



SchoolsBuddy

Pre-Live Checklist SchoolsBuddy

Introduction

This document is to help guide you through the process of getting you live with SchoolsBuddy, containing information for each stage and a handy list to help you track the steps as they are completed.

On the next page you will find the checklist, with more detail throughout the document, but firstly you must read the below and start the data process (and online payments process if applicable) using the relevant documents you will have received.*

Data - Integration or Import

Along with this document you will have received a guide on the steps to get your MIS data integrated with SchoolsBuddy, or instructions on how to provide data to be manually imported.

Start this process before moving onto the next page of this document.

Online Payments - *only applicable if you are having the payments module*

Along with this document you will have received a guide on the steps to setup online payments for your SchoolsBuddy account.

Start this process before moving onto the next page of this document.

**If you have not received these please contact us at onboarding@schools buddy.com*

Checklist

YOUR SCHOOLSBUDDY SETUP		Page	Done
Understanding Data in SchoolsBuddy		3	<input type="checkbox"/>
Complete New School Setup Information Form, adding logos & Data sharing		3	<input type="checkbox"/>
Receive Activation Email and set your password		3	<input type="checkbox"/>
Watch pre-training videos and complete setup tasks		4	<input type="checkbox"/>
Onboarding session with SchoolsBuddy	Date/Time:	4	<input type="checkbox"/>
Complete outstanding setup tasks and create your first signup		5	<input type="checkbox"/>
Set up Test Parent account and carry out test		5	<input type="checkbox"/>
Email Templates reviewed		5-6	<input type="checkbox"/>
Training session with SchoolsBuddy	Date/Time:	6	<input type="checkbox"/>
PREPARE FOR GO-LIVE			
Prepare a Letter/Notification to announce upcoming new system		7	<input type="checkbox"/>
Save your Subdomain and Organisation ID		8	<input type="checkbox"/>
Save SchoolsBuddy online support links		8	<input type="checkbox"/>
GO-LIVE			
Send Activation/Welcome emails to Staff, Parents and Students		9	<input type="checkbox"/>
Check Parent uptake		9	<input type="checkbox"/>
Check initial parent use		9	<input type="checkbox"/>
FURTHER TRAINING			
Accounts/Finance department training (ignore if not having Fees module)		10	<input type="checkbox"/>
Reports/Summary learning		10	<input type="checkbox"/>

Your SchoolsBuddy Setup

Understanding Data in SchoolsBuddy

SchoolsBuddy works with a variety of SIS/MIS so you will be given guidance on anything you need to know about importing and syncing information from your own system separately. Data is synced every 24 hours, on a nightly basis - our support team can trigger a sync if you are need to update your data but this is only available on occasion.

Here are the basics:

STAFF

- All staff accounts created by your data feed have access to student data including contact details and medical information as available (if medical data is synced)
- External staff can be added to SchoolsBuddy manually and configured with lesser permissions (these permission can control access for the external user (i.e coach) to take attendance, view guardian information, view medical data, send comms or edit and cancel events.
- We create staff accounts in SchoolsBuddy based on your email domain. Let us know if you have more than one. e.g.janedoe@**exampleschool.sch.org.uk**
- If a staff member has a personal email address in your MIS they will not be imported into SchoolsBuddy. We can remove this control on request but this is in place to stop dual accounts of parent and staff which are not possible in SB.
- If a staff member is also a parent, they must use a personal email address as a parent contact to keep their parent and staff accounts separate.
- We designate "Super users" for your school who can give elevated permissions to other staff members for functions such as administration, absence monitoring or financial processes.
- Staff accounts must be manually deleted when no longer required unless you are using ManageBac or some Wonde-facilitated integrations (check with us if you would like further details).

PARENTS

- Parents cannot use the same email domain as staff members.
- Both parents see all activities booked and charges for their child, but they will have their own credit wallet and voucher wallet to keep their individual finances separate from each other.

STUDENTS

- Students are initially set up with dummy email addresses. We can import real email addresses if you would like students to access SchoolsBuddy if these exist in your MIS/SIS.

Your SchoolsBuddy Setup (cont.)

Complete New School Setup Form & Data Integrations

You will receive a link to the online setup form to provide details specific to your school site requirements and also instructions on how to send us your School Data specific to your MIS system.

Receive Activation Email and set your password

The Key User 1 will receive an Activation email with a link to setup a password and login.

Watch pre-training videos and complete setup tasks

We will send you a link to a document which includes two short 'Discover' videos, as well as all required guidance to complete the setup tasks described below:

- **Block Dates** - set holiday dates to make creating repeating events easy
- **Staff Roles** - assign different roles to staff members, with different levels of access
- **Welcome Message** - set welcome messages on the landing page for staff, parents and students
- **Locations** - create specific locations to use when creating your events

Onboarding session with SchoolsBuddy

The email you receive once your site is setup will include a link to book your initial Onboarding call, which will last approximately 15-30 minutes.

This is to discuss how you would like to use the system so we can guide you accordingly and show you how to get the best out of it. This first call is not for all users at your school, just the key user.

On the first call we will discuss who you might need to include in the later training session.

