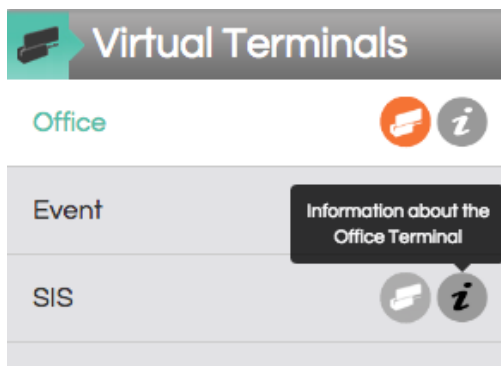# Virtual Terminal Module

SchoolPay allows you to accept payments both online & in-person. The virtual terminal processes the parent's credit card payment while they are in the school office, at the school's concessions stand, theater ticketing office, etc...

There are three types of Virtual Terminals:

- **Office Terminal** - Allows you to take payment for one of the individual items that you have created. Student data, custom fields, and payer information are collected when payments are processed through the Office Terminal, just as if it were processed online.

- **Event Terminal** - Allows you to take payment quickly while at an event. Custom fields, student data, and email addresses are not collected in the Event Terminal.

- **SIS Office Terminal** - If your district has a connection to your Student Information System's Fees Module, you can take payment for those fees here.

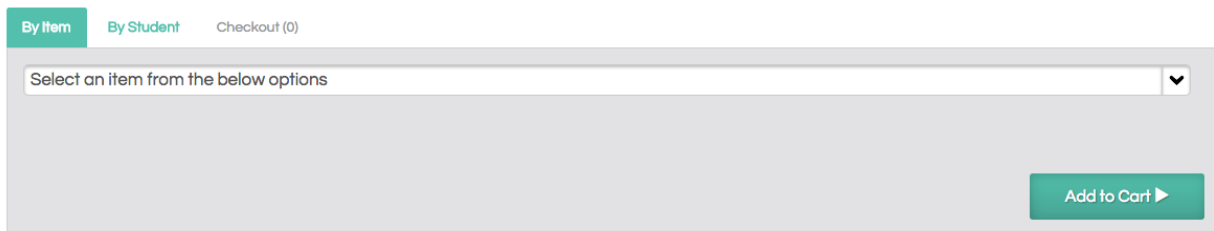To take payments on the virtual terminal:

Make sure your account is configured to take in-person payments. There is no additional cost, however, you do need a unique Merchant ID#, which we will happily set up for you. We also offer mobile and computer "readers".

Select "Virtual Terminal" from the primary navigation and then further select from the left side navigation, the kind of in-person payments you want to take.

Office Terminal

Select "Office" and then select the item you'd like to process a payment for from the drop down menu of your active items. Note the first line of the pull down menu offers a search field, which returns items based on the characters you enter.

VIRTUAL TERMINAL

Once the item is selected, the "Add to Cart" screen will appear.

Click "Buy for another student" if the payer would like to purchase the same item for a different student.

If the payer would like to purchase an additional item, click "Add and continue shopping."

If this is the only item being purchased, select "Checkout."

VIRTUAL TERMINAL

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Event Terminal

Click "Event" from the options on the left. This will bring you to a list of your Event Items. To add a new item for a new event, click +New Event on the top right.

Event Details

Basketball Concessions Stand

Category:
Fundraising

Settlement Account:
Red Elementary

Select or Edit Chart of Accounts

Primary Account Selected: Boys Basketball

Enter the details of your event here.

On this page, you will designate the item title, category, settlement account, and chart of accounts. These four data points, along with payer name & amount, will be available to you on your reporting.

After you click save, your item will be added to your list of Event Items.

Basketball Concessions Stand

Click the card reader icon to initiate payment.

Event Terminal

Item: 5/28 Soccer Concession Stand

Sale Amount:

☐ Email Reciept to Payor

Manually Enter   Tap to Swipe

Cancel   Submit

Enter the amount due in the box provided, and then click "Tap to Swipe." Swipe the payer's card through the reader and click submit.

SIS Terminal

The SIS terminal allows schools to pull fees that are held in SIS Fees Modules into the SchoolPay Virtual Terminal, process an in-person cash, credit card, or even paper check payment and then have that payment post back into the SIS as "paid". This feature is available for Edupoint Synergy, Skyward, PowerSchool and other SIS systems. Contact SchoolPay support for help in establishing this feature.

VIRTUAL TERMINAL

Reports Module 🔘

Types of Reports	❯	Batch Report	❯
Other Report Functions	❯	Chart of Accounts Report	❯
General Functionality	❯	Custom Reports	❯
Transaction Statuses	❯	Recurring Reports	❯
Search Data Options	❯	Data Sync Reports	❯
Transactions Report	❯	Registered Payers Reports	❯

Types of Reports

Items Report

- Most robust and widely used report
- This report will provide you with every detail on the transaction; like item purchased, student, custom field responses, chart of account data, etc.
- Used for generating lists of what students have paid for an item

Transactions Report

- This report will display each transaction processed to your account.
- Within one transaction, a user can purchase multiple items. Because this report is at the transaction level, it will not provide specific details on the items.
- Used for general transaction research and processing refunds/voids

Items by Site

- Only available in district accounts
- Reports on items that are created by the district and then offered to the payers of students across multiple sites. It allows an administrator to run an item report for a single item, such as Cafeteria Prepayments, and see item-level data (value of the payment, student name and ID, etc.) grouped by each site in the district.

Batch Report

- This report displays each SchoolPay batch, which is equal to the deposit made into your bank account
- Used for reconciling bank statements and identifying deposits in bank account

REPORTS

Chart of Accounts Report

- Organizes your SchoolPay revenue by the Chart of Accounts associated with each payment
- Used for reconciling bank statements and identifying deposits in bank account

Recurring Reports

- Displays information regarding all recurring series associated with your account
- Reports on all current, completed, or stopped recurring series
- Provides functions like stopping the series and generating a link you can send payer's to update payment methods for a series

Data Syncs Report

- Provides valuable insight into any automated data exchange between your organization and SchoolPay. While all data exchanges are reported on with email confirmation of success and/or failure and monitored by SchoolPay data admins, Data Sync Reports allow you to see more detail about all exchanges.

