



Forms | Approvals | Workflow



## **School & District Edition Feature Sheet**



[permissionclick.com/booknow](https://permissionclick.com/booknow)

**1-844-PERMISSION**

FEATURE

ESSENTIALS

STANDARD

PRO

**Language Support**

Translates on-the-fly into over 100 languages leveraging Google Translate



**Multi-Account Management**

Users in your district can be added to multiple sites with roles customized for each site.



**Single Sign On**

Your users can sign in with existing district username or email and password

• **Single Sign-On**

Single-click to log in with your personal Google or Microsoft Live ID



• **District-account SSO (Available Upgrade)** District Feature

Single-click to log in with your school or district's existing Microsoft Active Directory credentials

• **Role Mapping (Available Upgrade)** District Feature

Leverage Microsoft Active Directory to add and remove users automatically as they are hired and depart your organization. Also seamlessly set user roles, and assign users to one or multiple sites in your district via our Multi-account Management feature set

**Permission Click SafePay**

Collect fees on any public form safely and securely. Funds move directly from processor to your bank account. No setup and no monthly or annual service fees.



• **Custom Manual Payment Types**

Custom names for payment settlement types.



**Form Library**

Access templates created by your school or district to start from and easily find fillable forms for internal use.



**Form Dashboard**

Dashboard list or tile view of all your active forms with quick search and sorting.



**My Approvals**

Dashboard view of any approvals that require your attention should you be listed on any workflows of forms or processes.



| FEATURE   | ESSENTIALS | STANDARD | PRO |
|---|------------|----------|-----|
| <p><b>Form Builder</b></p> <p>Powerful, easy-to-use drag and drop form builder used to edit templates or create custom forms.</p>   | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Selectable Form Types</b></li> </ul> <p>Choose to optimize the form such that "Anyone can respond" or "Parent for a child".</p>   | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Form Information Editor</b></li> </ul> <p>Flexible editor with lists, fonts, colors, highlighting, and much more to personalize the form body. Images, lists, and tables can also be inserted. Supports copy-and-paste from docs and PDF files to easily transfer legacy forms.</p> | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Add Dates</b></li> </ul> <p>Set event start and end dates. Includes a deadline date which closes the form after the deadline has passed. Reminders in the platform are automated using these dates.</p>   | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Add Attachments</b></li> </ul> <p>Link to an external site with a description, or upload files to provide additional information on forms which can be viewed, saved, or printed by recipients.</p>   | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Questions for Parents/Recipients</b></li> </ul> <p>Ask questions directly to parents that are relevant to the whole family</p>  | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Questions about each Child/Attendee</b></li> </ul> <p>Ask questions for every child/attendee that is added to the response</p>  | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Form Fields - Basic Types</b></li> </ul> <p>Open Text, Yes/No, Multi-select, Star, etc.</p>   | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Form Fields - Conditional Questions</b></li> </ul> <p>Use any of our form fields to ask a follow-up question.</p>   | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Form Fields - Formatting</b></li> </ul> <p>Note, Divider, Headings</p>  | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Form Fields - Integrated Data Fields</b></li> </ul> <p>Insert data which is linked to an external source such as your SIS. Set whether respondents can update linked data.</p>  | +          | +        | +   |
| <ul style="list-style-type: none"> <li>• <b>Repeatable Fields</b></li> </ul> <p>Used when form fillers need to respond with multiple answers to a questions. Example: Expense Reports, Medication Requirements</p>  | ✓          | ✓        | ✓   |

