

Future facing software helps reach enrolment goals within budget in difficult times

Forward thinking Finance Managers and Bursars know that Marketing and Admissions teams need to regularly review their strategies to ensure they are maximising resources and funds to fulfil enrolment numbers.

But, with hard times looming, it can be difficult and time-consuming to evaluate where to tweak and update budgets without clear data on what has been achieved.

The strength of HUBadmissions

Most parents are like most of us - strapped for time and now expecting even more from the digital age.

With HUBadmissions, your school can instantly wow with how easy your application process is, and so dispelling parents' expectation that it is a time consuming, complex process.

Instead, it can be done at a time to suit them, without having to wait for responses by phone or email. Parents and staff can be notified, and reply to, enquiries and responses in real-time.

And not only can you add data and run sensible reports with just a click or tap, you can also straight away contact those who've attended events and lead them to your own easy-to-navigate enquiry, application and enrolment portal, all in one place.

Use ground-breaking software for free

The HUBadmissions Two Week Free Trial has been designed to give your admissions strategy a head-to-toe review, during which you can explore our latest admissions software, in your school's unique realm, for FREE!

HUBadmissions is our latest admissions CRM developed by WCBS exclusively for Independent Schools.

The trial comes with a workbook full of exclusive content not just from us but our partners The Stickman Consultancy and Kampus24.

Full of content to help you evaluate your admissions strategy

Your trial can be as hands-on or hands-off as you like, to find out exactly in what areas the software can transform the Admissions and Marketing Department, and ultimately increase revenue for your school.



Stephen Bilboe, CEO of WCBS, said:

"We are thinking about admissions differently than others. We don't think about it as an additional module, but instead consider it a full CRM system that will support schools all the way from enquiry to enrolment.

The solution provides a data driven strategy, that allows for a personal touch (no, the two are not mutually exclusive!), in order to convert as many enquiries into enrolled pupils as possible.

"For me, the best thing about this technology is that we are able to take the risk out of the buying process for our schools with this free trial journey. We're able to give each of our customers their own demo realm, allowing hands-on live access, before any decisions are made."

[Sign up for your free trial here.](#) If you have any further questions, please [email us](#).



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7 key advantages of using Direct Debit with PASS in your Independent School

With the current challenging economic climate, focus gets drawn to whether cash flow can be better managed.

This is just as important in an Independent school as in any other organisation; finance management is key to the smooth running of all departments.

Tried and tested way to pay bills

Over the years, Direct Debits have become a trusted and well accepted way for us to pay all sorts of bills, and are an extremely efficient way for businesses to collect monies.

This feature has been available and used by schools in PASS for years, yet still many English and Welsh schools don't collect fees by Direct Debit.

And for those schools that use Direct Debit with another provider, you may well find it worth considering to switch after the following information.

Parents readily accept setting up DD

In terms of set up, first consider the payment profiles that you'll provide to parents, before then offering the new payment option.

Getting bank details from parents might seem daunting, but just think how this is done quite simply with other companies and tailor an online or emailed form to suit your school's needs. Setup is done directly in billing accounts, under billing account maintenance, and files are submitted by PTX.



Here are just 7 of the advantages

- No more late payments as bills won't be missed or forgotten by parents.
- Admin time is significantly reduced, and with it, your costs.
- It lets you set and forget.
- Direct Debit is more cost effective than card payments.
- It reduces payment failures compared with using credit cards that have an expired date or have been cancelled.
- It improves cashflow, especially with Direct Debit Projection reports easily showing the expected income.
- Direct Debit is flexible and great for recurring, variable and one off payments, a must for schools wanting to bill for fees and other charges.

More details are in [our blog](#) or [contact your Customer Account Manager](#).

Automatic batch posting of payments into PASS saves time

You produce a Direct Debit batch and this monthly task is effectively doing your cash posting for you.

This makes it easier to process the payments as they are posted automatically into PASS in a single action rather than individually.


Once set up, still there is flexibility with the option to de-select anyone from the batch list.

This can happen if a parent contacts you, for instance, to say they want to pay cash for the due payment.