Registered Parents Report

- Shows all parents/guardians that have registered for a SchoolPay account
- Identifies all parent/guardian accounts associated with any student
- Offers parent support tools such as password reset and login to their account so you can view their account from their perspective

Other Functions of the Reporting Module

Configuring and viewing Custom Templates

- Custom Templates allow you to view items or transactions reports in a custom format specific to your reporting needs

- This feature is a great tool for making SchoolPay reports match the format of another software so you can easily import SchoolPay transaction data into third-party software
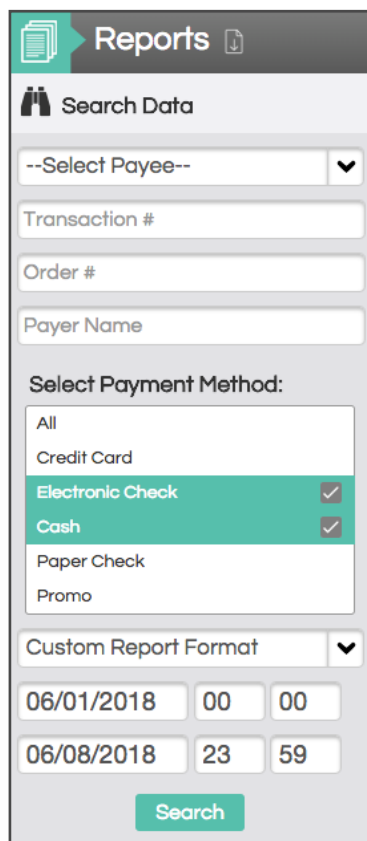
Processing Refunds and Voids

- Settled Transactions may be electronically refunded through SchoolPay up to 90 days from the original transaction date.
- Pending Transactions may be voided, which effectively cancels the transaction

REPORTS

General Reporting Functionality

Accessing the SchoolPay Reporting Module

Locate the navigation bar at the top of your screen. Place your mouse over "Reports" and you will see multiple options to choose from. Each report provides different information and serves its own purpose.

Search Data Sections

Each report has a "Search Data" section on the left-hand side of the screen. This section is used to query specific report results. Each report has a slightly different search data section specific to the report.

By using the search data section, you can quickly and easily populate a report with the specific transactions or items you are looking for.

Exporting/Downloading a Report

Each report in SchoolPay can be downloaded in a CSV format, which is easily opened in Excel. To export any of the SchoolPay reports to CSV, simply click on the CSV button **↓ CSV** in the top right corner of the report results.

REPORTS

Transaction Statuses Defined

Each transaction will have a specific status in SchoolPay. The transaction status is used by school staff to identify the type of transaction and the current status of the transaction as it relates to the payment processing.

Settled: A settled transaction is a successful transaction. A status of Settled indicates that the funds have moved from the payer and are either en route to the school bank account, or have already been deposited into the school bank account.

Pending: A pending transaction is a successful transaction that has been authorized, but the funds have not yet been pulled from the payer's bank account. A successful transaction will remain pending until midnight of the day the transaction was executed, at which point the funds will be processed.

Voided: A voided transaction is a transaction that has been cancelled before the funds were removed from the payer's account.

Transaction Status ⌄
Choose one or more transaction statuses*
All
Error*
Declined*
Settled ☑
Pending ☑
Voided
Refunded
Returned
Exception Status*

Refunded: A refunded transaction is a transaction in SchoolPay where all or part of the funds from a settled transaction have been refunded to the Payer. When a refund is processed, the original transaction will still remain in the SchoolPay reports as a settled transaction; however, a new transaction will appear with a "refunded" status, indicating the initiation of funds being reversed to the payer's card.

Returned: A returned transaction is an electronic check transaction that has been returned. An electronic check transaction is automatically in pending status until the funds are deposited into the school's bank account, at which point the status is updated to Settled. If the electronic check transaction is returned, the transaction will update to Returned rather then Settled. Please note there are various reasons why a check can be returned, including insufficient funds or an invalid account number.

Error: A transaction with the status Error, is an unsuccessful transaction. There are many reasons a transaction has an Error status, most of which are due to the payer entering invalid card numbers or invalid billing information. Regardless of the reason, an Error transaction is an unsuccessful transaction. The payer will know immediately that their transaction did not go through, and will be able to try again. No further action is required by the school staff.

Declined: A transaction with the status of Declined, is an unsuccessful transaction. Declined transactions are transactions that were NOT authorized by the bank for various reasons, including insufficient funds, or a mismatch on the billing address provided. Regardless of the reason, a declined transaction is an unsuccessful transaction. The payer will know immediately that their transaction did not go through, and will be able to try again. No further action is required by the school staff.

Exeption Status: It is very rare to see an Exception Status, and the status is temporary. School staff should note that a transaction with Exception Status is being reviewed by the SchoolPay operations team where it will be updated to an appropriate status. School staff should ignore transactions listed as Exception Status until it is updated. If you have questions about transactions with this status, you may contact SchoolPay Support.

REPORTS

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Search Data Options

The Search Data section on the left-hand side is used to generate an Items report specific to your reporting needs. The Search Data section is described in detail below:

Select Payee

- The Payee is the school or bank account receiving the funds.

- Most schools only have one bank account, however if you have more than one, or if you are accessing SchoolPay from a district account, you can query the report to only show items purchased that were deposited to a specific school or bank account by selecting the desired Payee here.

Transaction

- Each transaction in SchoolPay is given a unique Transaction ID Number

- If you would like to find the items purchased within a particular transaction, you can run a search by the transaction ID number

Payer Name

- A Payer in SchoolPay is the person who processed a payment—typically the parent.

- To view all of the items purchased by a particular person, enter their name in the Payer Name field.

Select Payment Method

- This allows you to narrow the item results for specific payment methods.

- This will default to Credit Card and Electronic Check, which are the electronically processed payment methods. Cash and Paper Check are only available for in-person payments.
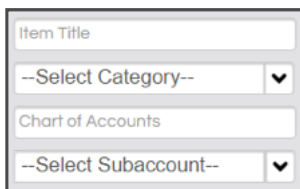
Select Custom Format

- Selecting a custom format will allow you to view and export specific data from the items report. Instructions for configuring custom formats are detailed later in this guide

- To view and export a report in a specific custom format, simply select the custom format from this menu

Configure Date and Time Range

- You must select the date and time range for which you would like to review results

- If searching for a list of what students have all paid for a particular item, be sure to adjust the date range far enough back to the date you first started accepting payment for that item

REPORTS

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The Advanced Search options are broken down into subsections. Simply click on the subsection to expand the options:
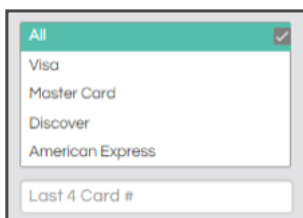
Item Options

- The item options allow you to search by item title, category, Chart of Accounts, or sub account

- The item title will populate items that match your entry as you are typing so you can easily select the item you are looking for

- If you would like to generate a report to see who has paid a particular fee, enter the item title and select searchv
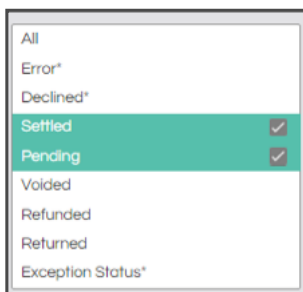
Card Options

- Allows you to search for a particular card used (last 4 digits of the card)

- Allows you to search for transactions processed using specific card types. This is useful for sorting AmEx transactions out if your school accepts AmEx and you are reconciling AmEx seperately
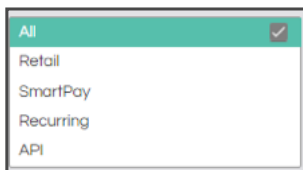
Transaction Status

- A Payer in SchoolPay is the person who processed a payment—typically the parent.

