

# Joinos for Schools

## User Guide

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## Joinos for Schools User Guide

# Chapter 1

## Introduction

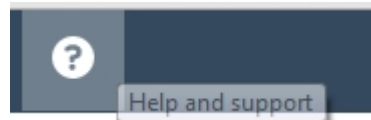
This guide describes how to use Joinos for Parents - our e-Payment platform for helping you and the parents of your pupils to communicate, allowing parents and carers to pay online for trips, school activities, meals and items such as uniform or sport kit.

Joinos for Parents is simple, convenient and easy to use. Parents can stay up-to-date via computer or mobile phone, make payments online, view transactions and balances and receive and return permission slips and other documents.

In this guide we show you how to:

- Deal with parent enquiries about adding children, shopping for offers, making payments for trips and other queries about their account balance in Joinos.

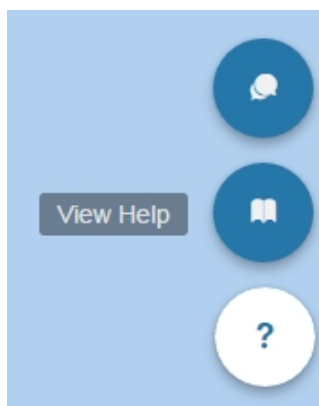
To access help in Joinos, parents click the Help and Support icon at the top of the screen.



- Create and manage Joinos Codes in Fund Manager.
- Create and manage Offers in Fund Manager.
- Use Joinos Messaging in Fund Manager.

Help for creating and managing Joinos codes, offers and messages is accessible from the screens within Fund Manager Help but is reproduced in this guide for your convenience.

To access the help in Fund Manager click the Help icon at the foot of the screen and select the option to View Help.



A help window is displayed with the help for the screen. For example, if you are wanting help on creating a Joinos message, the help is displayed for this.

**Compose Joinos Message**

**Message**

Title:

Body:

**Attachments**

	Name
<input type="checkbox"/>	Test
<input type="checkbox"/>	test2

**Contacts**

Filter:  ☐ Select all filtered

<input type="checkbox"/>	Name	Class	Year	Reg	Groups
<input type="checkbox"/>	Balfe, Caitriona	Chestnut	Year 8		
<input type="checkbox"/>	Beardmore, Tyler	Rowan	Year 5		Free School Meals, Swimming
<input type="checkbox"/>	Bell, Kyle	Mango	Year 8		Free School Meals
<input type="checkbox"/>	Bradshaw, Cameron	Rowan	Year 5		Free School Meals, Swimming
<input type="checkbox"/>	Braithwaite, Drew	Maple	Year 6		Free School Meals
<input type="checkbox"/>	Bridge, Cameron	Mulberry	Year 4		
<input type="checkbox"/>	Brown, Brandon	Rowan	Year 5		Free School Meals, Swimming
<input type="checkbox"/>	Bull, Kiren	Mango	Year 8		Free School Meals
<input type="checkbox"/>	Burn, Damien	Katsura	Year 6		
<input type="checkbox"/>	Butler, Markus	Katsura	Year 6		
<input type="checkbox"/>	Carr, Luis	Maple	Year 6		Free School Meals
<input type="checkbox"/>	Carter, Samuel	Maple	Year 6		Free School Meals
<input type="checkbox"/>	Clarke, Luke	Mango	Year 7		Free School Meals
<input type="checkbox"/>	Dawson, Kyle	Chestnut	Year 7		
<input type="checkbox"/>	Delaney, Cleon	Maple	Year 6		Free School Meals
<input type="checkbox"/>	Dolman, Harv	Katsura	Year 5		Swimming

**Compose Joinos Message**

[About the fields](#)

Use this screen to compose and send email messages and sms text messages to parents and carers of pupils.

**Note:** Email addresses and phone numbers are added to contacts through **Administration > Manage Names**. Attachments to send are uploaded using **Offers > Upload Document**.

**How do I ...**

- [Send an email message?](#)
- [Send an attachment with a message?](#)
- [Send an SMS alert?](#)

More help is available on Pebble Support Website.