Help families better manage budget

By offering payment plans you suit parents' finances, giving them the choice to spread the cost of school fees rather than paying a lump sum, as each term's invoice can be split into manageable instalments.

This undoubtedly helps many of your families to manage budgets and spread out their expenses – and by offering Direct Debit in difficult times may even be an attractive incentive to help retain students and attract new ones.



Reference Scheme

Sign up to our reference scheme so we can thank you for your time, and for the fantastic references. Once you give 5 references we will send you a £50 amazon voucher to spend on whatever you wish! We've already had a few contributors, and hope you can soon become one too!

Chris Castell, from High School of Glasgow, used hers to buy a new kitchen pan!

To find out more and sign up, [click here](#).

Latest developments in HUB



Excel Integration

There's already a wide range of insights available in HUB, and coming very soon, with HUB-Excel you can extract data from HUB to Excel.

This expands your reporting and allows for further analysis, so you can manipulate your data to learn more with just a few clicks, and with tools to build your own bespoke reports. HUB already gives you powerful insights, but with each school requiring different and specific reports, HUB-Excel puts the same power in your hands.

What's more, HUB-Excel makes use of our new Data Warehouse. It's more efficient than querying the HUBdatabase directly, and is populated via an ETL (Extract, Transform, Load) process that runs every two hours. So your extracted data can always be up to date!

HUB users will be contacted very soon with more information!



Google SSO

Google Single Sign On (SSO) is now available in HUBmis and HUBadmissions alongside O365 SSO.

There is nothing you need to do to enable this, any existing accounts using a gmail login will be able to choose SSO as an alternative to the standard login process.



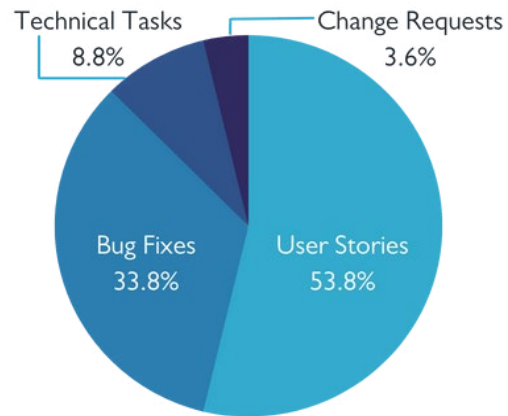
HUBadmissions updates

Tasks is a new feature that will allow Admissions Staff to create and manage the tasks they need to carry out in support of their day-to-day activity.

Events allows you to schedule and manage them within HUB and communicate with the participants.

Background improvements to HUB

Changes were made to the infrastructure mid-February. This has had a clear beneficial effect to improve availability, and we expect the uptime figure to further improve during March.



User Feedback feature


We've launched a new user feedback feature for you to give your thoughts when using HUBmis in a quick and easy way. This will help us hear your feedback sooner to help improve HUBmis.

Why HUBmis?

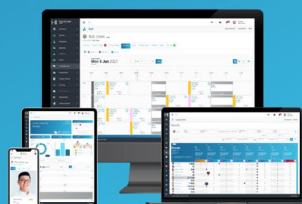
“ Not only did I like what WCBS was saying, but I also really liked what I saw.

I think you've got a great product, but I also think you've got exceptional people who are working to create an amazing experience.”

“I think for me the flexibility of HUBmis was really, really important, because we're not about being a standard school. We don't fit into a bulk standard product. We needed something that we could make our own, and HUBmis gives us that.”



Paula Watch, Principal
Shine International Academy, Malaga



Shine Case Study

We recently published some great feedback from one of our Partner Schools in Spain. We were even lucky enough to pay them an in-person visit following the NABSS conference last month.

"What we need is that extra little bit of magic. HUBmis absolutely has this."

You can read the full case study [here](#).

On-premise updates

2023.1 has just been released and is now available for download from the Customer Centre.

If you're one of our PASS-Hosted schools, then we'll take care of these upgrades for you.



This update includes the annual Payroll Year End RTI changes, along with changes to modules across the board.