- To view all of the items purchased by a particular person, enter their name in the Payer Name field.
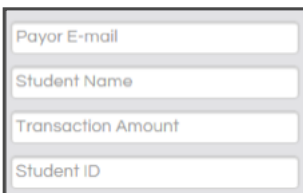
Transaction Type

- Each transaction in SchoolPay is given a unique Transaction ID Number

- If you would like to find the items purchased within a particular transaction, you can run a search by the transaction ID number

More Search Filters

- A Payer in SchoolPay is the person who processed a payment—typically the parent.

- To view all of the items purchased by a particular person, enter their name in the Payer Name field.

REPORTS

37

Transactions Report

A transactions report will display each transaction processed to your school as a separate line item. The transactions report is used for general transaction research and processing refunds/voids.

The transactions report will not include any of the student or item data as that information is only available on the Items Report. If a parent processes a single transaction with three items in it, that will only display as one line item on the transactions report.

To access the Transactions Report, place your mouse over Reports and select Transactions.

Just like the Items Report, you can use the Search Data section to search for specific transactions. The search data section is the same in the Transactions Report as it is in the Items Report. For detailed instructions for using the search data section, please refer to the Items Report instructions.

If you place your mouse over a given transaction, four action icons will appear:

Email Receipt: This icon allows you to email a copy of the reciept from this transaction to the email address you provide. The system will default to sending the email to the parent email address entered in by the parent at the time of payment

View/Edit Details: This icon allows you to view the details of a particular batch. The details will include the items purchased, information about the payer, and the student information of each item purchased

Issue a Refund: This last icon allows you to refund a particular transaction. Detailed instructions for processing refunds are included later in this guide

Void a Transaction: This last icon allows you to void a particular transaction. Detailed instructions for processing voids are included later in this guide

Processing Refunds and Voids

To process a refund or a void, navigate to the Transactions Report by placing your mouse over Reports and selecting Transactions. Use the Search Data section to locate the transaction you wish to refund or void.

Refunds

- A refund is a transaction where funds are pulled from your school's bank account and deposited back into the account/card used during the original transaction

- Only Settled transactions may be refunded

- You may only process a refund for a transaction that is less the 90 days old

- You may only process a refund up to the amount of the original transaction

- Multiple refunds can be executed from a mass refund function found in the transaction or items reports. Either manually place a check in the box for every item or transaction you'd like to include in your mass refund, or run a report and then user the easy select-all ☑ function. A common use for mass refunds are cancelled field trips.

Voids

- A void effectively cancels a transaction. No funds are moved as the transaction was cancelled before the funds were moved from the payer's account/card to the school

- Only Pending transactions may be voided

- When processing a void, the entire transaction must be voided. You cannot void part of a transaction. If you need to cancel part of a transaction, you must wait for the transaction to settle and then issue a partial refund for the transaction.

REPORTS

To refund or void a given transaction, place your mouse over the transaction and select the refund or void icon:

	Txn: 397 Batch ID: 5389	$0.00	District Admin	05/13/2016	
☐	Park Lake Public Schools	Settled	No-Cost	09:46:10 AM	🔄 🚫

This button will take you to the next step of the process where you either confirm the void, or select the items to be refunded.

Refunds and Voids
Transaction #5214383

Transaction: #5214383

👤 Payer Information
DemoDistrict Adminer
Demo Street
Demo Street 2
Orlando WI 53703

Payment To: Park Lake Public Schools

Refund full transaction amount of $10.63 ☑

Item Name	Student Name	Student ID	Amount	Fees	Already Refunded:	Available:	Quantity	Refund Amount	Do Not Refund
2014 Tickets to the Spring Dance	N/A	N/A	$10.00	$0.63	$0.00	$10.63	1 ▼	$10.63	☐
			Total:	$10.63					

Cancel   Make Refund

The system will default to refunding the entire transaction. If you wish to refund the entire transaction, simply confirm the details and select "Make Refund".

If you wish to issue a partial refund, deselect the "Refund Full Transaction" box circled above. Next you will indicate the items you with not to refund by selecting the "Do Not Refund Box":

Refunds and Voids
Transaction #5416922

Transaction: #5416922

👤 Payer Information
Pato
144 Madtown Rd
Madison TN 42522

Payment To: Park Lake Public Schools

Refund full transaction amount of $90.00 ☐

Item Name	Student Name	Student ID	Amount	Fees	Already Refunded:	Available:	Quantity	Refund Amount	Do Not Refund
Annual Round Trip	N/A	N/A	$50.00	$3.00	$0.00	$50.00	1 ▼	$50.00	☐
Welding Class	N/A	N/A	$10.00	$0.00	$0.00	$10.00	1 ▼	$10.00	☐
STEM Aqua Lab Field Trip	N/A	N/A	$30.00	$0.00	$0.00	$30.00	1 ▼	0.00	☑
			Total:	$60.00					

By selecting the "Do Not Refund" box, the "Amount to Refund" will change to zero for that item. If you wish to refund the full amount of the other item, simply select "Make Refund". You can also adjust the "Amount to Refund" field to issue a refund for part of the item before selecting "Make Refund".

REPORTS

Batch Report

The Batch Report will show the deposits made into your bank account for each payment method. SchoolPay utulizes Batch Processing where at the end of each day, transactions for that day are batched together and deposited as one lump sum two banking days after the transactions were executed. The Batch Report breaks down each batch and is used to reconcile bank statements and view the contents of a particular batch.

There are 5 different batch reports (Visa/MC/Discover, AmEx, Electronic Check, Cash, and Paper Checks). Cash and paper checks are in-person payment options only. Because the cash and paper checks are not ultimately processed by SchoolPay, their batch reports do not correspond to particular deposits, rather they are summaries of that day's transactions for those payment methods.

