



schoolmoney

The SchoolMoney User Guide



communitybrands



Introduction

This User Guide will take you through all the basic functions of **SchoolMoney** including setting up a payment, sending texts out to parents, and managing the payments.

Anything that is not covered in this user guide may be covered in one of our other guides.

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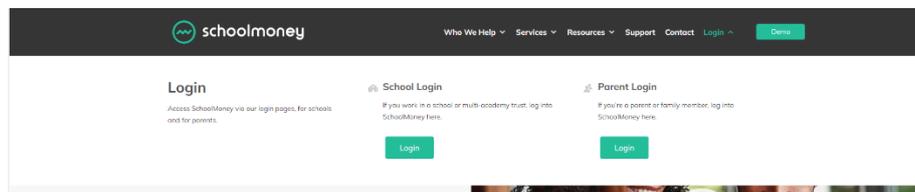
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1. Logging into SchoolMoney

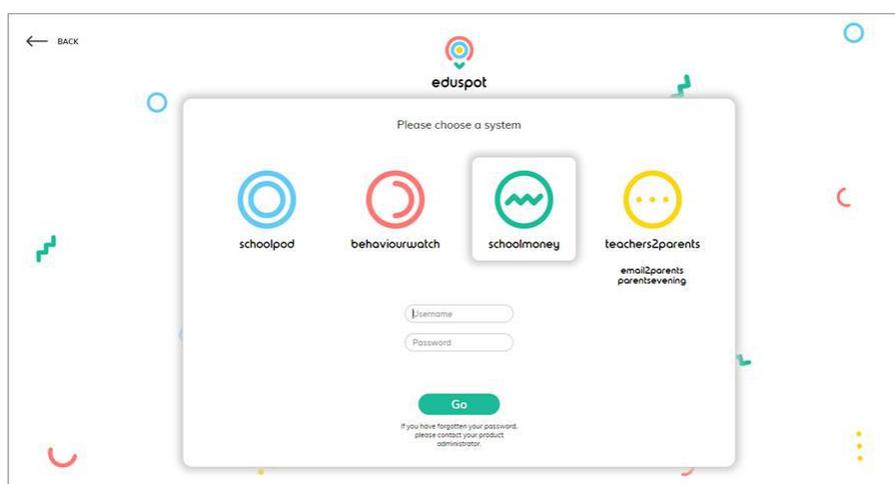
To log into **SchoolMoney**, please go to www.schoolmoney.co.uk and hover over the Login button in the top right-hand corner.



A drop-down box will appear, select the **School Login** option.



This will then take you to the login page where you need to enter your username and password – this will be the same as your Teachers2Parents username and password.



Press Go when you are ready. This will open your **SchoolMoney** account. From here, you will be able to navigate the system to set up your payments, mark registers and manage any incoming money.

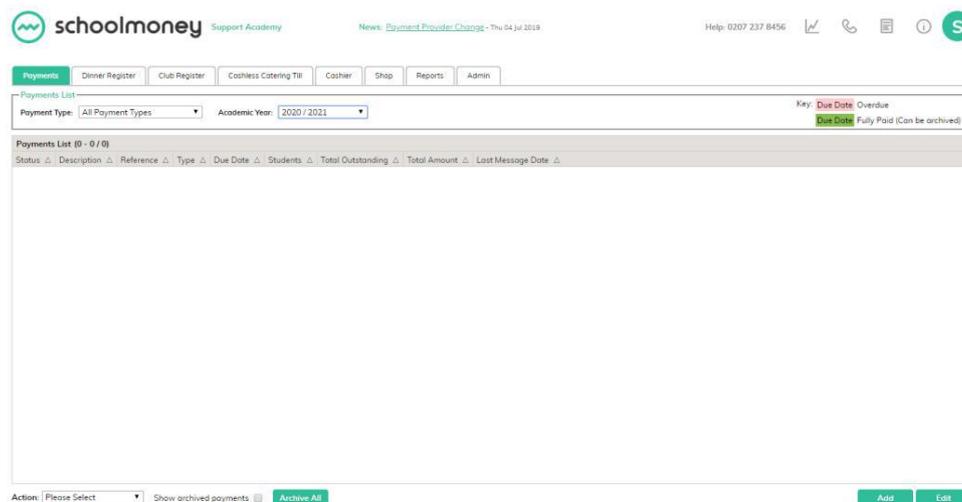
2. Creating Payments

2.1 Setting up a new payment (Trips, music, swimming etc.)

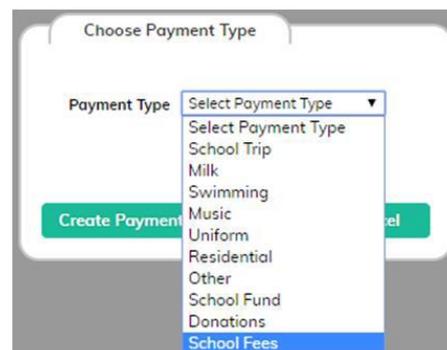
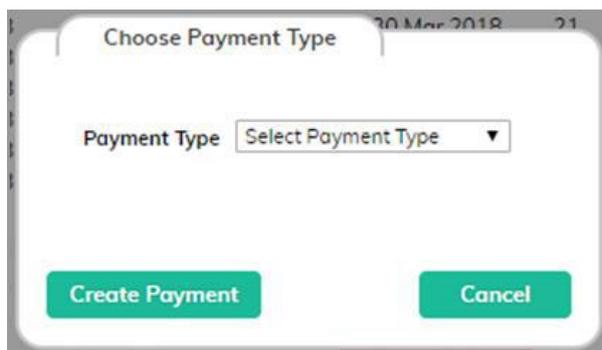
To get started, the first thing you need to do on SchoolMoney is set up a new payment. This could be for:

- School trips
- Music lessons
- Swimming lessons
- School fees
- Donations

To set up the payment, you will need to be on the Payments tab of **SchoolMoney**. In the bottom right-hand corner, please select the button labelled Add.



A window will appear asking you to select the payment type you would like to create. Select the payment type from the drop-down menu that you want to set up and then click on Create Payment.



You will now be able to see the payment screen split into two sections.

On the top green bar, you will see a drop-down box next to the number 1. This is where your bank account details will be held. Please ensure that you have the correct details in this box before you proceed.

Fill out the payment details in section one, and once you are finished, press Save.

Description: This is what the parents will see when they log into their SchoolMoney account. It is useful to put the name of the trip/lesson in here, so that the parents know exactly what they will be paying for. *Eg. Sea Life Centre*

Reference: You can put any extra information you like in here, such as year group, class group or the date. It is mainly used when filtering reports. *Eg. Autumn 2022*

Amount per child: This is the total amount that each child needs to pay. *Eg. £15*

Instalments: You have the choice of up to 10 instalments.

Instalment Dates: The 'Instalment Dates' button will open a window allowing you to change the instalment amounts and the due dates. To change a date, select the 'Choose Date' button and a calendar will appear; you can pick a date from here. When you are done, press OK and then Save.

Instalment	Amount	Due Date
1	£3	23 Aug 2020 Choose Date
2	£12	30 Aug 2020 Choose Date
Total:	£15.00 / £15.00	

Settings

Parental Consent: This requires parents who are paying online to give their consent before they make their payment. You will be provided with a list of these students.

Offline Only: If this is ticked, parents will not be able to make online payments; they will have to bring in cash/cheque to the school. The payment will show up on the parents' side, but they cannot pay using credit/debit card.

Voluntary: This allows the parents to choose exactly how much they are donating; either more or less than the amount specified by the school. Any remaining money will be written off automatically.

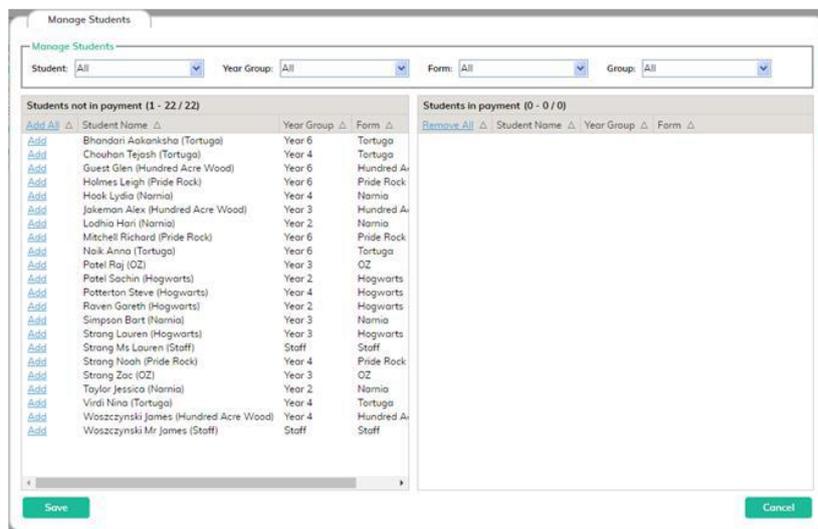
Part Pay Online: This allows the parents to choose how much of the required amount they would like to pay at a time. However, they will still need to pay the full amount by the due date.

