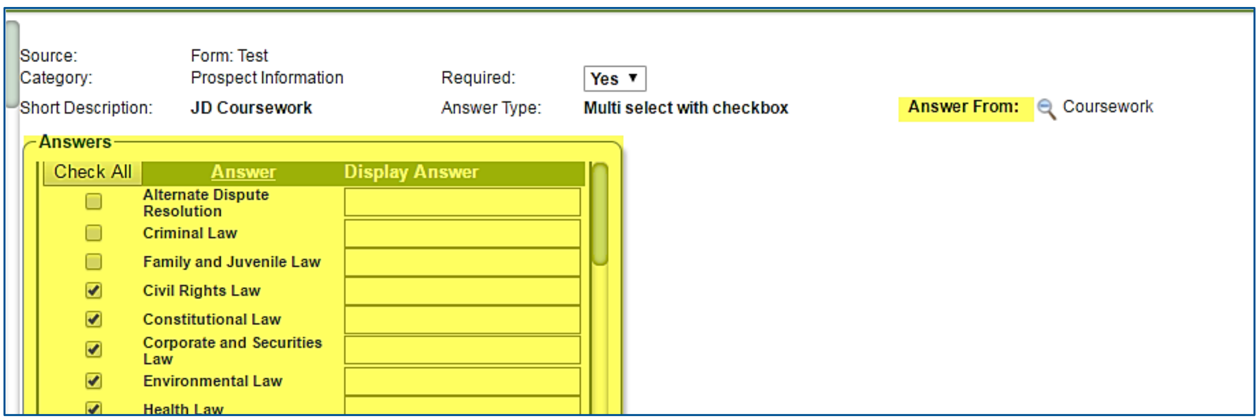
- The Short Description shows you a description of the question. This is also the field in which the prospect's information will flow into ACES^2 when the prospect record is created or updated.

- The Required checkbox lets you choose if the question should be required or not.

- Choose **Edit** to edit the question. For example, you may want to change Last Name to Family Name.

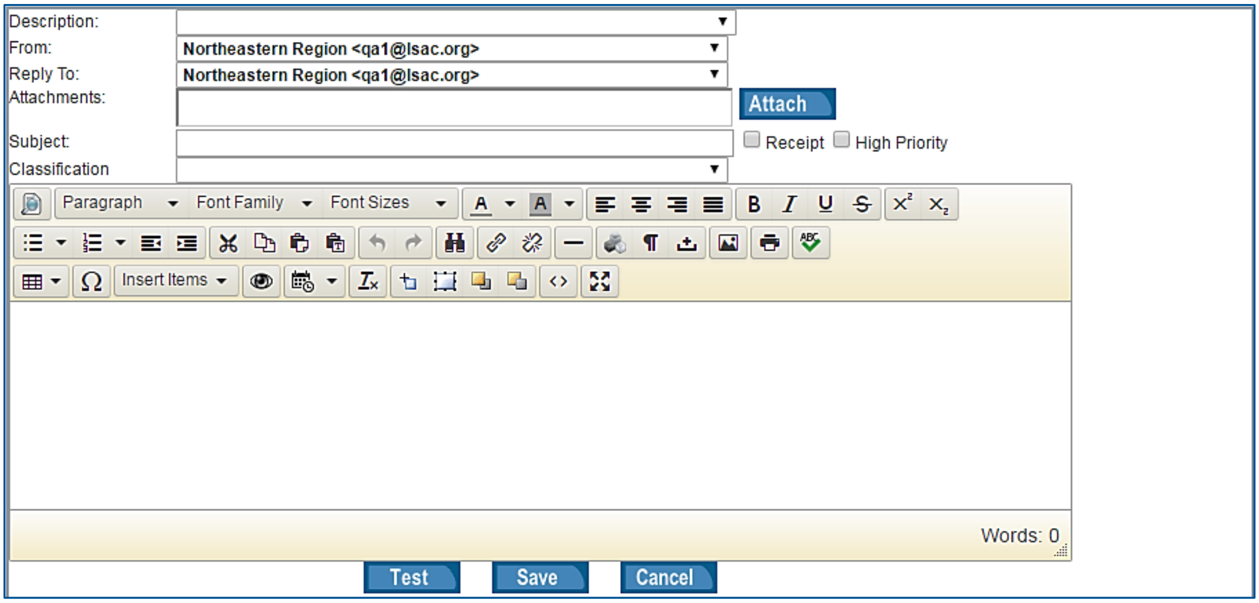
    - Make sure to save the form before editing specific questions if you have reordered questions, selected or deselected questions, or marked questions as required. Leaving this page without saving will cause you to lose your changes.

