

SchoolPay®

Administrator Guide



To Search this Document Click (Mac)



The Basics

[Organization of SchoolPay](#)
[Logging In](#)
[Getting Help](#)

Settings Module

[Payment Settings](#)
[Categories](#)
[Chart of Accounts](#)
[Account Structure](#)
[Images](#)
[Create Roles](#)
[Administrators](#)
[Schools](#)
[Students and Groups](#)
[Parent Registration](#)

Payments Module

[Item Types](#)
[Individual Item](#)
[Multi-Item Page](#)
[Recurring Item](#)

Virtual Terminal

[Office Terminal](#)
[Event Terminal](#)
[SIS Terminal](#)

To Search this Document Click (Windows)



Reports Module

[Report Types](#)
[Other Report Functions](#)
[General Functionality](#)
[Transaction Status Defined](#)
[Search Data Options](#)
[Transaction Report](#)
[Batch Report](#)
[Chart of Accounts Report](#)
[Custom Report](#)
[Recurring Reports](#)
[Data Syncs](#)
[Registered Parents](#)

Promote Module

[Service Alerts](#)
[Receipt Settings](#)
[Custom Skins](#)
[Marketing Tools](#)
[Webmaster Tools](#)
[Gmail](#)
[Constant Contact](#)
[Facebook](#)
[Twitter](#)

TABLE OF CONTENTS

The Basics

The Organization of SchoolPay

SchoolPay is organized into a series of “modules”. Each module’s User’s Guide can be exported into it’s own PDF document, or you can export the entire User Guide.

Settings Module

The settings module contains account-level configuration settings. Typically the settings module is used most during your implementation. However, when you want to add administrators or change Access Control Levels, or make other account configuration settings, you will return here from time to time. In addition to the functions already mentioned, the Settings Module is also home to:

- Local Tax Settings
- Accepted Payment Methods
- Establishing Payment Categories
- Chart of Accounts
- Establishing Images
- Creating Parent Accounts

Payments Module

The Payments Module is where you house every item you’d like to offer for payment using SchoolPay. Payment Items can take a variety of forms including individual, multi-item, no-cost items, event items, recurring items and more. In the payment module you can build items, edit them and configure them with easy dashboard toggles to make active/inactive, visible/not visible, promote over social media and much more.

Reporting Module

School administrators typically spend the bulk of their time in the Reports Module. Years of working with schools has lead to a wealth of reports based on varying stakeholders needs. Administrators that fulfill payments typically spend time in items reports, while finance staff tend to spend time in Transaction Reports, General Ledger Reports, and Batch Reports. There is a wealth of data available and if you don’t like any of the reports you’ve seen or you’d prefer your data in a custom format you can even create a Custom Report Template.

Promote Module

The Promote Module is the single best place for finding marketing, awareness, and training tools. The information is indexed so you can find each of these tools from the Parent perspective and from the Administrator perspective. Remember that internally communicating with your staff about SchoolPay is equally as important as communicating with your external community. In addition, the Promote Module allows you to promote items out over custom integrations to all of today's social media.

Virtual Terminal

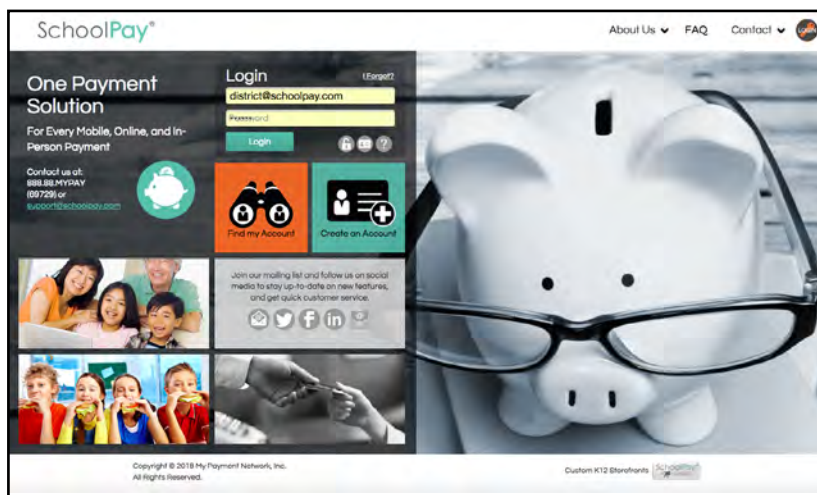
The Virtual Terminal Module is SchoolPay's custom solution for taking in-person payments. If you have in-person (Swipe) payment needs, SchoolPay's Virtual Terminal will give you all the convenience of "PayPal" or "Square" but it's built for schools, offers multiple bank account settlement and more sophisticated accounting details. Your data will carry all the required GL, student and custom data upon for every in-person payment, which is not available in any other in-person payment solution.

Logging In

1. Go to: www.schoolpay.com or your custom storefront URL if your organization uses a cobranded version of SchoolPay that "reskins" our service with custom colors, images and content.
2. Enter in your email address & password
3. Click Login

If you don't know your password, click the lock icon to 'unlock' your account. An email will be sent to you with information on how to login.

**If you are still unable to log in, contact your site's administrator for access.*



Getting Help

Getting help is easy. SchoolPay maintains live operator support **Monday-Friday 7 am - 7 pm Central Time**. We also staff Spanish-speaking operators.

Afterhours, weekend and holiday support are also offered via email at support@schoolpay.com.



In addition, you'll find that scattered throughout the service, we have gone to great lengths to provide tool tips whenever there are terms that require defining. We also provide "how to" text and videos.

Payment Categories ⓘ

Name ▲ ▼	# of items	# of admins		Site
Athletics	0	0	Private	Red Elementary
Category-o-matic	0	0	Private	Park Lake Public Schools
Donations	0	0	Private	Park Lake Public Schools
Fees	0	0	Private	Red Elementary
Field Trips	0	0	Private	Red Elementary
Food Service	0	0	Private	Red Elementary
Pizza Fridays	0	0	Private	Park Lake Public Schools
Testing	30	0	Private	Park Lake Public Schools
Textbooks	0	0	Private	Red Elementary

What is a Payment Category?

A Payment Category is a way to group related payment items together (e.g. HR Payments, Events, and Fundraising). Each time you create a payment category, a role is automatically created for that category. You may assign administrator access to or restrict access from this category role.

Settings Module

Payment Settings	>	Create Roles	>
Categories	>	Administrators	>
Chart of Accounts	>	Schools	>
Account Structure	>	Students and Groups	>
Images	>	Parent Registration	>

Payment Settings

There are five configurations under the category of Payment Settings.