Limit Places: This gives the option to offer payment on a first come, first serve basis, which is especially useful if it is open to more students than there are places for. All you need to do is put a tick in the box and input the number of places you have available.

On the right-hand side of the top green bar, you will see there is a Payment Status option. If it is marked as Off, then the parents will not be able to see the payment online. If it is marked as On, then they will be able to login and pay for it.

Once everything is correct in the top section, you will need to move down to section 2. This is where you add your students into the payment.

Click on the Manage Students button at the bottom and a box will pop up.

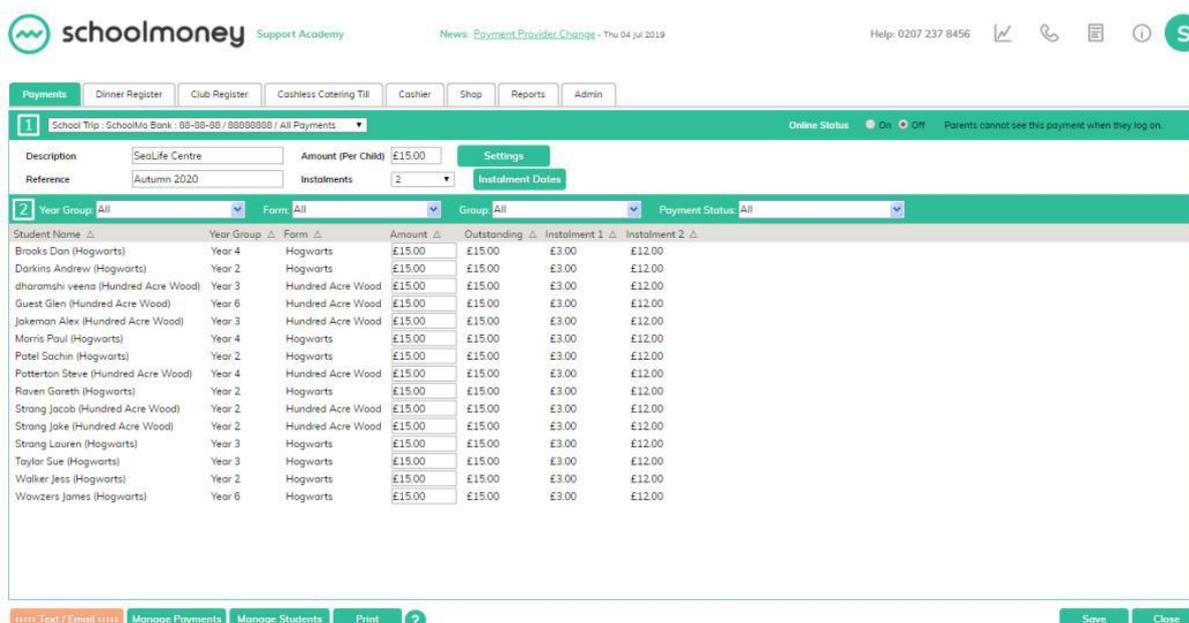


Click the Add link next to the child’s name to move them across to the right-hand side of the screen. Alternatively, click on the Add All option, which will move all students across. You can add as many or as few students as you wish.

To remove a student you have added by mistake, click on the Remove link next to their name and they will move back across to the left-hand side.

Once you have added all of the students you need and you have double-checked that all of the information is correct, select the Save button in the bottom left-hand corner. A confirmation box will pop up, click OK to continue.

Your payment has now been set up and saved ready to use!



2.2 Copying a Payment

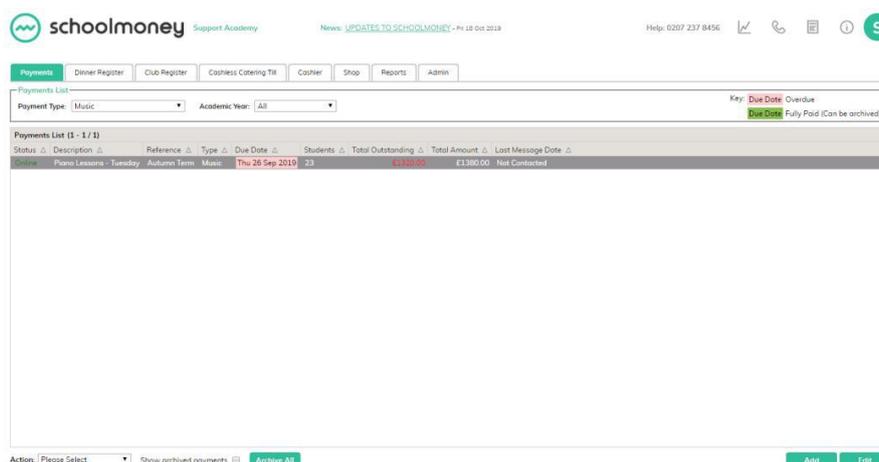
If you have any payments that will need repeating throughout the year you can use the Copy Payment feature to make things easier.

Copy Payments enables you to select a payment already in use and copy the relevant information to a brand new payment. This is useful if you run activities such as music each half term or even year residentials.

It will copy across the following information:

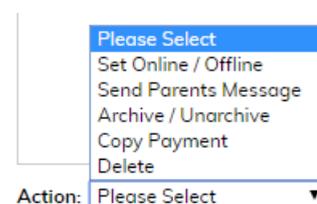
- The Payment type
- The bank account
- The description
- The reference
- The amount per child
- The number of instalments
- The instalment dates
- The boxes selected in the settings section
- The pupils listed in the previous payment

To copy a payment, you must first locate the original payment in the Payments tab. You can copy any payment you wish, including payments that still have outstanding amounts next to them, and archived payments.

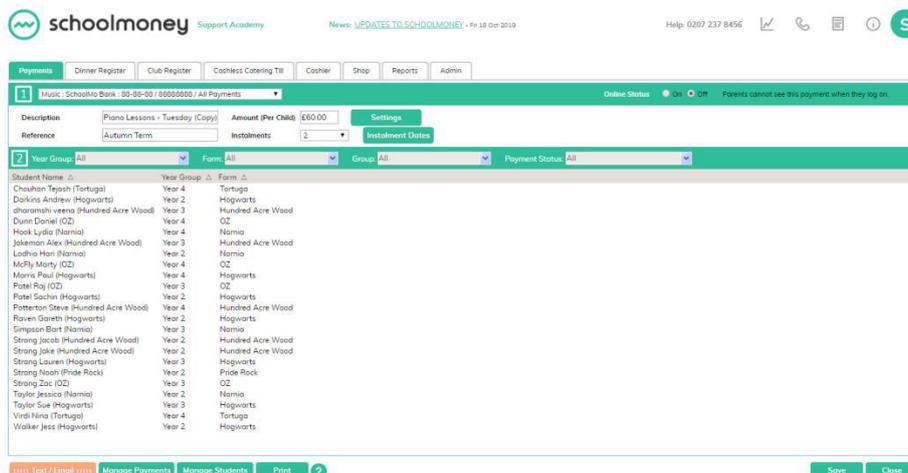


Once you have found the payment you want to copy, select it once so it highlights in grey.

In the bottom left-hand corner, click on the Action: Please Select drop-down box in the bottom left. This will pop up with a list of actions; click on Copy Payment.

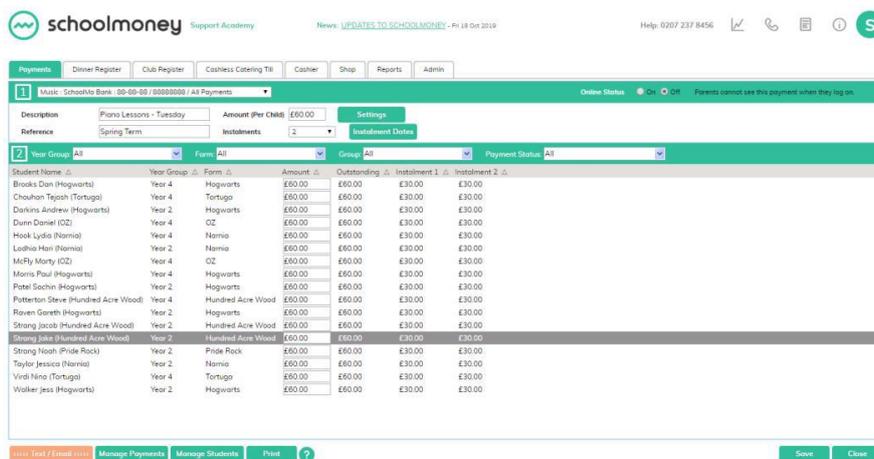


This will create a duplicate of the original payment.

