

# Arro Onboarding

## Guide

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Pebble, Media Exchange 3, Coquet Street, Newcastle, Tyne and Wear, NE1-2QB  
Tel: 0845 310 1788.

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# Chapter 1

## Welcome to Your Funding Passport

Welcome to your Funding Passport, providing you with everything you need to generate additional income for your school. The team at Pebble is looking forward to helping you along your Income Generation Journey.

### Your Funding Passport consists of:

#### Arro Software

You now have access to Pebble's Arro software, which is ideally positioned to help you manage your Income Generation projects and spread the word to your supporters. Arro is the only software in the market today which lets you manage all of your school's income generation in one place. You can use Arro alongside accounting software, such as Pebble's Fund Manager, or your traditional project management and accounting software, providing you with the toolkit you need to be successful.

#### Support from the Pebble Team

The team here at Pebble will be behind you every step of the way. From setting up your projects to completing grant applications and sending email campaigns to your supporters, the Pebble team are available to support you on your Income Generation journey.

## **Pebble Learn Training**

You will also be enrolled in Pebble Learn, a flexible and convenient way to access your Income Generation training. Pebble learn will give you access to videos, quizzes, articles and all the tools you will need to get you on your way to becoming an Income Generation expert.

# Chapter 2

## Meet Your Income Generation Team

Not only will you have Arro to support you with your Income Generation but you will also have a great team behind you every step of the way:

### Lydia Hill - Product Specialist



Lydia will take you through setting up Arro, making sure that you know how to use it to maximise your chances of success. She will support you in creating your project, your project community page, and populating Arro with your school's supporters. Lydia is also the instructor for Pebble Learn, your Income Generation training platform, which will provide you with all you need to become an Income Generation expert!

## Dan Wakenshaw - Technical Support

Pebble does everything possible to ensure that nothing goes wrong with Arro, but should you need any help you only need to contact Dan. Dan will help you to identify and resolve any issues that arise so that your Income Generation efforts are not interrupted.



## Ben Tyrer - Bid and Copy Writer



Ben is Pebble's bid writing expert. He will be on-hand to support you with writing your Project Narratives and identifying grants that suit your project. To save you time, Ben will start you off with up to 75% of your Project Narrative's content. Then, he'll help you along the process of customising that content for your particular project and school.



## **Tamara Healy - Relationship Manager**

If you are ever unsure of who you need to speak to or what you need to do next to get your project going, Tamara is the person to help! At the end of your first month with Pebble, Tamara will be in touch to ensure your project is still on track. Should you require additional support, Tamara will discuss this with you.





# Chapter 3

## Introduction to Income Generation

In future, schools and educational institutions cannot rely totally on government funding to sustain them. Recent research has shown that a typical secondary school in England now needs to find an extra £200K per year to stay afloat.

It may seem daunting to attempt to raise £200K but there are plenty of ways to go about raising money and Pebble is here to help you every step of the way.

Arro is the only software today, created especially for schools and the education sector in the UK, which brings together in one place the management of multiple income streams. Take a look of this list of possible revenue streams that you can begin to utilise:

- Gathering donations
- Grants
- Sponsorship
- Recruiting volunteers
- Hiring out services
- Letting rooms and equipment
- Running events
- Capitalising on school clubs

It's not all about donations and events for fundraising, although that is a great, traditional way of getting pupils and parents involved in school projects. It is essential that you begin to diversify sources of income to safeguard the future of your school, making it sustainable into the future.

It can be difficult to get started with Income Generation. Although it is essential, it requires a certain amount of time and energy to begin. Here's where we come in. Pebble can provide you with the tools, knowledge, and support you need to start your school engaging with Income Generation.

Here are some things to think about to get you started.

## **Your School's Vision and Goals**

It is important that you know your school's vision and goals in order to position your projects around these. This will help you find supporters that share your vision and will be more likely to contribute in any way they can.

## **Your School Projects**

Think about a project that will help you achieve your school's vision and goals. This may be something outlined in your school improvement plan. Consider having an initial focus project to get you started. If this is your first Income Generation project, it is worth choosing a smaller project first.