1. Payment Methods are configured so that you don't need to specify the methods you wish to accept every time you build a payment item. The column titled "Methods Accepted" defines every payment method your account can support. "Default for New Items" allows you to configure the default settings for all new items. Many schools will offer exceptions to payment methods, such as accepting American Express only for fundraising initiatives. In those instances you wish to offer Am Ex you could then edit that item's payment methods as an exception, rather than have to set every item's method as a rule.
2. Convenience Fees can be configured to "always suggest" or "never include". Again, you have the opportunity to overwrite this setting on a per-item basis. However, if you have made the decision to not pass on a convenience fee to your community, configuring this once will prevent you from having to make this selection any time.
3. Users can specify the Chart of Accounts for Convenience Fees, Shipping, or Tax.
4. Local Tax allows you to program your local tax rate in once. When you elect to include tax on any item, it will automatically calculate your local rate. As with the above two settings, you can overwrite this setting on a per-item basis.
5. Dashboards can be set to report district level payments.

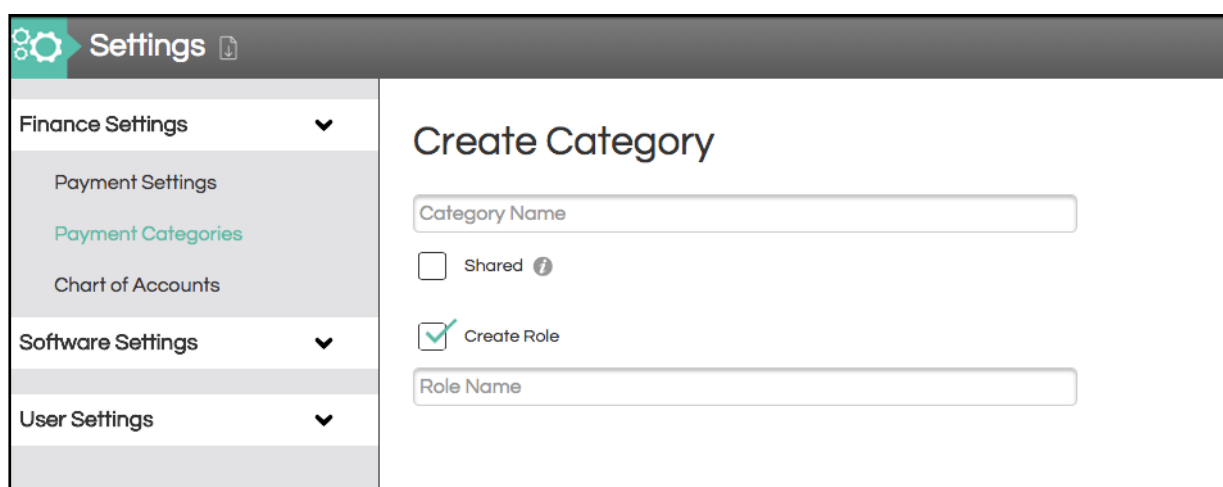
Categories

Create any number of Payment Categories. Categories group related payments together on a broader level than your Chart of Account designation. Categories aide in reporting and are used

for the purposes of creating “Access Control Levels” (ACL). When you create a category, such as Extended Day Payments, you can grant access to every payment designed by that category to administrators who have been assigned access to that role. See [Roles](#) for more explanation about creating roles.

Categories are added manually, one-at-a-time by clicking the “add category” button. When you add a new category a role is also automatically created for that category at the same time. You will be asked if you wish to immediately assign administrators to that role or you can come back and assign administrators at a later point.

In district-level accounts, categories can also be “shared”. When you check the shared box, that category will appear in every site-level account. This make viewing payment items by categories across all sites easy and organized and speeds site level account configuration.



The screenshot shows the 'Settings' page with a sidebar on the left containing 'Finance Settings', 'Payment Settings', 'Payment Categories' (highlighted), and 'Chart of Accounts'. The main area is titled 'Create Category' and contains a 'Category Name' input field, a 'Shared' checkbox, a checked 'Create Role' checkbox, and a 'Role Name' input field.

Chart of Accounts

SchoolPay tracks a unique General Ledger account code for every item sold. Your software requires you have at least one account code to build payment items. Chart of Account numbers can also be added “on the fly” as you build payment items.

In the settings module choose from either adding each Account Number manually via “Add Account” or uploading an entire file at once. Specifications for the CSV file format are provided.

District accounts have an extra configuration setting for Sharing account codes with their site accounts.

Account Structure

The account structure will show you visibly, from a high-level, how your SchoolPay account is configured. Accounts are shown in a hierarchy format so you can see how many SchoolPay accounts belong to each school site. In Account Structure you can also toggle child account reporting on and off to either give you greater oversight into transactions or reduce your scope of data.

Images

Images are freely included in all accounts. There is a maximum number of impressions offered freely, however, that threshold is set very high. It's unlikely most accounts will surpass that number. In the event your account exceeds your maximum you will be served a warning notice as you approach the limit and be offered an impression package of 3 MM additional impressions for \$30. You can see how many impressions you have used at any time.

The settings module houses your Image Library. You can interact with, delete, and add new images from your image library. You can also add images "on the fly" when you build or edit any payment item. When you do that, the image is also added to your Image Library.

Images

Library Details ▾

Total Images Uploaded	Active Items with Images	Total Annual Impressions	Plan ends on
30	23	38,513	07/31/2018

☒ ☐

[+ Add Image](#)

Preview	Name ▲ ▾	Dimensions
	Amazed-Face.jpg.jpg	Height: 347px Width: 347px

Create Roles

Access Control Levels, often referred to as ACL, is a complicated function that sounds easy enough, but the devil is always in the detail. ACL controls who accesses what. In SchoolPay we offer two kinds of Access: (1) You can control who sees what "Content" and (2) You can control who has rights to certain "Functions".

Content is simply Categories. When a payment category is built, a role is created. Anyone will access to that Payment Category will see items that belong to that category in the Reporting Module and in the Payments Module.

Functions are software features such as Refunds, Adding Administrators, etc. It's quite common for only certain administrators to have refund privileges

SchoolPay comes with four pre-configured roles. To see what functions and content are available with each of these pre-set roles, click the information icon next to them. In addition, you can create any number of roles custom for your needs. Consider roles a "badge" that grant you access to various parts of the service. There's no limit to the number of roles/badges any one administrator can be assigned.

To custom create a role, click “Create Role”.

