

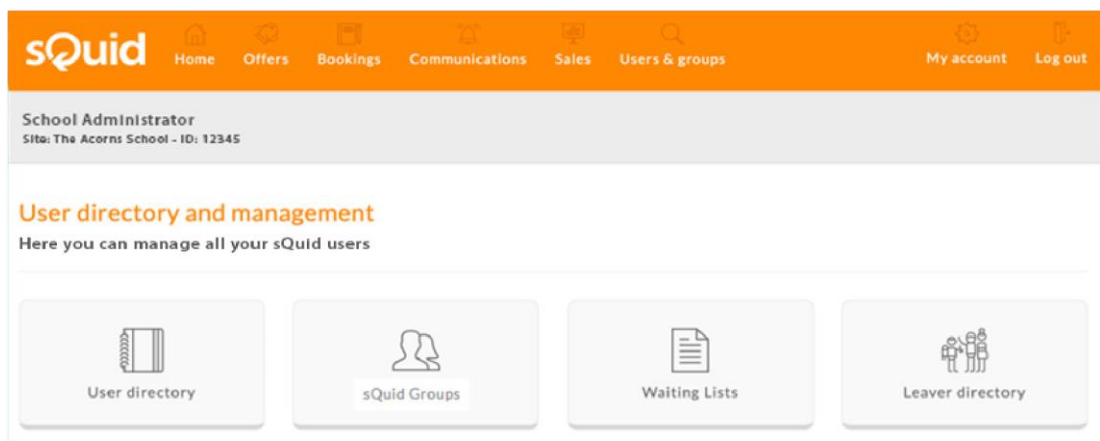
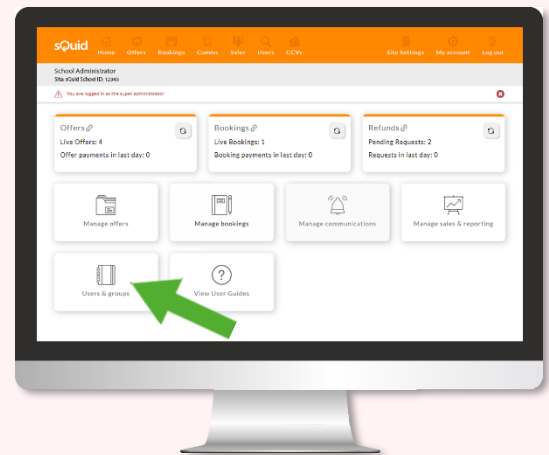
User Directory and Management

sQuad Trips & Offers User Guide

Home page: USERS & GROUPS

Select **User directory** to view all pupil and staff records, and to manage groups.

In this section you can **view and manage** your **users**, pre-populated sQuad **groups** (from your MIS) and custom groups **via sQuad Trips & Offers**. When you create an offer you can assign a particular group, or groups, to that offer.

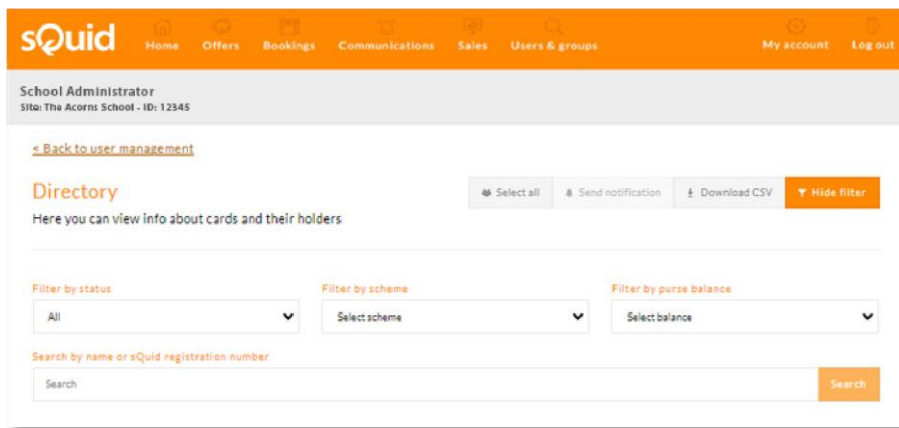


01 User directory

The **User directory** displays all account records for your school community (pupils and staff) as populated by your MIS.