## **Your School Supporters and Stakeholders**

In order for your projects to be successful, it is important to engage your community and build up a database of contacts that you can call upon to help. This could be for donations, sponsorship, volunteering, or simply sharing your message! Parents are a good starting point, but consider other members of the community that you could also reach out to: community groups, businesses, alumni, residents, and other schools are all viable stakeholders for your school. Start thinking about how you could gather contacts for these types of stakeholders.

## **Your Time**

Here at Pebble, we understand that our customers have busy schedules. That's why we have developed tools that allow you to engage with Income Generation in the most efficient way possible. With that said, you will need to dedicate some time to Income Generation in order to be successful. The key to this is scheduling. Is there a regular portion of your diary that you could dedicate to Income Generation? This could be a morning or an afternoon each week.

## **Your Team**

Your colleagues should also be called on to maximise your Income Generation efforts. If you haven't already, think about who is best-placed to lead on your school's projects. Once you have an idea of what your projects are, think about the expertise that may be needed and which members of your staff could provide this leadership. You are able to register up to four additional users on Arro so you can collaborate effectively with your team.

## **Your Plan**

When you are planning your project, it's important that you have a clear idea of where your money is going to come from and how you are going to achieve this. Consider the total value of your project and which Income Generation activities you are going to utilise to raise this. Make sure you break up your total amount into individual activities. How much are you expecting to achieve from donations, grants, sponsorship, lettings and events? Remember, it's important to utilise as many of these revenue streams as possible.

## **Gift Aid**

When gathering donations, you should also be claiming Gift Aid from HMRC to maximise the amount you have to contribute towards your school projects. A first step toward this would be to understand your charity status and whether you will need to register. You can then begin to gather Gift Aid declarations from your supporters. Pebble is on hand to support you through this process. We even offer a course on Gift Aid to take you through the steps of registering as a charity, gathering Gift Aid declarations, and making a claim.



# Chapter 4

## Guide to Arro Onboarding

Your Arro Onboarding Call will be an opportunity for you to learn all about Arro and how you can use it to manage and market your school projects. You will work with your Pebble Product Specialist to get your first project set up and ready to go. We'll also assist you in getting up and running with Arro, ensuring that you are in a position to begin raising support for your school projects.

Here is a run-down of what you can expect to cover during your Onboarding Call.

- [Project Narrative](#)
- [Your Project Community Page](#)
- [Grants Database](#)
- [Supporters](#)
- [Campaigns](#)
- [Pebble Learn](#)

## Project Narrative

Your Project Narrative is the foundation of your Income Generation activities. This document will house all the information relating to your project; the need for it, the impact it will have, and any supporting evidence. This is then used as the basis for your grant applications, as well as communications with your supporters.

The screenshot shows the Arro by Pebble interface for a project named 'Raring to Read' at Lakewood Primary School. The page is managed by Lydia Hill. Key features include:

- Header:** Arro by Pebble logo, project name 'Raring to Read', and a status 'Approved on 29 Sep 2017'.
- Amount Raised:** £869.50.
- Project Description:** A quote from a poem: 'Even the most misfitting child, Who's chanced upon the library's worth, Sits with the genius of the Earth and turns the key to the whole world.' The text describes the school's aim to follow the inspiration of Ted Hughes and create a stimulating reading environment. It also mentions a library refurbishment project to expand pupils' knowledge and enrich their learning experiences.
- Funding Target:** £10000.00.
- Project Strength:** 100%.
- Navigation:** Tabs for Narrative, Grants, Files, and Donations.
- Why Do You Need Your Project?:** A section explaining that a significant number of children are underachieving in literacy due to a small library and outdated materials. It states that the project aims to improve the library and provide more resources.
- Comments:** A section with a 'Share with colleagues' button, an 'Add Comment' button, and a 'Submit' button.

We understand that writing Project Narratives and grant bids can be time-consuming, which is why we will start you off with around 75% of your Project Narrative content. You can then customise this to your school's particular project.

Following your Onboarding Call, you will be put in touch with Pebble's Bid and Copy Writer who will work with you to customise your project, making it ready to start applying for grants and marketing your project.



## Your Project Community Page

Arro lets you spread the word about your projects and Income Generation activities in an online space. That's why we will create a project community page for you.