To mention only a few, the nominal module now

- allows budgets to be transferred from one budget holder to another
- the administration module has new optional grid fields
- the purchase module now allows you to choose to display supplier bank details on the purchase invoice posting screens.



This release contains enhancements within the attendance reports module, including the ability to search register marks by description, searching pupils and groups by code and name, and the ability to select or deselect all searched pupils/ groups/ register marks.



This release contains an enhancement to the Change My Contact Details feature, to optionally show only related individuals with the same address.

You can see all the enhancements in this release in the release notes in the [Customer Centre](#).

Proud to be established innovators

Established

Established in 1984 designing and implementing finance software solely with independent schools in mind.

40 years understanding the need for accurate and consistent financial management in independent schools.

Solutions you know and love with in-depth functionality, a beautiful billing solution to work with your finance system of choice, WCBS can help.

Cloud technology to improve security of your school's data, and give access anywhere, any time on any device with internet.

PASS-hosted
passFINANCE in the cloud.





Experts in Edtech for Independent Schools, processing more than

£2.16 Billion

in school fees each year

MIS

Admissions

Finance

Innovators

Investing millions of pounds to build beautiful cloud native solutions.

Ensuring your Independent School has future-proofed software in the three core areas of MIS, Admissions and Income.

With an agnostic approach, solutions are built on API, allowing integration partnerships with best of breed solutions so there's no need to compromise.

Linking with other systems eliminates the need for duplication of data entries, giving peace of mind that there is no mismatch of information across departments.

HUB MIS income admissions
by WCBS

The future of EdTech!





Conferences!


The last few weeks have been great, as our sales team have been out and about catching up with as many customers as possible whilst attending conferences across the globe!


 Our CEO Stephen Bilboe flew out to Abu Dhabi to meet with our new Regional Manager Alan Clark and attend the BSME Annual Conference whilst there.

 Oliver Rhodes, our newly appointed head of UK Sales, and Cullen Connors, our Regional Manager for the south of the UK, attended Society of Heads conference in Cheshire, where we were delighted to see some friendly faces as well as meeting new ones.

 John Cannon, WCBS Sales Director, was invited by COBIS to give a workshop at this COBIS MDA event in the Netherlands on how schools can ditch their spreadsheets yet get more from their admissions data. If you want the slides or your own run-down of the event, [reach out today!](#)

 John then flew out to Spain to meet Harry, Our European Regional Manager, at the NABSS conference, where they got to discuss all things Cloud Native EdTech with British Schools in Spain, and also took the opportunity to say hello to our partner school Shine International Academy whilst there.

After briefly both returning to the UK, John and Steve then both headed off to Bangkok to attend the  FOBISIA conference and chat to British International Schools from across Asia.

Cullen Connors was back on the road to speak to Governing Bodies of Independent Schools at the  AGBIS conference in London, and during the trip he stopped off to see a few of you too.

Catch up with us at:
COBIS 6-8 May • ISBA 23-25 May • AMCIS 15-16 May



Summer Term training events now on website

We've just published our new list of summer training events on the website.

These events have been organised to work in line with your school's finance and academic schedule, giving you refreshers on annual tasks or showing you how to get more from your solutions.

You can check the [events list here](#). If you require more specific training please reach out to your Customer Account Manager and they can organise this for you.

North Finance User Workshop

At the end of March Richard Walling, WCBS Director of Customer Success, is hosting the first of his WCBS User Workshops across the UK. And he's starting in the north at Bradford Grammar School!

Throughout the day you'll hear updates on all things WCBS, attend a Finance Workshop around your school's systems and learn about how simply we can put these in the cloud.

After lunch, Richard and Oliver Rhodes, Head of UK Sales, will be available to dive deeper into any more specific questions you may have.

[More information and book here.](#)

---Would your school host a user workshop? [Let us know!](#)



Is PASS-hosted right for your school?

WCBS Team Leader & Customer Account Manager Martin Croad breaks down the simplicity of moving PASS to the cloud.

