

ONBOARDING GUIDE

Preparing your school for Wise Ed

Everything Wise Ed connects when a school introduces it — payments and invoices, your country's requirements, payroll, sign-in, your learning platform, text messages, languages and integrations — with what we do, what your school provides, and real examples of how schools prepare.

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The short version

Wise Ed is complete as a product. What is particular to your school — your contracts, your providers, your country — is connected when you introduce it. For almost every item the work on your side is small and the same in kind: **a contract you already have, a sample file, or one approval**. This guide says exactly which, for each item, and shows how schools in different countries prepare it.

You do not need everything on day one. The core of Wise Ed works from the first day on the data your timetable already has; every other part is switched on when your school is ready. Start with what you need first — usually admission, records and invoices — and add the rest later.

1 How to use this guide

Each item in chapters 4 to 7 has the same shape:

WHAT WE CONNECT

The part Wise Technologies does. You do not need to install or programme anything.

WHAT YOU PROVIDE

The contract, file, account or approval only your school can give.

After that come **how to prepare** — the steps on your side, in order — and **examples** from different countries. Read the items that apply to you; skip the rest.

Who reads which part

Reader	Chapters
Head of the student office	All of it, starting with 2, 3 and 9. You lead the introduction.
Finance, bursar, accountant	4 (payments and invoices), 5.2 and 5.3 (payment slips, e-invoices), 6.1 (payroll).
IT and Microsoft 365 administrator	6.2 (sign-in), 6.3 (LMS), 7.3 (API and webhooks), 8 (data protection).
LMS administrator	6.3.
Data protection officer	7.2, 7.3 and 8.

ONE RULE FOR PASSWORDS AND KEYS

Never send a password, an API key, a certificate or its password in an ordinary e-mail. When a step below asks for one, we tell you where to type it in yourself, or agree a safe way to hand it over — for example the file by one channel and its password by telephone.

2 The introduction, step by step

Most of a first setup is your school's own data, and most of that is already in Wise Timetable. What is not comes in through imports that can be tried first and undone. A typical introduction runs like this; several steps run side by side.

- 1 **A first conversation and an inventory.** We walk through how your student office works today. You tell us which systems you use — payment provider, bank, accounting and payroll programs, LMS, Microsoft 365, SMS — and what your current student information system can export. The checklist in chapter 9 is the agenda.
- 2 **Wise Ed is switched on for your school.** We switch it on for your Wise Timetable database and set your country. The country brings the national ID check, the currency, the grade scale and the payment slip; it is set by us because it is a legal fact, not a preference.
- 3 **Taken over from the timetable.** Programmes, subjects, the curriculum the timetable knows and this year's students with their enrolment, in one action. Pressing it again changes nothing already there.
- 4 **Completed by the office.** What only a student office knows: a programme's cycle, national classification codes and credits; a subject's ECTS and hours; students' personal data.
- 5 **Rules set.** Exam rules, request types, the invoice issuer and numbering, rates of pay, code lists, document languages. Every setting has a default written in plain words.
- 6 **Connections made** — the items of chapters 4 to 7 that you need now. Each is tried on test data or a test account first.
- 7 **Roles and campuses.** Your administrators build roles from menu items and give them to people; campuses where you have more than one.
- 8 **Earlier years imported.** Students, subjects, curriculum rows, enrolments, historical grades and payments through the import wizard: a dry run, the import, and an undo if needed. Each import kind has an empty Excel template with its columns explained.
- 9 **Go live.** Students sign in with their enrolment number and a code by e-mail, or your Microsoft account. You decide when.

How long it takes depends mostly on how quickly outside parties answer — your payment provider, your bank, the register's administrator. Ask them early: those are the steps you cannot speed up from inside the school.

Not on Wise Timetable yet?

Every Wise Ed school has Wise Timetable. A school that does not have it yet gets both: we set up the timetable, import the timetable you have today, and put up its web pages within a few days. Then Wise Ed is switched on for the same database.