To run a batch report, simply place your mouse over "Reports", then place your mouse over "Batches", and select the payment method you would like to review:

Using the Search Data section, you can adjust the date ranges for which you would like to view the report and select a particular Payee. The system will default to the last full calendar month as that is the way most schools reconcile their bank statements.

Each line item on this report corresponds to a deposit into your bank account. This following information is displayed:

Date: this is the date the transactions are batched, which is typically the date after the transactions were executed and the day before they are deposited into your bank account

Batch ID: this is a unique identifier tied to each batch. This number is reported on the transactions and items report so that you can identify which batch each transaction is combined with

Payee: This is the bank account this batch was deposited into

Transaction Total: This is the sum of the settled transactions for that batch.

Convenience Fees: This is the sum of the convenience fees for transactions processed for that batch.

Returns: This is the sum of the refunds processed for that batch. Refunds are processed as negative transactions and are deducted from the deposit total

Deposit Total: The deposit total is the sum of the transaction total plus the convenience fees minus the returns.

View Batch Contents By: This section allows you to break down a particular batch by transaction, item, or general ledger account. Simply click on the links in that section to view the batch contents by:

- **Txn** - the transactions that make up that batch

- **Items** - the items that make up that batch

- **COAs** - the general ledger accounts or chart of accounts effected by that batch

View Batch Contents By:		
2 Txns ▶	2 items ▶	2 COAs ▶
3 Txns ▶	9 items ▶	2 COAs ▶

REPORTS

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Chart of Accounts Report

The Chart of Accounts Report will subtotal the general ledger accounts that need to be updated as a result of SchoolPay transactions. This report is useful for updating the general ledger to account for SchoolPay tansactions.

To access the Chart of Accounts Report, place your mouse over Reports and select Chart of Accounts:

This report will default to the overview report which will show the general ledger totals over the selected date range. You can use the Search Data section to change the date range, or review a particular general ledger account.

District staff can also search a particular school or site's general ledger accounts. School staff will only view their respective school.

By selecting the icon to the left of the Export to CSV button, you can view this report as the Daily Amounts

The daily amounts report will show each general ledger that needs to be updated by day/batch. This is usefull if you are updating the general ledger for each deposit in your bank account.

Configure Custom Report Templates

Custom templates allow you to view and export a custom report. This allows you to choose the specific information you would like to see on the report. To manage and configure a custom template, place your mouse over reports and select "Manage Custom Templates".
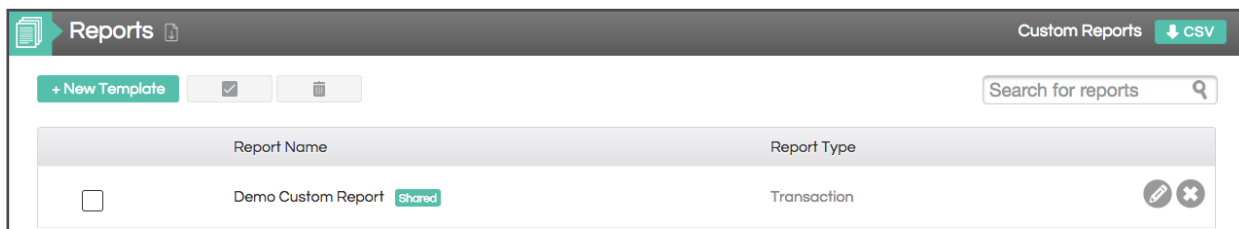
To edit or remove custom templates, select the x icon or the pencil icon next to the template you have already created.

To add a new custom template, select "New Template"
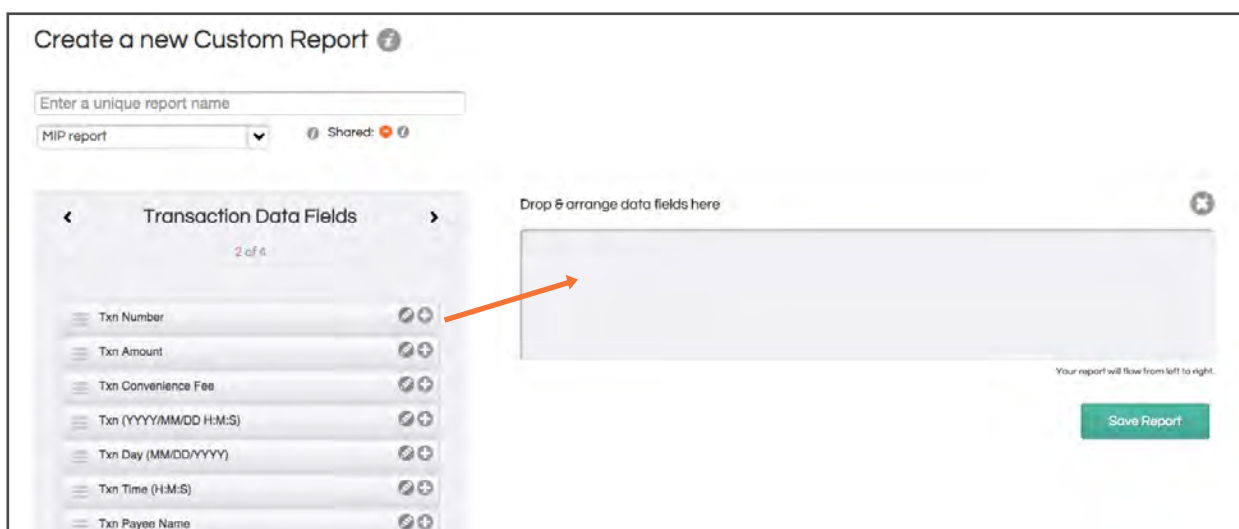
First, you must give your report a name. Next you must select the type of report you will be running: Transactions Report or Items Report. Generally speaking you will want to configure an Items Report.

Next you choose the "Payer and Payment Data Fields you would like included on the report. You simply drag the fields from the list of options into the box on the right. You can order the fields you have selected by dragging them into the desired position.

Once you have selected the Payer and Payment Data Fields, select the right arrow to move on to the "Transaction Data Fields" which will present you with additional options. After selecting from the Transaction Data Fields, hit the right arrow button again and you can select from "Item Data Fields".

REPORTS

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Lastly, hitting the right arrow one more time will allow you to select from the "Custom Data Fields". The Custom Fields are specific to each item that you have configured. You must first select the item you would like to select data fields.