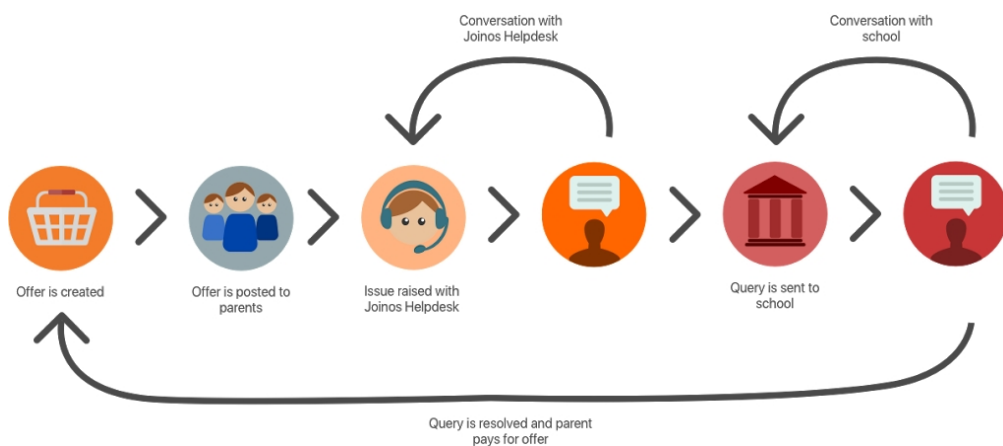
For information on transferring Joinos payments from the Settlement account to the bank account, recording Joinos charges and bank reconciliation, see the Joinos Offers section in the Integrated SIMS chapter in the [Fund Manager User Guide](#).

# Chapter 2

## Dealing with queries from parents

This chapter discusses how best to deal with parent queries about using Joinos to add children, shop for offers, make payments for trips or ask about their account balance.

In the past, parents have become frustrated by attempts to get answers to their queries about their Joinos account. This is because they asked us first for answers to questions that only you can answer. The support model looked like this:

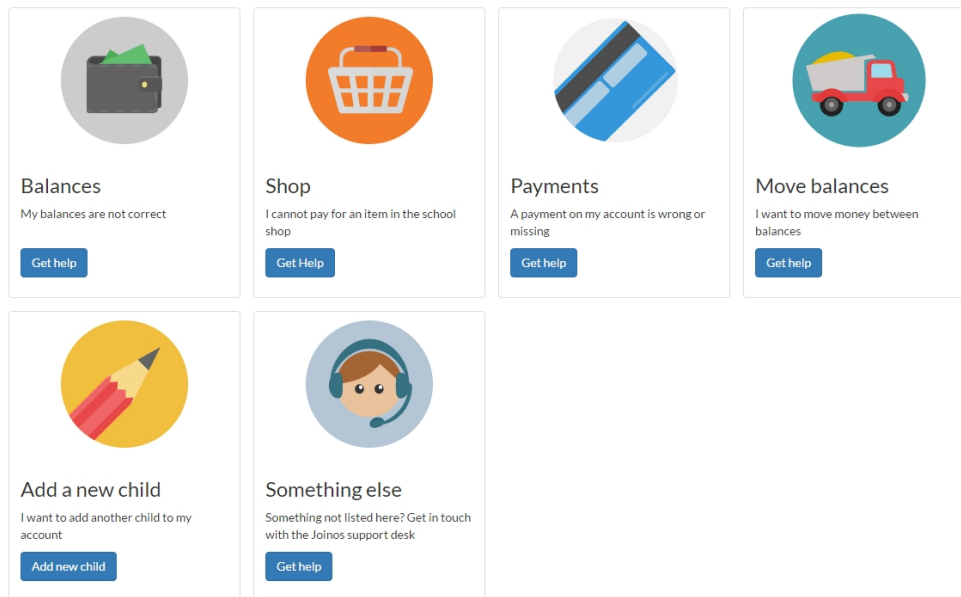


As you can see parents will likely have had a conversation with Joinos Support before coming to you with their query and as you know it is frustrating to ask a number of times before getting an answer.

In order to help you have more direct communication with parents for issues which only you can solve, we have created a new Help and Support Dashboard in Joinos which looks like this.