| FEATURE  | ESSENTIALS | STANDARD | PRO |
|--|------------|----------|-----|
| <p><b>Form Builder</b></p> <p>Powerful, easy-to-use drag and drop form builder used to edit templates or create custom forms.</p>  | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Conditional Questions</b></li> </ul> <p>Ask the respondent follow-up questions based on their initial answer.</p>  | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Workflow and Approvals</b> <ul style="list-style-type: none"> <li><b>Post-Response Workflow</b></li> </ul> <p>Create an approval workflow for questions answered by your respondents.</p> <li><b>Conditional Question Workflows</b></li> <p>Nest entire forms into your internal forms to build responsive workflows and dynamic forms.</p> <li><b>Internal Workflow</b></li> <p>Create an approval workflow for form submissions by your internal users to be reviewed prior to going public.</p> </li> </ul> | +          | +        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Equations and Formulas</b></li> </ul> <p>Create a series of questions that will display in a table format.</p>   | +          | +        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Repeatable Form Question Fields</b></li> </ul> <p>Give parents the ability to add a pre-defining group of questions as many time as they need.</p>   | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Form Preview</b></li> </ul> <p>Preview your form as a parent will see it before publishing live.</p>   | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Save as Draft</b></li> </ul> <p>Save your progress and only publish or submit when you're ready.</p>   | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Duplicate</b></li> </ul> <p>Make a draft duplicate of any form.</p>  | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Collect Payments with SafePay</b></li> </ul> <p>Add items with descriptions and images, inventory quantities, sale values, and more. Collect fees from parents online with major credit cards / bank accounts using Google Pay and Apple Pay.</p>  | ✓          | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Partial Refunds</b></li> </ul> <p>Refund a partial amount of funds collected</p>   |            | ✓        | ✓   |
| <ul style="list-style-type: none"> <li>• <b>Message to Respondents</b></li> </ul> <p>Add a custom message to respondents that appears after they have submitted their response.</p>  | ✓          | ✓        | ✓   |

| FEATURE   | ESSENTIALS | STANDARD | PRO |
|---|------------|----------|-----|
| <b>Form Builder</b>   | ✓          | ✓        | ✓   |
| Powerful, easy-to-use drag and drop form builder used to edit templates or create custom forms.   |            |          |     |
| <ul style="list-style-type: none"> <li>• <b>Yes/No Per Child/Student</b></li> </ul>   | ✓          | ✓        | ✓   |
| Adds a yes/no commonly used to indicate attendance at an event or consent.  |            |          |     |
| <ul style="list-style-type: none"> <li>• <b>Parent may respond for more than one child setting</b></li> </ul>   | ✓          | ✓        | ✓   |
| Allows respondents to add multiple children to the same form saving data entry time for parent/guardians.   |            |          |     |
| <b>Form Distribution</b>  |            |          |     |
| <ul style="list-style-type: none"> <li>• <b>Public Shareable URL</b></li> </ul>   | ✓          | ✓        | ✓   |
| Share a URL specific to each form that can be emailed, sent via text, added to a student portal, or even embedded into your district or school website with ease. |            |          |     |
| <ul style="list-style-type: none"> <li>• <b>Add Recipients</b></li> </ul>   | ✓          | ✓        | ✓   |
| Add recipients to a form and email the form directly to them using the Response Manager.  |            |          |     |
| <b>Copy/Paste from XLS/CSV</b>  |            | ✓        | ✓   |
| Paste in tab, comma, or space separated info from another source.   |            |          |     |
| <b>Student Roster</b> <span style="background-color: #c00000; color: white; padding: 2px 5px; border-radius: 10px;">Recommended Feature</span>                    | +          | +        | +   |
| Integrate your School Information System (SIS), learning management system (LMS), or other system to share student population data including class rosters.       |            |          |     |
| <b>Staff Roster</b>   | +          | +        | +   |
| Leverage Microsoft Active Directory or other systems to pre-populate your staff information.  |            |          |     |
| <b>Past Form</b>  |            | ✓        | ✓   |
| Utilize a roster from a past form to save time for common groups.   |            |          |     |
| <ul style="list-style-type: none"> <li>• <b>Publish to the Fillable Form Library</b></li> </ul>   |            |          | ✓   |
| Make your form available for staff users to find, fill, and submit from the internal Form Library. Set access for individual accounts to find and fill.           |            |          |     |
| <ul style="list-style-type: none"> <li>• <b>Printed Forms</b></li> </ul>  | ✓          | ✓        | ✓   |
| Forms can be printed and re-entered into the platform later using the Manual Response Entry tool.   |            |          |     |

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**Form Manager**

• **Response Manager**

Total control of your forms in one place.



• **Response Table**

View your responses in a searchable and sortable list view including live statuses showing who has responded and who hasn't.