‹	**Custom Data Fields**	›
	4 of 4	

Click here to add custom data fields.
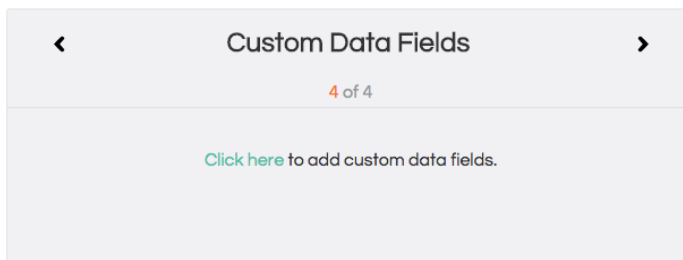
You can do this by selecting "Click Here" as highlighted in the image to the right. Upon doing so you will be prompted to select an item. After selecting an item, you will be able to choose from the custom fields configured for that item.

Once you have selected and ordered the fields you would like on your custom report, select save.

To use your custom report, navigate to the corresponding Item or Transaction report. Under the search data section on the left, select your custom format from the "Select Custom Format" dropdown where you will see the custom format you configured. Adjust the other search filters as needed, and click Search.

Your results on the right will be populated only with data you selected when buiilding the custom report.

Download this report to Excel by clicking the CSV button on the top right. The spreadsheet of information will only have the fields you requested when you built your custom report.

Reports

Search Data

-- Select Payee--

Transaction #

Order #

Payer Name

Select Payment Method:

All ✓
Credit Card
Electronic Check
Cash
Paper Check
Promo

Custom Report Format

06/11/2018 00 00
06/25/2018 23 59

Search

REPORTS

Recurring Series Report

The Recurring Series Report details all information associated with recurring payments for your account. This report is useful for reviewing the status of a payer's recurring series, stopping a series in place, or providing the payer with a link to update their series.

To access the Recurring Series Report, hover your mouse over Reports and select Recurring Series.

The Search Data fields on the left of the screen will allow you to research the series in place. The default results will report any recurring series that were initiated in the past 9 months and are scheduled to recur within 7 days.

- The first drop-down menu allows you to lter your series by payee name.

- Filtering your results by Item Name will provide you a report of series in place for a specfic item

- Filter by Payer Name to see all recurring series initiated by a specific payer

- Adjust the date range to search for recurring series initiated within a specific time frame. The default date range will show any recurring series that was initiated within the last 9 months

- Filter your results by the status of the recurring series.

  - In Progress: Payments that are on track to recur at the specified interval of the series

  - Completed: Series that has been paid in full, and no future payments are scheduled for this series.

  - Stopped: A series that was terminated prior to its completion. Series may be stopped by an administrator at the site, or in the scenario where the payer's series received 3 consecutive declines on the last installment

- View details for series associated with a Recurring ID number. All recurring series have a series ID number, which is associated with each transaction within the series.
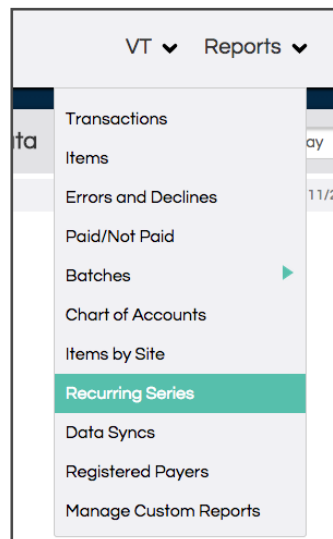
REPORTS

- After you click Search, your report results will appear. The data provides details which will help you understand the series' current status.

- You can interact with these transactions using the three icons on the right.

  - **Magnifying Glass:** Clicking this icon will take you to a page which provides detailed information on the series. Here you will see details on the transactions processed, as well as the current payment information associated with the series. Edit the settings by clicking the pencil icon. Click the arrow on the top right to return to your recurring series report.

  - **Update Link:** Click the link icon to generate a URL for updating the credit card information associated with the series. This link can be provided to the payer in the scenario where they need to update their payment information. Please note, each link you generate supports only one-time usage. Therefore, if you need generate a second or third link you will overwrite each previous link.

  - **STOP:** Click "STOP" to terminate the recurring series. Once stopped, future payments will no longer be processed for this series.

Crusader ASACP Membership Monthly	Series Is: Current	Recurring amount: $100.00	
Payee: ASACP	Payer: Todd Spaits	Progress: 1 / ∞	
Start: 12 Jun 2018 End: 11/30/0001 Next: 07/01/2018	0	Every: 30 days	Recurring ID: 10683
ASACP Corporate Sponsorship - Monthly Recurring	Series Is: Current	Recurring amount: $420.00	
Payee: ASACP	Payer: ALLAN HENNING	Progress: 1 / ∞	
Start: 12 Jun 2018 End: 11/30/0001 Next: 07/01/2018	0	Every: 30 days	Recurring ID: 10684
2017-18 Annual Giving Campaign Payment Plan - Two	Series Is: Current	Recurring amount: $250.00	
Payee: Redwood High School Foundation	Payer: Kirsten Womack	Progress: 1 / 2	
Start: 02 Jun 2018 End: 11/30/0001 Next: 07/02/2018	0	Every: 30 days	Recurring ID: 10680

- Download a CSV file of your recurring series report results by clicking the CSV button on the top right corner of your screen.

REPORTS

47

Data Syncs

Data sync reports are only available in the district account. The report allows you to see the status of every import and/or export you have scheduled to move data to and from SchoolPay. Every process is also supported by a "success" or "failure" email when the process runs. The Data Sync Report simply allows you to view the reports over time from a unified location. Reports are presented from the perspective of SchoolPay in terms of data direction and our Central time zone server times. Data is reported by:

- Imports include student data, purchase history and other balance-tracked items such as library fees, etc.

- Exports include food service prepayments, general ledger data transfers and a number of custom accounting reports.

- LBA stands for Low Balance Actions which all run from food service balance files. overwrite each previous link.

Data sync reports can be run for any time range of your choosing.

REPORTS

Registered Payers Report

The Registered Payers Report allows you to view all the registered payment accounts created by payers making payment on behalf of the students attending your school, district or K12 organization. While the Settings Module contains a function to create an account on your parents' behalf, this report is offered to help you serve payers requiring assistance.

Search features in this report include search for all accounts associated with a student by name or student ID number.

| Scott Morrow
scmorrow57@mac.com | Paige Morrow
Lake Highland Preparatory School | $0.00 | 🔍 🔓 🗋 🪪 |
| | Madison Morrow
Lake Highland Preparatory School | $0.00 | *Account created: 12/30/07* |

The data presented includes

- User name and email address

- Student's associated with their account

- Food service details (if we are powering your food service payments) such as current balance and specified low balance action (email or SmartPay, the automatic replenishing of a food service account)

- Date of account creation

Support functions include

- View details takes you to a page that provides more details about this user's account, including a history of emails sent from SchoolPay to the user, recent transactions, etc.