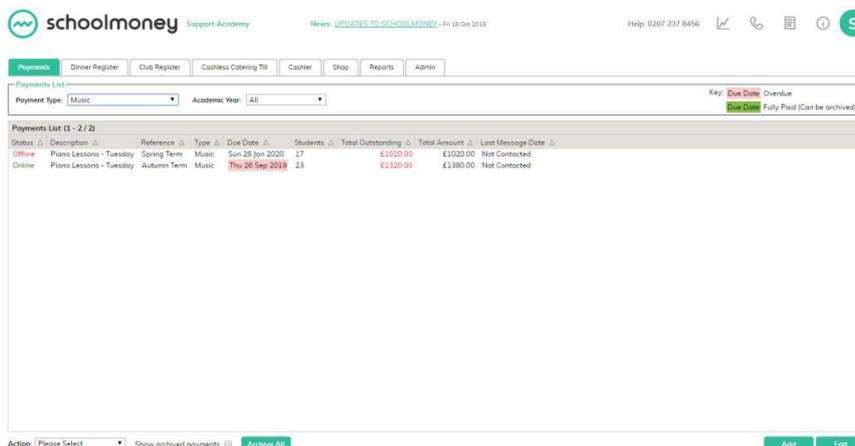


You will be able to see that the description now includes the word Copy so that you can distinguish the duplicate from the original.

You can amend any of this information as needed. Once you have the payment as you want it, select Save in the bottom left-hand corner.



You will now be able to see the copied payment in the Payments tab.



2.3 Dinner and Club Payments

On the **SchoolMoney** system, Dinner and Club Payments are not available to set up through the Add button in the bottom right-hand corner of the Payments tab. All Dinner and Club weeks must be set up through the relevant registers in the register tabs.

For more information on how to set up dinner and club weeks, please see the **Dinners User Guide** and the **Clubs User Guide**.

If you do not have any dinner or club payments set up and you would like to start using these features on the **SchoolMoney** system, please contact our support line on **02072378456** and our support team can help you to get this set up.

3. Managing Payments

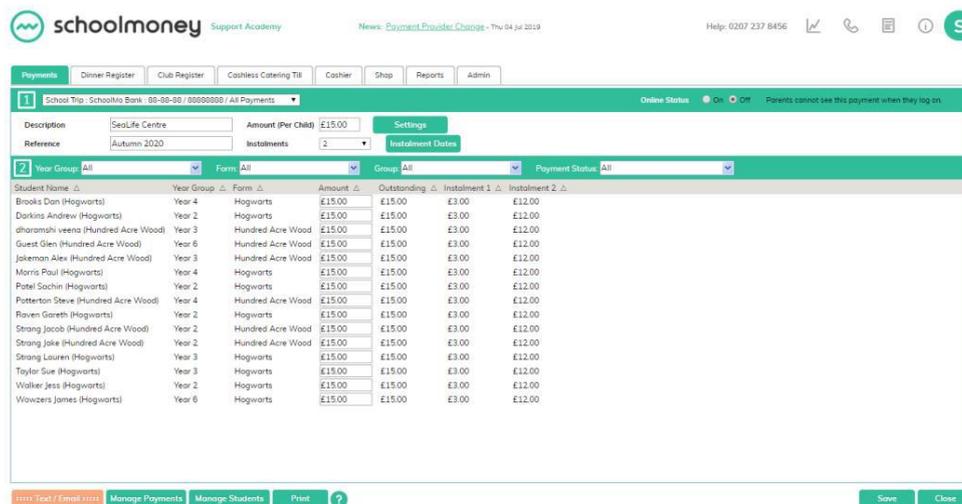
3.1 Contacting the Parents

Now that the payment has been set up, you will see that there are a number of features on the system that allow you to manage this payment. The first part of this involves contacting the parents to let them know they can go online and pay.

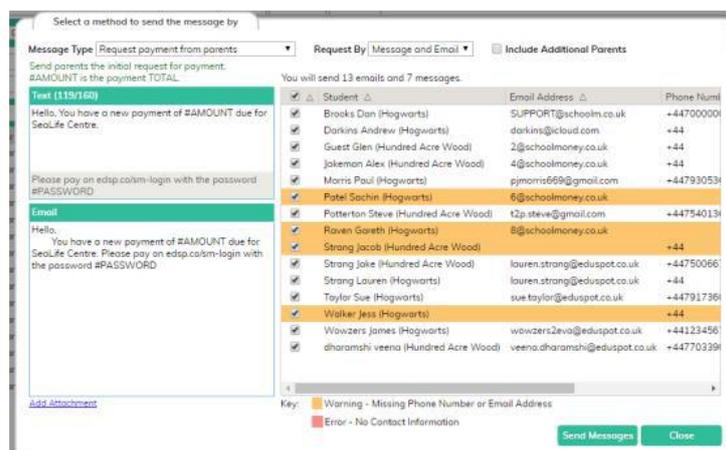
There are two ways you can do this. You can send it through the payment you have set up or you can send out a welcome message to all students.

Through the Payment

In the payment you want to send the message from, click on Text/Email in the bottom left-hand corner of the payment screen.



This will bring up a new window in the centre of the screen.



Request by: This allows you to choose whether you want to send a text, an email, or both to the parents.

Message Type: This allows you to switch between template messages.

Text/Email Sections: As these are template messages, the wording can be changed to add in or take away any information as needed. Please note that the #AMOUNT and #PASSWORD are mail merges; these will be automatically converted to the amount the child owes, and the password they need to log onto **SchoolMoney** with.

Student List: On the right, you will see your pupils listed with their mobile numbers and email addresses. You can untick anyone you do not want the message to go out to. They will be highlighted in orange if they are missing one set of details and red if they are missing both.

Please Note: There is a 160 character limit when sending the text message. If you go over this limit it will cut off your message.

When you are ready, press the Send Messages button. A confirmation box will appear; press OK to continue.

A brief graphic will appear, it will then pop up with ‘messages sent successfully.’

Welcome Message

Go to the Admin tab and select the Students icon. This will bring up a list of all students. To the left of their names, you will see tick boxes.

The screenshot shows the SchoolMoney Admin interface. At the top, there's a navigation bar with tabs for Payments, Dinner Register, Club Register, Cashless Catering Till, Cashier, Shop, Reports, and Admin (which is selected). Below the navigation bar, there are search filters for Student Name, Group, Form, Admission Status, and Year Group. The main area displays a table of students with columns for Student Name, Year Group, Form, Mobile Number, and Email Address. Each row has a tick box on the left. At the bottom, there's an 'Action' dropdown set to 'Please Select', an 'Export' button, and 'Add', 'Edit', and 'Back' buttons.

Student	Year Group	Form	Mobile Number	Email Address
<input type="checkbox"/> Hook Lydia	Year 4	Narmia		3@schoolmoney.co.uk
<input type="checkbox"/> Patel Raj	Year 3	OZ		3@schoolmoney.co.uk
<input type="checkbox"/> Patel Sachin	Year 2	Hogwarts		6@schoolmoney.co.uk
<input type="checkbox"/> Raven Gareth	Year 2	Hogwarts		6@schoolmoney.co.uk
<input type="checkbox"/> Taylor Jessica	Year 2	Narmia		jessica@schoolmoney.co.uk
<input type="checkbox"/> Chouhan Tejash	Year 4	Tortuga	+44	support@schoolmoney.co.uk
<input type="checkbox"/> Darkins Andrew	Year 2	Hogwarts	+44	darkins@icloud.com
<input type="checkbox"/> Darkins Luke	Year 6	Tortuga	+44	
<input type="checkbox"/> Dunn Daniel	Year 4	OZ	+44	daniel.dunn@eduspot.co.uk
<input type="checkbox"/> Guest Glen	Year 6	Hundred Acre Wood	+44	2@schoolmoney.co.uk
<input type="checkbox"/> Harry Prince	Year 6	Tortuga	+44	
<input type="checkbox"/> Holmes Leigh	Year 6	Pride Rock	+44	leigh@schoolmoney.co.uk
<input type="checkbox"/> Howard Russel	Visitor	Visitor	+44	russe143@blablah.com
<input type="checkbox"/> Jokeman Alex	Year 3	Hundred Acre Wood	+44	4@schoolmoney.co.uk
<input type="checkbox"/> McFly Marty	Year 4	OZ	+44	bttf55@hillvalley.com
<input type="checkbox"/> Naik Anna	Year 6	Pride Rock	+44	aarti.naik-kotadia@eduspot.co.uk
<input type="checkbox"/> Simpson Bart	Year 3	Narmia	+44	
<input type="checkbox"/> Strang Jacob	Year 2	Hundred Acre Wood	+44	
<input type="checkbox"/> Strang Noah	Year 2	Pride Rock	+44	
<input type="checkbox"/> Strang Zac	Year 3	OZ	+44	lauren@schoolmoney.co.uk
<input type="checkbox"/> Walker Jess	Year 2	Hogwarts	+44	

Tick the boxes next to the students you want to send the messages to (you can select all using the blue link at the top if you want to send it out to everyone).

In the bottom left-hand corner, click on the drop-down menu and choose the option Send Password Message.

Send Welcome Message

Request By: Text Message and Email Include Additional Parents

You will send 1 emails and 1 text messages.