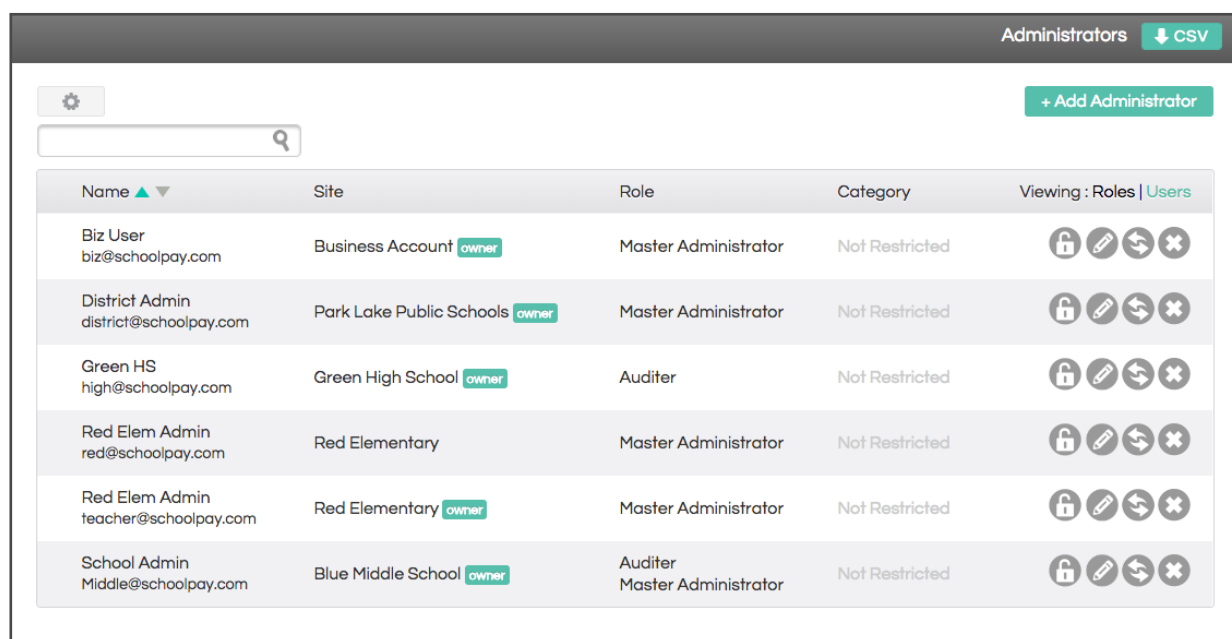
1. Assign the role a name
2. Designate the category of payment items to which this role will have access
3. District accounts will have an option to “Share” roles. This makes custom roles available in any sub account.
4. Then define functional permissions. Permissions are either “Full Control”, “Read Only” or “No Access”. The permissions are organized into module groupings, to speed up your configuration. You can also perform a “select all” by choosing the Functional Permission from the Module’s Gray Header row.

Creating roles can be complex. Don’t hesitate to call upon SchoolPay support for assistance or to verify your own work.

Administrators

Any number of administrators may be granted access to SchoolPay. To create a new administrator, click “Add Administrator”, then enter their information. District accounts can assign administrators to specific sites. When an administrator account is created, they will receive a welcome email with their password. You can elect to send a randomly generated password or manually create one on their behalf.

You can also “mass reassign” passwords for all administrators. It’s not uncommon for some schools to wish to reset all passwords each year.



Name ▲ ▼	Site	Role	Category	Viewing : Roles Users
Biz User biz@schoolpay.com	Business Account owner	Master Administrator	Not Restricted	
District Admin district@schoolpay.com	Park Lake Public Schools owner	Master Administrator	Not Restricted	
Green HS high@schoolpay.com	Green High School owner	Auditer	Not Restricted	
Red Elem Admin red@schoolpay.com	Red Elementary	Master Administrator	Not Restricted	
Red Elem Admin teacher@schoolpay.com	Red Elementary owner	Master Administrator	Not Restricted	
School Admin Middle@schoolpay.com	Blue Middle School owner	Auditer Master Administrator	Not Restricted	

Schools

Schools are uniquely designated in SchoolPay with a School Locator Number(SLN). SchoolPay can manage leading zeroes should your SLNs contain those. Your SchoolPay implementation manager will send file format specifications. Prepare your list in CSV format according to the specifications. Specifications are also provided here in the settings module. We typically load this data for our customers, but the feature is built to be self-service.



Students and Groups

Uniquely identifying students can only be done with a list of students, who each have a district-assigned student ID number. SchoolPay will also assign an ID# to each of your students so that we can uniquely identify your students from other districts in using our system. Most schools today, sync their student data by way of a scheduled file exchange; therefore, there is little manual interaction with student data here in the Settings Module. However, if your school manually loads files, you are free to edit student data directly from the setting module. To edit any student already in our system, find the student in question, then select the edit function.

To manually add one student, click the "add student" button.

[+ Add Student](#)

And to upload an entire student file, review the CSV file format specifications. When your file is in the proper format you can upload your file here. Please DO NOT load any students with temporary IDs that will change!

Groups can be built manually or by way of file sync. A custom group of students can be formed around an attribute such as Free and Reduced Lunch, Basketball Team, Band, etc. Again, if you sync student data, you will likely create groups by way of file exchanges, however, it's easy to add one or two students to a group if you don't sync groups with high frequency. To add or remove students from an existing group, select the group and then follow the instructions for adding or removing students. To mass assign groups by way of a file exchange, contact SchoolPay support to coordinate that exchange.

Group Name

Description (200 character limit)

☐ Shared

☐ Hidden Membership

Cancel

Save

ID #	Student	Grade	School
Select "Add Student" below to add students one-by-one to this group, or if there are many students, click the upload button to add a student group via CSV.			
<div>+ Add Student</div>			

Payer Registration

The Payer Registration function within settings is the place you go to create Payer Accounts on behalf of your payers. If you are looking for a list of payer accounts that are already created, find that in Reports.

Creating payer accounts is easy. Simply click "Add Payer Account" and enter the requested data. Creating payer accounts in mass, is done by way of the student file. We recommend working with SchoolPay support to do this. We encourage schools to Soft Create payer accounts. This creates an account "on hold". The account only becomes active after a parent "claims it" by requesting their credentials. This is the easiest path for payers and allows them to enter their account already configured with their students. Please contact SchoolPay support for more information about Payer Account Registration.

Payer Registration

Filter Payer List

+ Add Payer Account

Search

School Site

-- Select School --

Sort

Alphabetically

Search

☒

12

Name	Students	FS Balance
<input type="checkbox"/> Amanda Webb carnold2@loc.gov	<div>Margaret Riley\$21.73</div> <div>Jason Davis\$74.60</div> <div>Phyllis Barnes\$9.84</div>	<div></div> <div></div>

SETTINGS




Payments Module

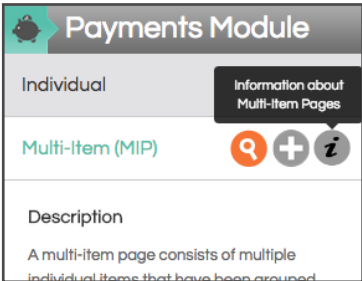
Organization	>	Item Type Definitions	>
Building an Item			
Individual Item General	>	Multi-Item Page	>
Details	>	Recurring Item	>
Advanced Item Settings	>	No-Cost Item	>
Quantity, Item Active, Visibility, Guest			
Payment and Settlement	>		
Custom Fields	>		
Targeting	>		
Saving the item	>		
Interacting with Items			
	>		

Organization

The payments module is organized by item type. Each item type offers two interfaces:

- Dashboard
- Item Build or Edit

The left side navigation within the Payment Module allows you to quickly index between these views. The magnifying lens  will take you to any item-type dashboard and the plus sign  takes you to the item build page. Also note there is an information icon  that provides you with the item type definition and a few examples of commonly built items for each category.



