

Parentapps Connect **guide.**

Contents.

Getting Started - [Click to Jump to Section](#)

Dashboard Overview	3
How to Login to Your Connect Portal	4
How to Invite Admins to Manage the Portal	5
How to Create Module Categories	6

Admin Features - [Click to Jump to Section](#)

Approving Additional Contacts	8
Managing Updated Contact Details	9
Parentapps Announcements	10

Importing Student & Parent Data - [Click to Jump to Section](#)

Student & Parent Overview	12
MIS Integration - How to Import Students & Parents Using Xporter	13
How to add Students & Parents via a CSV	14
How to Add & Remove Students & Parents Manually	15
How to Create Student Groups	16
How to Add Staff as App Users	17
Promoting Students & Leavers	18

Parents - [Click to Jump to Section](#)

How to Prepare for the Launch of Your App to Parents	20
How to Invite Your Parents	21
Removing & Deactivating Parents	22
Adding Additional Parents Manually	23
How to Engage with Your Inactive Parents	24

Consent Forms & Surveys - [Click to Jump to Section](#)

Absence & Standard Consent Forms	26
Exporting Form Data & Sending Reminders	27
Creating Your own Custom Form	28

Modules - [Click to Jump to Section](#)

Overview	31
How to Upload PDF Documents	32
How to Add Photos to Your Gallery	33
How to Add Useful Web Links	34
How to Add School Events	35

Messages - [Click to Jump to Section](#)

How to Send Messages & Attach Content	37
Message History & Delivery Reports	38

Housekeeping - [Click to Jump to Section](#)

End of Grade Housekeeping	40
---------------------------	----

Pre-Admissions - [Click to Jump to Section](#)

Pre-Admissions for Schools Using Xporter	43
Pre-Admissions for Schools not using MIS Integration	44

GETTING STARTED

Dashboard overview.

Welcome to the Parentapps Connect platform. You should already have an account and be logged into your portal, the central place you'll manage your app from. When you first log in, you'll be greeted by the dashboard where you can see an overview of the system, including module usage (an overview of the different types of content you can upload to the app), student and user statistics, savings calculator as well as an activity log split into various section.

We can see the different sections of the app we can manage down the left-hand side, such as Content, Form Data, Messages, Students, Users, Groups, Templates and Settings.

Finally, we can see a number of tabs across the top-right corner of the screen:

Alerts – containing important messages and updates directly from Parentapps.

Profile Updates – to let you know when a user updates their email address or phone number. This is so you can update your school records or MIS system accordingly as our system doesn't write any data back to your MIS.

Requests – Approve or Decline requests to add additional contacts to a child, as sent by a user.

Support – a quick link to our support hub in-case you need a little extra help.

Profile – to update your user profile and change your password and finally, Logout, to log you out of the system.

The screenshot displays the Parentapps Connect dashboard. On the left is a teal sidebar with navigation links: Dashboard, Content, Form Data, Messages, Students, Users, Groups, Templates, Settings, Extras, Evenings, and Clubs / Events. Below these is a 'New Logout' button and the Parentapps logo with a 'Refer a friend' link.

The main dashboard area is divided into several sections:

- Module Usage:** A grid showing usage for Messages, Form / Surveys, Information (Text / PDF), Parent Events, Term Dates / Events, URL's (Web Pages), Gallery, and Clubs / Events. Each item has a status (e.g., 'Actively Using', 'Not Using') and a 'Tutorial Video' link.
- Parents / Students:** A summary of active and inactive users with counts and percentages (e.g., Active Parents: 4 (100%), Inactive Parents: 0 (0%).)
- Savings Calculators:** A list of items with their respective costs or savings (e.g., Forms Sent: 150, Letters Sent: 85, Paper / Ink Cost Saved: £14.08).
- Your SMS balance:** Shows SMS Credits Used (60) and Remaining (1998). It also lists 'SMS Credits Bundles' with options to 'Top Up' for 1,800, 2,800, 5,000, and 10,000 credits.
- Form Submissions:** A table with columns for Form Title, Parent Name, Child Name, and Completed At. It shows recent submissions like 'Image Test' and 'Reporting a positive case of Coronavirus for a pupil ONLY'.

At the top right of the dashboard is a search bar and a row of icons for notifications, messages, and other features.

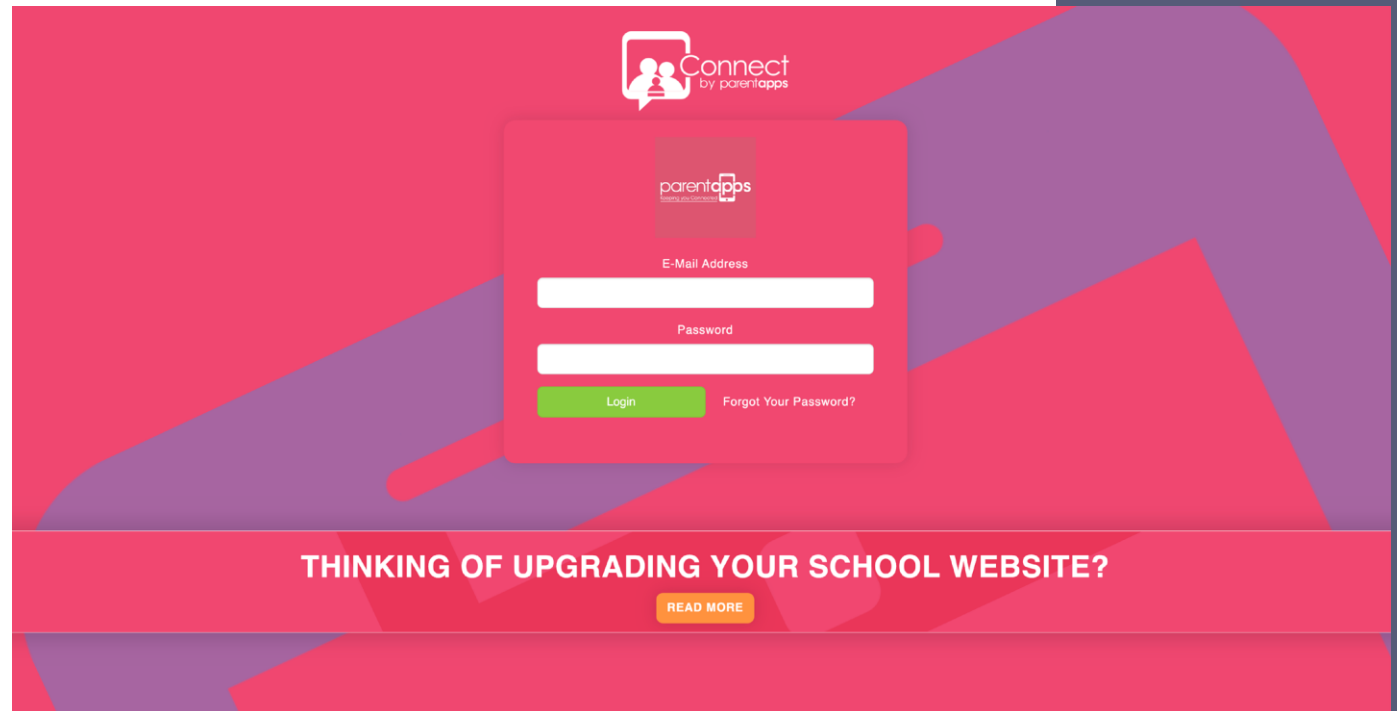
GETTING STARTED

How to Login to Your Connect Portal.

To login to the portal, you'll first need to find the link given to you during your first training session and open in Google Chrome. If you don't have your link, contact our support team via live chat and they will be able to give this to you instantly.

Bookmark the login page using CTRL-D on Windows, or CMD-D on a mac so you can easily access it later on. Next, you'll need to type in your email address as well as the password you created when setting up your account. You can reset it if you can't remember it by clicking Forgot Password.

Click Login, and you'll be redirected to your dashboard.



GETTING STARTED

How to invite admins to manage the portal.

Click into the **Settings tab** on the left-hand side and select **"Admin Users"**. Here you can see an overview of everyone who has access to your system including their name, account type, user status and some important dates. Each user has 3 Actions Edit, Delete and Deactivate. This allows you to temporarily suspend a user's access without deleting them.

To create a new user, click **"Create New"** in the right-hand corner and begin to fill in the user's details. Make sure their email address is correct as we will need to use this to invite them in the next step. Next, we need to select a Role for the user to determine how much access they have. The Super Admin Role gives a user complete access to the portal whereas the Admin Role gives you a little more granular control over what the user will have access to. For example, you can configure access to certain grades, classes or groups rather than the whole school. Once happy, click Save in the top right-hand corner of the page to create the user and return to the user list.

You will now notice there's a new action available, Invite. This will send the user an email, inviting them to the platform and asking them to set a password and login. This is like the email you received when you first created your account.

The screenshot shows the 'Admin Users' settings page in the Parental Connect interface. The left sidebar contains navigation options: Dashboard, Content, Form Data, Messages, Students, Users, Groups, Templates, Settings (highlighted), Extras, Evenings, and Clubs / Events. The main content area is titled 'Settings' and includes tabs for Years, Classes, Admin Users (selected), Content Categories, Teachers, and Subjects. A search bar for accounts is present, along with 'Create new' and 'Group Actions' buttons. A table lists three users: Kevin (Admin, Invited), Elliot (Super Admin, Invited), and Support (Super Admin, Active). Each user has an 'Actions' dropdown menu. The bottom of the sidebar features the 'parentalconnect' logo and a 'Refer a friend \$5' button.

	Name	Account Type	Status	Created on	Last updated	
<input type="checkbox"/>	Kevin	Admin	Invited	02/02/2022	02/02/2022	Actions ▾
<input type="checkbox"/>	Elliot	Super Admin	Invited	27/01/2022	27/01/2022	Actions ▾
<input type="checkbox"/>	Support	Super Admin	Active	11/02/2021	02/02/2022	Actions ▾

GETTING STARTED

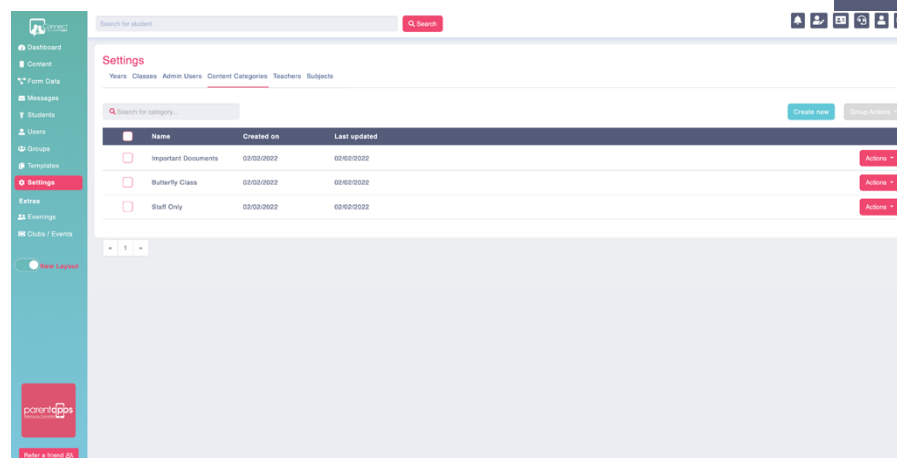
How to create module categories.

To organise your content more logically, you can create certain categories for it to fit into which will then be displayed in the app. To create a new category, click into **Settings** on the left-hand side then **modules** and choose **Create New**. We can then specify a name for our module and click Save.