Text (142/160)
Hello, Welcome to SchoolMoney, our new online payment system. Please go to edsp.co/sm-login to login for #FIRSTNAME using the password #PASSWORD

Email
Hello, Welcome to SchoolMoney, our new online payment system. Please go to edsp.co/sm-login to login for #FIRSTNAME using the password #PASSWORD

<input checked="" type="checkbox"/>	Student	Email Address	Phone Number	Parent
<input checked="" type="checkbox"/>	Strang Lauren (Hogwarts)	lauren.strang@eduspot.co.uk	+44	Debra Str

Key: ■ Warning - Missing Phone Number or Email Address
■ Error - No Contact Information

[Send Reminders](#) [Cancel](#)

A box will pop up in the middle of the screen. You can change the first drop down menu to send messages by text, email or both. The second drop-down menu will say Welcome Message. #FIRSTNAME and #PASSWORD will be replaced by the child's first name and unique password.

When you are ready, just hit Send Reminders.

3.2 Parental Consent

If you have selected the Parental Consent box when you initially set up your payment, along the bottom of the payment there is a button that is labelled View Consent List. Select this and a box will pop up.

Parental Consent List

(1 - 9 / 9)

Consent	Student	Year Group	Form	Phone Number	Paid
<input type="checkbox"/>	Jakeman Alex (Year 3)	Year 3	Hundred Acre Wood		Unp
<input checked="" type="checkbox"/>	Ladhia Hari (Year 2)	Year 2	Namia	+447000000000	Unp
<input type="checkbox"/>	Patel Raj (Year 3)	Year 3	OZ		Unp
<input type="checkbox"/>	Patel Sachin (Year 2)	Year 2	Hogwarts		Unp
<input type="checkbox"/>	Raven Gareth (Year 2)	Year 2	Hogwarts		Unp
<input type="checkbox"/>	Simpson Bart (Year 3)	Year 3	Namia	+44	Unp
<input checked="" type="checkbox"/>	Strang Lauren (Year 3)	Year 3	Hogwarts	+44	Unp
<input type="checkbox"/>	Strang Zac (Year 3)	Year 3	OZ	+44	Unp
<input type="checkbox"/>	Taylor Jessica (Year 2)	Year 2	Namia		Unp

[Print](#) [Export](#) Parental Consent Total: 2 [Close](#)

Here you will be able to see:

- The consent box
- Student names
- Year and form groups
- Priority one phone numbers
- Paid status
- Date the consent was received

If a parent gives their consent online when paying, this box will be automatically ticked for you. You can also select the tick box manually if the parents wish to pay in school. Just click on the box next to the child's name.

You have the option to print or export this information if you need to take it on your trip with you. When printing, you will have the option to include medical details if you wish.

3.3 Cashier

Marking on Money

If a parent brings money into the school (cash/cheque/card), you can mark this onto the **SchoolMoney** system through the Cashier tab. Click on the Cashier tab and it will bring up a screen that is split into two.

The screenshot shows the SchoolMoney web application interface. At the top, there is a navigation bar with the SchoolMoney logo, 'Support Academy', a news item 'Payment Provider Change - Thu 04 Jul 2019', and a help number '0207 237 8456'. Below the navigation bar is a menu with tabs: Payments, Dinner Register, Club Register, Cashless Catering Till, Cashier (highlighted in green), Shop, Reports, and Admin. The main content area is titled 'Cashier' and contains a search box 'Type Student Here...' and a 'Show Unpaid/Uncollected Items' dropdown. Below this is a table with columns: Description, Type, Reference, Due Date, and Outstanding. To the right of the table is a 'Manage payments' section. At the bottom left, there is a checkbox for 'Multiple Payments'.

In the top left-hand corner, there is a drop-down box that asks you to Type Student Here. Type in the name of the student whose payments you would like to input. This will automatically bring up all of the child's Unpaid/Uncollected Items on the left-hand side of the screen.

The screenshot shows the SchoolMoney Cashier interface for a student named Lauren (Hogwarts). The top navigation bar includes 'Payments', 'Dinner Register', 'Club Register', 'Cashless Catering Till', 'Cashier' (active), 'Shop', 'Reports', and 'Admin'. The 'Total outstanding' is £15.00. The 'Parent in Credit by' is £2.40 and 'Dinner Money' is £2.40.

The main area is divided into two sections:

- Unpaid/Uncollected Items:** A table listing items with columns for Description, Type, Reference, Due Date, and Outstanding.

Description	Type	Reference	Due Date	Outstanding
School Lunches	Dinner Money	W/C 16 Sep 2019	Thu 19 Sep 2019	£0.00
School Lunches	Dinner Money	W/C 16 Sep 2019	Thu 19 Sep 2019	£0.00
School Lunches	Dinner Money	W/C 09 Sep 2019	Fri 13 Sep 2019	£0.00
Breakfast Club	Club / Extended Services	W/C 02 Sep 2019	Thu 05 Sep 2019	£0.00
Cookery Club	Club / Extended Services	W/C 02 Sep 2019	Thu 05 Sep 2019	£0.00
Book Bag	Shop Item (Uncollected)		Mon 12 Aug 2019	
Total Outstanding				£15.00
- Manage payments:** A panel showing instalment details.

Instalment Amount	Due Date	Status	Action	Due	
1	£3.00	23 Aug 2020	Unpaid	Select	£3.00
2	£12.00	30 Aug 2020	Unpaid	Select	£12.00
Total Outstanding				£15.00	
Child has a total credit of				£2.40	

If you would like to see the child's Paid Items or All Items, click the drop-down box in the middle of the screen. Choose the payment you would like to pay off from the list on the left-hand side of the screen. This will bring up the unpaid instalments on the right-hand side.

To mark the money, select the first Unpaid drop-down menu. It will give you various options:

Cheque: If a parent brings in a cheque payment.

Cash: If a parent brings in a cash payment.

Vouchers: If you accept childcare vouchers (from the government or the parent's workplace).

Bank Transfer: This would involve you giving the parent your bank account details and waiting for the money to appear on your bank statement. Once it does, you can mark it on **SchoolMoney** using this option.

Card: If the parent doesn't have access to the internet at home or simply wants to pay within the school, you can accept card payments with no need to use extra equipment.

Write Off: If the parent is not going to pay the whole amount, you can write off some or all of the payment.

Pay By Credit: If the child has credit on the system, you can use this credit to pay off outstanding payments.

Once the payment method has been selected, another box will appear.

Instalment	Amount	Due Date	Status	Action	Due
1	£10.00	30 Mar 2018	Unpaid	Select	£10.00
2	£25.00	20 Apr 2018	Unpaid	Select	£25.00

Parental Consent	<input type="checkbox"/>
Total Outstanding	£

Payment Amount: You can pay off the whole amount or make a partial payment.

Email Receipt: This will send a receipt directly to the parent’s email. Uncheck this if you do not want this to happen.

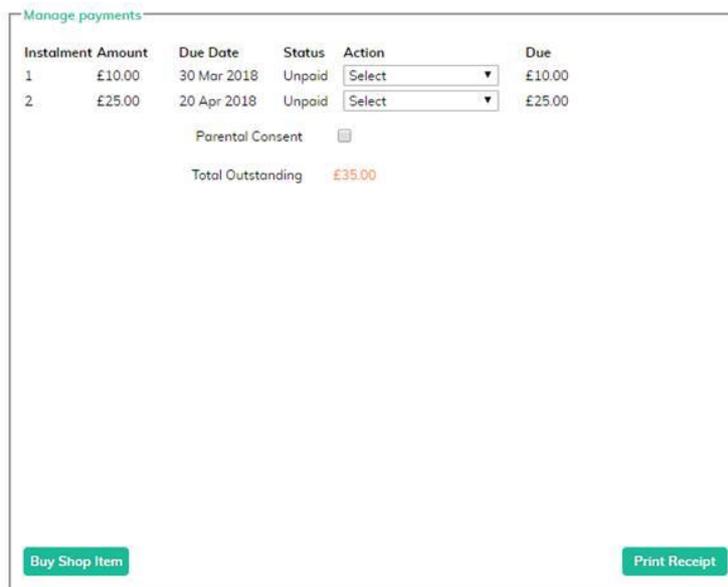
Payment Date: This is the date that the parent brought in the money. If the parent paid on a different day than the one you are on, we suggest you change it to reflect the correct information.

Payment Notes/Details: This section is a space to input any information regarding the payment, such as the cheque number. In write-offs, it is the reason you are writing off the payment.