The item’s dashboard is an inventory of every item you have built, organized by item type. The dashboard presents you will data that will quickly let you know how that item is configured by displaying things such as:

- Is the item currently active?
- Is the item visible in the Payment Center?
- How many items have been sold?
- What is the lifetime sales amount for this item

ITEM TYPES

Definition of Item Types

Individual Item

An “item” is anything for which you accept payment. Most items you build in SchoolPay will be Individual Items.

Example Individual Items:

- Field Trips
- Before/After Care Tuition
- Prom Ticket
- Athletics Fees
- Spirit Wear T-Shirt
- Yearbook

Multi-Item (MIP)

A multi-item page consists of multiple individual items that have been grouped together, for the purposes of organization from one unified “link”.

Example Multi-Item Pages:

- Create one MIP titled “Athletics Fees” containing an individual item for each sport
- Create one MIP titled “Donations” containing an individual item for each donation level
- Create one MIP titled “Summer Camp” containing an individual item for each camp

Recurring

A recurring item is an individual item that is scheduled to process multiple times automatically in the future at custom billing intervals.

Example Recurring Item:

- Kindergarten Tuition payment, automatically paid on the 1st of every month
- Yearly Donation, automatically paid every 365 days

Event

An Event item is a payment that you take in person, often when at an event, through the SchoolPay Virtual Terminal. Event Items are built to move lines quickly and reporting for these payments is limited to the event name, chart of accounts, payer name, and the transaction amount.

Example Event Items:

- Basketball Game Concessions Stand
- Spirit Wear Store

No-Cost

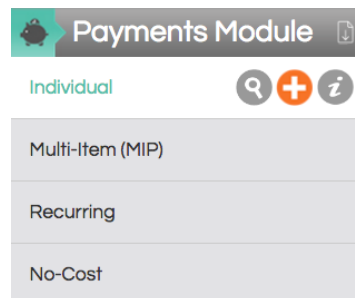
A No-Cost Item is an individual item, but carries no cost. No cost items are commonly used for registration to free events.

Example No-Cost Item:

- Registration for a free event
- Create a waiting list for a sold out item

Building an Item: Individual Item

From the Payment Module (payments button in the primary navigation), select the plus sign for Individual Items. Simply fill out the form on the next screen to add a new item for your school.



General Details

The General Details portion of the Item Build requests standard information about the payment that will guide the payer, including:

Item Title - Ex: Baseball Participation Fee

- Payers rely on these to find specific items. If you have many items that have similar titles, be specific and place differentiating aspects earlier in the item title. All items must have a unique item title.

Item Description - Ex: Baseball season starts on May 1st! Please have all...

- Tell the parent everything they need to know about this item. There's no limit to how much information you can provide here. Change the fonts, sizes, and colors to make important information stand out. The more information you give here the better!

Category - Ex: Athletics

- Categories are ways to organize your payments for reporting, sorting items, and administrator access. They are typically pre-defined by the district. Categories can be built in SchoolPay settings.

Image - Ex: (Image of Baseball)

- Add an image to your item to show payers what they're purchasing!

Advanced Item Settings

Click the  button on the top right to access Advanced Item Settings

Quantity Settings

Limited Quantity: SchoolPay allows you to cap the number of sales available for an item. Check this box, then insert the maximum number purchases you wish to allow for the item. This will ensure you don't oversell it!

Provide Quantity Field: Check this box to offer payers the option to purchase more than one of this item.

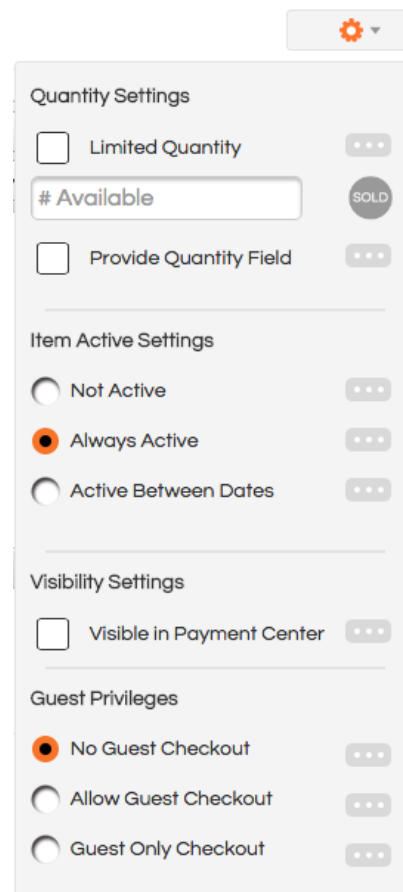
Item Active Settings

Not Active / Always Active: All items are set to active by default when you create them. If you are ready to accept payment for this item, keep it set to "Active." If you are NOT accepting payment for this item at this time, select "Not Active" instead.

Active Between Dates: You can also schedule an item to be active during any date range. Your item will automatically be unavailable for payment before and after your specified date range. *Please note: you always have the ability to manually make your item active/inactive. This setting will simply do this for you at midnight the morning of the date selected*

Visibility Settings

Visible in Payment Center: Check this box to display this item in payers' accounts. The item will display in the list of School Payments when users log into their account.



Quantity Settings

☒ Limited Quantity ...

Available SOLD

☐ Provide Quantity Field ...

Item Active Settings

☐ Not Active ...

☒ Always Active ...

☐ Active Between Dates ...

Visibility Settings


☐ Visible in Payment Center ...

Guest Privileges

☒ No Guest Checkout ...

☐ Allow Guest Checkout ...

☐ Guest Only Checkout ...

Hint: Click the  buttons to read more about these settings!

Guest Privileges

No Guest Checkout: This setting mandates that anyone purchasing this item logs in first. This is a common setting for items such as Cafeteria Pre-payments when uniquely identifying the student associated with the payment is critical. Even if a payer uses a bookmark on the payment item, they will be asked to first login prior to making payment.

Allow Guest Checkout: This setting has more flexibility. Use this when you would like to leave the option of logging in to the payer. Registered users wishing to keep all their transactions together in their reporting will prefer to login, however if your item is open to anyone, guest checkout will prevent someone from having to create an account simply to purchase an item.

