North Tyneside Catering Services

Onboarding New Schools Guide

Pebble

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Chapter 1

Getting Started

This Guide explains what you need to do to onboard new schools in Fund Manager.

Outline of the onboarding process

1. Create Groups.
    - Create a group for each school which will contain all pupils for the school.
2. Import Names.
    - Import pupil names for the school.
    - Allocate school name: group (created in step 1 above) to the pupil name.
    - Add other relevant groups to the pupil name (e.g. year, class, free school meals).
3. Request new user logon and password to be set up for each school.
    1. Email support@mypebble.co.uk requesting new user for school. Include the full school name and an email address. e.g. St Bernadette's Primary, stbernadettes@northtyneside.gov.uk
    2. Pebble will create the user for you and send confirmation back to you when this is done.
4. Manage user permissions for the school.
5. Manage Joinos Codes for new pupils

  - Create new Joinos codes.
  - Issue new Joinos codes to parents.

We'll consider each step in the following chapters.

This Guide assumes a basic level of knowledge of accessing and using Fund Manager, however a refresher is provided below.

Quickstart to accessing and using Fund Manager

Accessing Fund Manager

1. Go to www.mypebble.co.uk, click on Login > Fund Manager > Login.
2. Enter the email and password from your welcome email.

If you don't have a password:

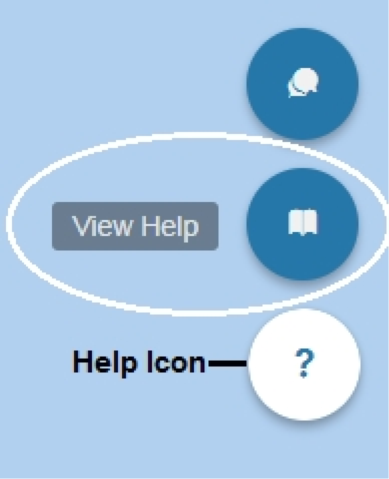
- Click on the Forgotten Your Login Details link underneath the login button.
- You'll then be prompted for your email address; enter the email address you use to log onto Fund Manager and click Reset my Password.
- You should then receive an email with a link to choose a new password.

Note: When you set your password, please remember that it must have at least eight characters, including at least one letter, one number and one special character e.g. $, &

Getting help on the screens

You can use the screen help within Fund Manager to learn more about the screen and the fields on the screen.

To access this, click on the Help icon at the bottom right hand of the screen and then select View Help.



This opens a panel of help on the screen which helps you with the activity you are doing on the screen.

Getting help on the Support Website

You can find us by clicking the support link top right of your Fund Manager software or by going to;

https://www.mypebble.co.uk/supportdocs/Content/support/fm/fm-home.htm

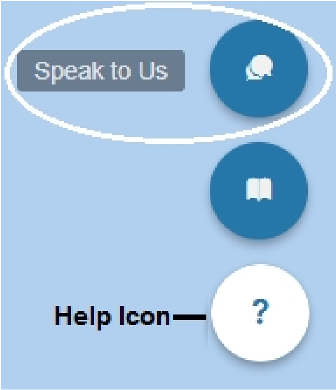
Have you checked the online documentation but still need to get in touch with us?

Our support lines are likely to be extremely busy in September and you may experience some delays. If your query isn't urgent, but can't be resolved with our online documentation, then email us at support@mypebble.co.uk and we'll be in touch as soon as possible; usually within four hours of receiving your message.

If your query is of a technical nature

If you have an urgent technical query that needs resolving and would like to speak to a Support Technician, please call us on 0845 310 1788. We're available to take your calls Monday to Friday from 8.30am to 4.30pm.

We also have an online support tool which you will find at the bottom right corner of Fund Manager. Click the Help Icon and select Speak to Us.


Speak to Us
Help Icon
?

Need to configure your browser?

Please go to the support site and search for Configuring Browsers

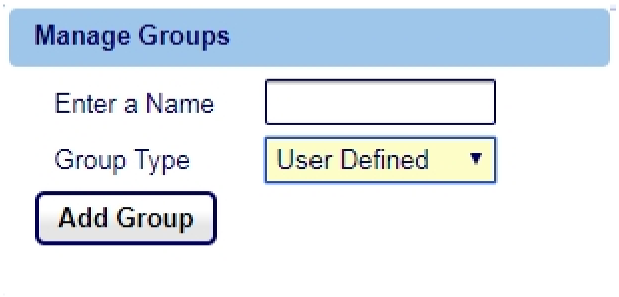
Chapter 2

Step 1: Create Groups

You already have a number of groups created for existing schools, so we are adding groups for the new schools that you are onboarding in th is step..