• **Messaging and Reminders**

Send individual or batch messages to form recipients. This comes in handy to remind parents to complete responses or remember to pay fees.



**Custom Email Subject Line and Body**

Customize the subject and body of your email when requesting a response from parents.



• **Automated Notifications**

**Roster Sending**

The system sends form filling requests to your list of recipients, directly via email.



**Start Date Reminder**

Emails respondents to remind them of an upcoming event a day prior.



**Partially Completed Response**

Remind users to complete their response.



**Complete Payment Reminder**

Remind users to pay their outstanding balance.



• **Form Supervisors**

Invite others to your form and adjust their access level.



**Show As Supervisor**

Add another user to be a supervisor on your form.



**Receive Response Notifications**

Receive a notification when a response is collected.



**Receive Emails from Respondents**

Receive an email when a response is collected.



**Restrict Access**

Parent must answer predetermined questions before gaining access to the form.



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**Form Manager**

• **Advanced Search**

Powerful search at your fingertips. Search by student name, date, teacher name, and more.



• **Advanced Reporting**

Create reports without your IT department. Reports can be exported for use in Excel, Google Sheets, CSV, or PDF.



• **Approval History**

Shows the audit trail of an internal workflow.



• **Download Responses**

Download a PDF record of each response with one click.



• **Manual Response Upload**

Manually enter responses for parents or guardians who may not have access to a computer and submit a form via paper or via a phone, email, or text. Attach a scanned copy of the paper submission, screenshot of the text, or image/pdf of the email. Entries added manually will reflect in your reporting.



• **Manually Complete Response**

Manually complete a form that was started and left incomplete by a respondent.



• **Restart a Response**

Allows teachers to "restart" a response. This means cancelling the old response and creating a new one, emailing the signee informing them to please complete the form again.



• **Heads-Up Display**

Add key fields from your forms directly into your response manager table for instant viewing.



• **Response Checklist**

Take your checklist digital. Track follow-up actions and to-do's on a per response basis. For example, add an "expiry" date for Athletic Clearance packages, or a checkbox for "returned library materials".



• **Uploaded Attachment Manager**

Quick search, view, sort, export individual or batches of files uploaded in your forms.



• **Manual Payment Entry**

For recipients who respond digitally, but send cash or cheque for payment, this feature allows you to enter the payment and generate an automated receipt emailed to the recipient or parent.



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**Form Manager**

• Reporting

Add recipients to a form and email the form directly to them using the Response Manager.

**Custom Spreadsheet**

Select fields, set filters, and export for use in Excel or Google Sheets.



**Custom PDF**

Select fields, set filters, sort alphabetically by first or last name, and even choose to set page breaks or condense output in PDF.



**Master Response Report**

A detailed excel report containing all the information that you form has collected.



**Financial Transaction**

A detailed excel report containing financial transaction information for tickets sold on your form.



**Response by Student**

Display responses collected by student.



**Orders by Ticket Type**

Display tickets sold on a form by type.



**Cancelled Response Audit Report**

An Excel report containing information on cancelled responses.



**Bulk PDF Response Download**

Downloaded a response PDF for all responses at once.



• Restrict Form Access

When using integrated data, require the parent to verify their identity with student-specific information before they can fill out a form.



**School Admin Features**

• Edit Organization

Edit the account information — including the logo — which is used on respondent form views.



• User Management

For school accounts not tied to a district using District SSO, school admins can add, remove, and edit user information.





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**School Admin Features**

• **Deposit Reports**

Comprehensive report to aid bank reconciliation, GL entry, and tracking funds collected by form, by date, by respondent, by ticket, and more.



• **SafePay Settings**

Edit your bank account details and more related to payment collection.



• **Customized Role Labels**

For accounts that would like to use role labels differing from school role defaults such as parent/student/principal, etc.



• **Email Response Documents**

Have response documents emailed to you in batch PDF for a given form, date range, etc.



**Parent Side / Form Filling**

• **Language Support**

Select from over 100 languages available on-the-fly.



• **Preview Response**

Confirm the information entered into a form before making the final submission.



• **Ask Organizer a Question**

Access the contact information of the organizer before filling out a form.