Guest Checkout Only: This setting is common in fundraising situations and often Adult Education. Use this setting when your entire payer audience will not find value in registering for a SchoolPay account. These are typically one-time payment scenarios.

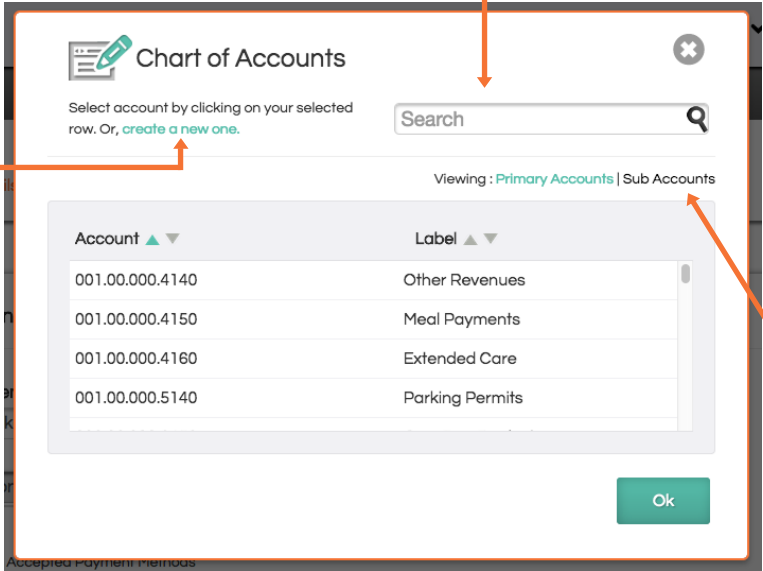
Reminder: Student data is only collected when the payment is made by a logged in user. If you require the student information associated with this payment, make sure payers are logging in (no guest checkout), or that you have asked for this information in the Custom Fields Section.

Payments and Settlements

The Payment and Settlement section asks for information imperative to the item's financial structure. This information includes:

Settlement Account: This drop-down menu allows you to determine the bank account receiving the funds for this item.

Item Description: Click this menu to select the income Chart of Account code associated with this item. You will be prompted with a window where you can select the appropriate account for these funds.



The screenshot shows a 'Chart of Accounts' dialog box. It has a title bar with a pencil icon and a close button. Below the title, it says 'Select account by clicking on your selected row. Or, [create a new one](#).' There is a search bar with the placeholder text 'Search'. Below the search bar, it says 'Viewing: [Primary Accounts](#) | [Sub Accounts](#)'. There is a table with two columns: 'Account' and 'Label'. The table contains four rows of data. At the bottom right, there is an 'Ok' button. Annotations with orange arrows point to various parts of the dialog box:

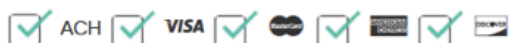
- An arrow points to the search bar with the text: 'Search by the Chart of Account label OR number in this box'.
- An arrow points to the 'Primary Accounts' link with the text: 'Most districts only use one list of Chart of Accounts, located under "Primary Accounts"'.
- An arrow points to the 'Sub Accounts' link with the text: 'If your district uses Sub Accounts in addition to Primary accounts, the secondary list can be accessed by clicking "Sub Accounts" here.'
- An arrow points to the 'create a new one' link with the text: 'Don't see the account you're looking for? Click "create a new one" to add it on the fly!'

Account	Label
001.00.000.4140	Other Revenues
001.00.000.4150	Meal Payments
001.00.000.4160	Extended Care
001.00.000.5140	Parking Permits

Edit Payment Methods Accepted

- Checking this box will show you the payment methods your account is configured to accept. Most accounts are setup to accept Visa, MasterCard, and Discover only; though SchoolPay does offer other payment methods.
- If you would like to disable a specific payment method for this particular item, simply un-check that payment method. Conversely some schools elect to not offer American Express by default, and simply add it as an additional method of payment to key fundraising events..

☒ Edit Accepted Payment Methods



Item Amount - There are 3 options for assessing the amount of the item:

Item Amount:

☐ Open ☐ Add Range

Fixed - Example: \$30.00 Participation Fee

- This means the item amount is the same every time.

Item Amount:

☐ Fixed ☒ Open ☐ Add Range

Open - Example: Open Amount Donation

- This allows the payer to type in the amount they are paying.

Item Amount:

☐ Fixed ☐ Open ☒ Add Range

Minimum: Maximum:

Add Range - Example: Before/After Care Tuition payment, must be at least \$40.00

- This allows the payer to type in the amount they are paying, within a designated range.
 - The minimum amount must be at least \$1.00, but there are no restrictions on the maximum
 - A \$0.00 maximum means the maximum is infinite.

Fees - Some districts choose to add additional convenience, tax, or shipping fees to the item amount

Convenience Fee [None](#) | [Fixed](#) | [Suggested](#)

- **None:** No Convenience fee will be added when "None" is selected.
- **Fixed:** The same convenience fee will be added each time this item is purchased. For example, it's common for schools to assess a flat convenience fee of \$2.00 regardless of the payers purchase amount.
- **Suggested or Calculated:** An estimation of the cost of processing the transaction will be applied to the item's amount. Select this option if you want to ensure your school recovers most/all of the transaction fee through a convenience fee.
- *If your district is setup for Split Settlement, a convenience fee is applied automatically, and you may not see an option to configure a fee in this section.*

Tax [None](#) | [Enabled](#)

- If you would like to add a tax to your item, simply click “Enabled” and enter the tax percentage. The amount in added tax will calculate based on this percentage. *Note: If you wish to add tax automatically into all items, go to schoolpay.com/school/payments/methods and configure your local tax rate from your account settings.*

Shipping [None](#) | [Fixed](#)

- If you would like to add an additional fixed fee amount to your item, you may do so here. Click “Fixed” and add the appropriate amount

Check your amount settings by reviewing the “Total” amount at the bottom of this section. Please note that if this is an open amount item, the total varies.

Custom Fields

Custom fields allow you to collect additional information from the user while they are making their payment. Some custom fields allow payers to type in responses to your requests, and other fields allow you to present payers with different options from which to choose. Below are the different formats available to request additional information:

Checkboxes - allow a user to make more than one selection from the options you’ve provided.

Please select the dates/times you are willing to assist at the concessions stand.

<input type="checkbox"/>	Monday June 1st 6:00-7:30
<input type="checkbox"/>	Tuesday June 2nd 6:00-7:30
<input type="checkbox"/>	Monday June 8th 7:30-9:00
<input type="checkbox"/>	Saturday June 13th 9:00-11:00am
<input type="checkbox"/>	Tuesday June 16 6:00-7:30

All parents are encouraged to volunteer for at least two games per season.