Moving from another student information system

- Ask your current supplier early what the system can export, and in which formats (CSV or Excel is ideal). Send us one sample of each export.
- Historical grades come in onto closed exam records, marked as imported. Undoing an import enters a correcting entry; a grade is never deleted.
- The same file imported twice changes nothing the second time: duplicates are recognised by the enrolment number, national ID or e-mail of a student, and the code of a subject.
- Decide the first academic year Wise Ed reports nationally. Earlier years stay as the old system reported them.

3 Your team for the introduction

A small school does all of this with two or three people; a large one spreads it. Name a person for each line before the first conversation — then every question has somebody to go to.

Role	What they do in the introduction	Time
Project lead (student office)	Owns the checklist, decides rules and code lists, checks import dry runs, says when students start.	Throughout
Finance or bursar	Payment provider contract, bank statement export, invoice issuer data, price lists, VAT treatment.	A few hours
Accountant	Accounts and cost centres, a sample import of the accounting program, e-invoice format the buyers accept.	One meeting and samples
Payroll	A sample file the payroll program imports, codes for kinds of work.	One sample
IT / Microsoft 365 administrator	Approves Microsoft sign-in once; looks after API keys and webhooks if used.	Under an hour
LMS administrator	Moodle token or LTI 1.3 registration.	An hour or two
Data protection officer	Data processing agreement, what personal data may leave Wise Ed.	One review
Native-language reader	Only for schools working in German, Italian, French, Spanish, Portuguese, Romanian, Lithuanian or Swedish: reads the office words before you start.	A day or two

4 Payments and invoices

Wise Ed issues the invoices itself: numbering without gaps, a PDF with a payment QR code, payments matched from the bank statement, credit notes for mistakes, and each period handed to the accountant. What is connected per school is the money side that runs through your own contracts.

4.1 Card payment online, through your payment provider

Students, parents and companies pay an invoice by card on the student portal. Wise Ed records the payment against the invoice by itself.

WHAT WE CONNECT

- The “Pay by card” step on the invoice, through your provider’s secure payment page — card numbers never pass through Wise Ed.
- The confirmation back from the provider, recorded as a payment on the right invoice.
- Refunds and failed payments shown to the office in plain words.

WHAT YOU PROVIDE

- The provider’s contract (a merchant agreement) in the school’s name.
- Its technical details: a test or sandbox account and the credentials the provider gives for an integration.

How to prepare

1. **Use the provider you already have, if you have one.** Many schools already take card payments for application fees or events. Tell us who it is.
2. **If you have none, ask your bank first.** In much of Europe the bank that keeps your account also offers online card acceptance; otherwise an international provider can be contracted online in days.
3. **Ask the provider for a test account** (often called a sandbox or test shop) beside the live one. Every connection is tried there first.
4. **Decide the details:** which cards and wallets you accept, who bears the fees, the refund policy, and the name that appears on the payer’s card statement.
5. **Get the integration credentials** — the names differ per provider, see the examples — and hand them over the safe way (chapter 1).

EXAMPLES

Where	What schools typically use	What you usually receive
Stripe (worldwide)	An account opened online and verified for the school as an organisation.	A publishable key, a restricted or secret key, and a webhook signing secret — in test mode first, then live mode.
PayPal (worldwide)	A PayPal Business account in the school’s name.	From the developer dashboard: a REST app with a Client ID and a Secret, in the sandbox first and then live.
Slovenia	Online card acceptance contracted with the school’s bank; card processing for many Slovenian banks is run by Bankart. International providers are used too.	A merchant ID, the shop’s test environment and the keys or certificate of the bank’s payment page.

Croatia	A card payment gateway such as CorvusPay or Monri, or the bank's own.	A shop ID and a secret key, with a test shop.
Serbia	The bank's e-commerce card acceptance; many payers also pay instantly by scanning the IPS QR on the invoice (see 5.2).	A merchant ID and the bank gateway's keys.
Euro area, broadly	Stripe, PayPal, Adyen or Mollie, or the bank's own gateway.	An API key and a webhook secret, test and live.
United States	Stripe, Authorize.net or PayPal/Braintree; many colleges run a campus payment platform such as TouchNet or Transact (formerly CashNet); Flywire for international tuition.	Gateway credentials, or for a campus platform its integration specification — tell us which, and we say how it connects.