Now, we can assign items to these categories when editing or creating a content item. Click into your module section on the left-hand side, choose Newsletters and Create New. We can create our Newsletter as normal, but this time assign a module from the Module Categories dropdown and click Save.

Modules are not limited to just PDF documents and can be used with any content type. For example, we can create a new Web Link, and assign it to a category in the same way as before, making sure to choose the relevant category and clicking Save.

Now, when a parent views the content in the app, they will see our Newsletter and Web Link grouped in the category we assigned.



[RETURN TO CONTENTS PAGE](#)

Admin Features.

ADMIN FEATURES

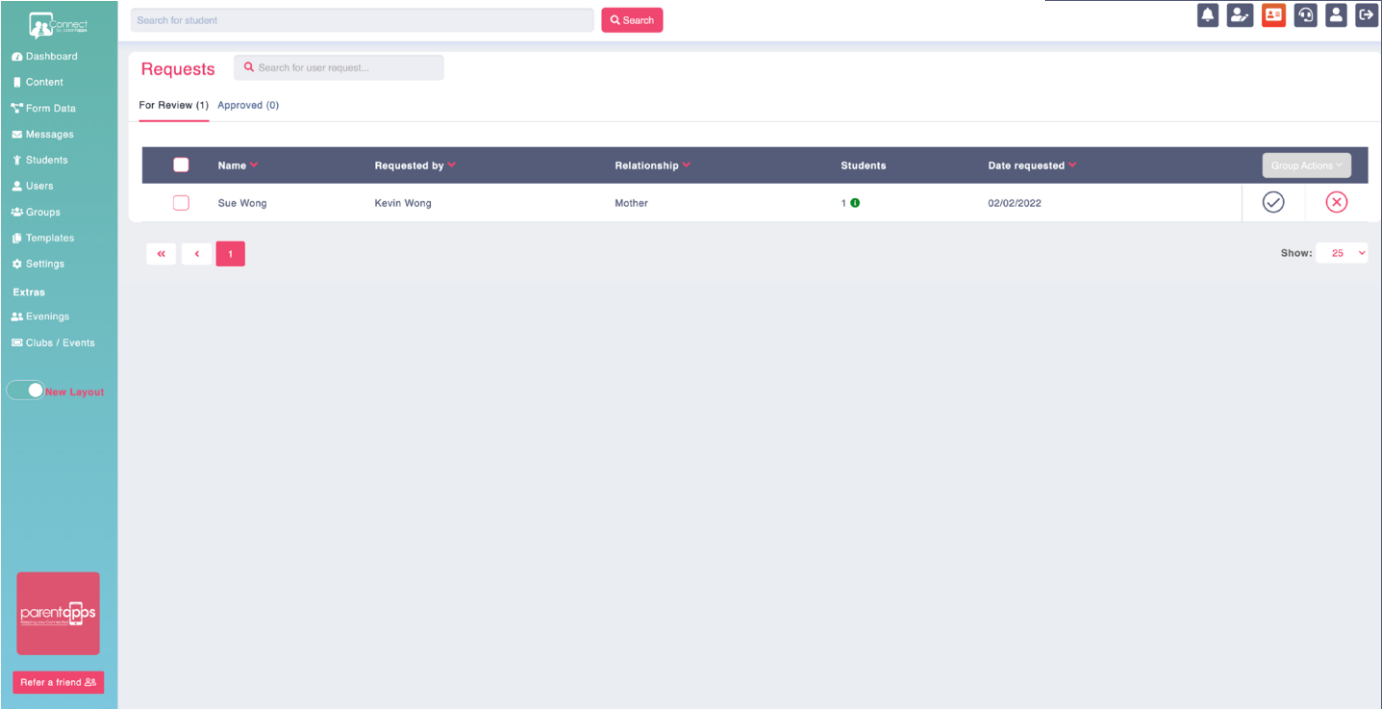
Approving additional contacts.

Parents who are listed as a priority 1 contact can invite additional users such as a partner, grandparent, carer, or other family member to the app. They can do this via the Additional Contacts section of the Profile tab.

Once a parent does this, you will be able to see the request appear in the Requests section in the top-right hand side of the portal. It flashes to show you that there is a new item to review. Click to view your requests, you'll see a list of any outstanding requests plus a list of all the approved requests too.

Each user request must be approved or declined by the school before the user will have access to the app. When you approve a contact, the record is saved so you have an audit trail. The parent who requested the contact will receive a notification to confirm the status and the new user will be added to the portal and automatically sent an invitation.

Before approval, you may wish to directly message or speak to the parent to confirm they have requested this.




Managing Updated Contact Details.


Parents can update their profile details using the Edit Profile section of the app. Whenever a parent does this, you will receive a notification within the portal, as well as an e-mail (if selected) to inform you of the change.

To view the changes, click into the Profile Updates section in the top-right corner. The button will flash to let you know that there are unreviewed updates. You can see what was changed, which student the contact is attached to, as well as the option to delete an update once you have reviewed or acted upon it.

Each update will automatically override the information in our portal and on the app but does not write any data back into your MIS system. This must be done manually; you can export all updates from this section to a CSV file to help you update your MIS system, just click the blue Export button.



- Dashboard
- Content
- Form Data
- Messages
- Students
- Users
- Groups
- Templates
- Settings
- Extras
- Evenings
- Clubs / Events



Refer a friend £5

Search for student

Search

Profile Updates

Search for User or event...

Export

<input type="checkbox"/>	Name	Message	Date Changed	Group Actions
<input type="checkbox"/>	Kevin Wong	Kevin Wong has updated their mobile_phone from 07653194678 to 07435929767	2022-02-02 14:29:33	Actions

<< < 1

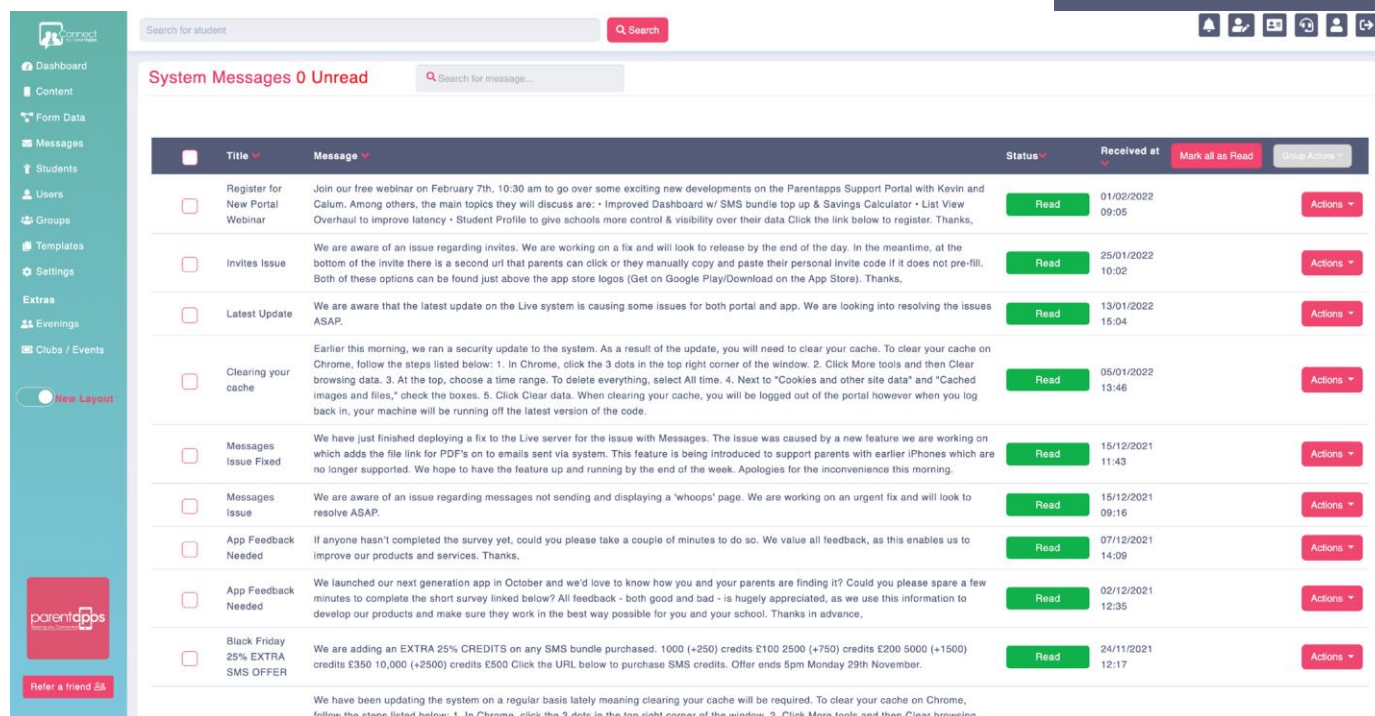
Show: 25

ADMIN FEATURES

Parentapps Announcements.

From time to time, we send out various messages and alerts to schools with any important updates or useful information. You can view all these messages from the Alerts section in the top-right corner.

It will flash to let you know there are unread messages, and you should also receive an e-mail. You can use the Actions button to Either Read or Delete a message, as well as mark them all as read in bulk at the top.



System Messages 0 Unread

<input type="checkbox"/>	Title	Message	Status	Received at	Mark all as Read	Group Actions
<input type="checkbox"/>	Register for New Portal Webinar	Join our free webinar on February 7th, 10:30 am to go over some exciting new developments on the Parentapps Support Portal with Kevin and Calum. Among others, the main topics they will discuss are: - Improved Dashboard w/ SMS bundle top up & Savings Calculator - List View Overhaul to improve latency - Student Profile to give schools more control & visibility over their data. Click the link below to register. Thanks,	Read	01/02/2022 09:05		Actions
<input type="checkbox"/>	Invites Issue	We are aware of an issue regarding invites. We are working on a fix and will look to release by the end of the day. In the meantime, at the bottom of the invite there is a second url that parents can click or they manually copy and paste their personal invite code if it does not pre-fill. Both of these options can be found just above the app store logos (Get on Google Play/Download on the App Store). Thanks,	Read	25/01/2022 10:02		Actions
<input type="checkbox"/>	Latest Update	We are aware that the latest update on the Live system is causing some issues for both portal and app. We are looking into resolving the issues ASAP.	Read	13/01/2022 15:04		Actions
<input type="checkbox"/>	Clearing your cache	Earlier this morning, we ran a security update to the system. As a result of the update, you will need to clear your cache. To clear your cache on Chrome, follow the steps listed below: 1. In Chrome, click the 3 dots in the top right corner of the window. 2. Click More tools and then Clear browsing data. 3. At the top, choose a time range. To delete everything, select All time. 4. Next to "Cookies and other site data" and "Cached images and files," check the boxes. 5. Click Clear data. When clearing your cache, you will be logged out of the portal however when you log back in, your machine will be running off the latest version of the code.	Read	05/01/2022 13:46		Actions
<input type="checkbox"/>	Messages Issue Fixed	We have just finished deploying a fix to the Live server for the issue with Messages. The issue was caused by a new feature we are working on which adds the file link for PDF's on to emails sent via system. This feature is being introduced to support parents with earlier iPhones which are no longer supported. We hope to have the feature up and running by the end of the week. Apologies for the inconvenience this morning.	Read	15/12/2021 11:43		Actions
<input type="checkbox"/>	Messages Issue	We are aware of an issue regarding messages not sending and displaying a 'whoops' page. We are working on an urgent fix and will look to resolve ASAP.	Read	15/12/2021 09:16		Actions
<input type="checkbox"/>	App Feedback Needed	If anyone hasn't completed the survey yet, could you please take a couple of minutes to do so. We value all feedback, as this enables us to improve our products and services. Thanks,	Read	07/12/2021 14:09		Actions
<input type="checkbox"/>	App Feedback Needed	We launched our next generation app in October and we'd love to know how you and your parents are finding it? Could you please spare a few minutes to complete the short survey linked below? All feedback - both good and bad - is hugely appreciated, as we use this information to develop our products and make sure they work in the best way possible for you and your school. Thanks in advance,	Read	02/12/2021 12:35		Actions
<input type="checkbox"/>	Black Friday 25% EXTRA SMS OFFER	We are adding an EXTRA 25% CREDITS on any SMS bundle purchased. 1000 (+250) credits £100 2500 (+750) credits £200 5000 (+1500) credits £350 10,000 (+2500) credits £500 Click the URL below to purchase SMS credits. Offer ends 5pm Monday 29th November.	Read	24/11/2021 12:17		Actions

We have been updating the system on a regular basis lately meaning clearing your cache will be required. To clear your cache on Chrome, follow the steps listed below: 1. In Chrome, click the 3 dots in the top right corner of the window. 2. Click More tools and then Clear browsing

[RETURN TO CONTENTS PAGE](#)

Importing Parent & Student Data.