1. Open Administration > Manage Names.
2. For each school that you want to create a group for:
    1. Scroll to the Group Actions section on the screen.
    2. Click Create Group.

       The Manage Groups screen is displayed.

       Group Type: User Defined

    3. Enter the school name in the Enter a Name field.
    4. Select School Name from the Group Type drop-down field.
    5. Click Add Group.

Chapter 3

Step 2: Import Names

There are three parts to this step:

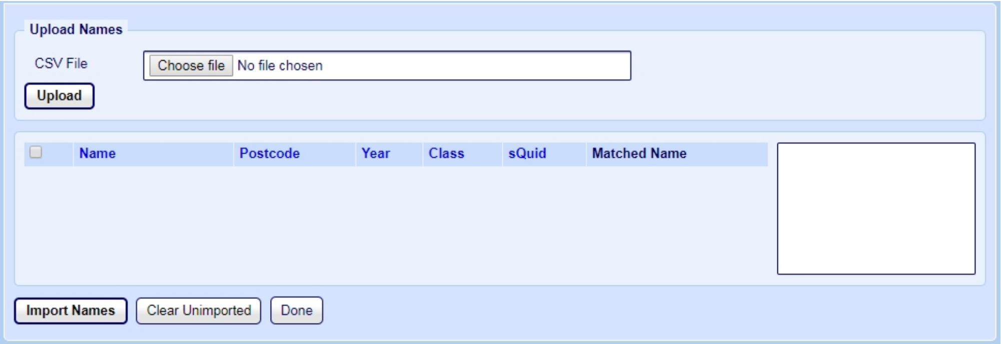
- Import pupil names.
- Add school name: group (created in step 1) to the name.
- Add other groups to the name.

Import pupil names

In order to import pupil names for each new school you are onboarding in this step, you must obtain from the school a CSV file which contains the pupil names.

1. Open Administration > Manage Names.
2. For each school that you want to create a group for:
    1. Click Import Names.

       The Upload Names screen is displayed.


Upload Names
CSV File
Choose file
No file chosen
Upload
☐
Name
Postcode
Year
Class
sQuid
Matched Name
Import Names
Clear Unimported
Done

    2. Click Choose File.

    1. Browse to the location of the CSV file to upload and click Open.
    2. Click Upload to display the names in the CSV file on the screen in the list of names.
3. Select the Names you want to import.
4. Click Import Names.

Add school group to pupil name

1. Open Administration > Manage Names.
2. Select the pupil name in the list of names.
3. Select the school name: group (created in step 1) from the Group drop-down list.
4. Click Add to Group. The group name appears in the Groups column for the pupil name.

Add other groups to pupil name

1. Open Administration > Manage Names.
2. Select the pupil name in the list of names.
3. Select the other group (e.g. User Defined : Free) from the Group drop-down list.
4. Click Add to Group. The group name appears in the Groups column for the pupil name.

Chapter 4

Step 3: Request New School Logon Details

This works in the following way:

1. You send an email to support@mypebble.co.uk.
    - Ask Pebble to set up a new user for the new school.
    - Include the full school name and an email address for the school e.g. St Bernadette's Primary, stbernadettes@northtyneside.gov.uk
2. Pebble will create the user for you and send confirmation back to you when this is done. You can then log on to the new school using the school email address.

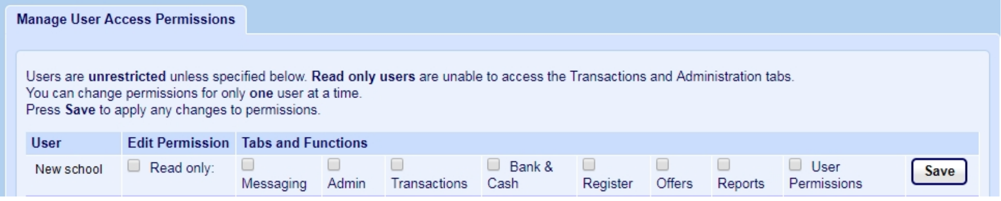
Chapter 5

Step 4: Manage New School User permissions

This works in the following way:

1. Open Administration > Manage User Access Permissions.

   The Manage User Access Permissions screen is displayed.



Users are **unrestricted** unless specified below. **Read only users** are unable to access the Transactions and Administration tabs.
You can change permissions for only **one** user at a time.
Press **Save** to apply any changes to permissions.

User	Edit Permission	Tabs and Functions							
New school	☐ Read only:	☐ Messaging	☐ Admin	☐ Transactions	☐ Bank & Cash	☐ Register	☐ Offers	☐ Reports	☐ User Permissions

2. Check that the new school logon (requested in step 3) is listed here.
3. For new schools there should be no restriction so all check boxes should be clear.