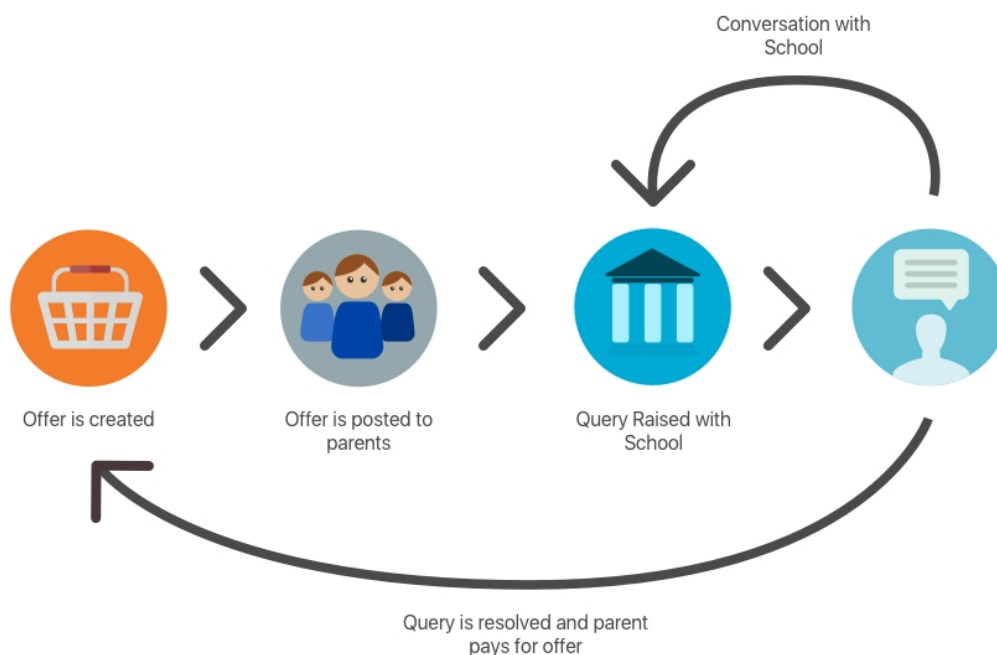
### Help and Support

How can we help?



Queries about balances, shopping and payments will come through to you from parents directly as emails. There is also a direct route for a parent to let you know they need a Joinos code for their child. All other queries will continue to come direct to Joinos Support.

This means that parents will be in touch with you before they are in touch with Joinos Support about the issues that you can help them with. The new model looks like this:





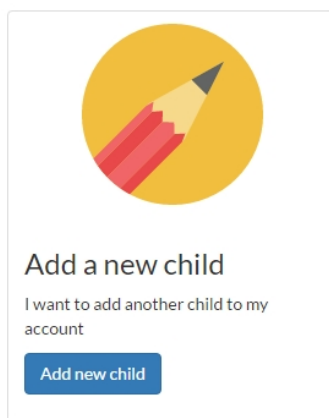
This means parents won't have wasted time contacting Joinos Support when we can't help them, and you won't receive telephone calls ad hoc from parents who are already frustrated because they have been in touch with us first. Getting emails from parents instead of phone calls means that you can plan your day better, putting aside a time to answer the emails instead of being on and off the phone throughout the day as the queries come in. It also means that you will have a written trail of the issues parents are having so you will be able to track and iron out the issues more easily.

### How does it work?

When parents click **Get help** on the appropriate icon on the new **Help and Support Dashboard**, they are led step-by-step to select the issue they are having, the school their child is with and write a description of the issue. When they click **Send**, an email is automatically generated and sent to the school.

### Adding a child

Provided you have given a Joinos code to the parent, parents can add their own children on Joinos. They will need a separate code for each child.



When parents need to add the child they click **Add a new child** and if they have a Joinos code for the child, they are led step-by-step to create the details in Joinos. If they don't have a code, they are prompted to contact the school for one.

For more information on creating and issuing Joinos codes, see [Joinos Codes on page 7](#).

## Aide Memoire - what you need to do

- Create and issue Joinos codes for pupils from Fund Manager.
- Create offers in Fund Manager for parents to see in Joinos.
- Send messages to parents from within Fund Manager

You can use the Joinos options on the Messaging menu to send parents/carers an email or SMS message to inform them of important information, new or amended offers, reminders, etc. For more information, see the Messaging chapter in the [Fund Manager User Guide](#).

- Expect email enquiries from parents to come to you direct about balances, offers and payments on their Joinos account.

For example, parents may not be able to see the offer as their child might not have been included in it or parents may want to ask you for a refund on their account or to move balances between their children's accounts.

- Plan your work day to schedule a time to deal with and reply to these email queries.

**Note:** Over time you will see a drop-off in phone calls and an increase in email enquires as parents begin to use the new Help and Support Dashboard. This will help you to plan your working day better.

# Chapter 3

## Joinos Codes

Joinos codes are used by parents to access Joinos and pay for trips and activities for their child. A parent needs a Joinos code for each child as the code is unique to the child.

You can create Joinos codes within Fund Manager, using the **Administration > Create Joinos Codes** option. All students and staff who are waiting to be registered on Joinos are listed. This includes all new students and staff at the school or those who have never been registered.

**Note:** Joinos codes expire after three months so if a pupil has already registered but their parent or carer has never used the code you gave them, they won't be able to see their child in Joinos and you will need to recreate a Joinos code for them.