• **Make a Payment or Purchase with Receipts**

Either make a payment for services, or purchase items using credit card, debit card, cash, or cheque.



• **Notification for incomplete payment.**

Be notified via email if you forgot to complete a purchase or payment.



• **Email Confirmation of Response**

Receive an email confirmation with a PDF copy of your form after submission.



• **Add Multiple Children in One Response**

Add more than one child to one response.



FEATURE

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PRO

**Parent Side / Form Filling**

|   |                                     |                                     |                                     |
|---|-------------------------------------|-------------------------------------|-------------------------------------|
| <ul style="list-style-type: none"> <li>• <b>Field Validation Assistance</b><br/>Automatically highlight and locate fields that are missing information or have an incorrect value.</li> <li>• <b>Notification requesting response</b><br/>Get an email notification when a form organizer requires a response.</li> <li>• <b>Incomplete response reminders</b><br/>Get an email reminder if a response is incomplete or not responded to.</li> <li>• <b>Form Recovery</b><br/>Automatically saves a partial response to allow you to return to the site at a later time to finish your response.</li> </ul> | <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> | <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> | <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> |
|---|-------------------------------------|-------------------------------------|-------------------------------------|

**District Edition Features**

• When the following features are included in a **District Edition license**, they will include enhanced functionality for each school within the district.

• **District Admin Features**

**Create Account**

Add accounts within the district (for those not hooked via District SSO).

**User Management**

District-wide user management (for those not hooked via District SSO).

**Customized Role Labels**

Use role labels differing from school role defaults such as parent/student/principal, etc.

• **Account Selector**

Quick search and access to enter any School Edition account as a School Admin.

• **District Dashboard**

Dashboard view highlighting most used forms and templates, processes and forms requiring attention or approvals, and metrics.

• **Fillable Form Building**

Create internal forms such as conference travel requests, expense reports, and more.

• **Form Template Reporting**

• **Fillable Form Reporting**

FEATURE

**District Edition Features**

• **Template Building**

Create form templates that can be used by staff in your organization to collect responses.

**Internal-Only Questions**

Questions that will be answered by the form builder prior to being published or sent for approval.

**Locking Sections**

Fully lock, fully unlock, or set sections of your form template to "Additions Only".

**Heads-Up Display**

Set Heads-up display column defaults.

**Response Checklist**

Set Response Checklist defaults.

• **Process Building**

Add multiple forms together to build a process.

**Deadlines**

Users enter dates for which timelines will be based on for form due dates (e.g. Date of departure).

**Form Order**

Add forms to the process in steps with one or many forms per step.

**Rules**

Set rules for each step which might include a form being due X days before or after the deadline date.

**Optional Forms**

Add other forms to the process which may be optional as a convenient place for users to access while completing the core process.

**Optional Attachments**

A handy place to add policies or checklists commonly used or associated with the process.

• **Set Access**

Set access at an account level for individual form templates, processes, and fillable forms. E.g., School 1 is the only account that might be allowed to access Process 7.

FEATURE

**District Edition Features**

- **Roster Integration**

Send data on students from your SIS (School information System) to Permission Click. When building a form, users can select any available roster (e.g., Grade 3, Homeroom 11) to be added to the form. Automates the sending of forms directly to the guardians. This is a prerequisite feature for Data Integration.

- **Integrated Data**

Send metadata attached to students with your Roster Import files that can be used to pre-populate (mail merge) data into forms. Data populated into forms can be read-only, or set for users to have ability to update the data.

- **Data Exporting**

Automated extract of your form data which can be used to push updates back to other district systems, including the SIS.

- **Custom Email Domain**

Emails sent to parents will be sent using the domain name of the district.

- **Process Dashboard**

A real-time view of all processes across the district showing status of forms, stage of approval, and deadlines.

- **District Wide Form Activity Report**

Summary by school by completion status.

- **Workflow and Approvals**

- **Post-Response Workflow**

- Create an approval workflow for questions answered by your respondents.

- **Conditional Question Workflows**

- Nest entire forms into your internal forms to build responsive workflows and dynamic forms.

- **Internal Workflow**

- Create an approval workflow for form submissions by your internal users to be reviewed prior to going public.