Lakewood Primary School - Projects - Learning Through Play - Community Page

Amount Raised **£569.50** Jane Doe

Here is your community page – isn't it beautiful!  
It's all ready to go, just hit publish if you're happy with it, or edit to change anything...

[Edit](#) [Publish](#)

**Lakewood Primary School**  
Powered by Arro, a Pledge platform.

**£1,500.00**  
Raised by 150 Supporters

[Donate](#)

Share & Support... [f](#) [t](#)

**Learning Through Play**

The provision of playground equipment will positively impact our pupils as it will offer them a range of outdoor physical activities to participate in. This kind of activity will aid the children's concentration, improve their behaviour, and develop their ability to work cooperatively as they interact with the equipment and share it between one another.

Our expanded selection of equipment, particularly the gym equipment, will help our children to develop their essential coordination and motor skills. The play equipment we install will also help to boost the self-esteem of our more introverted pupils, as working together to create something will foster a sense of achievement.

The outside play equipment we install will also encourage social interaction and communication, bringing many of our pupils out of their shells and into collaborative work and play. Spending time outside each day will instill the

**Key benefits**

- You are giving back to the community that gave you the education to succeed
- You are contributing to the lives of tomorrow's workforce. What's more, if you donate on behalf of a business, you are promoting your workplace to potential future employees!
- You are becoming a positive role model for the students in your area
- You are contributing to a charitable community ethos
- You are making a difference to the lives of young people in your community

**Supporters (150)**

<b>Anonymous</b> Pledge project: Keep it up!	£30.00 + £7.50 GR Aid	3 hours ago
<b>Jane Smith</b> It's really great to be a part of this	£80.00 + £20.00 GR Aid	2 weeks ago
<b>Harry Stevens</b> Good luck!	£10.00 + £2.50 GR Aid	8 weeks ago

[Help & Support](#)

This will outline the details of your project for supporters and give them the opportunity to donate money to the project, enquire about sponsoring, volunteer to help and share the details about your project on social media. We set up your project community page during the Onboarding Call and show you how you can customise this to suit your school's needs.

## Grants Database

Arro is home to the UK's largest grants database. We will show you how to find relevant grants and attach these to your project so you're ready to apply.

The screenshot displays the Arro Grants Database interface. At the top, the user is logged in as Lydia Hill, and the amount raised is £869.50. The page shows 408 results for grants matching the criteria: Secondary located in South East. The interface includes a sidebar with navigation options: Projects, Activities, Campaigns, and Supporters. The main content area features a table of grants with columns for TYPE, GRANT OVERVIEW, AWARD, COMPLEXITY, and DEADLINE. The table lists several grants, including ASH Scotland: Tobacco Awareness, Action Earth Awards, Adam Millichip Foundation, Airtricity Community Fund, and Alan Baxter Foundation. A search bar and filter options (Project Type, Grant Type, Complexity, Status) are also visible.

TYPE	GRANT OVERVIEW	AWARD	COMPLEXITY	DEADLINE
★	<b>ASH Scotland: Tobacco Awareness</b> ASH Scotland is an independent Scottish charity taking action to reduce the harm caused by tobacco. It is offering free	Free workshop	Medium	Ongoing
☆	<b>Action Earth Awards</b> Grants of £50 to £250 are available to groups of volunteers carrying out environmental activities.	Grants of between £50 - £250 are available for environmental projects.	Basic	Ongoing
☆	<b>Adam Millichip Foundation</b> The aim of the foundation is to help disabled people participate in sport.	Grant available for disabled people to participate in sport.	Medium	Ongoing
☆	<b>Airtricity Community Fund</b> The Airtricity Community Fund is intended to support community projects in the locality of the Airtricity wind farms.	No minimum or maximum grant specified	Medium	Ongoing
☆	<b>Alan Baxter Foundation</b>	Grants of up to	Medium	Ongoing

You can search for grants by project type, grant type, and complexity. Our grants database is updated regularly, so make sure you check back often to see what has been added.

## **Supporters**

You'll be able to use Arro to manage your project supporters. The supporters section has everything you need to manage your contacts, sponsors and volunteers.

