



# *Start of Year To-Do List*

# The Beginning of the Academic Year Tapestry To-do list

## When you start a new academic year, there are a few things you need to think about when it comes to your Tapestry account.

N.B. If you need to contact us at any point, please make sure that you do so from the **registered FSF account holder's email address** (where your invoices are sent), or **from any email address registered as a 'Manager' in Tapestry**.

### 1. Check your renewal date

You can check when your account is due to expire from Control Panel > Overview.

If you have any questions about renewing your subscription, please contact us at: [customer.service@eyfs.info](mailto:customer.service@eyfs.info)

### 2. Make any changes to your package size

It's possible that you'll find yourself needing to upgrade or downgrade your package size according to your new numbers. If you need to change your package size, contact [customer.service@eyfs.info](mailto:customer.service@eyfs.info) so we can help you.

### 3. Confirm who your FSF account holder is

All Tapestry packages are administered from the FSF account. The email address we have on record (where invoices are sent) will receive all invoice notifications, and will be able to log in to the FSF account to access, amend, download and make payment for these directly from the FSF.

Please make sure this is up to date by going to Control Panel > Overview, and [if you need to make any changes](#) and you are not able to access your FSF account, contact us at [customer.service@eyfs.info](mailto:customer.service@eyfs.info) and we can assist you with this.

### 4. Check and update your setting/school contact details

You might have changed your email handle, or the manager might have left. Either way, it is a good idea to check and [update your contact details](#) for both us (Tapestry) and your families.

### 5. Set up the Booking section

- [Choose/check your Opening Hours](#)
- [Set up/check your Sessions](#) and their pricing
- [Set up/check your Rooms](#)
- [Schedule in any closures and school holidays](#)
- [Add your funding types](#)
- [Set up your invoice format](#)

Manage your FSF Account by going to [www.eyfs.info](http://www.eyfs.info) and logging in with your FSF account details.

### 6. Staffing changes

Staff can come and go, so every start of the academic year (or whenever the staffing changes happen!), you'll need to:

- Add new staff either [individually](#) or [in bulk](#)
- Delete staff either [individually or in bulk](#)
- [Change staff type](#) – this could mean upgrading some staff to managers, or changing their type from PIN only to full staff
- [Review your staff user permissions](#), and edit them if necessary

### 7. Make sure that you have your new cohort set up and ready

- Add children [individually](#) or [in bulk via a CSV file](#)
- [Transfer children in](#)
- [Activate any 'Enrolling' children](#)
- [Fill in About Me pages](#)
- [Manage your groups](#)
- [Manage key children](#)
- [Add children to Rooms](#)
- [Create Regular Schedules for children](#)

### 8. Make sure your relatives list is up to date

- [Delete old relative users](#)
- Add new relatives [individually](#) or [in bulk](#)
- [Link relatives to their children](#)
- If needed, [retry a relative's activation](#) – this will be particularly handy if their activation email expired
- [Review your relative user permissions](#), and edit them if necessary
- [Assign relatives as bill payers](#) for invoices, and [add/update their billing details](#)