

Educator Welcome Wizard

Your service has started the transition to bring their educators online and have created a subscription for you to complete.

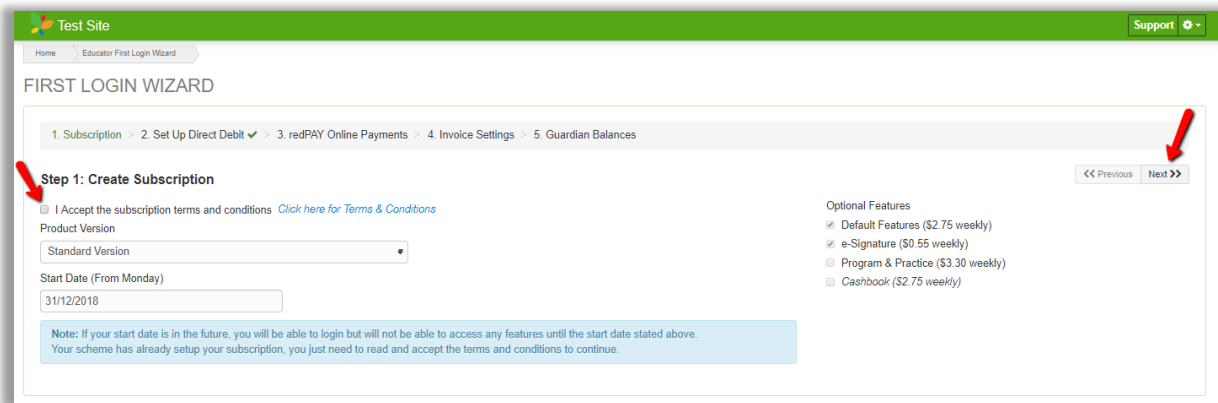
You will receive an email containing your login link and user credentials.

Note your username has a full stop between your first name and surname

The first time you login to Harmony Web for educators, there will be a welcome wizard displaying on your screen, there is **5 steps** for you to complete.

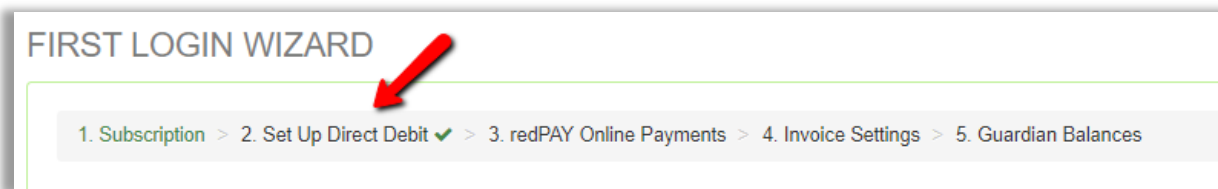
Step 1 – Subscription

Your service has already created your subscription to Harmony Web so your only job here is to read over the details, terms and conditions then tick ‘**I Accept the online payments terms and conditions**’.



Step 2: Set up Direct Debit

This Step you will skip past automatically for now as educators with pay the subscription fees via their service.



Step 3 – Redpay Online Payments

redPAY is an electronic payment processing service that is fully integrated into Harmony Web that facilitates Direct Debit payments from your parents.

redPAY operates in the background of Harmony, meaning you don't have to learn another system or deal with another supplier.

You create invoices as per usual and redPAY does the rest making this process convenient for Parent/Guardians, as they have the peace of mind knowing that they will always be up-to-date with their child care fees.

If you are wanting to go ahead with this process accept the **terms and conditions** and fill in the details below then click '**next**' button.

If you aren't wanting to go ahead with redPAY at this time you can click on the option '**I do not want to continue online payments at this time**' then click '**next**'.

If you choose to opt out now but change your mind, it's ok – this feature can be activated at a later date from the 'My Profile' page.

Step 4 – Invoice Settings

Before you can create your invoices, you must activate invoicing to allow the invoice menu options to appear in the account's menu. Through the Welcome wizard this feature will allow you to schedule the creation of invoices.

Scheduled invoicing can either run in advance or in arrears, weekly or fortnightly and any specific day you choose.

Invoice Time Sheets from 06/01/2019					
Mon	Mon	Mon	Mon	Mon	Mon
Tue	Tue	Tue	Tue	Tue	Tue
Wed	Wed	Wed	Wed	Wed	Wed
Thu	Thu	Thu	Thu	Thu	Thu
Fri	Fri	Fri	Fri	Fri	Fri
Sat	Sat	Sat	Sat	Sat	Sat
Sun	Sun	Sun	Sun	Sun	Sun
Week Ending 30/12/2018	Week Ending 06/01/2019	Week Ending 13/01/2019	Week Ending 20/01/2019	Week Ending 27/01/2019	Week Ending 03/02/2019

Legend: ■ First invoice trigger date. ■ First invoice period

The **Unscheduled** option will only be performed when the timesheet has been processed and queried by CCS.

Note: The 'commence invoicing Week end' date is important because timesheet invoices will be created starting from this date and not prior.

Invoicing settings can be changed through the accounts menu after you have completed your welcome wizard.

Step 5 – Guardian Balance

We strongly recommend that you enter the current balance of monies owed to you by the parents.

FIRST LOGIN WIZARD

1. Subscription ✓ > 2. Set Up Direct Debit > 3. redPAY Online Payments ✓ > 4. Invoice Settings ✓ > 5. Guardian Balances

Step 5: Guardian Balances << Previous **Finish** >>

Setting Guardian Balances:
 If the guardian *owes* you money, i.e. they are *not* in credit, then enter a value in the 'Money Parent Owes Me' column.
 If the guardian *does not owe* you money, i.e. they *are* in credit or their balance is \$0.00, then enter 0.00 or a more in the 'Money I Owe The Parent' column.
 *Balance as at Week Ending should be set to the week ending the guardian has already paid up until. The system will also not invoice guardians before this date to prevent double charging parents if you have already been charging them outside of the system.

Guardian Name	Money Parent Owes Me	Money I Owe The Parent	Balance as at Week Ending
Carmady Caddy	\$ <input type="text"/>	\$ 0 <input type="text"/>	<input type="text"/>
Deborah Bell	\$ <input type="text"/>	\$ 0 <input type="text"/>	<input type="text"/>
Enzo Jones	\$ <input type="text"/>	\$ 0 <input type="text"/>	<input type="text"/>
Juliette Hobbs	\$ <input type="text"/>	\$ 0 <input type="text"/>	<input type="text"/>
Linda Johnson	\$ <input type="text"/>	\$ 0 <input type="text"/>	<input type="text"/>
Reagan Stone	\$ <input type="text"/>	\$ 0 <input type="text"/>	<input type="text"/>
White Green	\$ <input type="text"/>	\$ 0 <input type="text"/>	<input type="text"/>

- If the parent does owe you money enter the value in ‘**Money Parent Owes Me**’ column.
- If the parent does not owe you and are in credit or are in \$0 balance enter the value in the ‘**Money I Owe Parent**’ column.
- ‘Balance as at Week Ending’ will be the date the parent has paid up until so that the system will not invoice the parent prior to this date.

Once the balances have been entered in you will now be able to click **finish**.