### **Contacts**

With Arro, you can send targeted campaigns to help you spread the word about your project in your community. Arro is the perfect place to house your supporter list, contact details, and Gift Aid declarations. You can organise your supporters by type in order to communicate with your stakeholder groups more effectively. As stated earlier, you will need to make sure that your contacts are present in this section to make sure that we can fully utilise your system during your Onboarding Call. We will also show you how to keep your contact list up-to-date.

### **Sponsors**

The sponsorship section holds enquiries, leads, and active sponsors for your projects. These can come through automatically from your Community Page. You can also add sponsors manually, and you can even import a new sponsor straight from your contact list. We will go over how you can use Arro to manage any business sponsors that support your projects.

### **Volunteers**

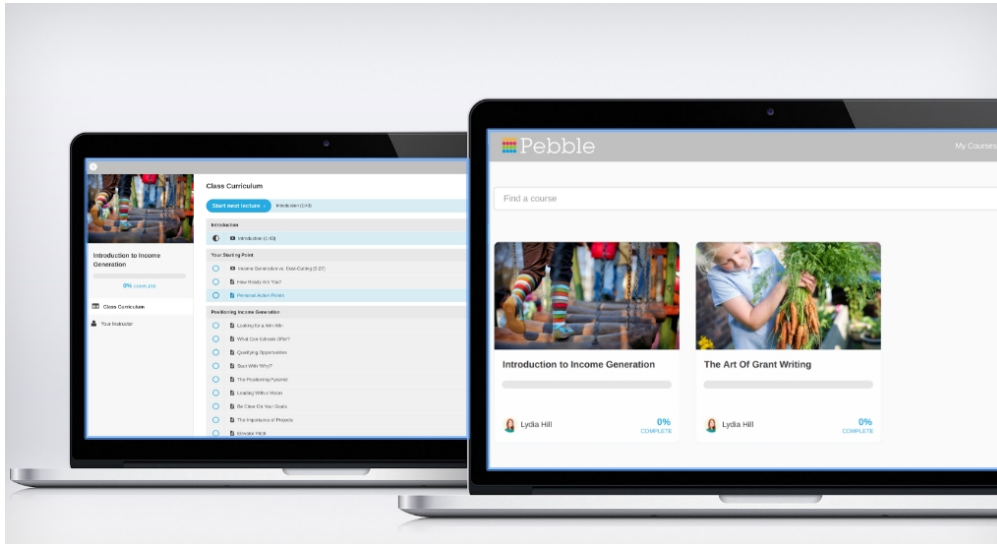
You will also use Arro to gather volunteers and to contact your volunteers to ask for help. We will show you how to turn a volunteer lead into an active volunteer in Arro during your Onboarding Call.

## Campaigns

When it comes to having a successful project, it's important to get the word out and tell as many people about it as possible. That is why we will get your first email campaign ready to tell your supporters about your project on your Onboarding Call. We will take you through the process of choosing a campaign template from our library, selecting your audience, and deciding how often you want your campaign to appear in your supporters' inboxes!

## Pebble Learn

During your Onboarding Call, we'll also enrol you in Pebble's online learning platform, Pebble Learn.



This is a flexible and convenient way to access your Income Generation training. With Pebble Learn you will be able to:

- Complete all of Pebble's training content in your own time and at your own pace
- Access tools and worksheets to use in support of your Income Generation activities
- Share your ideas with other school professionals in online discussions
- Have multiple colleagues in your school complete the training easily
- Put what you learn into practice using Arro

With your own Pebble Learn account, even after the Onboarding Call is complete you will be able to access all of the Arro training content and be well on your way to becoming an Income Generation expert.



# Chapter 5

## Next Steps

There are some things to do prior to your Onboarding Call that will ensure that we are able to launch your first project by the time we complete the Onboarding Call.

### Stripe Registration

As part of an Arro project, you can set up a project community page to update your supporters on your project, recruit volunteers, and sponsors as well as gathering donations for the project.

So that your school is able to receive donations, we will need to get you set up with our payment gateway, Stripe. This links your school account to your community page so any donations made through the page are paid straight into your school account.

You can read Stripe's Terms and Conditions by visiting the following link:

<https://stripe.com/gb/legal>

### Import Contacts

Arro makes it easy for you to send campaigns to supporters, raising awareness of your projects. The backing of your community is essential to the success of your project so it's important to get your message out there!

