Art of the Possible:
Applications

Submission & Review

Making Applications Easier

Form builders (e.g. Formstack, Jotform,Typeform, Zoho Forms) and integrations can make it easier for you to handle application intake and review. With a form builder, you can create online forms with drag-and-drop elements that capture the information needed for your applications. Additionally, these form builders usually have plenty of customization options so you can tailor the forms to fit your specific needs.

Once the forms are set up, you can integrate them into your existing digital tools. This makes it easier to track the progress of each application and save time manually entering data. It also allows for automation of processes such as notifications or follow-up emails.

Integrations with other tools, such as CRM systems or payment gateways, can be used to speed up the intake and review process. For example, by connecting applications to your CRM, you can quickly search for and retrieve application information. Integrations with payment gateways can also help you easily process payments upon successful receipt of an application.

Review integration is one of the many useful features that form building tools can offer. With review functionality, applicants and admins have an easy way to assess the submission process and provide feedback without having to go through each entry manually.

For example, if you're using a form building tool for program applications, you can assign a specific person or people to assess each submission and make a recommendation on next steps. This is especially helpful in large-scale programs, where it's important to make sure that all the data is accurate before compiling the results.

Another great use of review integration is to process applications or other forms with multiple fields for eligibility, such as job or grant application forms. With Review Functionality enabled, admins can easily check each field for accuracy and completeness before sending the form on to the next level.

Consider a successful example of a nonprofit that leveraged an online form builder and CRM to successfully accept and review applications. The organization used an online form builder to design an adopter application form, capturing pertinent information about potential adopters. This not only simplified their intake process but also made it easier to manage and vet applications efficiently.

Once forms are submitted, the data is automatically synced with their CRM system, Salesforce. This integration allows them to review applications quickly, track status, and send automated follow-up emails, ensuring a seamless communication flow with potential adopters. Salesforce's robust reporting capabilities also support their decision-making process by providing insights into adoption trends and applicant demographics.

This approach significantly streamlined the organization's application intake and review process, enabling the nonprofit to focus more on their mission to rescue, rehabilitate, and rehome animals.