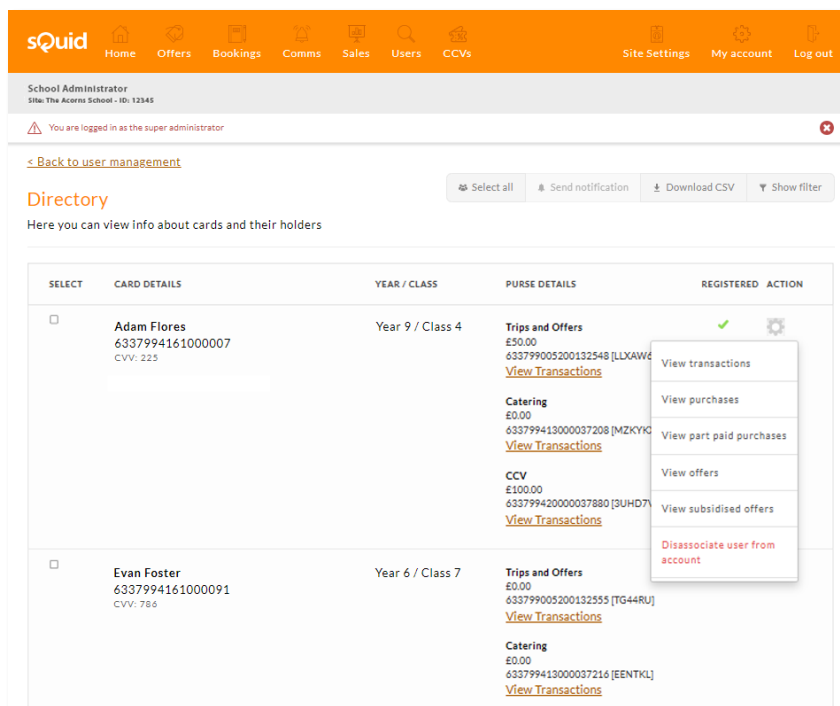
You can search for individual accounts by clicking **Show filter** and searching by a **user's name or sQuad registration number**.





The **User directory** lists accounts with the following details and options available (when there are multiple pages of information available there are page navigation options at the foot of the screen):

- **Card details** column shows a user's **sQuid registration number and CVV**
- The **Year/Class** column is populated from your **MIS**
- **Purse details** column shows a user's **balances, purse numbers and transactions** for **Trips & Offers, Catering or CCV**
- All sQuid accounts are **registered by default** and should have a **green tick** displayed in the registered column
- Click on the **action cog** for a user to view **transactions, purchases, part-paid purchases, available offers**, and to view any **offer subsidies** applied to the account.
- You can also **disassociate user from account** here.



01.1 Refunds

For information on how to issue a refund from the *User directory* tile, please refer to the **Refunds** section of the **sQuid Trips & Offers User Guide**.

01.2 On-site purchases

You can process an **on-site purchase** by searching for (using the filter) the relevant **user**, then from the **action cog** next to their **name**:

- **For an Offer:** select **View offers**, click **On-site purchase** from the **action cog** next to the relevant **offer**.
- **For a Booking:** select **View Purchases**, click **Show Booking Slots** (underneath), then **On-site purchase** from the **action cog** next to the relevant **booking slot**.

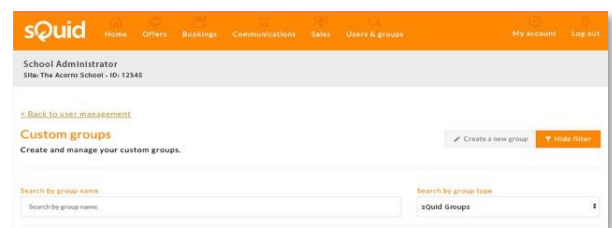
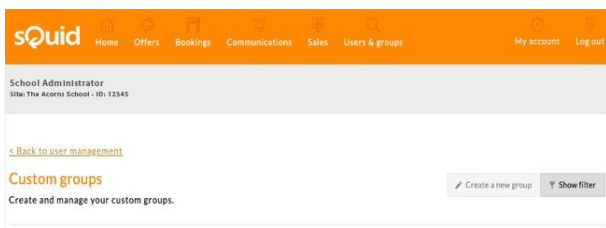
Then follow steps for **On-site purchases** in the **Offers** or **Bookings** section of the **sQuid Trips & Offers User Guide**.