- Some questions allow you to select the answers the prospect has to choose from if the answers come from a predetermined list. JD Coursework or LLM Areas of Interest are two examples.



3. You can also upload your logo. If you do not, your schools logo from your FlexApp will be inserted.

4. You can create or edit a thank-you email that is set to everyone who completes your form.



- The Description drop-down field lets you choose an existing email from the Reports section of ACES^2.

- Determine who you want the email to appear as coming **From** and to what email address you would like listed as **Reply To**.

- You can insert Attachments—they must be 1MB or less.

- Enter the Subject of your email and check the boxes indicating if you would like to receive a Receipt telling you who received the email.

- Choose if you want the message sent as High Priority.

- Choose your email's Classification (marketing vs. transactional).

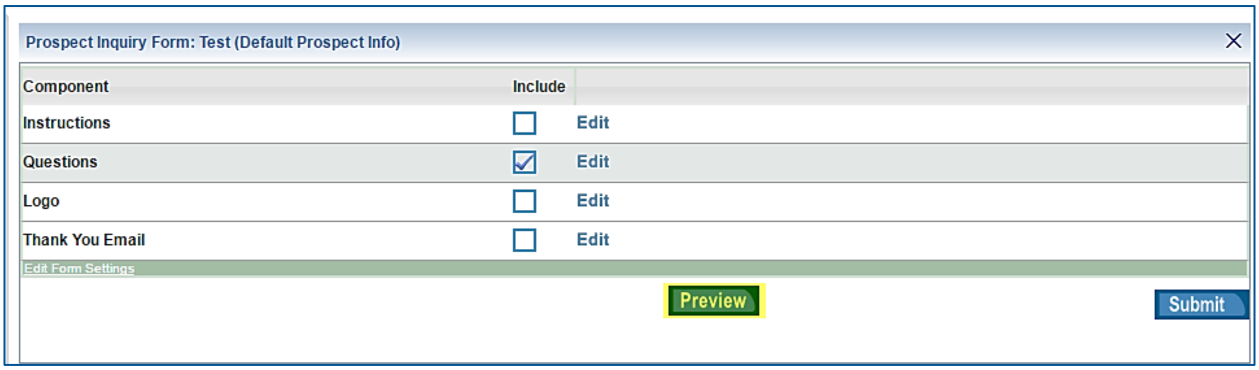
  If a prospect has opted out of emails from your school, they will no longer receive any marketing emails. They will continue to receive transactional emails.

  Remember to classify your marketing emails and insert an unsubscribe option.

- Use the text editor to create the body of your email. You can then select **Test** to send one copy of the email to yourself, select **Save** to save the email, or **Cancel**.

- Thank you emails are sent along with any other scheduled emails in ACES^2 and are processed every day. To unschedule a thank-you email, go to the Daily Check page, navigate to the scheduled reports section, and select **Remove** next to the email you want to unschedule.

5. Once you have completed your form, you can select **Preview** to preview your form. Select **Submit** to finalize the form and make it live.



6. When your prospect inquiry form is live, you can find the Form URL at the bottom left of the window. You can copy and post this link on your website or send it in emails to allow prospects to access and complete your form.

- If you make any changes to the form, be sure to resubmit it so the changes are published.