### To create Joinos codes

1. Open Fund Manager > Administration > Create Joinos Codes | Create Joinos Codes.
2. On the Create Joinos Codes tab, select the pupils to generate Joinos codes for.
3. Click Create Joinos Codes.

Joinos codes are created and displayed on the Joinos Codes tab.

### To re-create Joinos codes when the original has expired

1. Open Fund Manager > Administration > Create Joinos Codes | Create Joinos Codes.

2. Click **Show Registered** to show the pupil's name in the list of pupils.
3. Select the pupil's name and click **Create Joinos Codes**.

The pupil's new code is displayed on the **Joinos Codes** tab.

## To issue Joinos codes

1. Open **Fund Manager > Administration > Create Joinos Codes | Joinos Codes**.

**Note:** This tab lists all codes and expiry dates which have not yet been activated.

2. You can print individual letters, letters for groups of pupils or export the Joinos codes to a CSV file.
  - To print individual letters, click **Print** in the **Letter** column for the pupil.  
The letter is prepared and displayed in a new browser window for you to download and print.
  - To print letters for groups of pupils:
    1. Click **Print Joinos Letters**.
    2. On the **Print Joinos Letters** screen, add groups to print letters for and click **Generate**.  
You will receive an email when the letters have been created for the groups you have selected and you can access these on the **Joinos Letters** tab.
  - To export the Joinos codes to a CSV file, click **Export CSV**.  
A CSV file is downloaded automatically as **report.csv**. You can use this report in your own Joinos template letter.

## An example letter to parents/carers

<<Date>>

Dear Parent or Guardian of «first\_name» «last\_name» In Class/Reg «school\_class»

Our school is now using a brand new online platform called **Joinos**.

Once you have registered online with Joinos you can make payments using a credit or debit card, view receipts for transactions and check account balances. You'll always be up-to-date with our news and events via Joinos messages and no-more searching for permission slips or consent forms with online documents.

**Your Joinos code may expire if not used promptly please do not delay in activating your account.**

Access Joinos from both your computer or mobile phone at home or work.

It's really simple, convenient, and it's completely free for all parents.

Joinos benefits everyone. It makes things easier for you but also reduces the administrative burden on the school. We need your support to cut back on the amount of paper and envelopes we send.

Register by following these simple instructions; it should only take **3 minutes**.

1. Go to [www.joinos.com](http://www.joinos.com).
2. Under the Joinos Code section, enter the Joinos Code you have been given.
  - Please remember to include the dashes and don't confuse zero 0 and capital O.

3. Click Register.

**Note:** Your Joinos code may expire if not used promptly so if it doesn't work, please contact us and we will be able to issue you with a new Joinos code.

4. Please check your child's name and school year are correctly displayed.
  - If you have more than one child at the school, select Add another child at this school.
  - When complete, click All done!.
5. The final registration screen needs your details.
  - Enter your email address, you will be sent a verification email.
  - Choose a password; it has to be 10 characters or more.
  - Complete your contact details.
  - Click Sign up now to create your account.
6. Click the link within the verification email you receive to activate your account.
  - Once activated, go to [www.joinos.com](http://www.joinos.com) and login.

Yours sincerely,

**The School Office**

Become part of the Joinos community

[On Facebook](#) and [On twitter](#)

## **To manage parent/carer details for pupils**

Connections are added to the pupil record in Fund Manager. Pupil details are usually set up via an import through MISapp or a similar system; however, you can add connections, using Fund Manager > Administration > Manage Names.

You can see the connections that have been set up for a pupil through Administration > Manage Connections and clicking on the pupil name. If you need to remove a connection you can do so from this screen.

# Chapter 4

## Joinos Offers

Parents won't be able to buy or pay for anything in Joinos unless you create an Offer within Fund Manager and make this available to the relevant pupils.

Offers can be simple e.g. one-off with full payment up-front, or more complex e.g. recurring offers which can accept multiple payments. Some things should only be purchased once by parents e.g. a school trip, while other items, such as rugby shirts could be ordered and paid for more than once (the parent might need to buy a shirt in a bigger size when their child outgrows the one they had bought before, or the parent might want to buy their child two shirts).

### To create an offer

1. Open Fund Manager > Offers > Create Offer.
2. Select an account.
3. Select a settlement account.

**Note:** Within Fund Manager, you are required to have a Joinos Settlement Account that all of the money is imported into and this should have been set up for you before or during Training. The gross amount of money that is paid into your Joinos Settlement Account must be transferred to your Current or desired bank account for reconciliation. For more information, see Joinos Offers in the chapter Integrated Sims in the [Fund Manager User Guide](#).