BANK TRANSFER STAYS THE DEFAULT

Every invoice already carries your country's payment QR code, which fills in amount, account and reference in any banking app. Card payment is an addition for those who prefer it — and for payers abroad.

4.2 A fiscally verified cash register

Where the law requires a receipt for a cash (and sometimes card) payment at the counter to be verified with the tax administration, your school's register does it.

WHAT WE CONNECT

- Every payment taken at the counter recorded in Wise Ed, on the invoice it pays.
- On screen, the moment a receipt needs the register, so the clerk does not forget it.

WHAT YOU PROVIDE

- The register — the fiscal cash register or certified program your school already uses for counter receipts.

How to prepare

1. Ask your accountant whether your school must fiscally verify counter receipts, and for which payment types. Public institutions are sometimes treated differently.
2. If yes, tell us which register or program you use and who works the counter.
3. Consider whether you need counter payments at all: many schools take none and ask everyone to pay from the QR code.

EXAMPLES

Where	What it means
Croatia	Receipts are fiscalised in real time with the tax administration. Under the Fiscalisation Act in force since 1 January 2026 this covers invoices to private persons paid in cash, by card or online.
Slovenia	Receipts paid at the counter in cash or by card are verified with the tax administration by the school's register program.
Serbia	Retail receipts are issued through an approved electronic fiscal device.

Some other countries	The law may require every invoice to come from certified invoicing software (Portugal is a known case). Tell us at the first conversation and we agree together whether Wise Ed issues the invoices or hands the charges to your certified program.
United States, UK	No fiscal register for tuition; nothing to prepare.

4.3 E-invoices through your provider

Companies and public bodies that pay for students often must, or want to, receive a structured e-invoice instead of a PDF.

WHAT WE CONNECT

- Each e-invoice made in your country's format (see 5.3).
- Signed electronically with your school's own qualified certificate.
- A warning 30 days before the certificate expires.
- The office downloads the signed XML; your bank or e-invoice provider delivers it.

WHAT YOU PROVIDE

- The certificate as a `.p12` or `.pfx` file, with its password.
- Your provider — the bank or e-invoice service that delivers e-invoices to buyers.

How to prepare

1. **Find out whether you already have a qualified certificate for the school** — many schools have one for e-banking or for the tax administration. It must be issued to the school (the legal entity), not only to a person.
2. **If you do not, order one** from a qualified trust service provider of your country. Allow time: identification of the legal representative is usually needed.
3. **Export it with its private key** as `.p12` / `.pfx`. Your IT or the issuer's instructions show how; the password is chosen during export.
4. **Ask your bank or e-invoice provider** how they take e-invoices from you (upload in e-banking, a web portal, or a network such as Peppol), and send us one e-invoice your buyers have accepted.
5. **Collect the buyers' details** the format needs — tax number, sometimes an electronic address (for example a Peppol ID) and the buyer's order reference.

EXAMPLES

Where	Certificate	Delivery and format
Slovenia	A qualified certificate for the legal entity from a Slovenian issuer, e.g. SIGEN-CA, Halcom CA or POSTArCA.	e-SLOG; through an e-invoice provider or the bank, and Peppol. Public bodies already require e-invoices; B2B e-invoicing becomes mandatory on 1 January 2028.
Croatia	A business certificate from FINA.	eRačun in UBL 2.1 with the Croatian CIUS, through an information intermediary; mandatory between VAT-registered businesses since 1 January 2026.

Serbia	A qualified certificate, used to register on the national e-invoice system.	UBL 2.1 with the Serbian profile through the national e-invoice system (SEF), mandatory for B2B since 2023.
Germany	Electronic seal or none, depending on the route.	XRechnung or ZUGFeRD, increasingly required between businesses.
Other EU	Any qualified certificate from the EU Trusted List.	A national format based on EN 16931, often through Peppol.
United States	Not needed.	No national e-invoice mandate; companies normally take the PDF invoice. Nothing to prepare.

4.4 Bank statements in camt.053

You download the statement from e-banking and import it; each payment finds its invoice by itself — by the reference, then an invoice number in the text, then amount and name.