Student & parent overview.

To make it as easy as possible to manage your system, we have split Students and Users into their own separate sections on the left-hand side.

Click into the Students tab, this gives us a list of each student in the system, along with some filtering and search options at the top to help you narrow down the list a little, for example, you can filter by grade and class to view the students who are in a certain class. There are some other useful operations at the top, such as Export, Group Actions (to perform an operation for multiple users) as well as the XPorter button, if you've opted for MIS integration.

For each student, you can see we are given some information such as their grade, class and status (an active student means at least one contact is active and receiving communication, and inactive student means no contacts are active and communication will not be received). The Actions button next to each student allows us to either Edit a student's details or Delete them from the system. I'm going to choose Edit, and we can see the student's profile. We can view and edit information about the child and their assigned contacts, we can then see all the content that's been targeted to them across the bottom. You can edit this content directly by clicking the Edit button.

To make changes to a parent, you can click into the Users section to see a list of each parent in the system, with the same searching and filtering options as our Students section. For each parent, we can see their name, status, number of students as well as the date they were last invited. We can use the actions menu to edit parent data, show which children are attached and send invitations/or manage parent access.

The screenshot displays the 'connect' system interface, which is divided into two main sections: 'Students' and 'Users'. Both sections feature a sidebar on the left with navigation options: Dashboard, Content, Form Data, Messages, Students (highlighted), Users, Groups, Templates, Settings, Extras, Evenings, and Clubs / Events. A 'New Layout' toggle is also present.

Students Section: The top bar shows 'Students Active 4 Inactive 1'. Below this are filters for 'Select Years', 'Select Classes', 'Select Statuses', 'No MIS ID', and 'Select Pre-Admission'. Action buttons include 'MIS Connect', 'Promote', 'Add Student(s)', 'Export', and 'Group Actions'. The table lists the following students:

	First Name	Last Name	Status	Year	Class	Date of Birth	Created on	Last updated	Actions
<input type="checkbox"/>	Calum	Lockett	Active	Reception	R	25/05/2021	25/05/2021	28/09/2021	Actions
<input type="checkbox"/>	Elliot	McKenna	Active	Year 5	5	14/01/2022	14/01/2022	14/01/2022	Actions
<input type="checkbox"/>	Danny	Upton	Active	Year 1	1	01/02/2022	01/02/2022	01/02/2022	Actions
<input type="checkbox"/>	Kevin	Wong	Active	Year 1	1	01/02/2022	01/02/2022	01/02/2022	Actions
<input type="checkbox"/>	Eleni	Tsanikidis	Inactive	Year 2	2	08/02/2022	02/02/2022	02/02/2022	Actions

Users Section: The top bar shows 'Users Active 4 Inactive 1'. Filters include 'Select Years', 'Select Classes', 'Select Statuses', and 'Select Pre-Admission'. Action buttons include 'MIS Connect', 'Export', 'Invite all inactive Users', and 'Group Actions'. The table lists the following users:

	Name	Status	Students	Created on	Last Activity / Invited	Data for Invite?	Actions
<input type="checkbox"/>	Eleni Tsanikidis	Inactive	1	02/02/2022	No Invitation Found	✓	Actions
<input type="checkbox"/>	Kevin Wong	Active	1	01/02/2022	02/02/2022 14:23	✓	Actions
<input type="checkbox"/>	Danny Upton	Active	1	01/02/2022	01/02/2022 14:12	✓	Actions
<input type="checkbox"/>	Elliot McKenna	Active	1	14/01/2022	31/01/2022 13:54	✓	Actions
<input type="checkbox"/>	Calum Lockett	Active	1	25/05/2021	13/12/2021 16:53	✓	Actions

MIS integration importing students & parents using XPorter.

If you've opted for MIS integration via XPorter, your data will have already been imported into your system ahead of your first training session. Now, you will only have to sync the data once you have made a change in your MIS.

Click into the Students section, you will see an Xporter button in the top right corner. Click this button to begin syncing your new data. You will be given the option to import any pre-admission students should you wish to. Any new students will then be displayed on the next screen. You must make sure to select which students you'd like to sync across before clicking Continue. This may take a few moments depending on the size of your school.

Once the Xporter refresh has completed, any new students that have been imported are now shown as inactive as their contacts have not been invited yet. Click into the Users section, you will be able to send these new users an invitation via Actions and Invite or clicking Invite all Inactive Users at the top. You can see which student a contact is connected to under Actions and Show Children.

If you change the priority of a contact in your MIS, this will not automatically update within the Parentapps portal. You must ensure to manually do this. Xporter will only import information for the current priority 1 contacts within your MIS.

Please note, any changes that you make within your MIS system will need to be left overnight before pressing Xporter to pull the new changes into the portal. The platform does not write any data back to your MIS system.



Wonde Sync Update Summary

The following students have been added within the linked MIS system.
Would you like to import these students?

First Name	Last Name	Year	Status
Liz	Aaron	11	New
Chris	Aaron	11	New
Jason	Aaron	11	New
Sophie	Aaron	11	New
Tamwar	Abdullah	8	New

Buttons: Export, Cancel, Continue

How to add students & parents via a CSV file.

If you haven't opted for MIS integration (or don't have an MIS) you can import your student and parent data manually using a CSV import file. A CSV is a type of file that can be opened in Microsoft Excel, you can download a template from the Support Documents section of our support hub which you can then fill in with student data.

Each line should contain one student each with their name, class & grade, date of birth and a primary contact. The primarycontact is typically the priority one contact you have for

the student, this is the person who will be invited to the platform and will be able to use the app. Children can have multiple contacts once imported, but the import file should only contain one each. You'll need to provide their name, relationship and contact details.

Once you have added all your children and contacts, save the file as a CSV file somewhere easy to locate. We can now upload this file to the portal, click into your "Students" tab on the left-hand side, click "Add Students" in the top right-hand corner and select "Import CSV". You'll be prompted to search for and upload the CSV you have just created for Import into your portal.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	StudentForename	StudentSurname	Year	Reg	DOB	Gender	Relationship	Title	ContactForename	ContactSurname	PrimaryEmail	MobileNumber	Priority	
2	Abi	Kirby	Year 6	Class 14	15/10/2008	Female	Father	Mr	Gary	Kirby	calumlockett@kirby@gmail.com	7465501412	1	
3	Erin	Waters	Year 5	Class 12	10/06/2005	Female	Mother	Miss	Becca	Waters	becca@parentapps.co.uk	7738485860	1	
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														
17														
18														
19														
20														
21														

How to add & remove students & parents manually.

The below steps should only be followed if you have not signed up for MIS Migration via Xporter.

In order to add a new student along with their contacts manually, click into the students tab on the left hand side and click Add Student in the top right-hand corner. Now we can fill in the information for the student, leaving the MIS ID field blank and clicking Save Changes. You'll now be redirected to the student's profile.

Now we have created the student, we can add in a contact. Click into the Contacts tab then choose actions and Add Contact. You also have the option to assign an existing contact to a child, in the case of a sibling being added for example. Fill in the contacts details, leaving the MIS field blank, and click Save Changes. The final step is to click into the Users tab on the right, locate the new parent, choose Actions and Invite to send them an invitation.

Students and Parents can both be removed using the corresponding Actions button then choosing delete. Please note that deleting a Student will also delete their contacts as long as they're not linked to any other students and deleting a Users will not delete the student attached to them.

Add Student

First Name: Kira Surname: Gillespie DOB: 14/06/2016

Pre-Admission: ☐ Year: Year 4 Class: 4

MIS ID:

Close Save changes

Add Contact

Title: First Name: Last name:

Email Address: Mobile Number:

Priority: Relationship:

MIS ID:

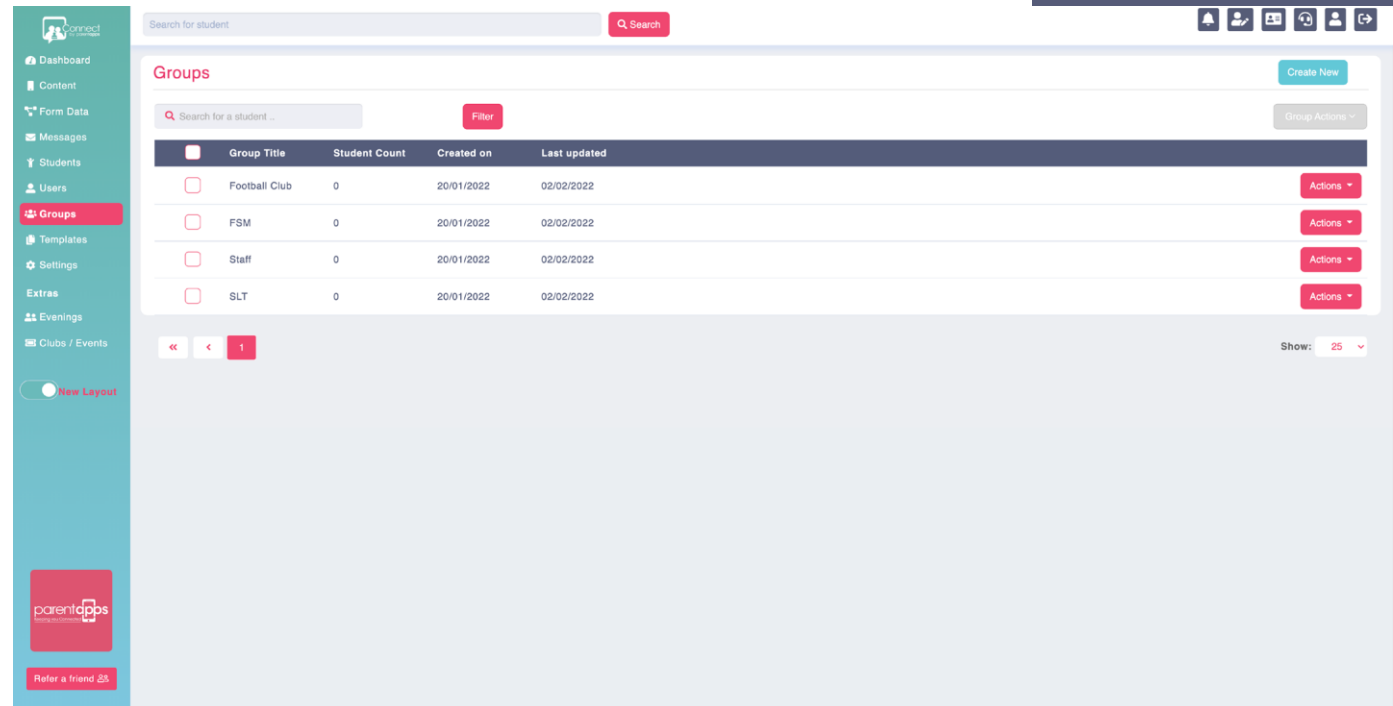
Close Save changes

How to create student groups.