4. Enter the offer Title and a description, if required.
5. Enter the cost of the offer in the Amount field.

6. If you want to offer payment by instalments, then select **Unspecified** and enter the minimum amount you accept for an instalment in the **Minimum** box.
7. If you want parents to give online consent for the offer, select **Consent required**.
8. If you want to collect Gift Aid on the offer, select **Gift Aid**.
9. Enter the **Offer Dates** and if the offer is recurring (you will offer the same thing more than once), select **Recurring**.
10. Enter details about the offer quantities, the **Minimum** number of items each parent can purchase and the **Maximum** number of **Items Available**. If there is no limit, select **Unlimited**.
11. Select any attachments that go with the offer, if there are any.  
**Tip:** If you have documents that you want to attach to the offer and they don't show up as available then you need to upload the documents first.  
For more information see, [To upload documents to attach to offers](#).
12. Select the **Names** of the pupils who qualify for the offer.
13. Click **Post Offer**

## To share outstanding balances

You can display outstanding balances for parents who are paying by instalment on the **Payments** tab within the parent's Joinos account.

**Note:** Balances are only shown when parents are paying by instalments so they can check how much they still have to pay.

To do this, you need to select **Share Balances** on the account which is being used for the offer:

1. Open **Fund Manager > Administration > Manage Accounts**.
2. Choose the account for the offer you want to share.
3. Ensure **In Use** is selected for the account.
4. Select the **Share Balances** check box.

**Note:** This instructs Fund Manager to share all outstanding balances for offers associated with the account.

5. Click **Save**.



## To amend an offer that is already active

1. Open Fund Manager > Offers > Active Offers.
2. Find the offer you want to amend in the list and click Amend.
3. Make the amendments you need to the offer.  
For example, to make the offer available to more pupils, select additional names in the Select Names list, or to extend the offer, select a new End Date that is further in the future.
4. Click Post Offer.

## To view and release pending offers

You can view and post offers that you have created and saved without posting initially.

- Open Fund Manager > Offers > Active Offers.
- From here you can filter the list and find the offer that's pending, amend it or extend it.

## To view and extend expired offers

You can re-open expired offers by extending the end date of the offer.

- Open Fund Manager > Offers > Active Offers and select the Expired Offers tab.
- From here you can filter the list and extend an expired offer by clicking Extend.

## To upload documents to attach to offers

1. Open Fund Manager > Offers > Upload Document..
2. Enter a name and a description for the document.
3. Choose the document by clicking Choose File and browsing to where it is on your computer network.
4. Select Public if you want the document to be visible to all members of the school.

**Warning!** Don't upload any private or sensitive information. Even if you don't select Public, the file will still be available to download.

5. Click Upload.

## To view documents you have already uploaded

- Open Fund Manager > Offers > Documents.

From the list of documents you have uploaded you can see which documents are marked as public and what offers the documents have been attached to.

- You can remove documents from offers, by clicking [Attached Offers](#) alongside the [Document](#), selecting the offer to remove the document from and clicking [Remove](#).

# Chapter 5

## Joinos Messages

You can create and send Joinos messages and sms text alerts to parents and carers of pupils. Telephone numbers are added in Fund Manager

> Administration > Manage Names.

You can send attachments via Joinos if the documents have been uploaded using Fund Manager > Offers > Upload Document.

### To send an email message

1. Open Fund Manager > Messaging > Joinos New Message.
2. Enter the Title and Body of the message.
3. Select any listed attachments to attach to the message within Joinos.

**Tip:** For more information see, [To upload documents to attach to offers](#).

**Note:** Attachments are not attached to the email notifications but can be accessed by parents within their Joinos account.

4. Select the names to send the message to in the Contacts list.
5. Click Send.
6. Parents receive a message in Joinos and an email notification.

### To send an SMS alert

1. Open Fund Manager > Messaging > Joinos New Message.
2. Enter the Title and Body of the message.
3. Select any listed attachments to send with the message.

**Tip:** For more information see, [To upload documents to attach to offers](#).

**Note:** Attachments are not attached to the SMS alerts but can be accessed by parents within their Joinos account.

4. Select the names to send the message to in the **Contacts** list.
5. Select **Send** selected contacts a message alert via SMS.
6. Click **Send**.

### **To view message history**

1. Open **Fund Manager > Messaging > Joinos History** to display a list of messages that have been sent.
2. Click the message **Title** to see the details of the message that was sent.
3. Check the **Read** column to check if a recipient has read the message.