Dropdown List - requires the user make one selection from a list of options you present.

Athlete is trying out for: *

Select from

Select from

Freshman

JV

Varsity

Radio Buttons - requires the user make one selection from a list of options you present.

Jersey Size *

☐ Small

☐ Medium

☐ Large

☐ XLarge

☐ XXLLarge

Please note: the jerseys must be returned after the season is over

Text Area - allows the user to type in their answer (large expandable box to type in)

Please list any of the athlete's allergies or medical concerns:

Text Field - allows the user to type in their answer (smaller box to type in)

Emergency Contact Phone Number *

Hidden - Allows you to record a key piece of information tied to this payment, which is not seen by the payer

Please note that the following information will be collected from the payer automatically:

- Student Name, ID Number, and Grade
- Payer Name
- Payer Email Address
- Payer Billing Address

Targeting

Targeting allows you to direct a payment item to the list of payers relevant to this item. Target items by school, grade, teacher, custom groups, or specific student. Payers will only see this item in their account if a student associated with their account matched your target attributes.

Targeting by School (District use only)

- Click "School" to view a list of schools within the district. Simply select the appropriate school or schools that will accept payment for this item.
- **Example: Only parents at Washington High School can purchase Washington High School Parking Spot Rentals.**

School ▼

Choose School

All

Washington High School ☒

Thomas Jefferson Elementary School

Lincoln Middle

Roosevelt Elementary

Targeting by Grade Level

- Click "Grade" to view all grades within the school. Select the grade(s) for which this item applies.
- Example: Only parents with a Junior or Senior in their account will be able to pay for this item for their Junior or Senior student.

Targeting by Teacher

- Click "Teacher" to view a list of teachers at the school, and select the appropriate class for which this item applies.
- Please Note: Many school districts do not provide teacher name, so this may not be an available option for your school.
- Example: Only parents with a Junior or Senior in their account will be able to pay for this item for their Junior or Senior student.

Targeting by Custom Group

- Click "Group" to see a list of custom groups. Groups can be created from your settings module by manually creating groups of students based on custom attributes such as "Football Team" or "Band". Groups can also be created by way of an SIS File sync.

Targeting by Student

- Click "Student" to view a list of students at the school. Use the search box or scroll through the list to locate specific students for which this item applies.
- Example: Only parents of Jordan Brooks and Ann Daily can pay for this item.

Saving the Item

There are two options for saving a payment item: **Save** & **Save as Draft**. You can also check your item's readiness.

- Click **Check Item Readiness** to see if you missed any required information. It will also provide you with some suggestions for your item.
- Click **Save as Draft** if you have started your item, but don't have all of the details you need. Your item will be saved in a "draft" state, allowing you to come back to it and make any necessary changes. An item in the "draft" state will not be available for payment.
- Click **Save** if you have completed your item.



Once you have saved your item, you will be taken back to your list of individual items.

Organize your list of payment items by clicking the wheel/gear icon on the top right corner of your screen.

- View items of a certain status
 - *Any items that you have deleted are retrievable in your trash here.*
- View items within a specific category, or multiple categories
- Sort your list of items by Modified Date, Creation Date, or Alphabetically by Title
- Make your filter a default setting by checking the box "Save as Defaults"

You can also choose to see a more compact view of your items by clicking the icon with four horizontal lines.

Sorted by: Title

Status

Draft

✓ Active

Inactive

Trash

All

Categories

Gift Card

Food Service

Donations

[+ View More](#)

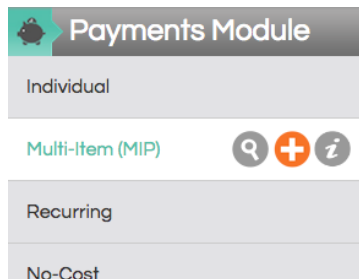
Sort By

Modified Date

Creation Date

✓ Title

☐ Save As Defaults



Building a Multi-Item Page

Click Payments at the top of the screen, and then select Multi Items. ***Please note that your individual items must be built prior to adding them to a multi-item page*

General Details

The General Details portion of the MIP Build will ask you for general information that applies to all items within the multi-item page. This information includes:

MIP Title - Ex: Fall Athletics Participation Fee

- Parents will see this MIP title within their account. The title should apply to all individual items within the MIP.

Item Description - Ex: Please select from the different sports included on this page...

- Tell the parent everything they need to know about these items as a whole. There's no limit to how much information you can provide here. Keep in mind that the parent will also have item-specific details when they select the particular individual item they would like to purchase.

Category - Ex: Athletics

- Categories are ways to organize your payments for reporting, sorting items, and administrator access. They are typically pre-defined by the district. Categories can be built in SchoolPay settings.

Image - Ex: (Image of Sports Gear)

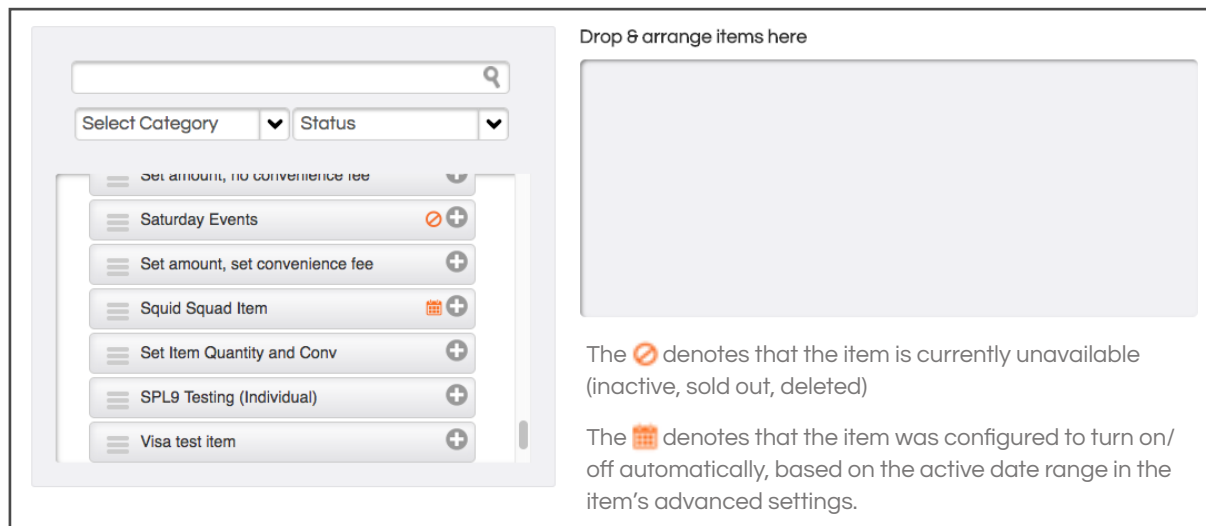
- Add an image to your item to show payers what they're purchasing!