Groups are useful to help you organise students. For example, you might have a group for the afterschool football club, meaning you can send and target content to the group separately grades and classes. If you have MIS integration, your existing groups will be synced across automatically. Alternatively, you are able to create and manage as many groups as you need via the portal. Please note these groups will not be synced back to your MIS system.

To begin working with groups, click the '**Groups**' tab on the left-hand side. You are able to search at the top and view some group information in the data table below. Click the "**Create New**" button in the top right and give the group a name and click "**Create**". Now we can begin to build the group by targeting the students who should be members. Click "**Select Students**" and choose the students you'd like to join the group, select a grade or class, search and select the students, and click "**Add to Group**" in the bottom right when you are done. Once you are happy, click "**Save**" in the top right corner.

You can now use this group to target content as you would a class or grade from any part of the portal. Whenever you are prompted to target content, expand the "Groups" dropdown on the left-hand side and select the group (or groups) you require. You can then target the students as you normally would do.



Search for student

Search

Groups

Create New

Search for a student ... Filter

Group Actions

	Group Title	Student Count	Created on	Last updated	
<input type="checkbox"/>	Football Club	0	20/01/2022	02/02/2022	Actions
<input type="checkbox"/>	FSM	0	20/01/2022	02/02/2022	Actions
<input type="checkbox"/>	Staff	0	20/01/2022	02/02/2022	Actions
<input type="checkbox"/>	SLT	0	20/01/2022	02/02/2022	Actions

« < 1

Show: 25

parentalabs

Refer a friend

How to add staff as app users.

You can add staff onto the app so they can receive content and messages just like a regular parent would. To do this, we need to set them up as regular app users, with themselves as both child and parent, then assign them to a special STAFF grade and class.

First, we need to ensure our staff grade and class are setup, click Settings on the left and check for the relevant grade and class. In my case, I need to create them, first we create a Grade using Create New, filling in the name and clicking Save. Now, we can repeat this for Class and choosing the grade we have just created.

Next, click into the Students Tab on the left-hand side then click the Add Student button. Fill in the staff members name, choose a date of birth and the staff grade and class we just created. Next, locate the student we have just added, and Click Edit under the action's menu. We can now see the child's profile, click contacts, and create a new contact, again filling in the staff members name, priority, relationship and email or mobile number. This is so we can invite them to the app, you may need to enter a personal email address if they are already an administrator.

Finally, we can click into the Users tab, locate the user we just created, click Actions and Invite. They will now be invited to the app and be able to receive content as soon as they have activated.

If you have lots of staff, you can import in bulk using a CSV import. Simply follow the same rules as above, ensuring they are both a student and a user and are set to the relevant class before uploading. The CSV is located in the 'documents for school' section of the Suporthub.

The screenshot displays the MIS Connect web interface. On the left is a sidebar menu with options like Dashboard, Content, Form Data, Messages, Students, Users, Groups, Templates, Settings, Extras, Evenings, and Clubs / Events. The main area shows a table of students. An 'Add Student' modal is open, showing the following fields:

- First Name:** Darren
- Surname:** Curran
- DOB:** 02/02/2022
- Pre-Admission:** ☒
- Year:** Staff
- Class:** Staff
- Mis ID:** (empty field)

At the bottom of the modal are 'Close' and 'Save changes' buttons. The background table lists students like Calum Lockett, Elliot McKenna, Danny Upton, Kevin Wong, Eleni Tsanikidi, and Kira Gillespie.

Promoting students & leavers.

You can promote students into the next grade group and class from within the portal.

If you are a school using Xporter, then all you need to do in September is press the Xporter button within your student's section. This will bring in your new students if you haven't already done so, detect any students that have left and will automatically update the grade and class groups of your students.

If you aren't using Xporter, the first step is to click into your Settings tab and ensure that you have created a Leavers grade and class if you'd like to, alternatively you can delete the students out of the portal. You should also create or re-name any existing classes as necessary for the new academic grade using Actions and Edit or Create New.

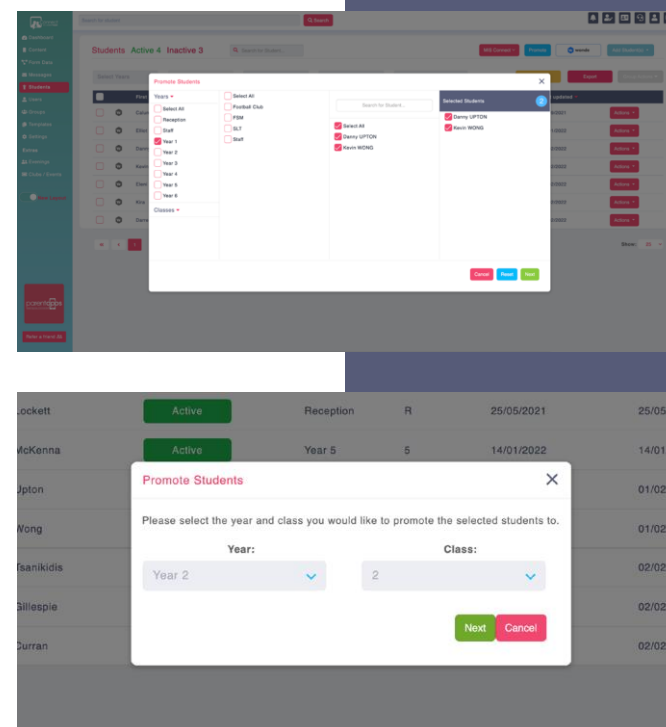
Once your classes are setup, the next step is for us to begin promoting students. We recommend starting this process from the top with the oldest students first, for example, promoting Grade 6 to Leavers, then Grade 5 into Grade 6 etc. Click into the Students tab on the left and click Promote, this allows us to select which students we'd like to move to a new class and grade. Here, you may select entire grades and classes, or select students from multiple classes in the case classes are getting mixed or are changing. You can see a definite list of which students you have selected on the right-hand side.

Once your classes are setup, the next step is for us to begin promoting students. We recommend starting this process from the top with the oldest students first, for example, promoting Grade 6 to Leavers, then Grade 5 into Grade 6 etc. Click into the Students tab on the left and click Promote, this allows us to select which students we'd like to move to a new class and grade. Here, you may select entire grades and classes, or select students from multiple classes in the case classes are getting mixed or are changing. You can see a definite list of which students you have selected on the right-hand side.

Once you are happy with your selection, click Next and you will be asked to choose which grade and class you'd like the students you selected to be promoted to. Click Next to confirm your selection and click Submit to confirm the promotion.

Now, you can repeat this step for each class and grade in your school to complete the promotion process.

When you are ready to remove current school leavers, click into your Students tab, filter by leavers, bulk select them all and click Group Actions and Delete.



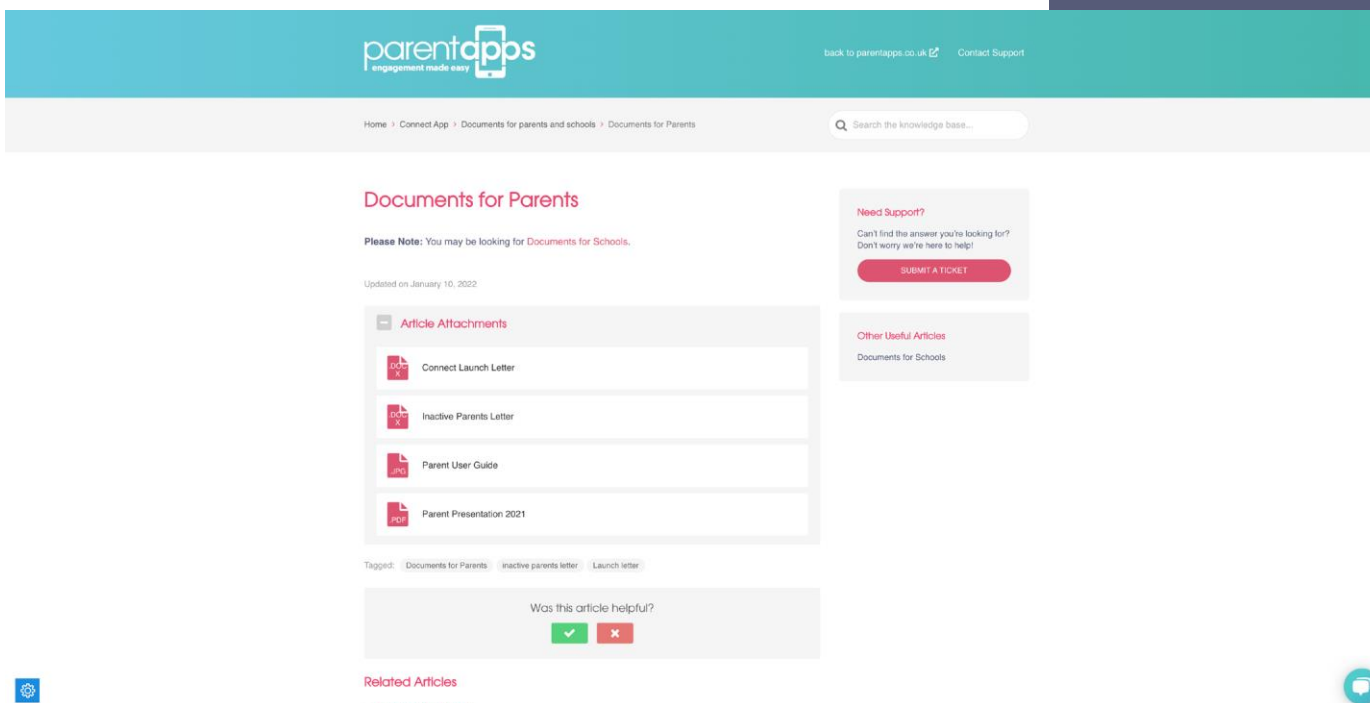
[RETURN TO CONTENTS PAGE](#)

Parents.

How to prepare for the launch of your app to parents.

To help you prepare for the launch of your app, we have a selection of materials that you can use to send to users. These can be found in the Support Hub under Documents for Parents. We have a launch letter, a flyer and some step-by-step instructions explaining how parents can activate their account. We also have a presentation that you can use during your welcome meeting for new parents. We suggest you send out this information before your launch so your parents will be expecting their invitation.

You will also need to check through the content of your app to ensure that all of the information is accurate and up to date. Check that your term dates are correct including the start and end times of the school day. Add any upcoming events, newsletters, meals menus, policies and create any consent forms that you may need to use throughout the grade.



The screenshot shows the 'parentapps' website with the tagline 'engagement made easy'. The header includes a teal bar with the logo and navigation links: 'back to parentapps.co.uk' and 'Contact Support'. Below the header is a breadcrumb trail: 'Home > Connect App > Documents for parents and schools > Documents for Parents'. A search bar is located on the right. The main content area is titled 'Documents for Parents' and includes a 'Please Note' section stating: 'You may be looking for Documents for Schools.' Below this is an update date: 'Updated on January 10, 2022'. A section titled 'Article Attachments' lists four PDF documents: 'Connect Launch Letter', 'Inactive Parents Letter', 'Parent User Guide', and 'Parent Presentation 2021'. To the right of this list is a 'Need Support?' section with a 'SUBMIT A TICKET' button and a 'Other Useful Articles' section with a link to 'Documents for Schools'. At the bottom of the main content area is a 'Was this article helpful?' section with a green checkmark button and a red X button. The page is decorated with colorful geometric shapes in the top right and bottom right corners.

parentapps
engagement made easy

back to parentapps.co.uk Contact Support

Home > Connect App > Documents for parents and schools > Documents for Parents

Search the knowledge base...