Arro makes email and social media campaigns simple, but first you need to make sure that Arro is populated with all your contacts so you can spread the word.

While Pebble can help you set up contacts in Arro, this is one part of Arro which we recommend that you really own.

- You already have a collection of contacts for your school (parents, partners, businesses, etc.) so you are best placed to ensure that you capture all the contact details you want to use in Arro.
- The General Data Protection Regulation (GDPR) is a new legal framework for data protection in the EU and its regulation is being enforced in the UK from 25 May 2018.

This new regulation makes a distinction between who owns and controls the data and who processes it.

Who owns and controls the data?	Who processes the data?
You - the school - own and control your contacts lists and the personal data they contain.	Pebble is responsible for processing the data of contacts within Arro.

Before you can send marketing campaigns and information to your contacts, you need to obtain their permission. To help you obtain your contacts' permission to send them marketing material, we will provide you with a campaign within Arro. You will then be able to send marketing campaigns and information to those contacts who have opted in.

Your contacts can be uploaded in two different ways:

- Install Pebble MISapp to sync your SIMS contacts with Arro
- Manually export a CSV file from your MIS and import this CSV file into Arro

Whichever method you choose, you can find the instructions below. Importing your contacts will usually be done by a nominated member of your IT staff, or your school Data Protection Officer.

**Note:** If your contacts are not imported before your Onboarding Call, we may need to reschedule the call. If you have any problems with this, please get in touch. We are always here to help!



## Importing Contact Details from SIMS.net Using Pebble MISapp

MISapp is a small application that runs alongside SIMS.net. It runs daily to import new and update existing contacts within Arro.

### Preparation

1. Ensure that you have the correct permissions and access to SIMS.net.

You must be a member of the following groups - Admin Assistant, Class Teacher, Personnel Assistant and Third Party Reporting.

To check if you are a member of these groups in SIMS.net:

1. Open SIMS.net menu option Focus > System Manager > Manage Users.

2. Search for your ID and check the groups you belong to in Section 3.

If you don't have all of these groups, please contact your System Manager and ask to be added.

**Tip:** Alternatively, create a System or Admin ID which only uses these groups instead.

2. Think about the fields you want to import from SIMS.net into Arro.

The following information is included automatically but you can exclude all or some of these:

- **UPN** Is the Unique Pupil Number allocated to each pupil (This option only applies to new customers)
- **Contacts** Are the parent/guardian contact details for each pupil
- **Groups** Are the groups that a pupil is linked to i.e. free school meals
- **Staff** Are the staff members held in your MIS system
- **Attendance** Is the pupil attendance records

The only information that you actually need to include in Arro is **Contacts**.

The other fields are applicable if you are using Pebble's Fund Manager software. To exclude any items, please notify a member of the Support team before you run MISapp.

3. Download the MISapp.msi by clicking [MISapp download](#).

If you have rights you can save it to your desktop, otherwise select a location to which you have full access rights.

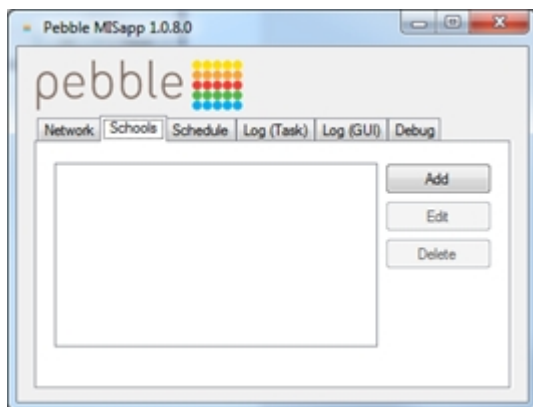
### Installation

1. Double-click MISapp.msi from your desktop (or other location in which it was saved).



2. Click Run when you are prompted at the Open File - Security Warning screen.
3. Select the check box I accept the terms in the Licence Agreement and click Install.
4. Click Yes at the prompt Do you want to allow the following program to install software on this computer?
5. When the installation finishes, click Finish.

MISapp automatically runs and opens, displaying the Network tab.