WHAT WE CONNECT

- The import of the statement, recognising lines already imported.
- Matching to invoices; what fits several invoices or none waits in the work queue; an overpayment is kept as credit.
- Payouts of aid as a SEPA payment file, where your bank takes one.

WHAT YOU PROVIDE

- One statement from e-banking for the first trial import.

How to prepare

1. In your e-banking, look for the statement export called **camt.053**, "ISO 20022" or "XML statement". Most European banks offer it for business accounts. Choose the daily statement.
2. Download one recent statement that contains student payments, and send it to us for the trial.
3. Confirm the **reference model** your invoices should carry (it decides how reliably payments match) — for example the RF creditor reference, or your national model.
4. If several accounts receive student payments, tell us; one IBAN per school is the default.

EXAMPLES

Where	Statement and reference
Slovenia	camt.053 from business e-banking; reference SI or RF model as printed on the UPN QR.
Croatia	camt.053 (XML statement) from business e-banking; reference model HR and the call number from the HUB-3 slip.
Serbia	The bank's XML statement; reference model 97 as on the IPS QR.
United States	Many banks give BAI2 by default and camt.053 on request. Ask for camt.053; if only BAI2 or a CSV is offered, tell us.

Elsewhere

If your bank offers only MT940 or a CSV, send a sample and we say what it takes.

4.5 Files for your accountant

Each period's invoices, invoice lines, payments and open balances go out in the form your accounting program (ERP) reads, with your accounts and cost centres.

WHAT WE CONNECT

- The export in your program's import format, with your accounts, cost centres and VAT codes.
- CSV and Excel for everything else.

WHAT YOU PROVIDE

- The accounts: revenue per kind of charge, receivables, VAT, credit.
- A sample of what the program imports, and its import description if it has one.

How to prepare

1. Sit down once with your accountant and list the kinds of charges you have — tuition, application fee, exam attempt, certificate, accommodation — and the account each goes to.
2. Decide the cost centres: per programme, per campus, or none.
3. Ask the accountant for an example import file from the program (a few invoices from another source are enough).
4. Agree how often the accountant receives the files — usually monthly.

EXAMPLES OF PROGRAMS SCHOOLS USE

Slovenia	Minimax, Pantheon, SAOP, Vasco and others.
Croatia, Serbia, Bosnia and Herzegovina	Pantheon, Minimax, Synesis and local programs.
International	SAP, Microsoft Dynamics 365 Business Central, Oracle, Sage, Xero.
United States	QuickBooks, Sage Intacct, or the finance module of a campus ERP.

Where your program can also send payments back (for example payments it booked), it can do so through the public API or as a file; a payment already recorded is left alone. See 7.3.

5 Your country's requirements

Wise Ed adapts to the national requirements of every country where it is integrated, as part of setting up your school. Your country is set when Wise Ed is switched on; it brings the national ID check, the currency, the grade scale and the payment slip. What follows is what your school brings to it.

5.1 National reporting to your country's register

Each country keeps a register of higher education to which institutions report every enrolment, the events that end or change a study, and after each year the credits each student achieved. Wise Ed prepares all of it from its own records and reports through one adapter per register.

WHAT WE CONNECT

- The adapter for your country's register: what is still to be reported, student by student, batches, checks against the register's schema before anything leaves the school.
- The register's code lists, updated from the file the ministry publishes.

WHAT YOU PROVIDE

- The register's technical specification.
- Access: your institution's user for the register and, where the register has a web service, its test environment.

How to prepare

1. Find the person at your school who reports to the register today, and the ministry or agency contact behind it.
2. Ask the register's administrator for the current technical specification and for test access, if they have a test environment.
3. Collect your institution's codes: the institution code, the programme codes and the national classification codes the register expects.
4. Where the register accepts a web service, a qualified certificate is usually registered with it — often the same certificate as in 4.3. Until it is, the office submits each prepared batch in the register itself.
5. Decide the first academic year Wise Ed reports. Earlier years stay as your previous system reported them.

5.2 Payment slips and QR codes

Every invoice carries the payment slip of your country with its code, so the payer's banking app fills in the account, the amount and the reference — and the reference cannot be mistyped.

WHAT WE CONNECT

- Your country's slip and code on every invoice and reminder.