- Change password is a great way to help a parent with login issues. This function will send the registered user an email containing a reset link.

- Search transactions links you directly to a transaction report containing every transaction this payer has made while logged in to SchoolPay.

- And nally logging into their account allows you to see things from the user's perspective. Please note that when administrators log into a parent account they are unable to view any payment account information.

REPORTS

Promote Module ⬇

Organization	❯	Gmail	❯
Service Alerts	❯	Constant Contact	❯
Receipt Settings	❯	Facebook	❯
Custom Skins	❯	Twitter	❯
Marketing Tools	❯		
Webmaster Tools	❯		

Organization of Promote

The Promote Module is separated into the common ways schools like to promote payment items:

- Within the SchoolPay service itself
- Externally, using email
- Externally, using mobile solutions
- Externally, using social media

SchoolPay has a communications API. If you utilize an email or mobile app solution that you do not see represented, we'd be happy to provide a copy of that API to your provider. The connection is easy. You can always carry a payment link into any solution, but we offer an easy way for providers to receive our payment links programmatically.

Also note that all External Promotion options have a warning indicator 📶 , cautioning you to consider the implications of public-facing payment links. When you put an item out on social media, it's possible that friends of the school may wish to purchase the item. If you'd like to post an item for the general public, make sure you configure your payment item to allow guest checkout. If you'd like to mandate only registered users purchase an item, simply require login and all payers will be prompted to log in prior to paying from a public link.

Most of the promote options also have instructional support. Watch for the book icon 📖 as your indicator that you can pull step-by-step instructions for that promote option.

PROMOTE

Service Alerts

Service Alerts allow you to display a message in your administrator and/or payer accounts. Upon logging in, users will see a message indicator to signal there is a message waiting for them. They have the option to clear that message or keep it. To create a service alert, click the "New Service Alert" button. Give your alert a title such as "Yearbook Sales Ends March 15". Add more detail to the service in the description Rich Text Editor box. You can also schedule a start and end date for your alert to be active. And finally, select your target audience by selecting which modules receive this alert and further specify school sites or even custom groups, such as parents of the Football team.

Your alerts are saved to a "dashboard" so that you can re-use them for a future occasion. Active indicators will tell you which alerts are active, expired, etc.
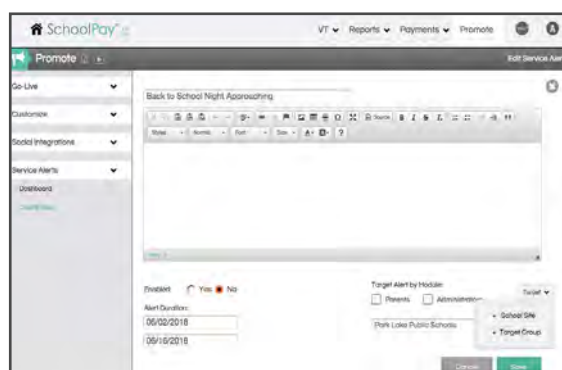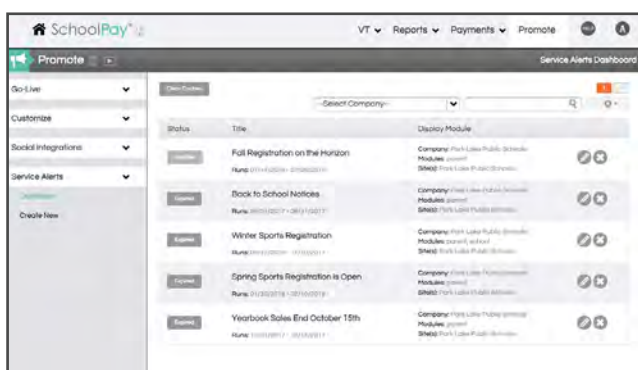
Receipts Settings

Receipts can be customized three ways:

1. Upload a logo. This will appear on every receipt.

2. Configure the receipt "sender" address, so that if payers need additional support they can reach you. Make sure any email address you use, is an attended email address. It's common for schools to create a new address such as schoolpay@ yourorganization.com

3. You may also add a small thank you or personalized text (such as your organization's Tax ID#) to the top of each receipt.

Custom Skins

Custom Skins are a premium feature that allows you to create a custom SchoolPay storefront. SchoolPay marketing staff will "re-skin"both the SchoolPay landing page and the Payment Center in your organization's colors and custom images added so that the user experience feels more consistent with your website. Contact your SchoolPay representative for information about costs and getting started.
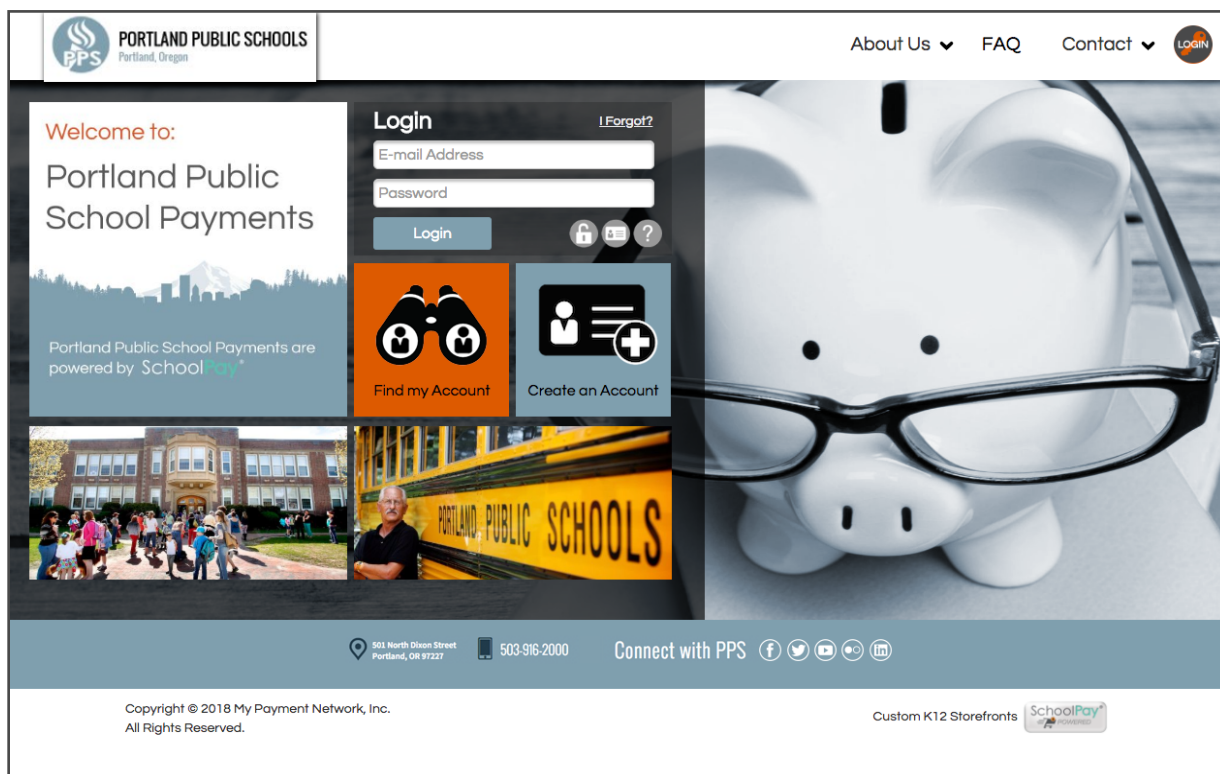
Marketing Tools