Documents for Parents

Please Note: You may be looking for Documents for Schools.

Updated on January 10, 2022

Article Attachments

- Connect Launch Letter
- Inactive Parents Letter
- Parent User Guide
- Parent Presentation 2021

Tagged: Documents for Parents inactive parents letter Launch letter

Was this article helpful?

Yes No

Need Support?

Can't find the answer you're looking for?
Don't worry we're here to help!

[SUBMIT A TICKET](#)

Other Useful Articles

[Documents for Schools](#)

Related Articles

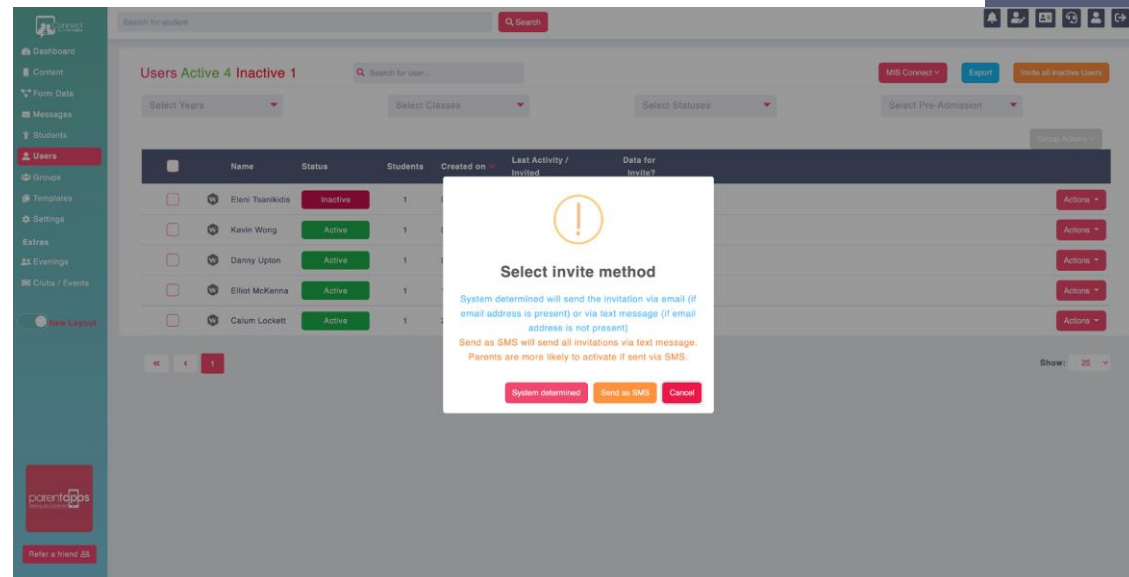
- [Documents for Schools](#)

How to invite your parents.

Once you have updated your app with all the latest information, it is time to launch to parents by sending each one an invitation. This message, sent via Email, prompts the user to create an account and log into the app. Click into the Users section on the left-hand side, you will notice that all your users will show as red and inactive.

To send your invitations, you can click the Invite All Inactive Users button in the top-right corner. Alternatively, you can select your users in bulk or individually and click the Group Actions drop-down list and choose Invite.

Once you press invite, it may take a couple minutes to send, depending on the number of students. Once completed, you will get a success message and all user statuses will now show as orange and invited. When the user has accepted the invite, their status will show as green and active. You can see the last time an invite was sent or the last time a user was active under the Last Invite/Activity column.



Removing & deactivating parents.

You can remove or deactivate users at any time from the Users section of your portal. Deleting a user will log them out and remove them from the app entirely, whereas deactivating a user will simply suspend their account and log them out of the app. They will not be able to receive communication or login again until they are re-activated.

First, locate the relevant user and click the corresponding Actions button, you can then choose either Delete or Deactivate. To re-activate a user, you can filter by deactivated then search if necessary to locate them, choose Actions then Reactivate.

The screenshot shows the 'Users' section of a parent portal. A confirmation dialog is displayed in the center, asking 'Are you sure?' and 'Are you sure you want to delete this user?'. It also states: 'ANY INDIVIDUALLY TARGETED CONTENT TO THE SELECTED USER(S) WILL BE DELETED. DO YOU WISH TO CONTINUE?'. The dialog has 'Cancel' and 'OK' buttons.

The background shows the 'Users' section with a table of users. The table has columns: Name, Status, Students, Created on, Last Activity / Invited, and Data for invite?.

Name	Status	Students	Created on	Last Activity / Invited	Data for invite?
Eleni Tsanikidis	Inactive	1	02/02/2022	No Invitation Found	✓
Kevin Wong	Active	1	01/02/2022	02/02/2022 14:23	✓
Danny Upton	Active	1	01/02/2022	01/02/2022 14:12	
Elliot McKenna	Active	1	14/01/2022	21/01/2022 13:54	
Calum Lockett	Active	1	25/05/2021	13/12/2021 16:53	



PARENTS

Adding additional parents manually.

If you've opted for MIS integration via Xporter, it will only pull through the priority 1 contacts for each child. We understand that some schools and settings need to have more than one contact, so there are two ways to add additional contacts in.

The first method is via the app. Priority 1 parents who are already activated can choose to add up to three additional contacts to the platform for their child (or children). This is achieved via the Additional Contacts section under the Profile tab. All additional contacts must be approved by school before they are activated for Safeguarding purposes. This can be done from the Requests section in the top right corner.

The second method is to manually add additional contacts to the student. Click into your Students tab on the left-hand side, locate the student and choose Actions and Edit. Click into the Contacts tab, choose Actions and Add Contact. You can now fill in their details, leaving out the MIS ID, and click Save Changes when you are done. The final step is to click into your Users tab, locate the user and send them an invite, via Actions and Invite.

The screenshot displays the ParentZone app interface. On the left is a sidebar with navigation options: Dashboard, Contact, Form Data, Messages, Students (highlighted), Users, Groups, Templates, Settings, Extra, Events, and Clubs / Events. The main content area shows 'Elliot McKenna's Profile' with tabs for Child Information, Contacts, Attendance, and Behaviour. The 'Contacts' tab is active, showing a table with one contact: Elliot McKenna, Father, Priority 1. An 'Add Contact' modal form is open in the foreground, containing fields for Title, First Name, Last name, Email Address, Mobile Number, Priority, Relationship, and MIS ID. At the bottom of the modal are 'Close' and 'Save changes' buttons. The background interface also shows 'Attendance' and 'Behaviour' sections with 'No Attendance Records Found' and 'No Behaviour Records Found' respectively. A 'Refer a friend' button is visible in the bottom left corner of the app interface.



How to engage with your inactive parents.

At Parentapps, we want to help you achieve as close to 100% activation rate with your users as possible. This will not only save the school money but will also allow you to communicate and engage with users a lot more effectively. We have a dedicated Customer Service and Support team who can provide guidance and advice to ensure as many users as possible are using the app successfully.

The best way to engage your inactive users is by continuously promoting your app and highlighting the importance of receiving information about their children.

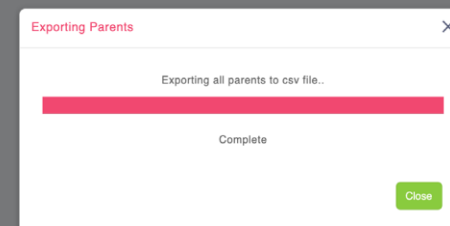
First, you need to identify who your inactive users are. Click into the Users tab on the left-hand side and filter by Inactive. Now, the only users shown are red (inactive). You can export these using the blue export button in the top right corner. This will download a CSV of the users you need to target.

We suggest that you send an e-mail to your inactive users, explaining that you have noticed they haven't yet activated their account and you will be sending them a new invitation at a certain date and time.

This will get their attention and pre-warn parents to expect a new invitation. You can do this via the messages tab. When composing a message, you have the option to send via Email, and you are also able to choose to only send to inactive users only.

Finally, it is important to remember that the more you use the app, the more your parents will interact and tell other parents about it. This will prompt inactive parents to download the app and register their account.

If you have any parents that are struggling to download the app or having any other issues, they can contact our support team directly either via phone or email.



Your SMS balance

SMS Credits Used

69

SMS Credits Remaining

1998

SMS Credits Bundles

Need more SMS credits? You can now easily top up by selecting one of the bundles below. The bundle will automatically be added to your balance and our finance team will be in touch to complete payment.

Please note these prices are not including VAT

1,000 SMS credits - £100

Top Up

2,500 SMS credits - £200

Top Up

5,000 SMS credits - £350

Top Up

10,000 SMS credits - £500

Top Up

If you would like to request a custom bundle, please contact

support@parentapps.co.uk



[RETURN TO CONTENTS PAGE](#)

Consent Forms & Surveys.

Absence and Standard Consent Forms.

There are a selection of forms already in the app such as Absence Reporting. You can easily edit these and amend the preferences to make sure the form is suitable for your school. To do this, click Actions then Edit.

The form editor is split between the Preferences and Builder tabs. First, you can modify form information such as the title and description. In the Form Preferences section, you can set custom Start/End dates for the form, these dates determine when parents will be able to submit the form between. Leave these blank to keep the form open indefinitely.

You can also add up to 3 notification e-mail addresses for different members of staff. Now, once a user submits a response, each member of staff will receive an e-mail containing the submission data. Every response gets saved into the portal regardless of this setting.

If you want to target the form to specific users then you can Target Users, or just enable Send to All Users. The last step is to choose if you want to send a notification to parents about the form you have just uploaded. If yes, you also have the option to specify a custom message of up to 2000 characters, using #ParentName and #ChildName to personalise it. The message will be sent at 9am on the start date, if this is specified, or straight away if not.

Finally, we can click into the builder tab to view our actual form. On the left, we can see each of the fields the form contains, and on the right, we can see a preview of what the form will look like when parents view it on the app.

You can remove a field entirely by clicking Actions and Delete for that field, or you can modify it by clicking Edit. You'll then be prompted to make any amends and save changes once you are done. You can also add in any new fields that may be more relevant to your school using the Add New Item button at the top, choosing a field, giving it a Title and saving. You can drag and drop to re order.

Once you are done, click Save Form in the top right to publish your updated form.

Exporting Form Data & Sending Reminders.

Any form which a parent has submitted via the app will be stored within the Form Data section on the left-hand side. This will flash to alert you that there are unreviewed responses.

You'll be able to see a list of all the forms in your system, along with an overview of new, existing and outstanding entries. There is a toggle between active and expired forms at the top, as well as search and filtering options. Forms become expired once the End Date set in form preferences has passed. To view the responses for a specific form, click the View Data button on the right.

You can now see a table containing all the form entries with a summary of the student and parent, as well as additional search and filtering tools across the top. New, unread entries are highlighted in red, and the entry details can be viewed by clicking Actions and Show. You can export the entry to a PDF or CSV at the top. You could alternatively delete an entry using the Delete action.

You also have the option to Export your entries in bulk to either CSV or PDF, as well as marking all entries as read.

This form hasn't been targeted. If we go back and look at a form that has been targeted, we can see that there are still 5 users who need to submit the form on the status page. When we view the form data, there is an extra tab allowing us to view parents who have not yet submitted the form. This allows us to send either an individual reminders using Actions and Remind, or we can Send a Reminder to all who have not yet booked. You can choose to send either a system determined or personalised message.

