

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'.

🎾 Test Site		Support 🗢 -
Home Educator First Login Wizard		
FIRST LOGIN WIZARD		
1. Subscription $>$ 2. Set Up Direct Debit 🛩 $>$ 3. redPAY Online Payments $>$ 4. Invoice Settings $>$ 5. Guardian Balances		
Step 1: Create Subscription		<< Previous Next >>
I Accept the subscription terms and conditions Click here for Terms & Conditions Product Version	Optional Features	
Standard Version •	 e-Signature (\$0.55 weekly) Program & Practice (\$3.30 weekly) 	
Start Date (From Monday)	Cashbook (\$2.75 weekly)	
31/12/2018		
Note: If your start date is in the future, you will be able to login but will not be able to access any features until the start date stated above. Your scheme has already setup your subscription, you just need to read and accept the terms and conditions to continue.		

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.

FIRST LOGIN WIZARD
1. Subscription > 2. Set Up Direct Debit < > 3. redPAY Online Payments > 4. Invoice Settings > 5. Guardian Balances





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.

IRST LOGIN WIZARD		
1. Subscription ✔ > 2. Set Up Direct Debit > 3. redPAY Online Payments > 4. Invoice Settings > 5. Guardian Ba	alances	
Step 3: redPAY Online Payments		<pre>K Previous Next >></pre>
I Accept the online payments terms and conditions Click here for Terms & Conditions		
redPAY Settings	Settlement Account Details This is your ba	nk account parent fees will be paid to
Name to Appear on Parents Bank Statements	Bank Name	Account Name
TestSite		
15 Characters Max. This will appear on parents bank statements when they make online payments.	The name of the bank the account belongs to (I.e. CBA, WBC etc).	The Account Name as it appears on bank statements.
Bank Account Transaction Fee Paid By Credit Card Surcharge Paid By	BSB	Account Number
Parent/Guardian Parent/Guardian		
Choose to pass the fee on to the parent or incur it yourself Choose to pass the fee on to the parent or incur it yourself	The BSB number of the account. Must be in NNN-NNN format	The Account Number must only include numbers and no spaces and be between 6 and 12 digits.
Credit Card Transaction Fee Paid By Dishonour Fee Paid By		
Parent/Guardian Parent/Guardian		
Choose to pass the fee on to the parent or incur it yourself Choose to pass the fee on to the parent or incur it yourself		
I do not want to configure online payments at this time.		

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'.

1. Subscription ✓ > 2. Set Up Direct Debit > 3. redF	PAY Online Payments > 4 . Invoice Settings > 5 . Guardian Ba	alances	
Step 3: redPAY Online Payments			Previous Next >>
I Accept the online payments terms and conditions C/	ick here for Terms & Conditions		
edPAY Settings		Settlement Account Details This is your bar	nk account parent fees will be paid to
lame to Appear on Parents Bank Statements		Bank Name	Account Name
TestSite			
5 Characters Max. This will appear on parents bank tatements when they make online payments.		The name of the bank the account belongs to (I.e. CBA, WBC etc).	The Account Name as it appears on bank statements.
Bank Account Transaction Fee Paid By	Credit Card Surcharge Paid By	BSB	Account Number
Parent/Guardian *	Parent/Guardian =		
Choose to pass the fee on to the parent or incur it yourself	Choose to pass the fee on to the parent or incur it yourself	The BSB number of the account. Must be in NNN-NNN format	The Account Number must only include numbers and no spaces and be between 6 and 12 digits.
Credit Card Transaction Fee Paid By	Dishonour Fee Paid By		
Parent/Guardian 🔻	Parent/Guardian •		
choose to pass the fee on to the parent or incur it yourself	Choose to pass the fee on to the parent or incur it yourself		





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.

IRST LOGIN WIZARD	
1. Subscription V > 2. Set Up Direct Debit > 3. redPAY Online Payments > 4. Invoice Settings > 5. Guardian Balances	
Step 3: redPAY Online Payments	<pre>K Previous Next >></pre>
I do not want to configure online payments at this time.	
You have chosen to opt of of online payments for your parents. Note: 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.

1. Subscription < > 2. Set Up Direct Debit	> 3. redPA	✓ Online Payments ✓ > 4. Invoice Settings > 5. Guardian B	alances					
Step 4: Invoice Settings							<	Previous Next >
Commence Week Ending (Sunday)		Invoicing Type			Invoice Time Shee	ets from 06/01/2019		
06/01/2019		 Unscheduled Scheduled 	Mon	Mon	Mon	Mon	Mon	Mon
Silling Method		R Automatically Email Invoices	Tue	Tue	Tue	Tue	Tue	Tue
In Arrears	Ŧ	Automatically Email Invoices	Wed	Wed	Wed	Wed	Wed	Wed
1 Week		Occurs on a	Thu	Thu	Thu	Thu	Thu	Thu
Tweek	•	Monday	Fri	Ed	Fri	Fri	Ed	Fri
Auto Invoicing will be performed when: Auto Invoicing will run for time sheets from (and including) week ending 06/01/2019 and will invoice in arrears. Auto invoicing if energy and supplies a function of the provide provide provide provide and the second statement of the provide prov		Sat	Sat	Sat	Sat	Sat	Sat	
advance.	monday. The	n duo involding fundi k win processi i week in	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

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

PAY Online Payments 🗸 > 4. Invoice Settings > 5. Guardian	Balances	
		K Previous Next 3
Invoicing Type		
Inscheduled Scheduled		
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nvoice created via the Auto Invoicing will be		
	Invoicing Type Unscheduled Scheduled Invoice created via the Auto Invoicing will be	Invoicing Type Unscheduled Scheduled Invoice created via the Auto Invoicing will be

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.

RST LOGIN W	/IZARD			
1. Subscription 🗸 > 3	2. Set Up Direct Debit > 3. redPAY Onlin	e Payments ✔ > 4. Invoice Settings ✔ > 5	5. Guardian Balances	
Step 5: Guardian E	Balances			K Previous Finis
Setting Guardian Bal If the guardian owes y If the guardian does n 'Balance as at Week E double charging paren	ances: ou money, i.e. they are not in credit, then ot owe you money, i.e. they are in credit inding' should be set to the week ending t its if you have already been charging then	enter a value in the 'Money Parent Owes Me' or their balance is \$0.00, then enter 0.00 or a he guardian has aleady paid up until. The syst n outside of the system.	column. more in the 'Money I Owe The Parent' column. tem will also not invoice guardians before this date to prevent	
Guardian Name	Money Parent Owes Me	Money I Owe The Parent	Balance as at Week Ending	
Carmady Caddy	\$	\$ 0		
Deborah Bell	\$	\$ 0		
Enzo Jones	\$	\$ 0		
Juliette Hobbs	\$	\$ 0		
Linda Johnson	\$	\$ 0		
Reagan Stone	\$	\$ 0		
White Green	\$	\$ 0		

- 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.