Chapter 6

Step 6: Manage Joinos Codes

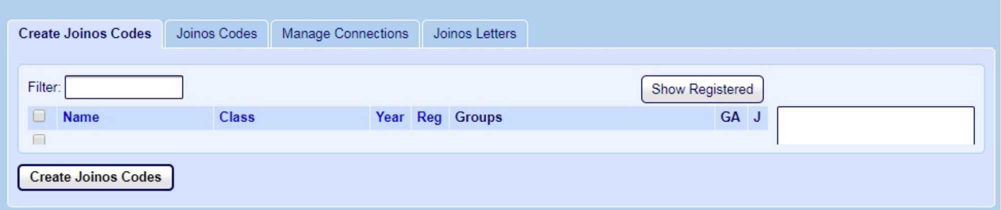
Before any parent or carer can pay for an offer, the pupils need to be registered on Fund Manager. This is normally done in Step 2: Import Names on page 7. Usually parent/carer details are imported as part of pupil details. Otherwise the contact details can be set up using Manage Names > Update Pupil.

Once pupils are registered with their associated parent or carer details, you can create the Joinos codes and issue these to the parent or carer.

Create new Joinos Codes

1. Open Administration > Create Joinos Codes.

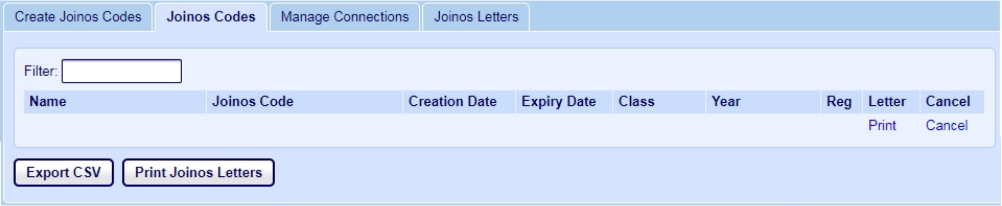
   The Create Joinos Codes screen is displayed.

   
   Create Joinos Codes
   Joinos Codes
   Manage Connections
   Joinos Letters
   Filter:
   Show Registered
   ☐ Name
   Class
   Year
   Reg
   Groups
   GA
   J
   Create Joinos Codes

   This screen displays pupils who are waiting to be registered on Joinos.
2. Select the names that you want to generate Joinos codes for.
3. Click Create Joinos Codes

   Joinos codes are created for the selected names and displayed on the

Joinos Codes tab.


Create Joinos Codes
Joinos Codes
Manage Connections
Joinos Letters
Filter:
Name
Joinos Code
Creation Date
Expiry Date
Class
Year
Reg
Letter
Cancel
Print
Cancel
Export CSV
Print Joinos Letters

What to do if the Joinos code you have issued has expired

When you create Joinos codes for selected names on the Create Joinos Codes tab, they are listed on the Joinos Codes tab and recorded as registered on Joinos even if the parent hasn’t yet registered the code on their side. When a parent tries to register after three months, they get a message to say their Joinos code has expired.

To create a new code you need to:

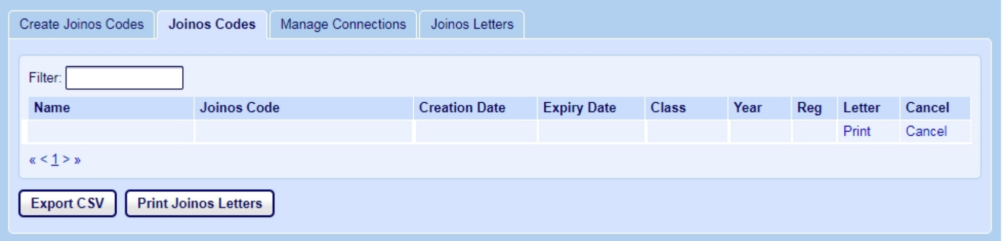
- Click Administration > Create Joinos Codes.
- Click Show Registered.
- Filter for the child’s name.
- Click the box to select the child and click Create Joinos Code.
- Go to the Joinos Codes tab and there name will now show the new Joinos code.

Issue new Joinos codes to parents or carers

Note: Although parent or carer details are added to the pupil record through Manage Names, you can view the pupil’s connections through Administration > Manage Connections. You can also remove connections that are incorrectly assigned or no longer applicable from Manage Connections.