02 Groups

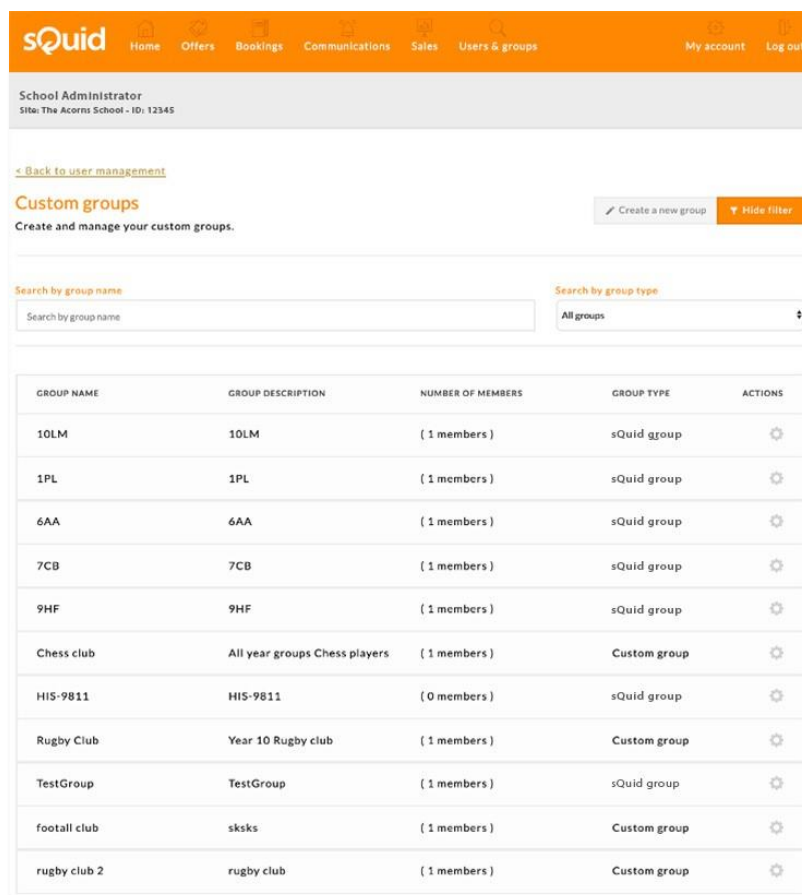
In **sQuid Groups** you can view **pre-populated groups** (from MIS) and also view **which pupil/staff members are part of the group**. You can also add, amend and delete **custom groups**.

**Please note pre-populated MIS sQuid group names cannot be amended in sQuid. The group name pulls through exactly as entered in the school's MIS.*

You can **search** for specific groups by clicking **Show filter** and searching by **group name**. You can further refine the search by narrowing the search parameters to search only **sQuid groups** or **custom groups**.



Groups are listed by **group name**, **group description**, **number of members** and **group type**: whether prepopulated by MIS (sQuid groups) or a custom group. By selecting the **action cog** next to a sQuid group you can **view the members** of the group.

A screenshot of the sQuid web application interface showing a list of groups. The top navigation bar and user information are the same as in the previous screenshots. The search filters are still applied. Below the search fields, there is a table with the following data:

GROUP NAME	GROUP DESCRIPTION	NUMBER OF MEMBERS	GROUP TYPE	ACTIONS
10LM	10LM	(1 members)	sQuid group	
1PL	1PL	(1 members)	sQuid group	
6AA	6AA	(1 members)	sQuid group	
7CB	7CB	(1 members)	sQuid group	
9HF	9HF	(1 members)	sQuid group	
Chess club	All year groups Chess players	(1 members)	Custom group	
HIS-9811	HIS-9811	(0 members)	sQuid group	
Rugby Club	Year 10 Rugby club	(1 members)	Custom group	
TestGroup	TestGroup	(1 members)	sQuid group	
football club	sksks	(1 members)	Custom group	
rugby club 2	rugby club	(1 members)	Custom group	