Your SchoolsBuddy Setup (cont.)

Complete outstanding tasks & create first signup

An opportunity to complete any outstanding setup tasks or repeat as required e.g. finish adding all Locations.

Also, if you are ready to proceed following your onboarding call, you can now create your first signup.

You will be advised to book a Training session so you can ask any questions you may have following the creation of your first signup, or to show you how to create your first signup.

Setup Test Parent account and carry out test

We recommend you create a Test Parent account so you can experience SchoolsBuddy as your parents will.

NB The email address for this test parent will need to be different from existing staff and parent emails within your MIS.

You may have done this as part of the initial setup tasks but if not, do it now so that you can run through a test booking before opening your first signup.

You can use this account to check the setup is correct for any future signups you create, or to help parents that come to you with queries.

Email Templates

There are numerous Email Templates used within SchoolsBuddy which can be amended with your chosen wording.

Before going live, you should check the most important templates and let us know of any changes needed.

Your SchoolsBuddy Setup (cont.)

Email Templates (cont.)

These are the Activation and Welcome emails, which can differ for Parents and Staff. At this point you can also check the Email Footer.

Activation email – you will have received this as a Staff member and can check the Parent version when setting up a test parent.

Welcome email – you will have received this as a Staff member and can check the Parent version once your test parent account is activated.

All templates can be viewed from the Reception > Reports section within SchoolsBuddy in 'Email Templates HTML Viewer' and we can provide you with a full guide of the standard templates for you to submit revisions if you would like this.

As you work through setting up further signups and events within SchoolsBuddy (and always Testing as a Parent) check for any email where you would like to amend the wording - these can be sent to the support desk (details on Page 10).

Training call with SchoolsBuddy

Having completed all setup tasks you will probably have lots of questions.

Booking your Training session will give you and your colleagues the chance to ask those questions to one of our trainers.

These sessions are held on a video call so we can share the screen for demonstrations.

Think about the key people from your school who need to be on this call, e.g. Activities Coordinator (this will be discussed during your onboarding call).

Prepare for Go-Live

Prepare and write Letter/Notification to announce upcoming new system

When you are nearly ready to go live to your school, parents and staff you will need to send a communication.

The below is an example parent template that you can use and adjust as required, depending on the modules you are using and when you plan to send activation emails to parents.

Dear Parents

We are very pleased to advise that very soon we will be starting to use online bookings for many of our activities, clubs and trips with a system called SchoolsBuddy.

This includes tools to allow you to:

- Make bookings for your child/children online and view these in your own diary
- Provide consent for school trips and view confirmed events in your own diary
- Pay fees and view your balance
- Receive various communications from us
- Importantly you will be able to do this on the move using the iOS and Android apps

We will be launching this in the next two weeks when you will receive an activation email that will include a link for you to create a password for your own login.

Please look out for this and check your junk email folder just in case.

Kind regards

Our School Name

Prepare for Go-Live (cont.)

Learn/Save your Subdomain and Organisation ID

Please learn your school subdomain to ensure you have no issues signing in.

Once you receive your activation email you will have your subdomain which will be in the format:
yourschoolname.schoolsbuddy.net

Your subdomain page shows your logo and SSO (Single Sign-On) option if you have chosen to use this.

Our Subdomain:

Organisation ID:

The Subdomain can be published on your school website so parents and staff can link through if needed.

Learn/Save SchoolsBuddy online support links

There are online portals for Staff and Parents full of support documents and videos for a wide variety of tasks.

When you receive confirmation that your SchoolsBuddy site is setup, we will provide links to these online portals.

The support documents can also be accessed from within your SchoolsBuddy site when you are logged in.

Once you have completed training and are up and running, our [Support Team](#) will be on-hand to help with any queries.

Go-Live

Send Activation/Welcome emails to Staff, Parents and Students

When you are ready, you can send Activation emails to Staff and Parents (and students if required).

This will contain a link for them to set a password, get logged in and start using SchoolsBuddy.

Check Parent uptake

Once you have sent Activation emails to Parents and are up and running, you can view who has and hasn't logged in, including:

- Parents who have never logged in
- Students with Inactive Parent accounts

Check initial parent use

Once your first Signup is open we recommend you review the bookings and/or preference selections made, to ascertain usage.

If it is low you can then take the opportunity to send a further communication to encourage account activation.

Further Training

Accounts/Finance department training

Once bookings are open, training can be booked for your finance staff. We recommend this takes place within the first few weeks after the first payments have been processed. This will cover:

- o Refunds
- o Credits & Vouchers
- o Reporting / Reconciliation

You will have the link to the online booking form from the initial email received with the pre-training information. (*We can make this training earlier for you if needed.)

Reports/Summary learning

Within SchoolsBuddy there are various standard reports you can use, and bespoke reports may also be available (*at an extra cost).

Once Signups are open, we advise you contact us to book some specific training on these reports and how to use them.

CUSTOMER SUPPORT

Once your site is live our Support Team will be on-hand to help with any queries.



help@schools buddy.com



UK Support Desk

+44 (0) 1903 959 565

Monday - Friday 9am to 5pm