Advanced Item Settings


Please refer back to the [Individual Items section](#) for information on these settings. These settings are applied to the entire MIP, and the items within the MIP.


Select Items

In this section, select the items that should be included in your multi-item page. The list of available items will appear on the left, and selected items will be shown in the gray box on the right.



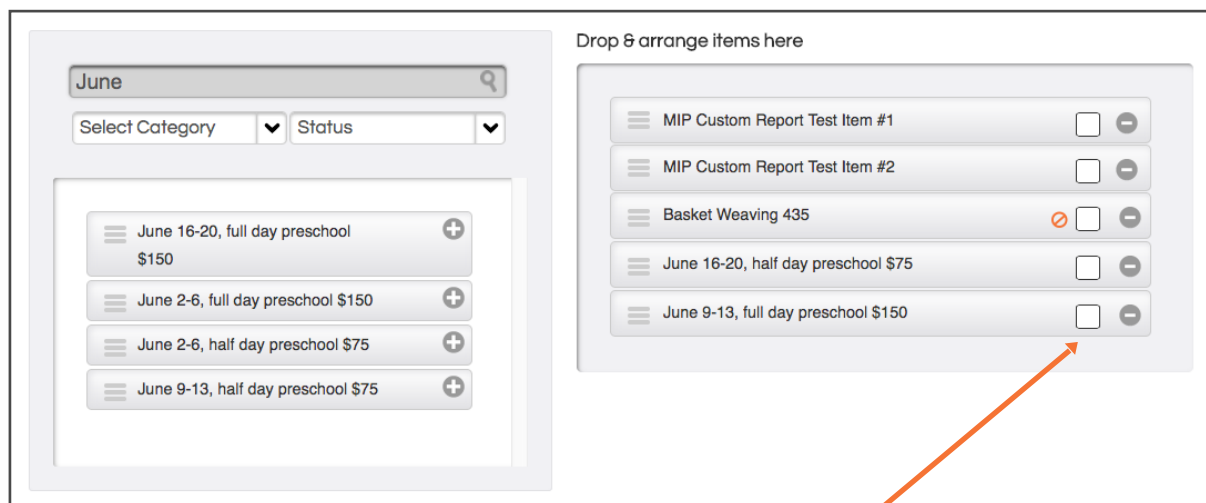
Drop & arrange items here

The  denotes that the item is currently unavailable (inactive, sold out, deleted)

The  denotes that the item was configured to turn on/off automatically, based on the active date range in the item's advanced settings.

Sort your list of available items by category or status. You can also search for specific items through the search filter provided.

To add an item to your multi-item page, click the plus icon and it will be added on the right. You can also drag and drop the item into the gray box.



Drop & arrange items here

MIP Custom Report Test Item #1	<input type="checkbox"/>	-
MIP Custom Report Test Item #2	<input type="checkbox"/>	-
Basket Weaving 435	<input checked="" type="checkbox"/>	-
June 16-20, half day preschool \$75	<input type="checkbox"/>	-
June 9-13, full day preschool \$150	<input type="checkbox"/>	-

If there is an item within the MIP that is required, check the box to the right of the item on this list. The payer will not be able to purchase another item unless all mandatory items have been added to their cart.

Custom Fields

Custom fields allow you to collect additional information from the user while they are making their payment. A custom field added to a MIP will only be asked once, regardless of the number of items purchased. Your reports will add this information to all items purchased within the transaction.

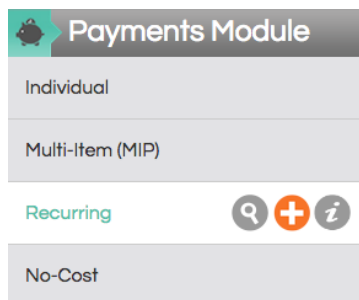
Some custom fields allow the parent to type in the answer to your question, and other fields allow you to present them with different options to choose from. Custom Fields are explained within the [individual item build information](#). The same options are available at the multi-item level, and it is possible to add custom fields at both the individual item and multi-item level.

Targeting

Targeting MIP's requires you consider two layers. The target selections you make at the MIP level will impact who can see the MIP itself (e.g. Summer Camps). The targeting you have selected for each item within the MIP will determine how many items appear for a user when they expand the MIP. For example, if a parent has one child in elementary school, they would not see Middle School Summer Camp options, if those happened to be threaded into the MIP titled Summer Camps. Therefore, when targeting MIP's think as broadly as the target groups of every item you which to thread together into a single page. The same targeting options are available in the MIP level as the [individual item targeting](#).

Saving the Item

Please refer back to the [Individual Items section](#) for information on saving your item.



Payments Module

- Individual
- Multi-Item (MIP)
- Recurring**
- No-Cost

Building a Recurring Item

Recurring Items are built similar to individual items, with a key difference in the Payment & Settlement section.

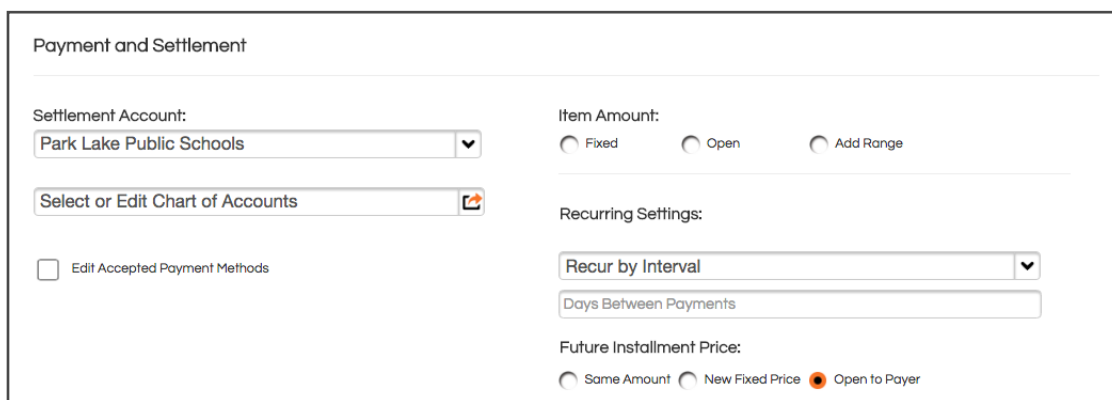
General Details

In the General Details section, you will enter a title, category, image, and description for the item. See [Individual Item Instructions for more details](#). The information you enter here will be applied to each payment that is processed within the recurring series. It is also recommended that details of the recurring payment plan are outlined in the description section, providing payers with adequate details on the recurring timeline.

Payment and Settlement


In the Payment & Settlement Section, you will select a settlement account and chart of account code. Every payment that is processed within the series will be deposited to the selected Settlement account. Likewise, all payments will be associated with the specified Chart of Account code selected here.