02.1 Create a new custom group

You can **create, manage or delete custom groups**

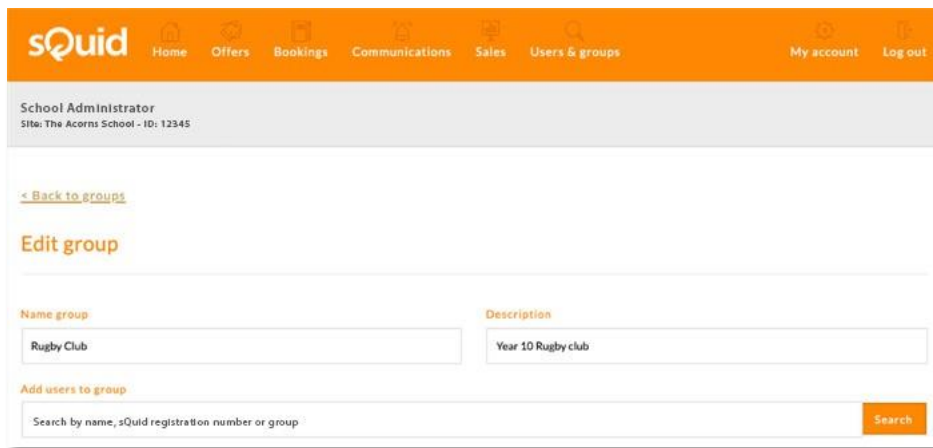
- Click the **Create a new group** icon
- Enter the name you wish to give the group in the **Name group** field, for instance 'Year 10 Rugby Club'
- Enter a group description in the **Description** field, for instance 'All Year 10 Rugby Players (Boys and Girls) 1st and 2nd 15s'
- You then search for individuals to add to the group by entering their name or sQuid registration number in the **Add users to group** field, and clicking **Search**
- When the searched-for user's name is displayed, **click on it to add** to the group
- When **all users** you wish to add to the group have been **added**, click **Save** and your new group will now be in your **list of groups**

Full Name	sQuid Registration Number	Action
Filter user by name or sQuid registration number		
There are currently no users in this group		

When a **custom group** is listed in your groups you can click the **action cog** next to the group to **manage** the group, **delete** the group or **export** the group details to a **CSV file**.

02.2 Manage a custom group

- Click the **action cog** next to the group and select **Manage group**
- **Search for and add new individuals to the group** by entering their **name or sQuid registration number** in the **Add users to group** field and clicking **Search**. When the individual's name is displayed, click to add to the group



- To remove members from the group, search in the grey action box for **Filter user by name or sQuid registration number**, and when listed, tick beside their name, select **Delete** and then **Save**



02.3 Delete a custom group

- Click the **action cog** next to the group and select **Delete group**
- You will be prompted to confirm deletion: either **Cancel** or **Confirm**

02.4 Export a custom group to a CSV file

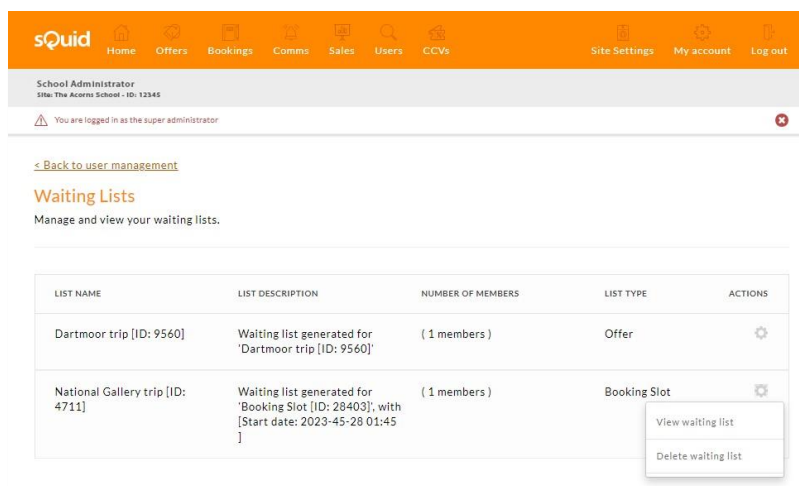
- Click the **action cog** next to the group and select **Export to CSV**
- The file will be downloaded to your desktop

03 Waiting lists

In **Waiting lists** you can view and manage waiting lists for **Offers** and **Bookings**.

