

## Arbor September Readiness Checklist

### Entering new parent/staff details on Arbor

For parent/staff contact details to be successfully imported into Schoolcomms, there are certain guidelines which need to be followed. See the Arbor Data help guide [here](#). Parental Responsibility also needs to be applied in Arbor for parents to be able to give consent, see balances, and make bookings on School Gateway. To review and identify any gaps in data currently imported into your Schoolcomms account, check your registered users with the Management Report. Access the Management Dashboard help guide [here](#).

### Import Settings

You can check the data you are currently importing from Arbor via Schoolcomms Web version: [app.schoolcomms.com/login](http://app.schoolcomms.com/login).

To review your Schoolcomms Import Settings, go to **Dashboard > Import Management > Edit settings**.

Access the Import Arbor Data help guide [here](#).

**Please note:** Wonde imports data on an hourly basis so users will need to wait an hour after amending any details in your MIS before running an import to ensure the latest data is imported.

### Data issues

Ensure that your data issues are dealt with on a regular basis; if ignored, you may not be communicating to all imported contacts. See the Data Issues help guide [here](#).

### Create/delete Staff Schoolcomms accounts for new/leaving staff members

Your school multi-user administrators can create, unlock, amend, and delete staff Schoolcomms user accounts.

Access the Create Additional Users help guide [here](#).

If your school has a Scheduled Import set up using your Schoolcomms user credentials, please ensure that the credentials are updated on the Task Scheduler; you may need your IT Support to assist you with this.

## Leavers

**Please note:** When deleting your leavers from Schoolcomms, this is a permanent deletion; only complete once you are certain you no longer need to access any related information or communicate through Schoolcomms.

School leavers need to be given a leaving date (employment end date for staff members) and once the leaving date has passed, they will be taken off roll. Once they are leavers, they can be permanently deleted from Schoolcomms. Access the Delete Leavers help guide [here](#).

Once students are identified as leavers in Schoolcomms, they can still be messaged as normal, however they will no longer show in their MIS groups. We would recommend that you manually create a **Leavers Group** in Schoolcomms to continue to message them in bulk before they are deleted as leavers. Access the Groups help guide [here](#).

## Leavers in Meal Manager (Cypad)

The status of leavers will change to Closed once they have been deleted from Schoolcomms; they will then no longer appear on the Whiteboard.

## Adding/amending Bank Details

As part of our improving security standards, schools will be asked for proof of ownership when adding new bank accounts to Schoolcomms. Access the Bank Accounts help guide [here](#).

## Payments

Amend existing or create new payment requests for the new academic year. See the Payment Requests help guide [here](#).

**Please note:** Schoolcomms recommends that a new payment request is created if a vast sum of monies has been collected to prevent time-outs.

## Refunds

For credit balances for leavers etc, access the Refunds help guide [here](#).

## Text Credits

Top up text credits to ensure you have enough for the new academic year. Access the Ordering Text Credits help guide [here](#).

## Space Usage

Archive messages and clean up the inbox.

Access Archiving via the Web (Sent Items) help guide [here](#).

## Schoolcomms Dinners

Amend existing or create new Dinner Plans for the New Academic year. Add new students to the Dinner Plan and connecting payment request once they have been imported after they have hit date of admission in your MIS. Access Schoolcomms Dinners help guide [here](#).

UIFSM year groups will not be updated until the first import is run following your Academic promotion being completed in your MIS.

We would advise that you do not allow parents to pre-book meals in the Summer.

## Meal Manager

To ensure that UIFSM meals are charged correctly on your first day of term, run an import in Schoolcomms before 11am so that the updated year groups will be passed to Cypad.

Depending on when the first import in the new academic year is run in Schoolcomms, pupils and class groups will update in Cypad after the next data sync:

**School members – 6am, 11am, 3pm, and 6pm each day.**

The status of leavers will change to Closed once they have been deleted from Schoolcomms, they will then no longer appear on the Whiteboard.

Access the Meal manager help guide [here](#).

## Clubs

Amend existing or create new Clubs and connecting payment requests. Access the Clubs help guide [here](#). Add new students to Clubs and Payment requests once they have been imported after they have hit date of admission in your MIS.

## School Gateway

Encourage your new and existing parents to register for School Gateway. Useful letter templates can be found in the School Gateway Success Guide [here](#). Also see App/Payments invites in Messaging templates. Access the Full Parent Guide [here](#). Access the School Gateway help guide [here](#). Please remind parents to ensure that they are on the most recent version of School Gateway for the best user experience.

## FAQ and Hot Topics

Access a useful help guide for Frequently Asked Questions [here](#).

Access the Hot Topics [here](#).