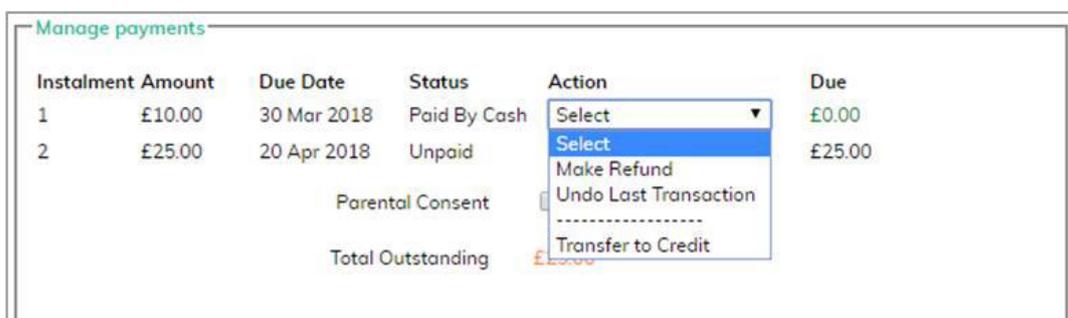
Top left – Cash
 Bottom left – Cheque, bank transfer and vouchers
 Right – Write offs

Please ensure that all these fields are correct and then press OK. Once you press OK, the status will automatically turn to paid and all records for that child will have been updated.

If the parent would like a hard copy of the receipt, then you can select the box in the bottom right-hand corner to print it out.

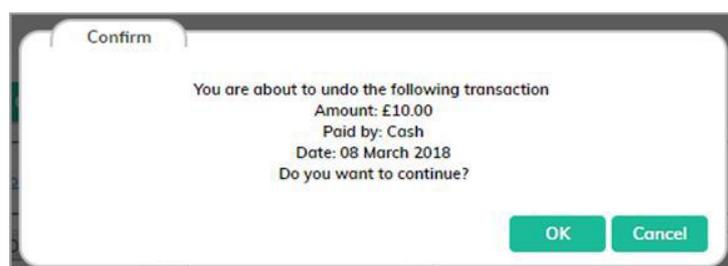


You can make changes once the transactions have been completed by clicking on the Paid drop-down box. New options will appear.

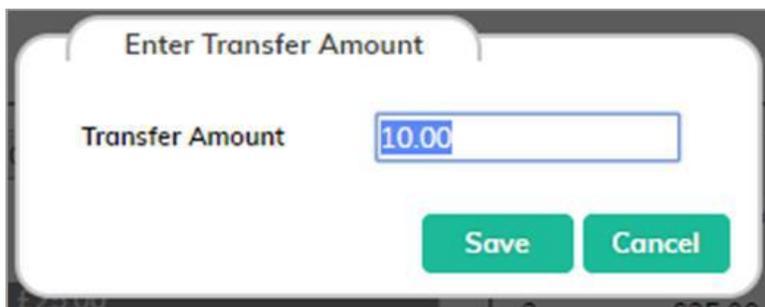


For Refunds see page 21

Undo Last Transaction: If you have made a mistake with a payment, you can undo the last transaction made. Select the payment you wish to undo and click Undo Last Transaction from the options in the drop-down menu. This will then bring up a box with all of the information of the transaction in it. Press OK and the transaction will be reversed; any trace of the payment will have been removed from the system. This option is only available for offline transactions.



Transfer To Credit: This enables you to move the money to the credit pot for use on another payment. Click Transfer To Credit and it will open a window where you can specify how much needs to be transferred. Type in the amount and click Save. This amount has been removed from the payment and is in credit.



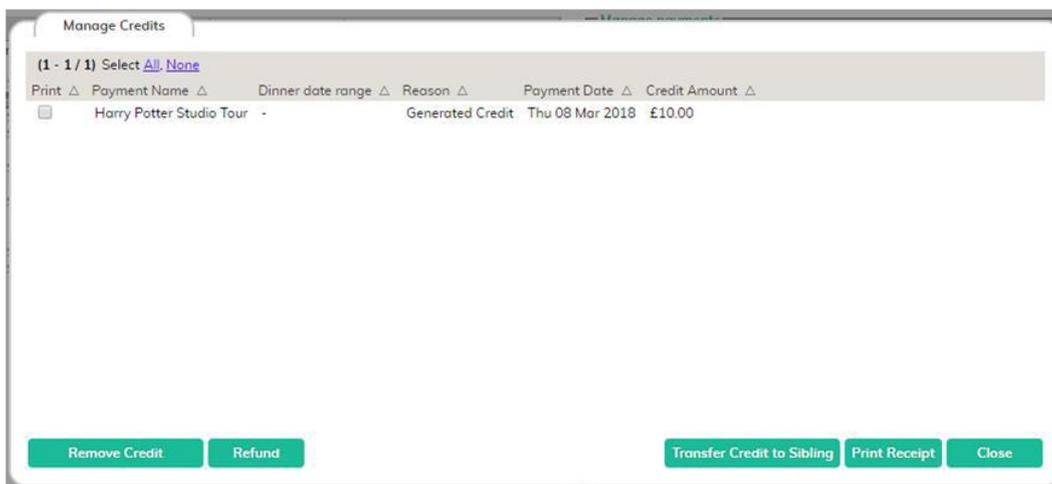
Other Information

If you would like to pay for a shop item from within the school, you can do so in Cashier by selecting the Buy Shop Item button (for more information regarding this, please see our Shop User Guide).

In the top right-hand corner of the screen, you will be able to see Total outstanding. This shows you the amalgamated amount of everything that the child owes. Underneath the total outstanding there are the Parent in Credit by and Dinner Money options.



The Parent in Credit by shows you how much credit that child has overall whether it is from dinner money, clubs or trips. To see a breakdown of the credit, select the amount in green. This will open up a new window.



This box allows you to manage your credits. To print a receipt for any of these credits, tick the box next to the amount and select Print Receipt.

For Refunds see page 21

If a parent has paid on the wrong child, or if one of the children is leaving school and has credit, you are able to transfer their credit to a sibling.

- Click on the credit you would like to transfer
- Click on the Transfer Credit to Sibling button
- Choose the sibling you want the money to go to and amend the amount if you wish
- Press OK

This money will have gone into the child's credit pot. If you need to allocate it to a specific payment, find the child in Cashier, then select the payment you would like to pay off from the list on the left-hand side of the screen.

- Click on the Unpaid drop-down box
- Select the option Pay by Credit
- Type in the amount of credit you would like to use
- Press OK and the credit will have been allocated

Date	Type	Cost	Paid	Balance
Mon 12 Mar 2018	Payment - Cash		£13.00	-£2.20
Fri 09 Mar 2018	Paid Meal	£2.60		-£15.20
Thu 08 Mar 2018	Paid Meal	£2.60		-£12.60
Wed 07 Mar 2018	Paid Meal	£2.60		-£10.00
Tue 06 Mar 2018	Paid Meal	£2.60		-£7.40
Mon 05 Mar 2018	Paid Meal	£2.60		-£4.80
Mon 05 Feb 2018	Paid Meal	£2.20		-£2.20
Mon 06 Nov 2017	Free Meal	£0.00		£0.00
Thu 26 Oct 2017	Free Meal	£0.00		£0.00
Fri 13 Oct 2017	Free Meal	£0.00		£0.00
Thu 12 Oct 2017	Free Meal	£0.00		£0.00
Wed 11 Oct 2017	Free Meal	£0.00		£0.00
Tue 10 Oct 2017	Free Meal	£0.00		£0.00
Mon 09 Oct 2017	Free Meal	£0.00		£0.00
Tue 03 Oct 2017	Free Meal	£0.00		£0.00
Mon 02 Oct 2017	Free Meal	£0.00		£0.00
Fri 29 Sep 2017	Free Meal	£0.00		£0.00
Tue 19 Sep 2017	Free Meal	£0.00		£0.00
Mon 18 Sep 2017	Free Meal	£0.00		£0.00
Totals:		£15.20	£13.00	-£2.20

The final part of the cashier page is the Student Dinner Breakdown. This gives you a brief overview of which dinners have been taken and paid for.

Multiple Payments

If you want to pay for more than one payment at a time or more than one sibling at a time you can use our multiple payments feature. In the bottom left-hand corner of Cashier, there is a tick box labelled Multiple Payments. Tick this and it will take you to another screen.

schoolmoney Support Academy News: Payment Provider Change - Thu 04 Jul 2019 Help: 0207 237 8456

Payments Dinner Register Club Register Cashless Catering Till **Cashier** Shop Reports Admin Total outstanding: **£15.00**

Cashier
Strang Lauren (Hogwarts) Parent in Credit by: £2.40 Dinner Money: £2.40

Payments (1 - 4 / 4)

Select	Name	Description	Reference	Type	Instalment	Total	Due	Due Date	Status
<input type="checkbox"/>	Strang Lauren (Hogwarts)	Dinner Top Up		Dinner Money	Credit	£0.00	£10.00		
<input type="checkbox"/>	Strang Lauren (Hogwarts)	Club Top Up		Club / Extended Services	Credit	£0.00	£10.00		
<input type="checkbox"/>	Strang Lauren (Hogwarts)	SeaLife Centre	Autumn 2020	School Trip	1 of 2	£3.00	£3.00	Sun 23 Aug 2020	Unpaid
<input type="checkbox"/>	Strang Lauren (Hogwarts)	SeaLife Centre	Autumn 2020	School Trip	2 of 2	£12.00	£12.00	Sun 30 Aug 2020	Unpaid