**Please note that waiting list functionality is only available if the Offer or Booking has been created with this option enabled. Please refer to the Offers and Bookings sections of the sQuid Trips & Offers User Guide.*

By clicking the **action cog** next to an offer or booking you can **View waiting list**, filtering by the user's name or sQuid Registration Number if required, or **Delete waiting list**. You will be asked to confirm this action.

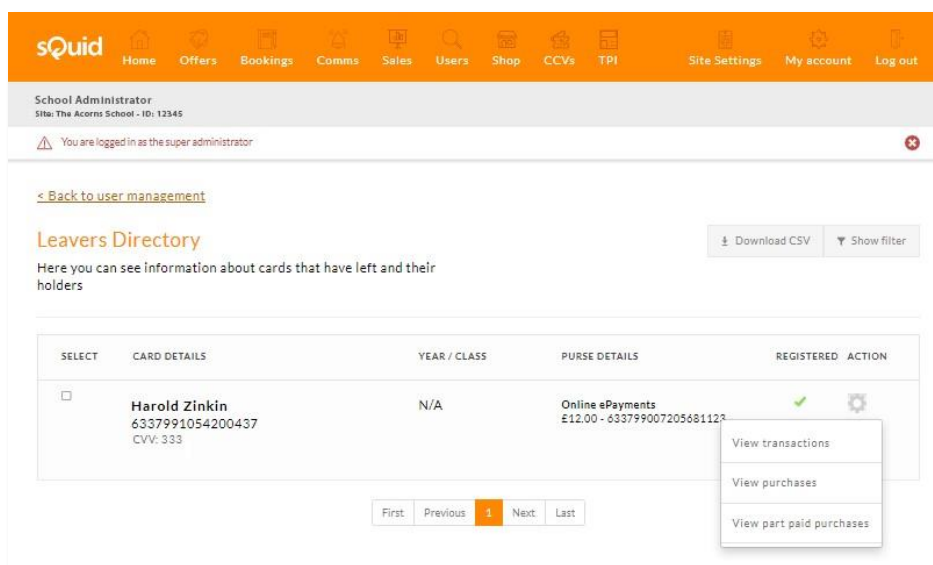


04 Leaver directory

In the **Leaver directory** you can view information about users who have left.

Select the user who has left, then click on their **action cog** to select **view transactions, purchases** and **partpaid purchases**. Then click **Show filter** to search as required.

You can export a **CSV file of your filtered data** by clicking on the **Export as CSV** button, located next to the Filter button. This downloads an **Excel spreadsheet** of this data to your computer.



The screenshot shows the sQuid web application interface. At the top, there is a navigation bar with icons for Home, Offers, Bookings, Comms, Sales, Users, Shop, CCVs, TPI, Site Settings, My account, and Log out. Below this, the user is identified as 'School Administrator' for 'Situ: The Acorns School - ID: 12345'. A warning message states 'You are logged in as the super administrator'. The main content area is titled 'Leavers Directory' and includes a 'Download CSV' button and a 'Show filter' button. Below the title, there is a table with the following columns: SELECT, CARD DETAILS, YEAR / CLASS, PURSE DETAILS, REGISTERED, and ACTION. The table contains one entry for 'Harold Zinkin' with card number '6337991054200437' and CVV '333'. The 'PURSE DETAILS' column shows 'Online ePayments' for '£12.00 - 633799007205681127'. The 'REGISTERED' column has a green checkmark, and the 'ACTION' column has a gear icon. A dropdown menu is open from the gear icon, showing options: 'View transactions', 'View purchases', and 'View part paid purchases'. At the bottom of the table, there are pagination controls: 'First', 'Previous', '1', 'Next', and 'Last'.

SELECT	CARD DETAILS	YEAR / CLASS	PURSE DETAILS	REGISTERED	ACTION
<input type="checkbox"/>	Harold Zinkin 6337991054200437 CVV: 333	N/A	Online ePayments £12.00 - 633799007205681127	✓	⚙️