Marketing tools are organized first by audience type: Payers or Administrators. Tools are then further organized by the kind of support provided by the tools:

Go Live Messaging

Go Live Messaging tools will help you communicate with your internal and external audiences as you take SchoolPay live.

Awareness Building

Awareness Building tools are designed to help administrators and users understand SchoolPay. Parent tools are written to explain how to create accounts and what they can do with SchoolPay. Administrator tools are written to specific departments.

PROMOTE

Training Tools

Training Tools include training videos that teach users how to use SchoolPay.

Webmaster Tools

Webmaster Tools provide best practices and downloadable graphic elements that will help you position SchoolPay on your website. SchoolPay also has an in-house design team that is happy to build buttons, banners, Facebook promotions and more. Simply contact support.
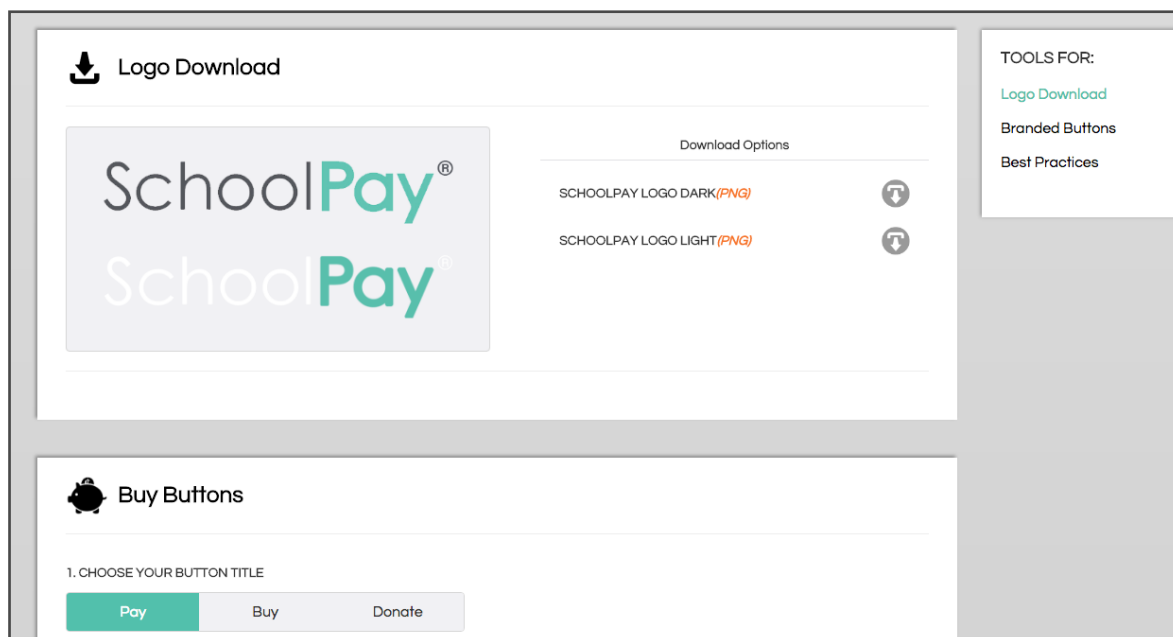

Gmail

SchoolPay is built to sync with Gmail accounts. This allows you to leverage custom groups you may already have created in Gmail. You will need to perform a one-time authentication to your Gmail account. Future access to Gmail will not require authentication. Make sure you are logged out of personal Gmail accounts and logged into your organization's Gmail account when you perform your authentication.

Within the promote module, you can "build" a Gmail Promotion. Simply select the item and write your message. You will be passed into Gmail with your message and item link. Then select your recipients from within Gmail.

PROMOTE

support@schoolpay.com   888.88.MYPAY (888.886.9729)