WHAT YOU PROVIDE

- The school's account details: account holder exactly as the bank has it, IBAN, BIC, and the reference model you use.

EXAMPLES

Where	Slip and code
Croatia	HUB-3 with its PDF417 barcode — the HUB 3A form printed on the invoice, or the barcode alone — scanned by Croatian banking apps. The EPC QR can be chosen instead.

Serbia	The IPS QR code of the National Bank of Serbia, for instant payment from a banking app.
Slovenia	UPN QR, the national payment order with its QR code.
Euro area	The EPC QR ("GiroCode"), which any SEPA banking app reads.
Elsewhere	Where a country has no common payment code, the invoice carries the full bank details; card payment (4.1) does the rest.

5.3 E-invoice formats

Wise Ed adapts to the e-invoice format of every country where it is integrated, signed with your school's certificate (4.3).

WHAT WE CONNECT

- Your country's format, checked against the e-invoice your buyers accept.

WHAT YOU PROVIDE

- A sample of an e-invoice your buyers accept — one your school issued from another program, or one a supplier sent you.

Typical formats: e-SLOG in Slovenia; UBL 2.1 with the national CIUS in Croatia; UBL 2.1 with the national profile in Serbia; XRechnung or ZUGFeRD in Germany; FatturaPA in Italy; Peppol BIS Billing 3.0 across the Peppol network. If your buyers include public bodies, ask one of them which channel they require.

5.4 Applications from your national application system

Where applications reach you through a national application system, its export comes in through the admission import; the columns are matched once and remembered.

WHAT WE CONNECT

- The column mapping for your export, so next year's file reads with no question asked.
- Duplicates and decisions already made are never changed by a second import.

WHAT YOU PROVIDE

- A sample export — last year's, with personal data replaced if you prefer.

Your country has no national application system? The import reads any CSV or Excel list of applications, and Wise Ed has its own online application form for your website — added with one line of code, or on a page of its own.

6 Payroll, sign-in and learning

6.1 Your payroll program

A lecturer's month is taken from the real timetable, checked by the lecturer, approved by the office — and goes out in your own export profile, set up once and downloaded every month.

WHAT WE CONNECT

- An export profile describing your payroll program's file: columns and their order, headings, your codes for kinds of work, separator, decimal mark, encoding (Windows-1250 included), date format, or fixed width.

WHAT YOU PROVIDE

- A sample file your payroll program accepts.

How to prepare

1. Ask payroll for a file they already import — from a spreadsheet or another system — and the description of the import, if the program has one.
2. List your kinds of work (lecture, tutorial, exam, mentoring, travel) and the code payroll uses for each.
3. Decide how a lecturer is identified in the file — a personal number, a tax number or an employee code — and make sure Wise Ed has it for every lecturer.
4. Agree the rates per lecturer category (for example employed and contract) and whether lecturers see amounts or only hours.

Examples of payroll programs: in Slovenia and the region Pantheon, Minimax, SAOP or Vasco; internationally SAP, Workday; in the United States ADP or Paychex. The file is downloaded and imported by payroll — nothing is sent automatically.

6.2 Sign-in with your Microsoft accounts

Students and staff sign in with the school's Microsoft 365 accounts instead of a separate password. Parents can use any Microsoft account whose address Microsoft confirms.

WHAT WE CONNECT

- Microsoft sign-in on the student portal, the lecturers' pages and the office.
- Matching each account to its person by the e-mail address.

WHAT YOU PROVIDE

- One administrator approval (admin consent) of the app in your Microsoft tenant.

How to prepare

1. Find a person with an administrator role in Microsoft Entra ID (formerly Azure AD) — a Global Administrator, Privileged Role Administrator or Cloud Application Administrator.
2. We send the approval link. The administrator signs in, reads the permissions the app asks for (sign-in and basic profile), and approves for the organisation. It takes a few minutes.
3. Optionally, the administrator can limit the app to chosen users or groups in Entra ID — for example only students and staff.
4. Check that each student's school e-mail in Wise Ed is the same address as their Microsoft account. Where students and staff are in different tenants or domains, tell us.

WITHOUT MICROSOFT 365

Students sign in with their enrolment number and a one-time code sent by e-mail. Nothing to prepare.