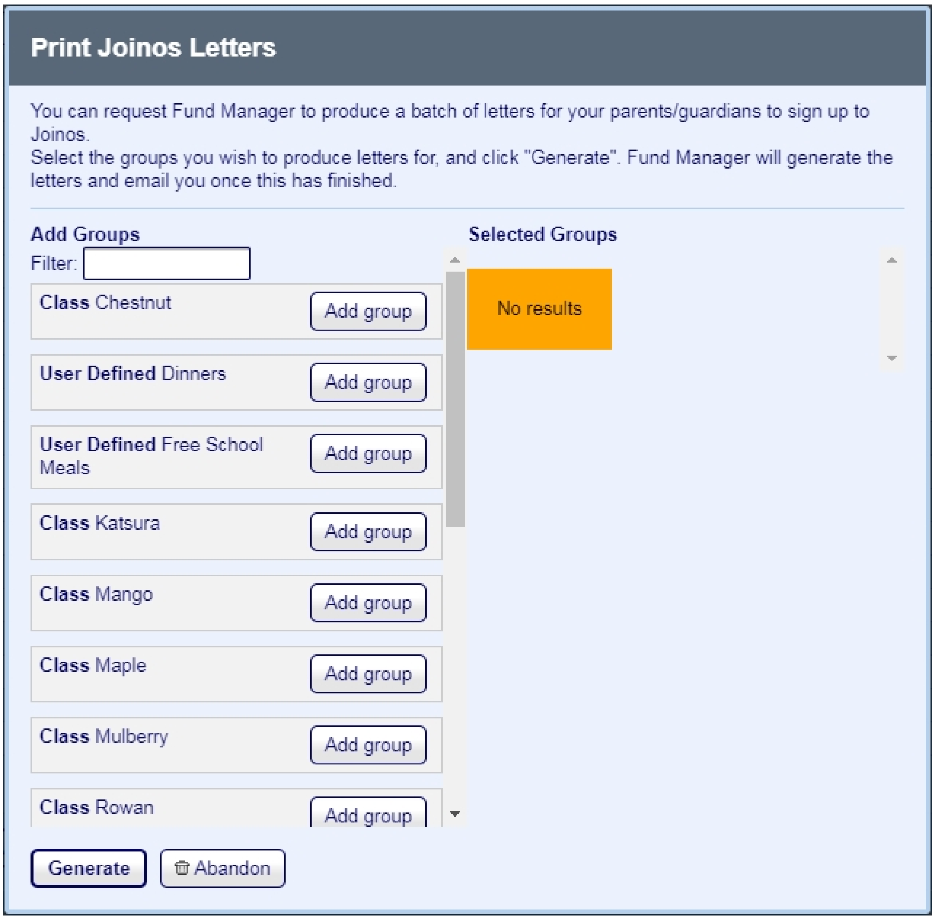
1. Open Administration > Create Joinos Codes and select the Joinos Codes tab.

   A list of pupil names is displayed showing creation and expiry dates for the codes you have created.


Create Joinos Codes
Joinos Codes
Manage Connections
Joinos Letters
Filter:
Name
Joinos Code
Creation Date
Expiry Date
Class
Year
Reg
Letter
Cancel
Print
Cancel
« < 1 > »
Export CSV
Print Joinos Letters

2. To print an individual letter for a pupil:
   - Click Print in the Letter column for the pupil.

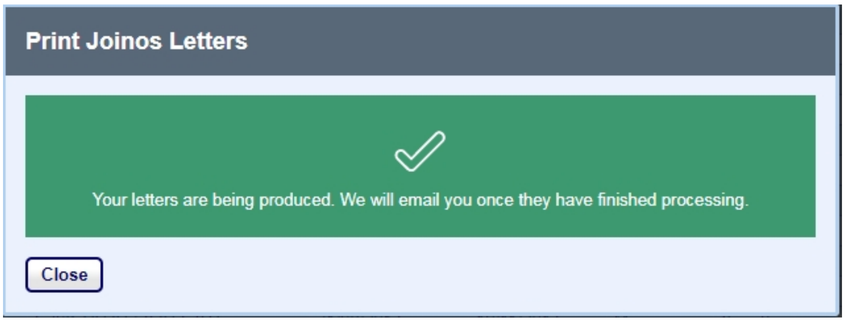
     The letter is prepared and displayed in a new browser window for you to download or print.
3. To print letters for groups of pupils:
   - Click Print Joinos Letters. The Print Joinos Letters screen appears.


Print Joinos Letters

You can request Fund Manager to produce a batch of letters for your parents/guardians to sign up to Joinos.
Select the groups you wish to produce letters for, and click "Generate". Fund Manager will generate the letters and email you once this has finished.