The screenshot shows the 'Form Data' section of the Parentalops system. On the left is a teal sidebar with navigation icons and labels. The main content area has a header with search and filter options. Below this is a table titled 'Form Data' with columns: Form Name, Submitted, Unread, and Awaiting. The table lists several forms, each with a 'View Data' button on the right. The 'Unread' column uses colored circles to indicate the count of unread responses: green for 0, red for 1, and purple for 0. The forms listed are: Leave of Absence Request (Submitted: 0, Unread: 0, Awaiting: 0), Absence Reporting (Submitted: 1, Unread: 1, Awaiting: 0), Reporting a positive case of Coronavirus for a pupil ONLY (Submitted: 1, Unread: 0, Awaiting: 0), Targeting Form (Submitted: 0, Unread: 0, Awaiting: 0), and Image Form (Submitted: 2, Unread: 0, Awaiting: 0). At the bottom of the sidebar is a 'parentalops' logo and a 'Refer a friend 20%' button.

Form Name	Submitted	Unread	Awaiting	Action
Leave of Absence Request	0	0	0	View Data
Absence Reporting	1	1	0	View Data
Reporting a positive case of Coronavirus for a pupil ONLY	1	0	0	View Data
Targeting Form	0	0	0	View Data
Image Form	2	0	0	View Data

Creating your own Custom Form.

The Consent Forms tab can be used to build a variety of forms/surveys for your users to submit. They can be used for many things such as parent's permission or surveys.

Having forms built into the app will provide a simple to use option for parents to submit certain information. They're quick and simple to use and help reduce printing and distribution costs as well as saving a considerable amount of time for both the school and parents.

We recommend building your form within the Templates section. This is so you can reuse the form if required.

Click into the Templates section and click Create New Template, first we need to fill out our Form Information with a title and description, selecting a content category if necessary. You can learn how to use and edit these in a separate video.

It's recommended to set your Form Preferences when we convert the template to an actual Form as we will cover later, but you are welcome to set these now if you wish.

Click into the Builder tab at the top – this is where you will build your form. The right side of the screen shows a live preview of how the form will look within the app.

Click Add New Item to start building the form - each item has a different function.

Name, Address, Phone and Email Fields require the user to enter personal information for themselves or their child.

Text and Text Area/Paragraph Fields give the user space to freely type. For example, stating allergies or medical conditions. The text field can hold a maximum of 190 characters whereas the paragraph field has no character limit.

Multiple Choice, Dropdown List/Select, Checkboxes, Date and Time Fields allows the user to select options from a list or menu.

Creating your own Custom Form.

Image Upload will allow the user to upload a photo/image from their device, for example, attaching a doctor's note.

Signature makes any consent form an official document by asking the user to sign on their device screen before submitting.

Once you have added an option, you can fill in the relevant details and click Save to return to our form overview. Some fields get grouped together and have sub fields attached, such as Name. This means we need to click Actions then Edit, select which field we'd like to modify and click Edit again.

You can reorder the fields by dragging and dropping using the pink arrow on the left and Deleting using Actions and Delete.

Press the Save button once you are finished building your template.

To add the form into your app, click Modules on the left-hand side and choose the section you'd like to add your form to, and click Use Template. You will see a popup, defaulting to our Global templates. Global templates are pre-made by the Parentapps team for all schools to use. These can then be edited to suit your school's needs. Custom templates are forms which you have built yourself. Click on Custom, find your template and click add. You'll see both our Form Information and our Form itself have been pulled through.

Now, you can fill in your form preferences. You can set start and end times to determine when parents should be able to see and submit this form between. If you want to target the form to specific users then you can Select Users, or just enable Send to All Users.

The next step is to choose if you want to send a notification to parents about the form you have just created. If yes, you also have the option to specify a custom message of up to 2000 characters, using #ParentName and #ChildName to personalise it.

E-mail Notifications can also be sent to 3 e-mail addresses every time a form is submitted. This is useful for absence reporting and appointment requests to be sent straight to the school office as well as being stored within our portal.

Finally, have a final check through the form content and make any changes if needed. Once you are happy, click Save in the top right-hand corner.

Add a new item to the form:

Choose Item ▾

Section Break	Time Field
Name (field group)	Textarea / Paragraph
Address (field group)	Multiple choice
Phone Field	Dropdown List / Select
Email Field	Checkboxes
Text Field	Image Upload
Date Field	Signature

[RETURN TO CONTENTS PAGE](#)

Modules.

CONTENT

Overview.

The Modules tab displays all the sections within your app. There are only five different types in total.

Term Dates / Events – to add any key dates and events into the calendar on the app. Parents can then add these directly to the calendar on their phone.

PDF Documents – to add any useful documents such as letters home or newsletters, which parents can browse through and read in the app

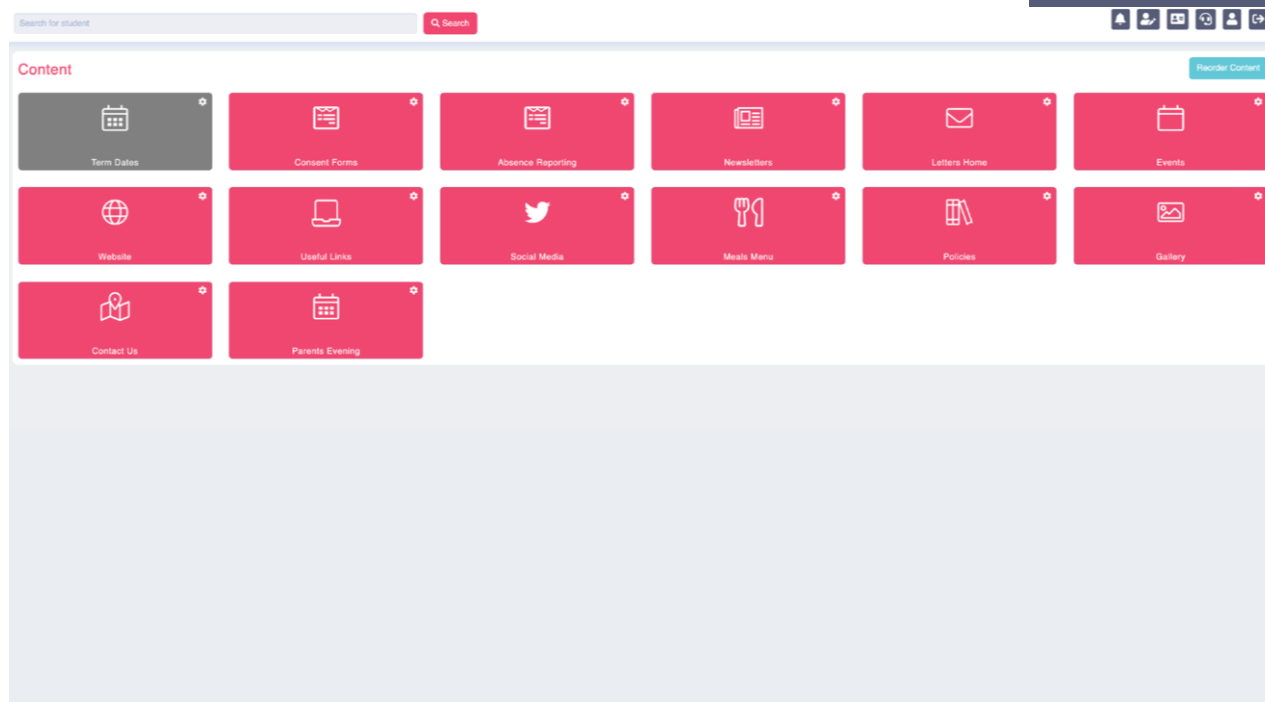
Website Links – provides links to your own or any third-party websites.

Consent Forms / Surveys – to build your own custom forms and surveys or use pre-made templates.

Photo Gallery – to upload images to the app. You can have up to 500 images in the app at any one time.

You can re-arrange the tabs by first clicking the Reorder Content button in the top right-hand corner, then dragging and dropping the tiles into your desired order.

You must click Save for any changes to take effect.



CONTENT

How to Upload PDF Documents.

There are a few PDF tabs within your portal. For example, Letters Home or Meals Menus.

To add a PDF, click into the tab you wish to upload to and click Create New.

First, we can give the PDF a Title and choose a content category if necessary - you can learn how to create and use these in a separate video. Next, choose whether you want to link to an external PDF (one you've uploaded to your website for example) or Upload a PDF directly to the tab. I am going to choose Upload a PDF and choose the document I'd like to link. Alternatively, paste a link to your PDF into the URL field.

Next, we can set our PDF preferences, if you want to target the document to specific users then you can Select Users, or just enable Send to All Users. The last step is to choose if you want to send a notification to parents about the document you have just uploaded. If yes, you also have the option to specify a custom message of up to 2000 characters, using #ParentName and #ChildName to personalise it. Click Save in the top-right corner to publish and save your changes.

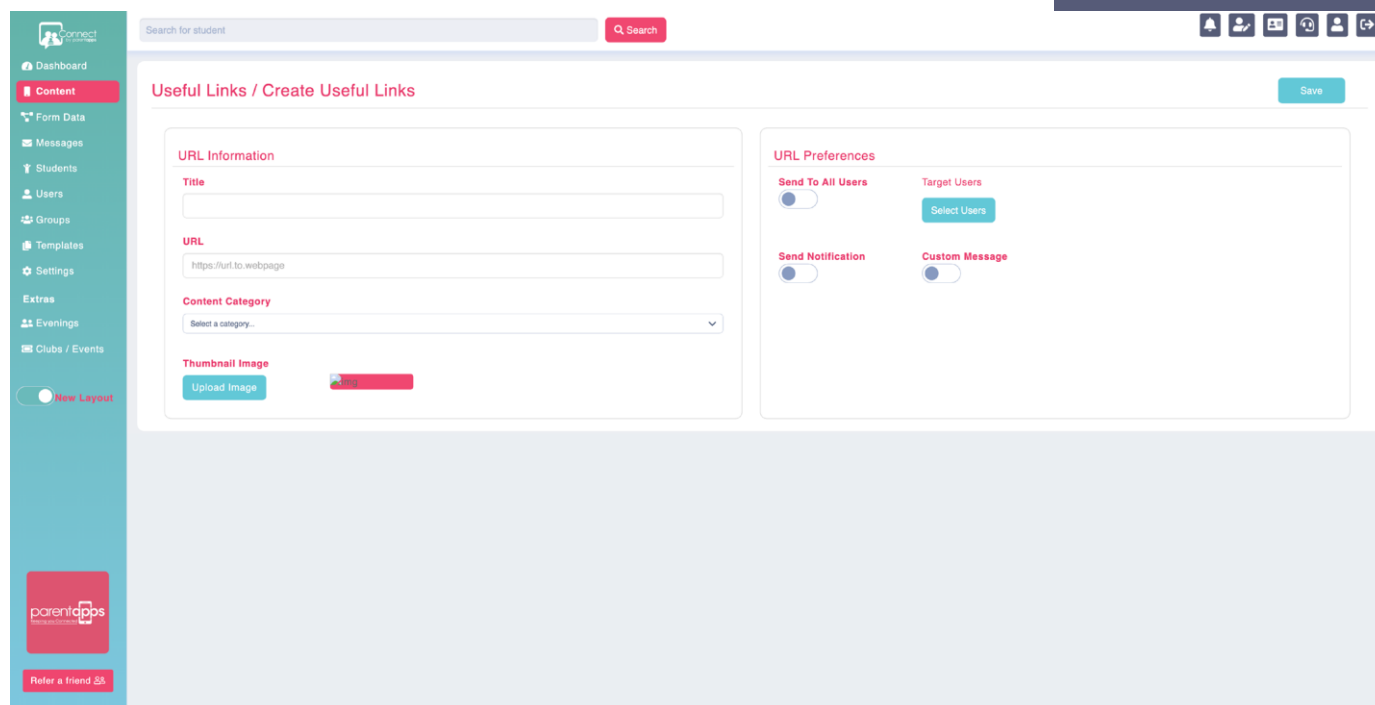
The screenshot displays the 'Letters Home / Create Letters Home' form within the Parental Connect portal. The interface includes a teal sidebar on the left with navigation options: Dashboard, Content (highlighted), Form Data, Messages, Students, Users, Groups, Templates, Settings, Extras, Evenings, and Clubs / Events. At the bottom of the sidebar is a 'New Layout' toggle and a 'parentalconnect' logo. The main content area has a search bar at the top and a 'Save' button in the top right. The form is divided into two main sections: 'URL Information' and 'URL Preferences'. The 'URL Information' section contains fields for 'Title', 'Content Category' (a dropdown menu), 'URL' (with a placeholder 'https://url.to.webpage'), and an 'Upload Pdf' toggle. The 'URL Preferences' section includes 'Send To All Users' and 'Target Users' (with a 'Select Users' button), 'Send Notification' and 'Custom Message' (with a 'Custom Message' button), and an 'Allow Printing' toggle. A 'Refer a friend' link is visible at the bottom left of the main content area.