## Configuration

1. Open Pebble MISapp.
2. Set up the schools.

You can add, edit and delete the schools you need on the **Schools** tab.

This is useful for schools with a central/hosted SIMS server.

1. Select the **Schools** tab.
2. Click **Add**.

3. Enter your school Name.
4. Enter the SIMS Information:
  - Your User name.
  - Your Password.
  - Your Server and Database.

MISapp will attempt to fill in these fields automatically by reading the Sims connect.ini file. It is possible that the connect.ini file redirects to another connect.ini file on the server, and there may be multiple redirects. MISapp attempts to follow the redirects but might fail in some circumstances. Checking the MISapp Log (GUI) tab will show how far it got and the paths it was searching.

If the fields remain blank then manually look at the connect.ini file and follow the redirect to the correct Sims file location.

Alternatively, use the default Server and Database names.

These are (local)\sims2008 and SIMS respectively.

**Note:** Please seek your school's IT Support advice if you need help with your SIMS location settings.

- Click Test.

If all the entries are correct you will see the message - Sims information correct. If the message shows anything different e.g. 'Sims information incorrect', or 'Missing Sims permissions', you need to correct the SIMS information before proceeding. In the case of 'Missing Sims permissions', the Sims user may not have been added to the relevant SIMS groups ( Admin Assistant, Class Teacher, Personnel Assistant and Third Party Reporting).

### 5. Enter the Pebble Information:

- Your MISapp Email address.
- Your MISapp Password.
- Your MISapp Organisation ID.

You will already have been provided by Pebble with the MISapp Email address and Organisation ID. You will need to call us for the password if you have not so already. If you do not have this information please call us on 0845 310 1788 option 2 (Fund Manager Support)

- Click Test.

This connects MISapp to Pebble using the URL

<http://apps.mypebble.co.uk>.

If everything is correct, you will see the message - Pebble information correct. Otherwise, you'll see 'Wrong username or password' or 'Wrong organisation' or something else entirely.

**Tip:** If your Email or Password is incorrect, try to log on to Arro without auto fill to check if you have your correct Email and Password.

### 6. Click Save.

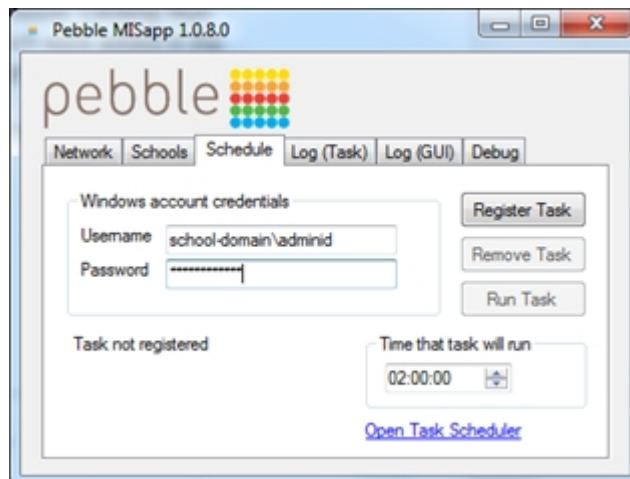
## 3. Set up the schedule for running MISapp.

MISapp is set up by default to run at 02:00 am every day. But you can use the **Schedule** tab to select when you want it to run.

You can also run it immediately (**Run Task**) if you are aware of SIMS updates and want these reflected in Arro immediately.

**Tip:** Don't schedule MISapp to run at midnight and don't run it immediately at or around midnight because this is when SIMS updates and you risk not capturing all those updates.

1. Select the **Schedule** tab.



The current Windows Username is automatically filled in.

2. Enter the Windows Password.

**Note:** This is the Username and Password you use to log onto your computer and / or your network. You must have a password-protected Windows account.

3. To register a schedule, click **Register Task**.
  - To change the time of the schedule, scroll to the desired time to run the task and click **Change time**.
4. To run MISapp immediately, click **Run Task**.

**Tip:** Try this to check that the schedule is created and the reports are sent correctly.

The **Log (Task)** tab is displayed automatically so that you can see what is happening while the task is running.