6.3 Your learning platform (LMS)

Wise Ed keeps the platform you already use in step with student records and appears inside its courses: Moodle through its web services, and Moodle, Canvas, Brightspace or Blackboard through LTI 1.3. Grades coming back are appended, never overwritten, and reach an exam record only through a person.

WHAT WE CONNECT

- Moodle: courses, categories, enrolments and groups from Wise Ed, with a dry run first.
- LTI 1.3: Wise Ed inside a course, deep linking, grades through the LTI grade services.

WHAT YOU PROVIDE

- An LMS administrator for the connection.

How to prepare

Platform	What the LMS administrator does
Moodle (sync)	Enables web services and the REST protocol, creates a dedicated service user and a token for the external service with the functions we list, and types the site address and token into Wise Ed's LMS settings. The token is stored sealed.
Moodle (LTI 1.3)	Site administration → Plugins → Activity modules → External tool → Manage tools: registers Wise Ed with the addresses Wise Ed shows, and copies back the platform ID, client ID and deployment ID.
Canvas	Creates an LTI developer key with the addresses Wise Ed gives, switches it on, and installs the tool by its client ID.
Brightspace	Registers an LTI Advantage tool and creates a deployment and links.
Blackboard	Registers the LTI 1.3 tool by its client ID in the administrator panel.

Then decide the rules — naming of courses, who counts as a student and as a teacher, the roles — and start with a pilot of one or two programmes. The Moodle administrator's guide walks through both sides.

6.4 Text messages through your SMS provider

A fourth channel beside the inbox, e-mail and push: by default only essential notices, with a monthly cap and quiet hours. Off until the school switches it on.

WHAT WE CONNECT

- A generic HTTP gateway, Twilio or Infobip.
- The cap, quiet hours and each student's "no texts".

WHAT YOU PROVIDE

- The provider's account in the school's name. The school pays the provider directly.

EXAMPLES

Provider	What you receive
Twilio	Account SID and an API key or auth token, plus a sender: a number or a Messaging Service. In the United States, texting from an ordinary 10-digit number requires A2P 10DLC registration of the school — start it early, it takes days.
Infobip	An API key, your account's base URL and an approved sender name.
A local SMS gateway	Many mobile operators and local providers offer an HTTP gateway: the address, the user or key, the parameter names, and the sender.

An alphanumeric sender (for example the school's short name) is allowed in many countries but must be registered in some. Ask your provider which applies to you.

7 Languages and integrations

7.1 Your office language, read by a native speaker

The office speaks thirteen languages: Slovenian, English, Croatian, Serbian, Bosnian, German, Italian, French, Spanish, Portuguese, Romanian, Lithuanian and Swedish. Each user picks their own.

WHAT WE CONNECT

- For a school working in German, Italian, French, Spanish, Portuguese, Romanian, Lithuanian or Swedish: we go through the words with a native speaker before you start, and correct them.

WHAT YOU PROVIDE

- A reader at the school who knows the work — usually somebody from the student office, not a translator.

Separately, your **document languages** — the language of certificates, decisions and diplomas, and any second languages — are your school's choice. A language whose document texts nobody at the school has reviewed is allowed, with a question naming what will appear in English until then.

7.2 Zapier, as a private integration

For the office's own automations — a new application into a spreadsheet, a decided request into a team chat.

WHAT WE CONNECT

- The invitation to Wise Ed's private Zapier integration, on request.
- Nine events (a new application, a new enrolment, a new invoice ...), actions and searches.

WHAT YOU PROVIDE

- A request for the invitation, and your own Zapier account.

How to prepare

1. Decide which personal data may leave Wise Ed by Zapier and webhooks, on the one screen that decides it for every receiver. Contact details and invoice lines go by default; national ID, home address and birth data do not, until you switch them on.
2. Each clerk connects as herself; the connection carries her rights and stops the moment she loses them.

7.3 The public API and webhooks

For your ERP, a bank connector, a web form or your own scripts. The public API is part of the licence.

WHAT WE CONNECT

- The API, its documentation (it comes with the key), and webhooks signed with HMAC-SHA256.