With many schools now deciding to make the move to the cloud, some of the more frequently asked questions can be answered to help ease any queries your school may have about moving.

Q: How many schools currently use WCBS Hosting?

A: We've nearly hit the 100 mark – reader, you could be the 100th! We have schools which are live and have been for a while, schools which are just getting set up, and schools ready to be moved across in the next few weeks.

Q: Why should we move to PASS-hosted?

A: Many reasons, WCBS handles all the hard work so you don't have to. Version upgrades, password issues, or even restoring a backup. And security is becoming a bigger issue for schools, especially with recent Data Hacks within the Independent school sector. Potential costs of such hacks can exceed £10,000 due to loss of data, and repairing this damage let along the cost to a school's reputation too. With PASS-hosted you gain top level security.

Also, the cost of moving to the cloud is often balanced out when you consider the cost of IT Infrastructure. A server migration in-house could be between £500 - £2000.

Q: What changes when we move to hosted?

A: The PASS application itself, all routines and functionality remain the same. So, for example, with a Bill run, the Bills are produced, updated and sent out exactly as normal. With the access now being in a cloud environment, when you are logged in you can use Outlook in the cloud to send emails straight from PASS like you would do when it was on your own server.

If you run anything outside of PASS, which links in to ODBC queries, these can still be run on the server directly. The ODBC reports will currently pick up settings

based on your local machine, so our Tech Team will help you to reconfigure these to match the new environment and keep them working.

PTX will pick up local settings, so just need to be pointed to the new Cloud Server, and a routine modification is all that's required for SSL Post. Functionality again stays the same.

Q: How long does it take?

A: Once you commit, our Delivery team slots 3 dates in your diary. First is a pre-call with our Senior Technician to go over exactly what is happening, check we are aligned on outcomes, and answer any technical questions. We recommend that someone from your technical team is available and

also someone from the team who will be a regular user so they are aware of what's involved and what may change. This is done about a week or two before the install. The next two dates are consecutive days to make the move. We try to make sure the dates are when you can be supported by the Tech Team and WCBS Support should you have any questions after moving. The first day of install is the environment and getting everything set up, and the second day is onboarding users and making sure they are happy they have everything they need.

It's a very simple process, and we have done it so many times now, it's second nature.

Q: What about the price?

A: The price to move to PASS-hosting is based per PASS User. If you are a 3sysACADEMIC school, then Teacher logins won't be impacted. 3sys and anyone who uses it remains exactly as it is, as this is already browser based for those logging in.

The key people are the day-to-day users of PASS as the desktop application. In our experience, this tends to be the Finance team, Secretaries and maybe School IT teams.

We have an initial setup cost for the first year, but then the costing is per user on an annual basis. Your software costs for the PASS modules themselves don't change.

Q: When can I move?

A: Whenever you want! If you have a specific date in mind we try to work around you, otherwise, it's just a matter of scheduling you in with our tech team.

Q: How do I get more information or a price quote?

A: Contact your Customer Account Manager directly who can provide a hosting quote for you. If you have technical questions, some of our Senior Technicians are happy to have a catch-up call with your school before it even goes to the pricing stage. Again, your Customer Account Manager can get this set up for you. In my opinion it really is a no-brainer to make the move.

You can contact Martin for any other information [here](#).

PASS-hosted
passFINANCE in the cloud

- Uptime Target**: 99.95%. WCBS targets 99.95% for uptime which is measured over a month.
- Accredited Datacentre**: ISO27001, BS:5979
- Daily Database backups**: Retained for 7 days
- Daily Server backups**: Retained for 28 days
- UK Data Residency**: Accessible via a browser 24/7, Globally accessible
- Accessed only via HTTPS**
- Isolated Servers on a Secure Private Network**
- Security updates can be deployed Weekly**
- Availability of Multi-Factor Authentication**



Jayne Morris

Product Support Coordinator

I joined WCBS as a Support Consultant in 1998. Previously I was a Weapons Analyst in the Royal Navy, where I first gained experience working with software products on submarine torpedo trials.