The item amount is configured on the right side of this section. The amount entered here is applied to the INITIAL payment, and subsequent payment amounts are determined in the Recurring Settings. The same item amount options are available here as an [individual item](#) (Fixed, Open, Open with a Range). You also have the ability to assess a convenience fee, tax, and shipping. Any additional fees or tax will also be applied to the subsequent payments in the series.



Payment and Settlement

Settlement Account:

Select or Edit Chart of Accounts 

☐ Edit Accepted Payment Methods

Item Amount:

☐ Fixed ☐ Open ☐ Add Range

Recurring Settings:

Future Installment Price:

☐ Same Amount ☐ New Fixed Price ☒ Open to Payer

Recurring Settings

There are several options for processing recurring payments.

Recur by Interval - Example:

Payment every 90 days

- Select **Recur by Interval** in drop-down menu
- Enter the # of days between payments
- Select a Future Installment Price
 - Same Amount: The same amount will recur every time as listed above in the payment settlement section. **Example: \$30 monthly textbook payment.**
 - New Fixed Price Amount: Enter a new amount that should recur after the initial payment **Example: Kindergarten Tuition, 1st payment is \$100 because it included a registration fee. Each subsequent payment is \$50.**
 - Open to Payer: The payer will decide how much they are paying after their initial payment. **Example: Donation**
- After initial payment, future installments bill:
 - A specific number of times
 - Indefinitely (until school admin stops series)
 - Until a specific date

Recurring Settings:

Recur by Interval ▼

Days Between Payments

Future Installment Price:

☐ Same Amount ☐ New Fixed Price ☒ Open to Payer

After initial payment, future installments bill: ☐ 0 Times

☐ Indefinitely

☒ Until

Do Not Recur After

Recur by Date of Month - Example: Payment on the 15th of each month

- Select the recurring day
- Second Payments should occur no sooner than _____ days from the payers initial payment. Enter days between 1st and 2nd payment.
 - **Example: If a payer makes their initial payment on the 10th of the month, do you want their second payment billed again on the 15th of that same month?**
- Select a Future Installment Price
 - Same as Recur by Interval
- After initial payment, future installments bill:
 - Same as Recur by Interval

Recurring Settings:

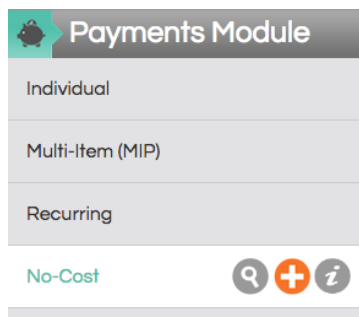
Recur by Day of Month ▼

Payment bills on the **Recurring Day** ▼ each month

Second payments should occur no sooner than _____ days from the payer's initial payment

Future Installment Price:

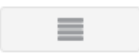
☐ Same Amount ☐ New Fixed Price ☒ Open to Payer



Building a No-Cost Item

From the Payment Module, select the plus sign from the left-side navigation for No-Cost Item. Please follow the same [instructions for building an individual item](#). The only difference is there will be no item amount to enter. All remaining form fields are the same. You may incorporate custom data fields, etc.

Interacting with Items


You can access your items at anytime by selecting “Payments” from the navigation options at the top of your screen. Your list of items will be displayed to you in either an expanded or collapsed format. Click the button  with horizontal lines to see the collapsed version of your items.

Click the button  with 3 blocks to see the expanded version of your items.

When an item is **active** it means you want to accept payment for that item. **Inactive**, means the item cannot be purchased. **Visibility** determines whether an item can be seen in the Payment Center. It's not uncommon for some items to be built for things like Facility Rental fees or other community focused needs, that may be inappropriate for the item to be visible to parents. Simply click each indicator to the teal plus sign for positive choices and click again to the minus sign to turn off.








Active:  Visible: 
Active:  Visible: 


Item Title & Description


☐


Baseball Participation Fee

Boys Baseball Fall 2017. Register here to play baseball in the fall and following your registration find the MIP that offers the purchase of gear. This is a great programming that has created quality athletes over the years. You don't want to miss out. For further questions regarding the season contact the school main offices or athletic department.

Active: 

Visible: 

Sold: 3

Unit Price: [\\$1.00](#)

Lifetime Sales: [view](#)

Total amount in sales so far

Number of Items sold so far Item Amount



Take a payment: for this item in-person through the SchoolPay Virtual Terminal. Clicking this button will take you to a screen where you can swipe the payer's credit/debit card or manually enter the payment information.



Lock the item: by clicking the lock icon. You disable the edit, in/active, and visibility features.



Edit the item: by clicking the pencil icon. This opens your original item-build form in edit mode.



Duplicating the item: by clicking the icon that looks like two sheets of paper. Duplicating an item creates a second, identical instance of your original item. This is a great way to rapidly build items that are similar, but contain a few differences which are easier to modify quickly from a copied instance. Note that all item titles must be unique so remember to modify the item title in your duplicated instance.



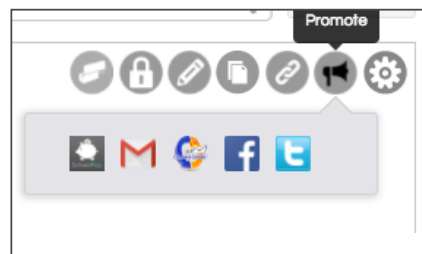
The link icon provides several preview and link share options.

- **Admin Preview:** Payment Items are written to support a different set of rules for administrators. A logged in admin can both view and purchase items that are not active, not available, sold out, etc. This allows administrators of items to interact with them while items are not “public”.
- **Shareable Admin Preview:** This link allows an administrator to “share” the experience of being an administrator with someone that may not have access to SchoolPay. Shareable Admin Preview Links are view only. Anyone granted a shareable admin link to an item can view the item, but they would not be able to purchase the item. The item will display a banner signifying it’s for administrators.
- **Purchaseable Sharelink:** When you wish to put a purchase link in the hands of your community, this is the option you should use. This link carries all the logic your item could be configured to support. For example, if you set a maximum number of items sold to be 100, anyone using this link after 100 items have been sold, could not purchase that item and create an oversold situation.



Promote your item using various promotion pathways (see SchoolPay Promote section). Simply click the megaphone icon on any item row and you will be presented with a number of promotion options. Also be sure to visit the Promote Module. You can promote any item from that location as well.

- Constant Contact
- Gmail
- Facebook
- Twitter



The gear icon provides two links for advanced item settings.

- **Item Rules:** Item rules allow you to change a value based on user input. For example, at the district level, you might decide that students at a specific school need money to go into a different account
- **Item History:** Within item history you can view any changes made to your item since its original creation date.