WHAT YOU PROVIDE

- Nothing to us: your school makes one key per system itself, on the office's "API keys" screen.

How to prepare

1. Make a list of the systems that should talk to Wise Ed, and give each its own key with only the scopes it needs — for example the ERP reads invoices and writes payments; the website form writes applications.
2. Set limits where they make sense: an expiry date, an allow-list of addresses, a campus.
3. For webhooks, give your receiver's https address — Make, n8n, Power Automate or your own server — and keep the secret shown once when it is made.

8 Data protection

Before real personal data comes into Wise Ed, three things are agreed. They are short, but they come first.

1. **A data processing agreement** between your school (the controller) and Wise Technologies (the processor). In the EU this is the agreement under Article 28 of the GDPR; outside the EU, the one your law asks for — in the United States, schools usually also check it against FERPA.
2. **Who sees what:** your roles, built from menu items. Health and support records, disciplinary cases, accommodation documents, list export and the full export are ticked separately.
3. **What may leave:** the one screen that decides which personal data goes out by Zapier and webhooks (7.2). Health, support, accommodation and disciplinary records never leave, and that is not a setting.

YOUR DATA STAYS YOURS

Wise Ed has a one-button full export of the school's data — every table, the real files and a description of the format — which your school can take whenever it wants, without us.

9 The checklist

Bring this page to the first conversation. Tick what applies to you; leave out what you do not need yet.

	Item	What to hand over	Who
☐	Inventory	List of systems you use today; what the current student system can export, with one sample per export	Project lead
☐	School and invoice issuer	Legal name, address, tax and registration numbers, VAT status and exemption wording, invoice numbering	Finance
☐	4.1 Card payments	Provider name; test account; integration credentials (safe handover)	Finance
☐	4.2 Cash register	Whether counter receipts must be verified; which register	Accountant
☐	4.3 E-invoices	Certificate as .p12/.pfx and password (safe handover); the provider	Finance, IT
☐	4.4 Bank statements	One camt.053 statement; reference model; IBAN(s)	Finance
☐	4.5 Accounting	Accounts per kind of charge, cost centres, VAT codes; sample import file	Accountant
☐	Price lists	Tuition and fees per programme and year, instalment plans, payers (companies, sponsors)	Finance
☐	5.1 National reporting	Register specification; access or test access; institution and programme codes; first year to report	Project lead
☐	5.2 Payment slip	Account holder as at the bank, IBAN, BIC, reference model	Finance
☐	5.3 E-invoice format	A sample e-invoice your buyers accept	Accountant
☐	5.4 Applications	Sample export of the national application system, or your own list	Project lead
☐	6.1 Payroll	Sample payroll import file; codes for kinds of work; lecturer identifier; rates	Payroll
☐	6.2 Microsoft sign-in	Administrator who approves once; tenant domain(s)	IT
☐	6.3 LMS	Platform and version; LMS administrator; pilot programmes	LMS admin
☐	6.4 Text messages	Provider account; sender; monthly cap	IT
☐	7.1 Office language	A native reader (for the eight languages listed); document languages	Project lead
☐	7.2 Zapier	Request for the invitation; what personal data may leave	Project lead, DPO
☐	7.3 API and webhooks	List of systems that need a key; receiver addresses	IT
☐	8 Data protection	Signed data processing agreement; first roles	DPO, project lead
☐	Earlier years	Exports of students, enrolments, grades and payments, in the import templates	Project lead

10 Something your school uses is not here?

Tell us which systems your school works with today, before you plan the move. We will say how Wise Ed connects to each, and what it takes. A short list is enough: the name of the system, what it does for you, and whether it can export or import files.

Where a system offers a web interface (an API) or reads and writes files, there is almost always a way — through the public API, webhooks, Zapier or a file in its own format.

See Wise Ed on your own school

Book an online presentation. We walk through how your student office works today and show you the same job in Wise Ed — with your programmes, taken over from your timetable, not a demonstration dataset.

Set up with your school	wise-tt.com/ed/setup/
Getting started	wise-tt.com/ed/getting-started/
Integrations	wise-tt.com/ed/integrations/
Questions schools ask	wise-tt.com/ed/faq/
Contact	wise-tt.com/contact/

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