You can also promote an item over Gmail from the Payment Item Dashboard. To do this, simple find the item on the item's dashboard and select the Bullhorn Icon to the far right.
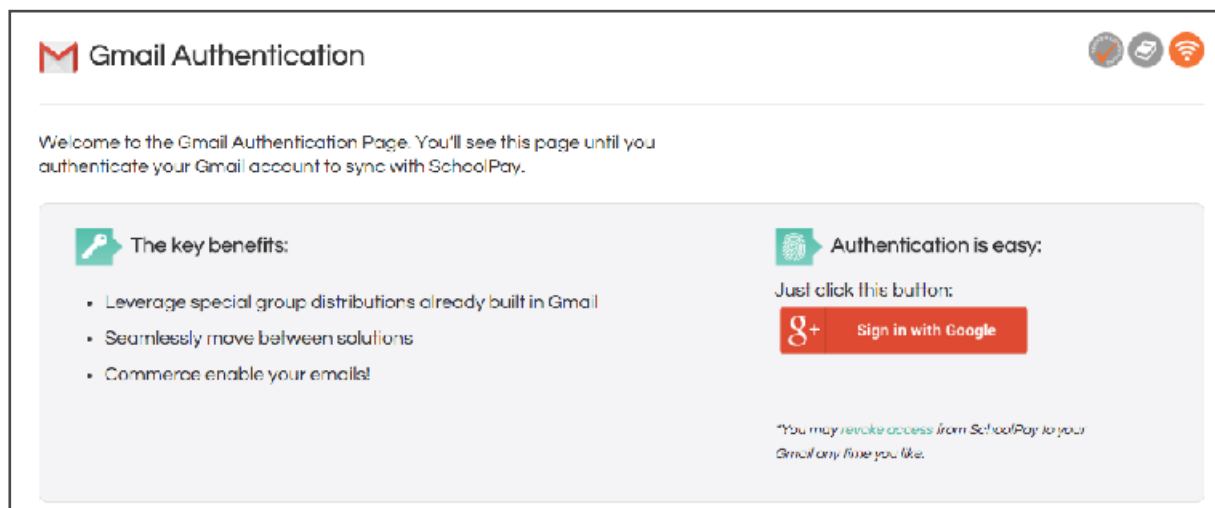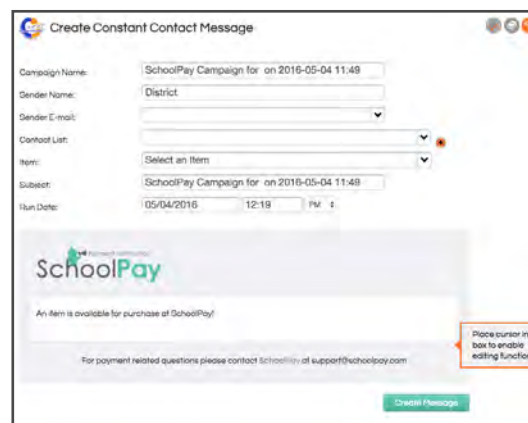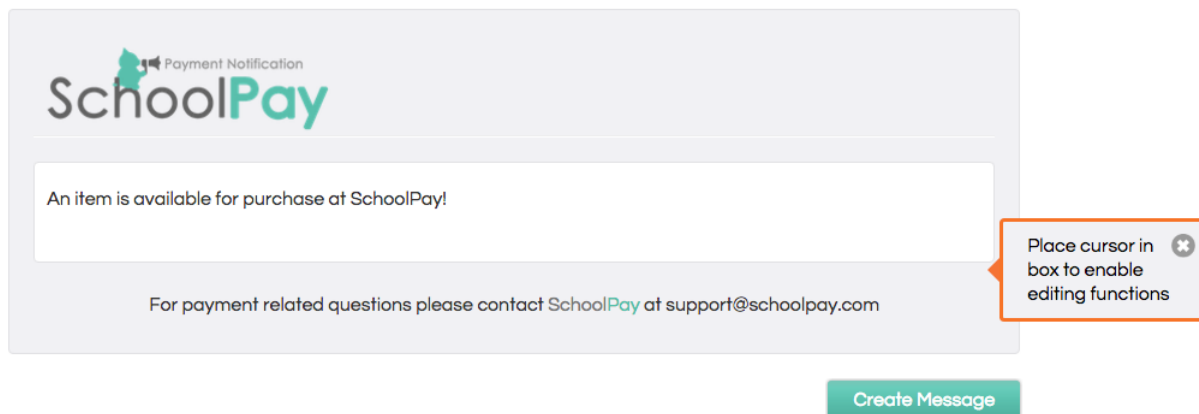

Constant Contact

SchoolPay syncs with Constant Contact, allowing you to create your entire message in the SchoolPay Promote Module. Like other social media integrations, you will need to perform a one-time authentication to sync your Constant Contact account with SchoolPay.

You may start your campaign by either selecting your item from the Payments Module and then clicking the bullhorn icon to indicate you'd like to promote that item via Constant Contact. Our you can begin your campaign in the Promote Module and simply find the item in the campaign build form. You will be prompted to:

- Give your campaign a title

- Specify the sender's name and email (the name that your email appear to come from)

- Specify the list/s to which you would like to mail this payment item. Add more than one via the orange plus sign

- Select the item you wish to promote

- Give your email a custom subject line

- Select the delivery date/time. If you select "now" please allow up to 30 minutes for delivery.

PROMOTE

Your item and image will appear in the rich text editor below that shows you the custom SchoolPay template that will be sent via Constant Contact. This will allow your audience to distinguish a pure informational Constant Contact message from one that contains a payment item. You can build and send the entire campaign directly from SchoolPay, but you'll need to log into Constant Contact for your reporting.
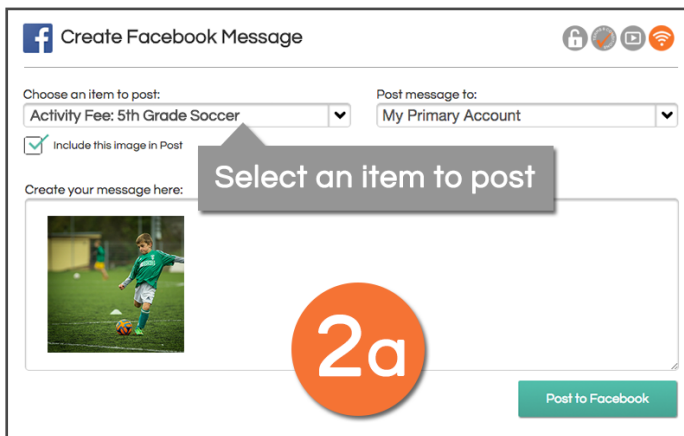
Facebook

SchoolPay can sync with one or many Facebook accounts. Make sure you are logged out of your personal Facebook account before you authenticate a sync between the accounts. You simply need publishing rights turn your SchoolPay payment items into commerce-ready Facebook posts!

There are two paths for selecting an item for Facebook:

Image 2a demonstrates how to select an item from a pull down menu on your Facebook creation form.
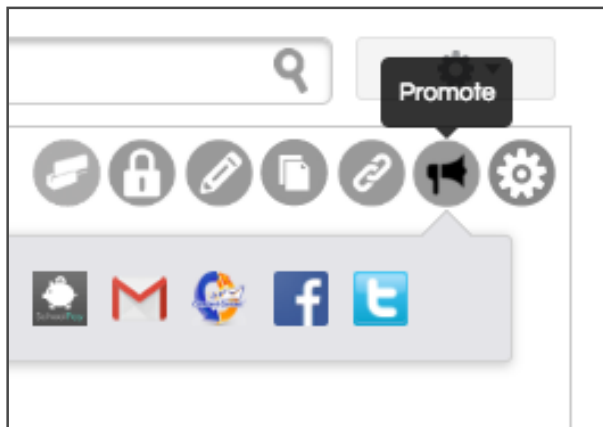

PROMOTE

Image 2a demonstrates how to select an item from a pull down menu on your Facebook creation form.

- Find the item you wish to promote over Facebook

- Click on the bullhorn icon on the right side of that item row

- Select Facebook from your promotion options

- Your item will be carried into the Facebook promotion form

Twitter

Twitter is such a stripped down mode of promotion, it's no surprise this is the easiest way to promote. Simply select your item and compose your message. That's it!

PROMOTE

support@schoolpay.com   888.88.MYPAY (888.886.9729)