My career with WCBS has developed considerably over the years. In 2003 I became Support Manager, and in 2019 I moved into the role of Product Support Coordinator.

A key part of my role involves communication. I document and distribute information about all of our products, and I also get involved with considering customer feedback and shaping future product content.

I enjoy applying and sharing my knowledge and experience to deliver practical solutions, whether that involves directly helping customers, or simply supporting my colleagues.

For me, the most rewarding aspects of working at WCBS are our customer focus and our collaborative culture. We understand the importance of working together to design and deliver innovative software solutions that meet our customer's needs.

Outside of work I spend time with my husband and two British Shorthair cats. I love reading all kinds of books, especially biographies and memoirs.

I also create needlework pictures with seed beads, including the odd pet portrait for friends or family.

In summer I enjoy walking and bird watching with my husband, and we regularly visit our respective families in Shropshire and Norfolk.



Stefan Colburn

Junior Support Consultant

Before I started at WCBS in September 2022, I worked as Finance Assistance at an SEN College and then as a Front of House Banker on the high street.

With nearly 10 years of experience in the Finance and Banking sector I can use my knowledge and experience to assist our clients in my present role of Junior Support Consultant, and am able to provide essential support especially in times of need.

Originally from Reading, I moved to Somerset when I was young.

I spend most of my spare time online and connecting with people all around the world.

Also, as I wanted to expand on hobbies I decided to use some of my spare time learning how to bake, as this has the biggest benefit in my working and home life.

I am really pleased how well my chocolate brownies have been enjoyed by my colleagues!

I have visited a few countries in my years and really enjoyed France and Sweden.

A favourite part about working at WCBS is having great colleagues who have a wealth of knowledge within Edutech and other areas.

After a member of my family did some digging around, I found out that I'm distantly related to Heath Ledger.



Cloud hosting: meeting cloud objectives

We migrate you to the cloud, and then staff can work from anywhere.



HUBmis Case Studies across the globe

We catch up with some HUBmis partner schools to get their take on their journey.



WCBS' customer conference branded a success!

Conference 2023 brought together our customers in the UK and overseas.



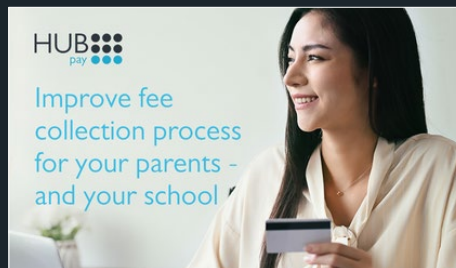
Independent Schools still a growing target of ransomware attacks

Check that you are up-to-date with recommended measures.



School marketing ideas to implement before a half-term break

Before any half-term break is the perfect time to implement new marketing ideas.



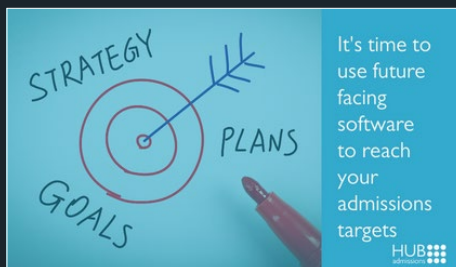
How to transform the way your school manages its fee collection

Learn how to save hours of headache and millions in fees.



How Independent Schools can improve cash flow

Direct Debit function in PASS offers convenience and boosts productivity.



Future facing software helps admissions strategies reach goals

It can be difficult and time-consuming to evaluate where to tweak and update budgets.

CALENDARS FOR MOUSEMATS NOW AVAILABLE

Download from Dashboard Notices in the [Customer Centre](#)

- ✓ Academic year (Sept 22 - Aug 23) now including **EXTRA BANK HOLIDAY**
- ✓ Calendar year (Jan-Dec 23) option available
- ✓ PLUS Calendars with Scottish holidays only
- ✓ Need a mousemat? They are available **FREE** by emailing marketing@wcbs.co.uk

Crossword time!

One £20 Amazon voucher for the first winner drawn with correct answers and an ecoffee cup for second and third are up for grabs!