**Note:** The task might take some time to run. Depending on how much data there is to send it can take between 2 and 15 minutes.

If the Log states INFO data sent to pebble successfully and you receive no error messages, the data has transferred successfully and you will be able to see the updated contacts in Arro generally within 30 minutes.

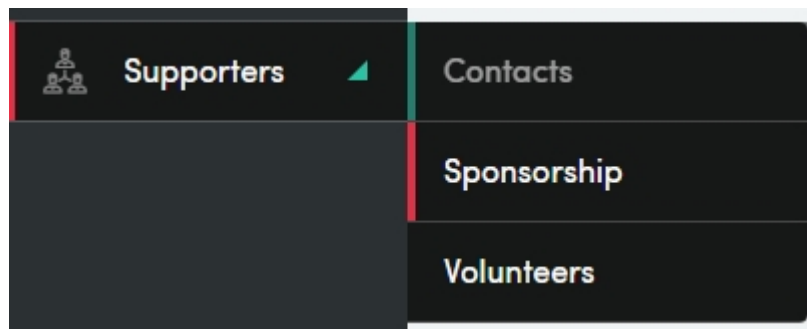
5. To remove a task, click [Remove Task](#).

## Importing Contact Details Manually

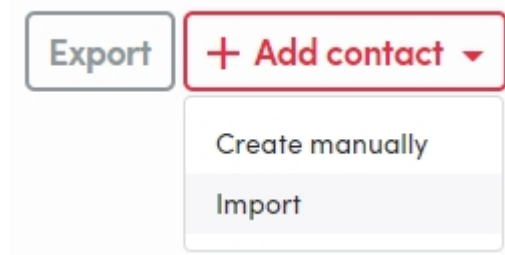
You can manually import your contacts into Arro. There are two stages to this. In the first, you prepare the contacts list for import and in the second, you import the list.

### Stage 1 - Prepare contacts list to import into Arro

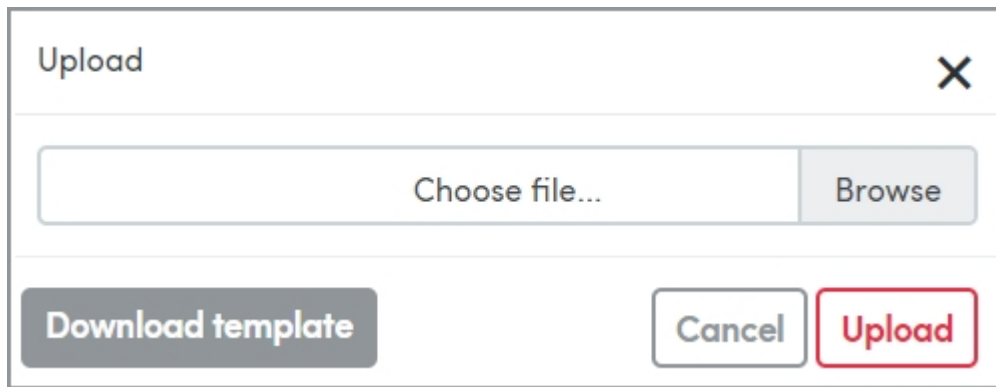
1. Gather your contacts list from where you currently store this information.
  - If you have your contacts in a MIS database, you can export these from the MIS database.
2. Download a template from Arro that you need to import contacts into Arro.
  1. Log on to Arro at <https://arro.mypebble.co.uk>.
  2. Open Supporters > Contacts.



3. Click +Add Contact.> Import.



The Upload screen appears.



4. Click Download template.

The template is downloaded to your computer.

3. Open the template and enter the contacts you gathered in the first step into the template.

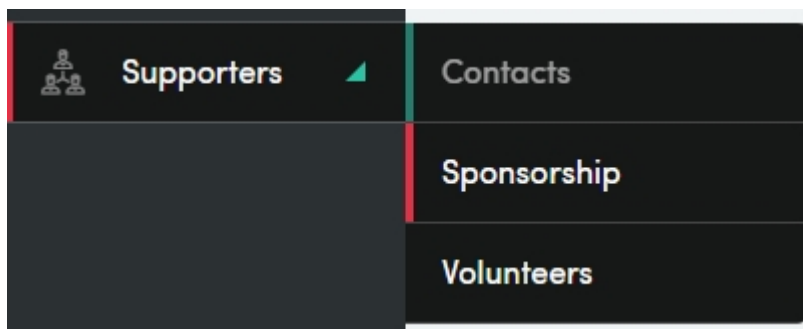
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	ID	Title	FirstName	LastName	AddressLines	Postcode	Volunteer	DonorFirstNa	DonorLastNa	DonorTitle	GiftAid	Profile	Class	Year	Reg	Phone	Mobile	Email
2																		
3																		