CONTENT

How to add photos to your gallery tab.

A Gallery tab will contain a number of image albums, with different targeted users attached. To create a new gallery, click on Create New. Give your album a Title, then upload your images by clicking Add Image(s). The system will allow you to upload images in bulks of 20 and each image has a limit of 5MB.

Next, we can set our Gallery preferences, if you want to target the gallery to specific users then you can click Target Users, or just enable Send to All Users. The last step is to choose if you want to send a notification to parents about the gallery you have just created. If yes, you also have the option to specify a custom message of up to 2000 characters, using #ParentName and #ChildName to personalise it. Click Save in the top-right corner to publish and save your changes.



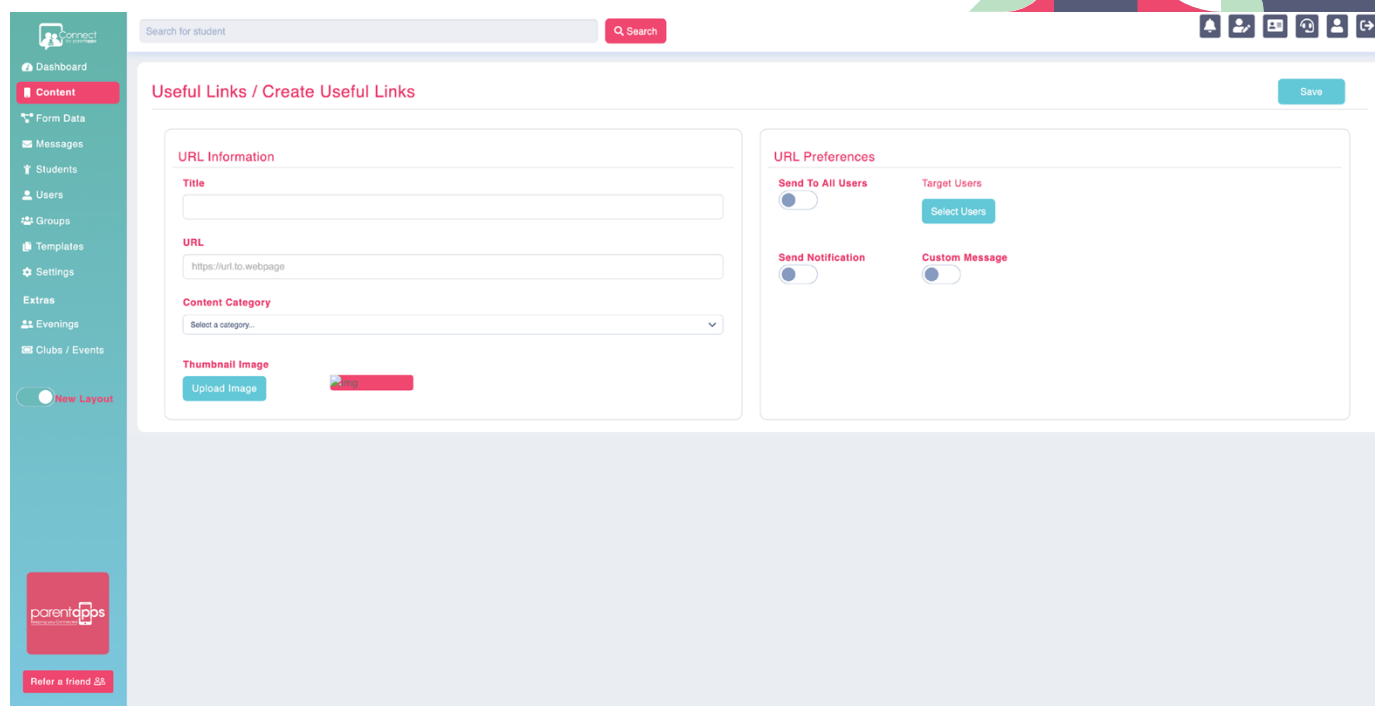
The screenshot shows the 'Useful Links / Create Useful Links' interface in the Parental Connect system. On the left is a teal sidebar with navigation links: Dashboard, Content (highlighted), Form Data, Messages, Students, Users, Groups, Templates, Settings, Extras, Evenings, and Clubs / Events. At the bottom of the sidebar is the 'parentalconnect' logo and a 'Refer a friend \$5' button. The main content area has a search bar at the top. The form is divided into two main sections: 'URL Information' and 'URL Preferences'. The 'URL Information' section includes fields for 'Title', 'URL' (with a placeholder 'https://url.to.webpage'), 'Content Category' (a dropdown menu), and 'Thumbnail Image' (with an 'Upload Image' button). The 'URL Preferences' section includes 'Send To All Users' (a toggle switch), 'Target Users' (a 'Select Users' button), 'Send Notification' (a toggle switch), and 'Custom Message' (a toggle switch). A 'Save' button is located in the top right corner of the form area.

CONTENT

How to add useful web links.

You can provide any number of useful web links (such as your school website or social media) to parents. To create a new link, click Create New in the top right. Give your Link a title, paste in the URL itself and choose a content category if necessary - you can learn how to create and use these in a separate video

Next, we can set our URL preferences, if you want to target the link to specific users then you can click Target Users, or just enable Send to All Users. The last step is to choose if you want to send a notification to parents about the link you have just created. If yes, you also have the option to specify a custom message of up to 2000 characters, using #ParentName and #ChildName to personalise it. Click Save in the top-right corner to publish and save your changes.



The screenshot shows the 'Useful Links / Create Useful Links' form in the ParentApps interface. The form is divided into two main sections: 'URL Information' and 'URL Preferences'.

URL Information:

- Title:** A text input field.
- URL:** A text input field containing 'https://url.to.webpage'.
- Content Category:** A dropdown menu with the option 'Select a category...'.
- Thumbnail Image:** A section with an 'Upload Image' button and a small image placeholder.

URL Preferences:

- Send To All Users:** A toggle switch that is currently turned off.
- Target Users:** A button labeled 'Select Users'.
- Send Notification:** A toggle switch that is currently turned off.
- Custom Message:** A toggle switch that is currently turned off.

The form is part of a larger interface with a sidebar on the left containing navigation links: Dashboard, Content (selected), Form Data, Messages, Students, Users, Groups, Templates, Settings, Extras, Evenings, and Clubs / Events. At the bottom of the sidebar is a 'New Layout' toggle and a 'parentapps' logo. The top of the form has a search bar and a 'Search' button. The bottom right corner of the form has a 'Save' button.

CONTENT

How to add school events.

You can add any important dates or events so parents can view and save them to their calendar as easily as possible. A good example of this are your Term Dates, which you should upload a full set of for the academic grade. To create a new Event, choose the section you'd like to add your event to then click Create New in the top right. First, we need to enter our event title and description, to let the parents know what it is about.

Next, we can set our event details, setting a start time along with an optional end time and location. You could paste a link to google maps in the Location URL box, for example.

Next, we can set our event preferences, if you want to target the event to specific users then you can click Target Users, or just enable Send to All Users. The last step is to choose if you want to send a notification to parents about the event you have just created. If yes, you also have the option to specify a custom message of up to 2000 characters, using #ParentName and #ChildName to personalise it. Click Save in the top-right corner to publish and save your changes.

Once an event has passed, it will remain visible in the app for 2 weeks, before then moving into the archived section. You can view your archived events by filtering at the top, now we can choose to re-instate this date. This is especially useful for Term Dates, since they may be similar or the same grade to gradeand saves you re-creating them from scratch. To do this, click Actions then Re Use. You'll notice the Event Editor loads up, allowing us to make any necessary changes to our Date, once you are happy click Save in the top right.

The screenshot displays the 'Parental Connect' app interface for adding a new event. The left sidebar contains navigation options: Dashboard, Content (selected), Form Data, Messages, Students, Users, Groups, Templates, Settings, Extras, Events, and Clubs / Events. The main content area is titled 'Kev W test / Events /' and features a search bar at the top. The form is divided into three main sections: 'Event/Term Date Information', 'Event/Term Details', and 'Event/Term Preferences'. The 'Event/Term Date Information' section includes a 'Title' field, a 'Description' field, a 'Header Image' upload button, and a 'Content Category' dropdown. The 'Event/Term Details' section includes 'End Date & Time', 'Start Date & Time', and 'Add Location' fields. The 'Event/Term Preferences' section includes 'Send Notification' (with a toggle for 'All users can view'), 'Target Users' (with a 'Select Users' button), and 'Event/Term Details' (with a toggle for 'Add Location'). The bottom right corner of the app shows a 'parentalconnect' logo.

Alternatively, you can remove archived events using Actions and Delete or by selecting in bulk, clicking Group Actions and Delete.

[RETURN TO CONTENTS PAGE](#)

Messages.

MESSAGES

How to send messages to your parents.

One of the main features of the platform is the messaging service. You can instantly communicate with parents via push notifications and emails.

Click into the Messages tab on the left-hand side, you can see a list of your messages along with their title, sender, type and sent date. At the top, you can filter by sent, scheduled and draft messages as well as search.

You can send two types of messages from our system – app notifications and emails. To send a new message, click Compose Message in the top right corner.

The first section to fill in is Message Details. Here, you can add a title and your message body. You have up to 2000 characters available.

You can personalise your message to your users by using #ChildName and #ParentName within the message. This will ensure your users see their own name and their child/children's name within the message.

The Message Link section gives you the ability attach a specific piece of content (for example, a Letter Home you already uploaded) to your message or link it to an external website. To link to some content, choose "Link to app section/content", select the section then select the content. To link to a website, select Link to Website from the drop-down and add the URL. Parents will be directed straight the section or link you have chosen by clicking the Show Content button in the app.

Message Preferences is where you decide who the message will be delivered to and how it is going to be sent. You can toggle on the Send to All Users button to send your message to all users within your system or to a specific set of users using the Select Users button to target.

Next, we have to choose how we want the message to be sent. App notification or email.

App Notification – An app notification is a message that pops up on the user's device when connected to the internet. These are free to use and can only be viewed by active users.