All you have to do is find the answers within these pages. Some are harder than others.

[Download fillable pdf](#)

You can do this on the pdf or print off this page and complete, then send a photo or the edited pdf with your answers to marketing@wcbs.co.uk

Competition closes 28th April 2023.



For latest news and announcements
Click the icons to follow us!

Across

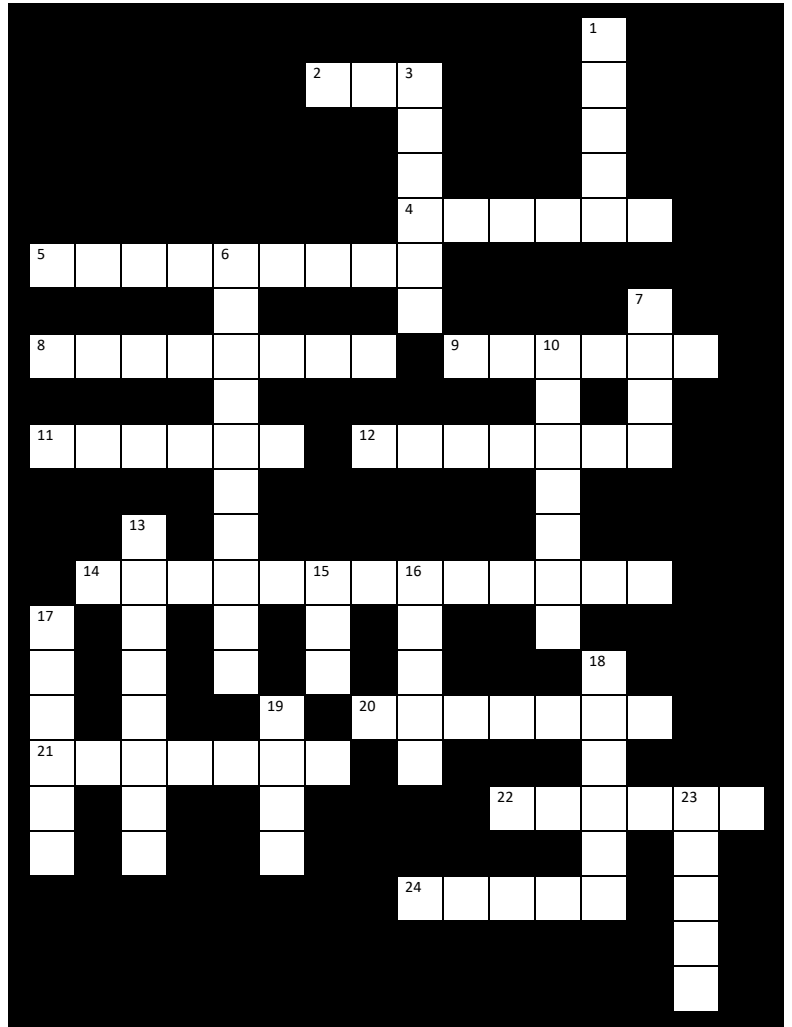
2. Update Summer 2023.
4. Type of SSO.
5. Sign up for what scheme?
8.Events are on the website.
9. What improves fee collection process?
11. Where can you spend £20 voucher?
12. The experts in what for Independent Schools?
14. What has a free trial?
20. £2.16 what?
21. passFINANCE module mentioned in latest update.

Down

1. With what does HUB now integrate?
3. Help families to better manage what?
6. attack is a Security threat.
7. What does Stefan like to do in spare time?
10. Where FOBISIA was held.

Last term's Wordsearch competition results

The winners of the autumn issue's competition were: Ian Cullen, Morrisons Academy; Debbie Hill, Uppingham School and Sarah Ball, Castle Court. Congratulations - and well played to all of you who entered!



13. From which centre can you download mousemat calendars?
15. Which month is ISBA annual conference?
16. Where was nabss held?
17. Sales Director's last name.
18. Get to know Jayne who?
19. What can we host for you?
23. Martin's surname.

Wishing you a happy and enjoyable Easter break
from all of us at WCBS