- You should only need to enter the First Name, Last Name, Email address and the Profile (Parent, Local Business, Staff Member or Community Organisation)

**Note:** Save the template to a location that you will be able to find in Stage 2 and with a name that identifies the file easily to you.

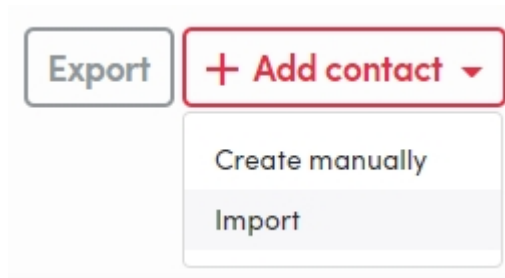
## Stage 2 - Import the contacts list into Arro

1. Log on to Arro at <https://arro.mypebble.co.uk>.
2. Open Supporters > Contacts.

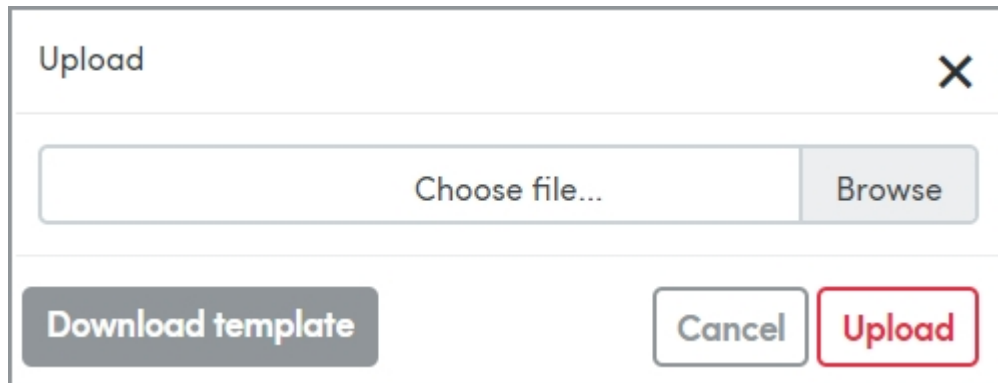


3. Click +Add Contact.> Import.





The Upload screen appears.



4. Click Browse to choose the contacts file you created in Stage 1.
5. Click Open.

The file name is displayed in the Upload screen.

6. Click Upload.
7. Confirm the upload by clicking Upload All.

**Note:** Please allow up to five minutes for this to complete.



# Chapter 6

## I'm Ready to Start. What next?

So our team can get your Arro account set up, there are some details that we will need from you first of all. All of these questions can be found in our [Onboarding Questionnaire](#) which you will have the chance to fill in with the help of your Regional Manager.

Here are the items you can expect questions on when we fill in the [Onboarding Questionnaire](#):

### School Details

- School name
- URN
- Address
- General phone number
- General email address
- School website URL
- Type of school
- Phase of Education
- Free School Meals band

### Project Details

- Type of Project
- Project Details

- Project Description

## Setup Details

- MIS Platform
- Users
  - Main User (Name, Email, Phone, Position)
  - MIS Contact (Name, Email, Phone, Position)
    - This is to support your school install MIS app for Arro contacts
- Additional Users (Anyone else in school you would like to have access to Arro)
  - Name
  - Email
  - Position

## Stripe Setup

This is our Payment gateway provider which will allow donations achieved through the Community Page to be paid into your school bank account.

- School Business name
- Account holder name
- Account holder DoB
- Account holder personal address
- Bank account number
- Sort code
- Confirmation of acceptance of Stripe's Terms and Conditions