Email – An e-mail can also be sent for free to your users through the app. You can send as an e-mail or send as e-mail to inactive users only. This will allow you to communicate with all users 100% of the time and is particularly useful when first launching your app.

Finally, you can choose to send your message right now or to schedule the message to be sent at a later date using the Schedule Message toggle. If you choose to schedule a message, you also have the option to repeat it.

When you are ready, click Send in the top right corner. If you want to save your message for later, you can always choose to save the message as a draft.

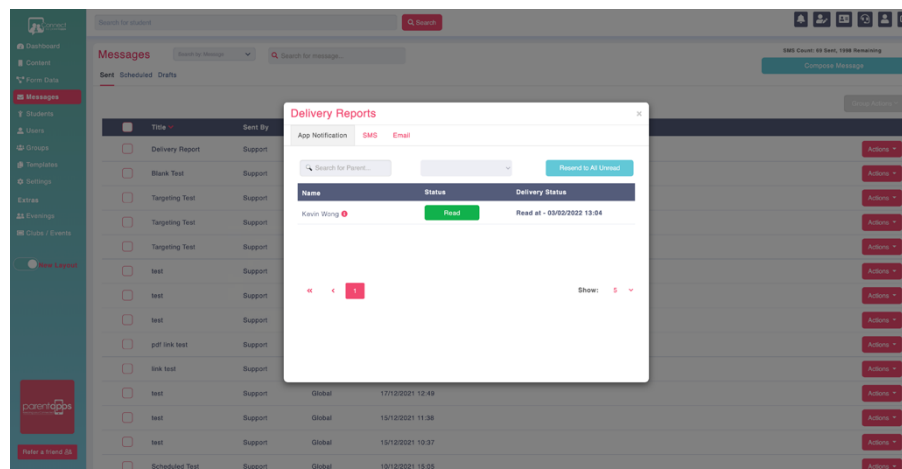
Message history & delivery reports.

For each message sent via the Parentapps portal, you can see detailed delivery reports as well as the option to re-use messages that have already been sent. To view a delivery report for a message, choose Actions then Delivery Report and you will see a list of which parents have or haven't read a message split by App Notification and Email. You can search by name and status, as well as re-sending a message if a parent hasn't yet read it.

To re-send a notification, you can either Resend to All at the top or re-send to parents individually.

You can also Reuse a message, meaning you can view and edit the contents of a message you have already created and re-send it, making any amends if necessary. To do this, click Actions then Reuse message, you'll notice we get redirected to the message editor with all the properties from the previous message getting populated automatically. You can now make any amends and choose Send Message in the top right when you are done.

Finally, you can delete a message using the Delete Message action. This will also remove the message from the inbox on the users device.



[RETURN TO CONTENTS PAGE](#)

Housekeeping.

End of grade housekeeping.

To prepare for the new academic grade, we recommend having a tidy-up of your portal. A good idea would be to visualise how the app will look from a parent's perspective and what they'll be able to see. Some of the recommendations we have are as follows:

Deleting out old content

Take a look through all the sections within your modules tab and delete out any old information that is no longer needed or outdated, for example, Newsletters. To delete them, you can select multiple newsletters at once on the left, then click Group Actions and Delete. You can also use Actions and Delete to remove them individually.

Deleting old messages

Within the Messages section, select the ones you wish to remove, then click Group Actions and Delete. You can keep in any messages that you wish to re-use at a later date.

Deleting old form data

Please export any data that you wish to keep before deleting. To export, select the form and choose whether to export as either a PDF or CSV file.

To delete, you can select the submissions, clicking group actions and then delete. Don't forget to check the expired section as well. Please note that this will not delete the form itself, and only the submissions it contained.

Adding in new term dates and events

We recommend that you have next academic grade's term dates in the app running until the end of the summer term.

In your modules tab, you will see any upcoming term dates that have already been entered. To add in any new dates, you can use the archived section. This will bring up any previous term dates you have used, you can click the re-use button and amend the start date and time accordingly and click save.

For a brand-new date, please use the create new button.

This is the same process for any upcoming events you may have in school, but these can go in the events tabs.

Checking your targeting

Within your content, you can target the information within each tab. We recommend that you check each item has the correct targeting.

If a tab is for the whole school, please make sure that the targeting is set to ALL USERS CAN VIEW. This will then allow any new users to see this content as well. Also, check that the targeted ones are correct, you can check this by going into the targeted users and looking at the grades and class groups.



End of grade housekeeping.

Checking useful links

Most schools have a useful links tab that either has direct links to external websites or diverts to your school website, please check that these are still relevant and delete if necessary, using Actions and Delete.

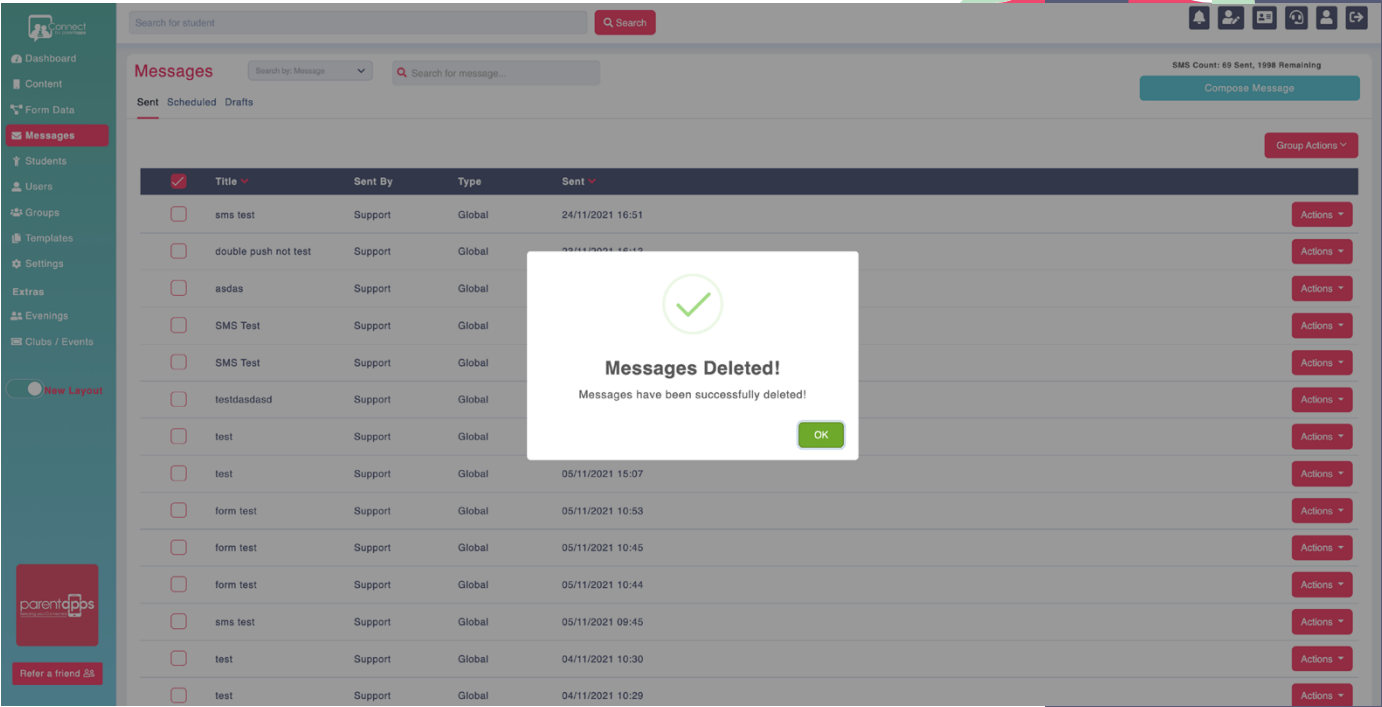
To add in any new links, use the create new button on the right, insert the title and link and paste in the URL. Click Save once you are done.

Xporter schools

If you are a school using Xporter, then all you need to do in September is press the Xporter button within your students section. This will bring in your new students if you haven't already done so, detect any students that have left and will automatically update the grade and class groups of your students.

Non-Xporter schools

If your school does not have the Xporter integration, you'll need to promote manually using the promote utility in the Students Section. Please contact support if you need any assistance with this.



[RETURN TO CONTENTS PAGE](#)

Pre-Admissions.

Pre-admissions for schools using Xporter

Importing Pre-Admission students with Xporter is just as straightforward as syncing any other data from your MIS system. First, click Students, then click the Xporter button in the top right corner. A pop-up will appear asking if you'd like to proceed, click Yes. The next screen will ask if you would like to include your pre-admission students, click Yes.

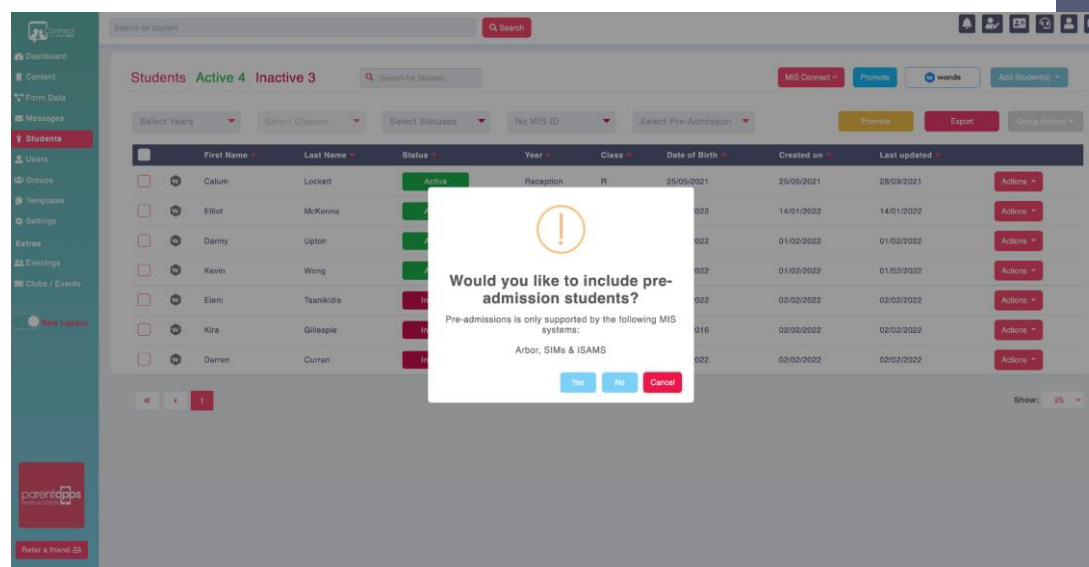
Xporter will begin to search for any pre-admission students along with any other updates that may have changed within your MIS system. Once it has found your pre-admission students, it will display them. If you would like to import these students into your portal, you can either tick each individual student, or you can select all students by clicking the tick box at the top.

Once you have finished selecting which students to import, click Continue.

This will then display a second screen if any of your students have been deleted from your MIS system, such as leavers. Once again, you can select which students you would like to delete and click Continue.

Xporter will then process which students to import and which students to delete according to your selection. This process may take a couple of minutes, depending on the number of students at your school.

Once the refresh has completed, a confirmation message will display, informing you that the data has been refreshed successfully. You can then view all your pre-admission students using the Pre-Admissions filter at the top of the page. You can easily target content to Pre-Admissions students via a dedicated tickbox on the targeting window, this is what it looks like in the Messages section, for example.



Pre-admissions for schools not using MIS integration.

Please do not change/remove any of the columns as this will prevent the data from importing properly into the system. You need to enter the data exactly as it is formatted in the example line on the spreadsheet.

Please password protect any documents that you send for GDPR. You can send a separate email with the password or call us.

[illegible]