Add Groups
Filter:
Class Chestnut
Add group
User Defined Dinners
Add group
User Defined Free School Meals
Add group
Class Katsura
Add group
Class Mango
Add group
Class Maple
Add group
Class Mulberry
Add group
Class Rowan
Add group
Selected Groups
No results
Generate
Abandon

     1. Click Add group to add groups you want to print letters for.
     2. Click Generate.


Print Joinos Letters

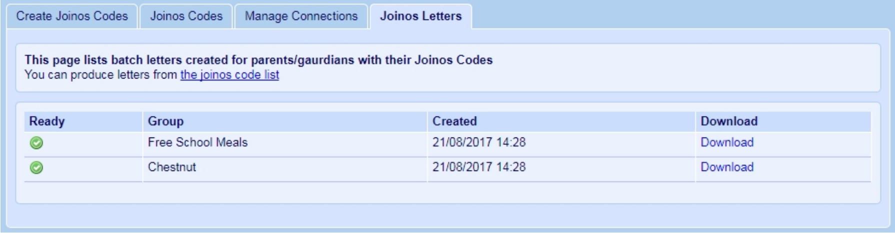
Your letters are being produced. We will email you once they have finished processing.

Close

You receive an email when the letters for these groups have been created. You can access these on the Joinos Letters tab.

   When you receive the email, you can view and download the letters from the link in the email or from the Joinos Letters tab.

3. Click the Joinos Letters tab.



This page lists batch letters created for parents/gaurdians with their Joinos Codes
You can produce letters from the joinos code list

Ready	Group	Created	Download
✓	Free School Meals	21/08/2017 14:28	Download
✓	Chestnut	21/08/2017 14:28	Download

   - Click Download to download the letters for all parents in the group. These are all downloaded in one PDF for the group, one letter per page.

4. To print letters for the entire list:
   1. Click Export CSV.
   2. Select where to save the CSV file, enter a File name and click Save.

      The CSV file provides nine columns of information with the following headings:

      first_name, last_name, joinos_code, created, expires, school_class, school_year, school_reg, school_name
   3. Use a letter template and insert the information from the CSV in the appropriate spaces in the letter template.

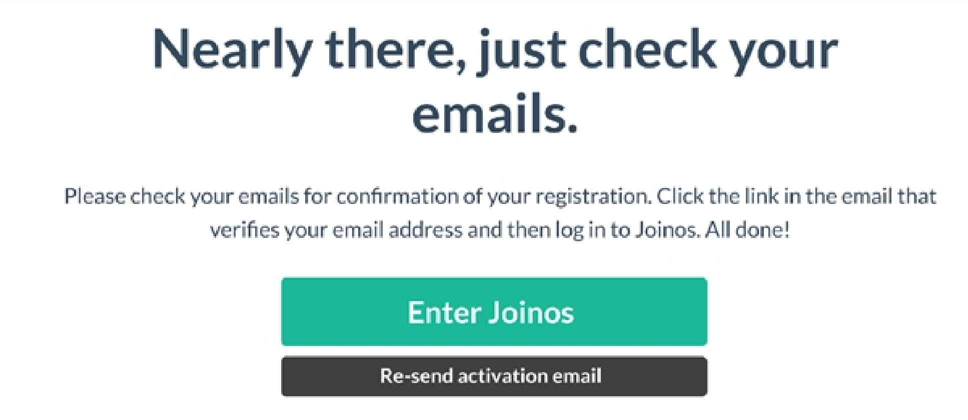
      For example:

> <<Date>>
>
> Dear Parent or Guardian of first_name [last_name] in Class 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 will expire so please use promptly to activate 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 towww.joinos.com.
    - Click I need to....
    - Select enter my Joinos code.
2. Enter your child's unique Joinos code: joinos_code
    - Please remember to include the dashes and don't confuse zero 0 and capital O.
    - Press the Enter key or click the Search icon to continue.
    - Your Joinos code will expire so use it promptly.
3. Please check your child's name and school year are correctly displayed.
    - If you have more than one child at this school, select 'Add another child at this school'
    - When complete, click All done!
4. 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.
5. Click the link within the verification email you receive to activate your account.
    - Once activated, go to www.joinos.com and login (link at top-right of page)



Nearly there, just check your emails.

Please check your emails for confirmation of your registration. Click the link in the email that verifies your email address and then log in to Joinos. All done!

Joinos will email you daily a summary of any new items or changes relating to your child. We know you’ll find Joinos a really useful way to pay for everything and miss nothing.

Yours sincerely,

The School Office

Become part of the Joinos community

On Facebook and On twitter