Multiple Payments Include Siblings Total To Pay: **£0.00** Pay By: Select

This will list all of the payments, with the tick boxes next to the child’s name. Tick the boxes of the payments you would like to pay off. This will add each payment cost to the total in the bottom right-hand corner. If you need to amend any of the payment amounts, you can do so in the boxes under the heading Due.

schoolmoney Support Academy News: Payment Provider Change - Thu 04 Jul 2019 Help: 0207 237 8456

Payments Dinner Register Club Register Cashless Catering Till **Cashier** Shop Reports Admin Total outstanding: **£15.00**

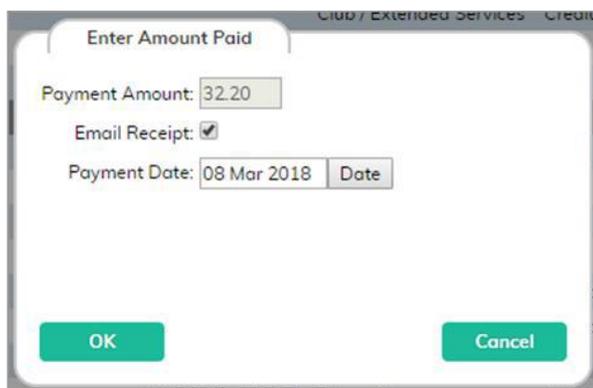
Cashier
Strang Lauren (Hogwarts) Siblings Parent in Credit by: £2.40 Dinner Money: £2.40

Payments (1 - 13 / 13)

Select	Name	Description	Reference	Type	Instalment	Total	Due	Due Date	Status
<input type="checkbox"/>	Strang Jake (Hundred Acre Wood)	Dinner Top Up		Dinner Money	Credit	£0.00	£10.00		
<input type="checkbox"/>	Strang Jake (Hundred Acre Wood)	Club Top Up		Club / Extended Services	Credit	£0.00	£10.00		
<input type="checkbox"/>	Strang Jake (Hundred Acre Wood)	Alton towers trip with coach payment	Alton towers trip with coach payment	School Trip	1 of 1	£9.45	£9.45	Wed 24 Apr 2019	Unpaid
<input type="checkbox"/>	Strang Jake (Hundred Acre Wood)	Alton towers trip - own travel arrangements	Alton towers trip - own travel arrangement	School Trip	1 of 1	£5.00	£5.00	Wed 24 Apr 2019	Unpaid
<input type="checkbox"/>	Strang Jake (Hundred Acre Wood)	Eden project trip	Summer 2019	School Fees	1 of 3	£10.00	£10.00	Mon 13 May 2019	Unpaid
<input type="checkbox"/>	Strang Jake (Hundred Acre Wood)	Eden project trip	Summer 2019	School Fees	2 of 3	£10.00	£10.00	Mon 20 May 2019	Unpaid
<input type="checkbox"/>	Strang Jake (Hundred Acre Wood)	Eden project trip	Summer 2019	School Fees	3 of 3	£10.00	£10.00	Mon 27 May 2019	Unpaid
<input type="checkbox"/>	Strang Jake (Hundred Acre Wood)	SeaLife Centre	Autumn 2020	School Trip	1 of 2	£3.00	£3.00	Sun 23 Aug 2020	Unpaid
<input type="checkbox"/>	Strang Jake (Hundred Acre Wood)	SeaLife Centre	Autumn 2020	School Trip	2 of 2	£12.00	£12.00	Sun 30 Aug 2020	Unpaid
<input type="checkbox"/>	Strang Lauren (Hogwarts)	Dinner Top Up		Dinner Money	Credit	£0.00	£10.00		
<input type="checkbox"/>	Strang Lauren (Hogwarts)	Club Top Up		Club / Extended Services	Credit	£0.00	£10.00		
<input type="checkbox"/>	Strang Lauren (Hogwarts)	SeaLife Centre	Autumn 2020	School Trip	1 of 2	£3.00	£3.00	Sun 23 Aug 2020	Unpaid
<input type="checkbox"/>	Strang Lauren (Hogwarts)	SeaLife Centre	Autumn 2020	School Trip	2 of 2	£12.00	£12.00	Sun 30 Aug 2020	Unpaid

Multiple Payments Include Siblings Total To Pay: **£0.00** Pay By: Select

You also have the option of including siblings in this list, making payments by card and cheque much easier for parents. Once you have added everything you need to the total, you can select your payment method using the drop-down menu in the bottom right-hand corner.



This will then pop up with the standard payment box.

3.4 Refunds

You can process refunds on the system if parents need their money back. If they have paid by cash/cheque, you will need to give them cash/cheque back. If a parent pays by credit or debit card, you will be able to make a refund straight back onto their card.

When you are trying to do an online refund, you may get an error message telling you that there are not enough funds in the holding account to process the refund. This means that not enough parents have paid money into that payment type this week (Monday-Sunday). As we don't have access to your bank accounts, the refund must come out of the money that is paid to you on a weekly basis. If you do get this error, you will need to either wait until your parents have paid enough money for you to refund it online, or refund it by cash/cheque. You must wait 48 hours after the initial payment to process an online refund.

Please Note: Refunds cannot be undone once they have been processed.

From the Payment (Trips, Music Lessons, Etc)

- Click on the Cashier tab and find the child that needs the refund

- Change the filter from Unpaid/Uncollected Items to Paid Items
- Click on the payment you would like to refund and the Manage Payments box appears on the right-hand side.
- Select the instalment you would like to refund and, in the drop-down menu, you will have the option to make a refund.

- Click 'Make Refund'

Method: Cash, cheque or online (back to their debit/credit card)

Amount: How much you want to refund

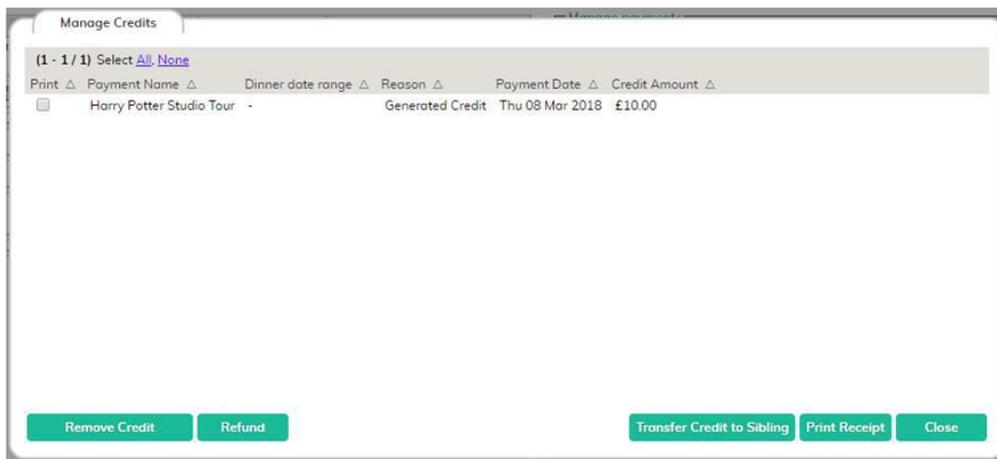
Details: A reason for the refund.

- Click on Refund and it will start to process
- A pop up will appear telling you that the refund has been completed

The money will go back onto the parent's card if it is an online refund, or you will need to give them back cash/cheque if they have paid in the school.

From the Credit Pot

- Find the child in the Cashier
- Click on Parent in Credit by, in the top right-hand corner of the screen and the Manage Credits window will open



- Select the amount you would like to refund by clicking on it, this will highlight the row in grey
- Click on Refund and another pop up will appear

The screenshot shows a 'Refund Credit' pop-up form. It includes a 'Refund Method' dropdown menu set to 'Cash Refund', an 'Amount' field with '£10.00', a 'Details' text input field, and a 'Paid By' field with the text 'Primary Contact (lauren@schoolmoney.co.uk)'. At the bottom right, there are two buttons: 'Refund' and 'Cancel'.

- Input any relevant details as to why the refund is being made and then click the Refund button
- It will take a few moments to process. Once it is completed, you can give the cash/cheque back to the parent or wait for the money to be processed back into their account.

For Dinners and Clubs

- Find the child in the Cashier
- Select the payment you want to refund from the left-hand side
- The Manage Payments box will appear on the right-hand side. Select the drop-down box and choose Make Refund

The image shows two side-by-side screenshots of the 'Refund Payment' form. The left form is titled 'Refund Payment' and has the instruction 'Select the dinners that you wish to refund. This will also remove the dinner from the register.' It features checkboxes for days of the week: Mon, Tue, Wed, Thu, and Fri, all of which are currently unchecked. Below the checkboxes, it shows 'Total refund amount: £0.00', 'Method: Cash Refund' (selected in a dropdown), a 'Details' text box, and 'Paid By: Primary Contact (lauren@schoolmoney.co.uk)'. At the bottom, there are two buttons: 'Refund' (orange) and 'Close' (green). The right form is also titled 'Refund Payment' but has the instruction 'Select the club days that you wish to refund. This will also remove the session from the register.' It has the same checkboxes for days of the week, all unchecked. It also shows 'Total refund amount: £0.00', 'Method: Cash Refund', a 'Details' text box, and 'Paid By: Primary Contact (lauren@schoolmoney.co.uk)'. It has the same 'Refund' and 'Close' buttons at the bottom.

- Tick the days of the week you would like to refund the money for. This will refund the money and remove the marks from the register

The image shows two side-by-side screenshots of the 'Refund Payment' form, similar to the previous ones but with some changes. The left form is titled 'Refund Payment' and has the instruction 'Select the dinners that you wish to refund. This will also remove the dinner from the register.' The checkboxes for days of the week are: Mon (unchecked), Tue (unchecked), Wed (unchecked), Thu (checked), and Fri (checked). Below the checkboxes, it shows 'Total refund amount: £5.20', 'Method: Cash Refund', a 'Details' text box, and 'Paid By: Primary Contact (lauren@schoolmoney.co.uk)'. At the bottom, there are two buttons: 'Refund' (orange) and 'Close' (green). The right form is also titled 'Refund Payment' but has the instruction 'Select the club days that you wish to refund. This will also remove the session from the register.' The checkboxes for days of the week are: Mon (unchecked), Tue (unchecked), Wed (unchecked), Thu (checked), and Fri (checked). It also shows 'Total refund amount: £4.00', 'Method: Cash Refund', a 'Details' text box, and 'Paid By: Primary Contact (lauren@schoolmoney.co.uk)'. It has the same 'Refund' and 'Close' buttons at the bottom.

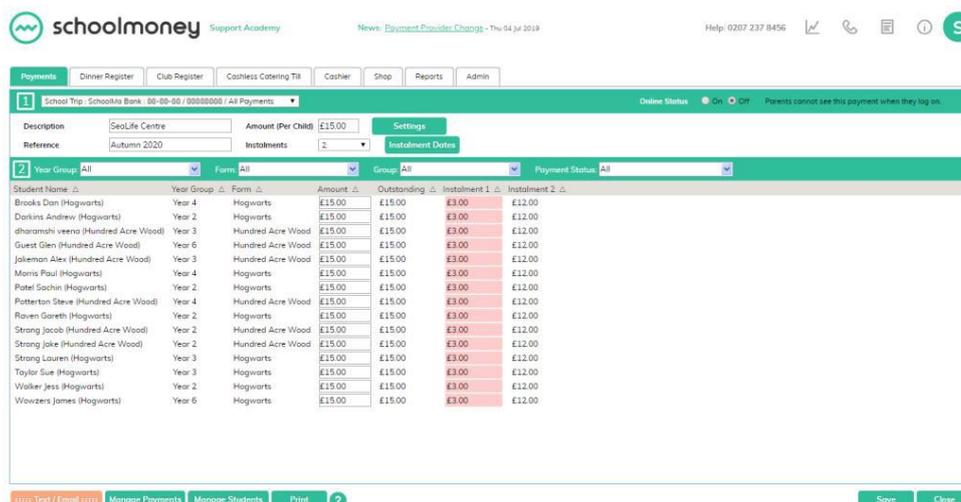
- Choose your method of refund and write in any details you need
- Select Refund when you are ready.

4. Chasing Payments

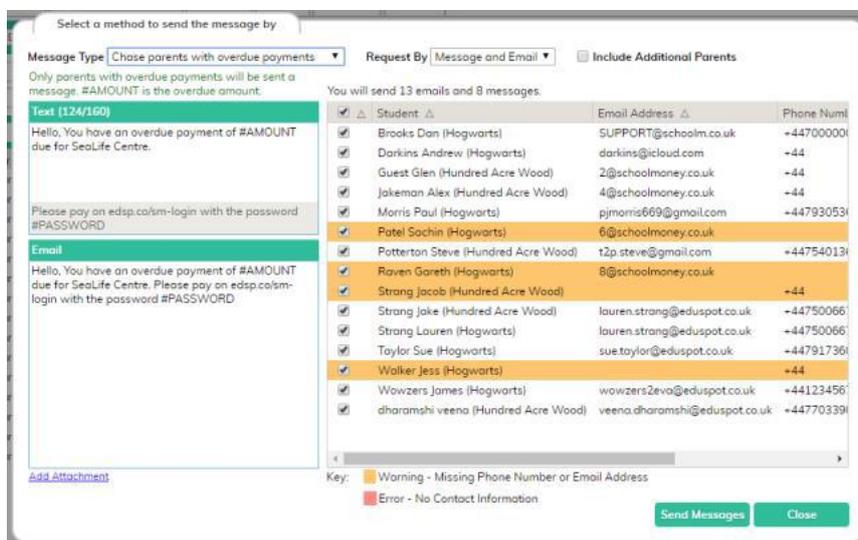
If the due date on the payment passes and some of the parents have not paid, they will be classed as overdue. Overdue payments can be chased via text/email on **SchoolMoney**.

You can chase outstanding amounts directly from the payments as outlined below or you can do it from our Money Overdue, Dinner Arrears and Club Arrears reports. **If you want information about how to chase through reports, please see our Reports guide.**

To start, find the payment in the Payments tab and double-click into it. If any of the students have overdue payments, they will be highlighted in pink.



To send out the chase text, you need to select the Text/Email Parents button. When the box opens, choose the Chase Parents With Overdue Payments option as the message type.



You can send these via text, email or both. Remember that you can change the wording of the text if you need to.

When you are ready, select Send messages and they will be sent out to the parents. You can also send these messages from the main Payments tab:

- Click on the payment you want to send the messages from
- In the bottom left-hand corner, select the drop-down menu
- Choose the Send Parents Messages option
- Amend the message as you need
- Select Send Messages

The screenshot shows the SchoolMoney interface with a 'Send Messages' dialog box open. The dialog has a title 'Select a method to send the message by.' and a 'Message Type' dropdown set to 'Choose parents with overdue payments'. Below this, it states 'Only parents with overdue payments will be sent a message. #AMOUNT is the overdue amount.' The 'Request By' dropdown is set to 'Message and Email', and there is an 'Include Additional Parents' checkbox. A message preview is shown for both 'Text' and 'Email' options. The 'Text' preview says: 'Hello, You have an overdue payment of #AMOUNT due for SeaLife Centre.' The 'Email' preview says: 'Hello, You have an overdue payment of #AMOUNT due for SeaLife Centre. Please pay on edsp.co/sm-login with the password #PASSWORD'. A table of 13 students is displayed with columns for 'Student', 'Email Address', and 'Phone Numl'. The table includes names like 'Brooks Dan (Hogwarts)', 'Darkins Andrew (Hogwarts)', etc. A 'Send Messages' button is at the bottom right of the dialog. A key indicates 'Warning - Missing Phone Number or Email Address' and 'Error - No Contact Information'.

Student	Email Address	Phone Numl
Brooks Dan (Hogwarts)	SUPPORT@schoolm.co.uk	+447000001
Darkins Andrew (Hogwarts)	darkins@icloud.com	+44
Guest Glen (Hundred Acre Wood)	2@schoolmoney.co.uk	+44
Jakeman Alex (Hundred Acre Wood)	4@schoolmoney.co.uk	+44
Morris Paul (Hogwarts)	pjmorris669@gmail.com	+447930531
Patel Sachin (Hogwarts)	6@schoolmoney.co.uk	
Potterton Steve (Hundred Acre Wood)	t2a.steve@gmail.com	+447540131
Raven Gareth (Hogwarts)	8@schoolmoney.co.uk	
Strang Jacob (Hundred Acre Wood)		+44
Strang Jake (Hundred Acre Wood)	lauren.strang@eduspot.co.uk	+44750066
Strang Lauren (Hogwarts)	lauren.strang@eduspot.co.uk	+44750066
Taylor Sue (Hogwarts)	sue.taylor@eduspot.co.uk	+44791736
Walker Jess (Hogwarts)		+44
Wowzers James (Hogwarts)	wowzers2eva@eduspot.co.uk	+44123456
dharamshi veena (Hundred Acre Wood)	veena.dharamshi@eduspot.co.uk	+447703391

5. How to Delete and Archive Payments

On the main page of **SchoolMoney**, you have the ability to delete payments if something has been created by mistake or is no longer needed. You can also archive payments if they have been paid off and you no longer want to see them on the main page.

5.1 Deleting Payments

- Click once on the required payment so that it is highlighted in grey
- Select the drop-down menu in the bottom left-hand corner
- Select Delete from the options

The screenshot shows the SchoolMoney interface with the 'Payments List' section. A table lists various payments with columns for Status, Description, Reference, Type, Due Date, Students, Total Outstanding, Total Amount, and Last Message Date. One payment, 'Overseas Trip', is highlighted in grey. A context menu is open over this payment, showing options: 'Please Select', 'Set Online / Offline', 'Send Parents Message', 'Archive / Unarchive', 'Copy Payment', and 'Delete'. The 'Delete' option is selected. Below the table, there is an 'Action:' dropdown menu with 'Please Select' chosen, and an 'Archive All' button. The interface also includes navigation tabs at the top (Payments, Dinner Register, Club Register, etc.) and a search bar.

Status	Description	Reference	Type	Due Date	Students	Total Outstanding	Total Amount	Last Message Date
Offline	IOW	IOW	School Trip	Thu 12 Sep 2019	16	£1600.00	£1600.00	Not Contacted
Offline	ScooLife Centre	Autumn 2020	School Trip	Fri 30 Aug 2019	15	£225.00	£225.00	Not Contacted
Online	Zoo Trip - 16th May	Year 3 - Summer 19	School Trip	Mon 24 Jun 2019	5	£47.00	£67.00	Fri 24 May 2019
Offline	Snowdon Trip	Snowdon trip W/C 08 Jul 2019	School Trip	Thu 20 Jun 2019	11	£295.00	£315.00	Not Contacted
Online	Alton towers trip with coach payment	Alton towers trip with coach payment	School Trip	Wed 24 Apr 2019	35	£264.60	£305.40	Tue 07 May 2019
Online	Alton towers trip - own travel arrangements	Alton towers trip - own travel arrangement	School Trip	Wed 24 Apr 2019	35	£150.00	£175.00	Not Contacted
Online	Overseas Trip	Overseas Trip	School Trip	Tue 23 Apr 2019	4	£0.00	£48.00	Not Contacted

- Click OK on the confirmation box that appears
- The payment has now been deleted.

Please note: You can only delete a payment if parents have paid no money towards it.

Please note: You cannot delete club and dinner payments. If you want these payments to be deleted, you need to contact our support team.

5.2 Archiving Payments

- Click once on the required payment so that it is highlighted in grey
- Select the drop-down menu in the bottom left-hand corner of the screen
- Choose the Archive/Unarchive option

The screenshot shows the SchoolMoney interface with the 'Payments List' tab selected. The table below lists various payments with columns for Status, Description, Reference, Type, Due Date, Students, Total Outstanding, Total Amount, and Last Message Date. A context menu is open over the 'Overseas Trip' entry, showing options like 'Set Online / Offline', 'Send Parents Message', 'Archive / Unarchive', 'Copy Payment', and 'Delete'. The 'Archive All' button is also visible at the bottom of the screen.

Status	Description	Reference	Type	Due Date	Students	Total Outstanding	Total Amount	Last Message Date
Offline	IOW	IOW	School Trip	Thu 12 Sep 2019	16	£1600.00	£1600.00	Not Contacted
Offline	SeaLife Centre	Autumn 2020	School Trip	Fri 30 Aug 2019	15	£225.00	£225.00	Not Contacted
Online	Zoo Trip - 16th May	Year 3 - Summer 19	School Trip	Mon 24 Jun 2019	5	£47.00	£67.00	Fri 24 May 2019
Offline	Snowdon Trip	Snowdon trip W/C 08 Jul 2019	School Trip	Thu 20 Jun 2019	11	£295.00	£315.00	Not Contacted
Online	Alton towers trip with coach payment	Alton towers trip with coach payment	School Trip	Wed 24 Apr 2019	35	£264.60	£305.40	Tue 07 May 2019
Online	Alton towers trip - own travel arrangements	Alton towers trip - own travel arrangement	School Trip	Wed 24 Apr 2019	35	£150.00	£175.00	Not Contacted
Online	Overseas Trip	Overseas Trip	School Trip	Tue 23 Apr 2019	4	£0.00	£48.00	Not Contacted

- Click 'OK' on the confirmation box that appears
- The payment has now been archived

You can also Archive All; if you select this, it will automatically archive any payments on the main page that have been fully paid.

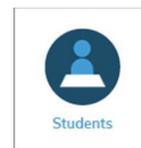
To view the payments that you have archived, tick the Show Archived Payments in the bottom left-hand corner of the screen; this will show every archived payment that you have on the system. You can unarchive these payments using the Archive/Unarchive option.

Please note: You can only archive payments that have a 0.00 outstanding balance.

6. Adding Visitors

If you have any visitors going on trips or taking dinners, you may want to add them onto the system.

- Select the Admin tab at the top of the screen
- Choose the Students icon
- When the student page appears, select the Add button in the bottom right-hand corner



Student	Year Group	Form	Mobile Number	Email Address
Hook Lydia	Year 4	Nornia		3@schoolmoney.co.uk
Patel Raj	Year 3	OZ		3@schoolmoney.co.uk
Patel Sachin	Year 2	Hogwarts		6@schoolmoney.co.uk
Paven Gareth	Year 2	Hogwarts		8@schoolmoney.co.uk
Taylor Jessica	Year 2	Nornia		jessica@schoolmoney.co.uk
Chouhan Tegash	Year 4	Tortuga	+44	support@schoolmoney.co.uk
Darkins Andrew	Year 2	Hogwarts	+44	darkins@clubud.com
Darkins Luke	Year 6	Tortuga	+44	
Dunn Daniel	Year 4	OZ	+44	daniel.dunn@eduspot.co.uk
Guest Glen	Year 6	Hundred Acre Wood	+44	2@schoolmoney.co.uk
Harry Prince	Year 6	Tortuga	+44	
Holmes Leigh	Year 6	Pride Rock	+44	leigh@schoolmoney.co.uk
Howard Russell	Visitor		+44	russell43@blablabla.com
Jakeman Alex	Year 3	Hundred Acre Wood	+44	4@schoolmoney.co.uk
McFly Marty	Year 4	OZ	+44	btff55@hillvalley.com
Nook Anna	Year 6	Pride Rock	+44	anna.nook-kobasia@eduspot.co.uk
Simpson Bart	Year 3	Nornia	+44	
Strang Jacob	Year 2	Hundred Acre Wood	+44	
Strang Noah	Year 2	Pride Rock	+44	
Strang Zac	Year 3	OZ	+44	lauren@schoolmoney.co.uk
Walker Jess	Year 2	Hogwarts	+44	

- This will open up a blank student record
- You will need to fill out the information in the following sections:
 - First Name
 - Surname
 - Mobile Number and/or Email Address
 - Year Group and Form Group need to be set as Visitor

Student Details

Forename: *

Surname: *

Gender: *

Year: *

Form: *

ADNO:

Admission Status:

Medical Information:

Parent Details

Parent Title:

Parent Forename: *

Parent Surname: *

Mobile:

Email:

Office Contact:

School Dinner

School Dinner Days: Mon Tue Wed Thu Fri

Free School Meals:

Costless Pin:

Dietary Information:

- Save when you are ready. The Visitor will now be available to add to any payments.

7. Updating SchoolMoney from your MIS

SchoolMoney is updated with information taken from your MIS. We automatically link with the systems SIMS and Integris.

7.1 Management Information System – SIMS

If you use the MIS SIMS, then we will set up an automatic link that connects to SchoolMoney and will run on a daily basis, when you switch on your computer.

This link will bring over:

- Student's name
- Priority 1 mobile
- Priority 1 email
- Admission Number
- Year Group
- Form Group
- Any FSM (Locally hosted schools only)
- Meal Patterns (Locally hosted schools only)
- Dietary Requirements (Locally hosted schools only)

You need to make sure all of the child's contact details are added to Section 5 (Family&Home) in SIMS. We can only bring priority 1 details across, so you need to make sure that:

- There is only one priority 1 entered into SIMS
- There are no contacts with a 0 priority
- Parental responsibility is ticked
- The phone number is marked as Mobile
- The email address is marked as Home

7.2 Other Management Information Systems – WONDE

If you do not use SIMS as your Management Information System, it is likely you have the Wonde link set up to import relevant information into **SchoolMoney**.

To update your system:

- Log in to Teachers2Parents
- Click on the Text Message Service icon
- Click on the Admin icon in the top right-hand corner
- Click on the Wonde tab
- Select the Import Student Details button in the bottom right-hand corner
- Import Completed

This link will bring over:

- Student's name
- Priority 1 mobile
- Priority 1 email
- Admission Number
- Year Group
- Form Group

As long as these details are correct, all of your information will pull across smoothly.

If you do not have the Wonde link set up but would like this to be implemented, please contact our support team and we can talk you through the setup.

7.3 Schools Not Using WONDE

If you do not use SIMS or you do not want/cannot have the Wonde link, then you will need to send us an updated CSV file when you want to roll over your students each year. The CSV will need to hold the following information in the given order:

Year Group

Admission Number

Forename

Surname

Mobile Number

Priority (must always be 1)

Priority Email

Form Group

Gender

If you get students joining throughout the year or you need to change mobile numbers/email addresses, this can all be done manually in the Admin section (See [Administration Guide](#)).

8. Contact Details

We hope this user guide has helped you to use the **SchoolMoney** system. If you have any questions or re-quire further assistance, please get in contact with us and we will be more than happy to help.

Telephone number: **02072378456**

Online: www.eduspot.co.uk/support

We look forward to hearing any ideas or feedback you have about **SchoolMoney**, so let us know what you think!

