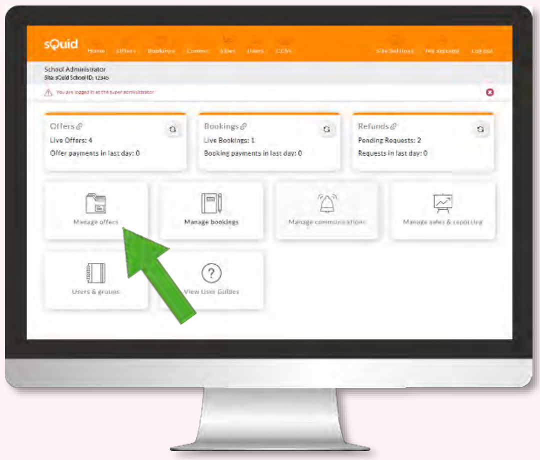
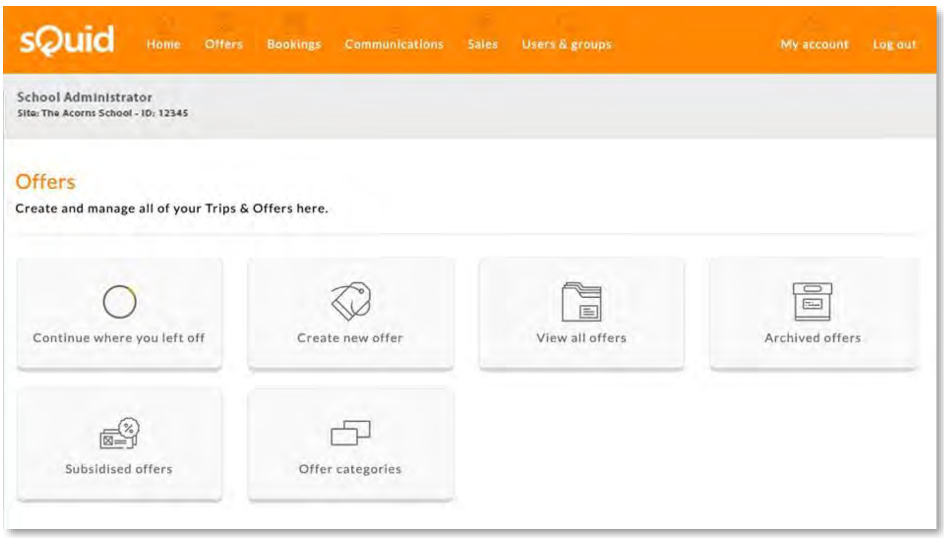
Offers
sQuid Trips & Offers User Guide

Home page: MANAGE OFFERS

Select Manage offers to create, view and amend offers.



An **offer** is when you wish to offer an end user (parent/guardian) the opportunity to **purchase an item via sQuid Trips & Offers**. Offers will typically be made for items that can be purchased as part of a straightforward purchase transaction, e.g. an item of school uniform, a ticket for an event, or a place on a school trip.



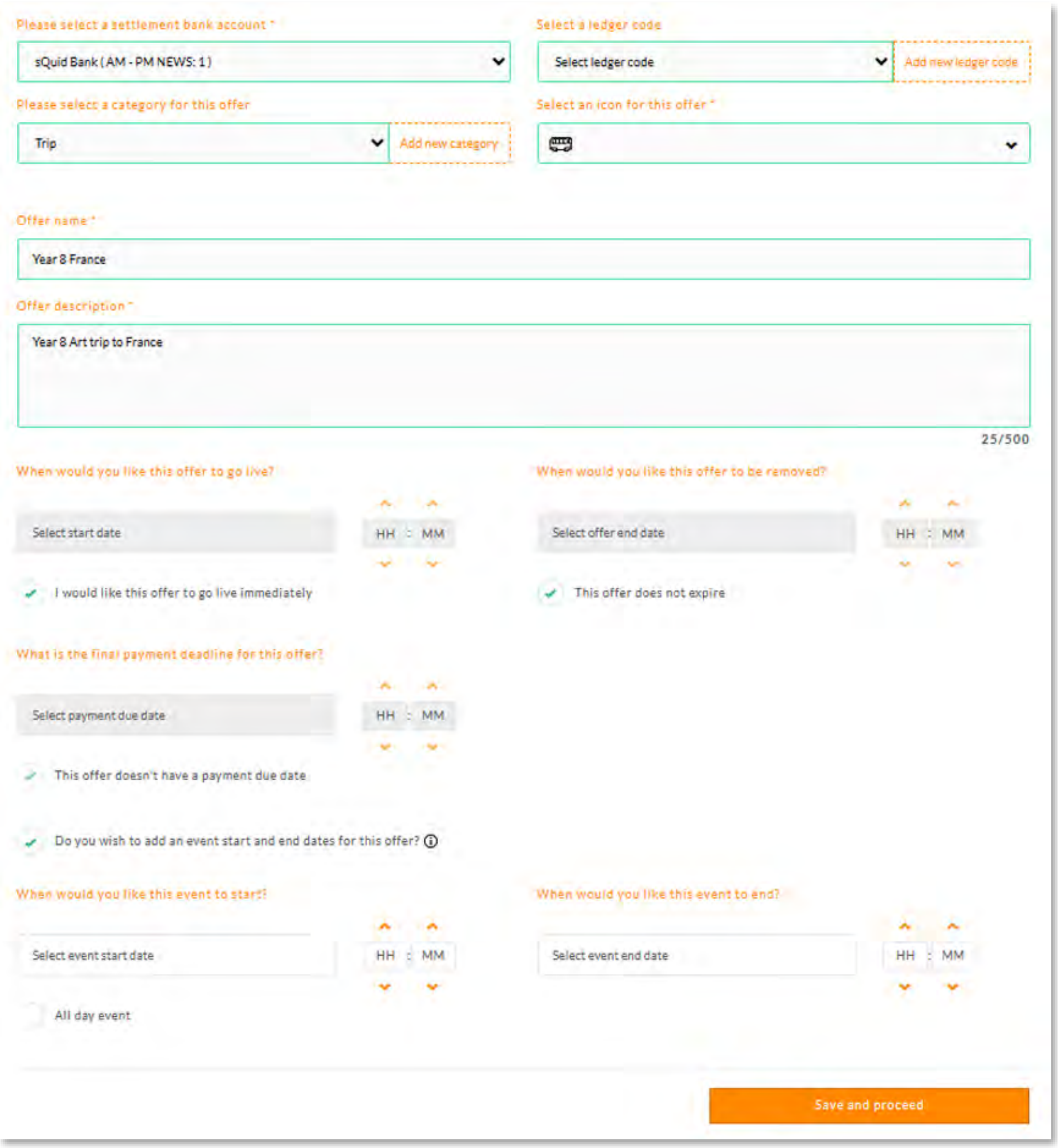
The following options are available from the **Offers screen**:

- Select **Create new offer** to add offers
- Select **Continue where you left off** to continue creating an offer (only displayed If you have partially completed creating an offer and not yet saved to drafts)
- Select **View all offers** to see all live, upcoming, paused and expired offers. The offers can also be edited from this screen
- Select **Archived offers** to view all offers that have been archived. Expired offers can be added to this section from within the **View all offers** area
- Select **Subsidised offers** to view any offers with subsidised users
- Select **Offer categories** to view your list of offer categories

01 Create new offer

When creating a new offer, please note the system runs on a **traffic light system**. Any fields highlighted in **red** are mandatory and any in **green** are optional or already completed. There are several steps involved in creating an offer.

01.1 Step 1: Details

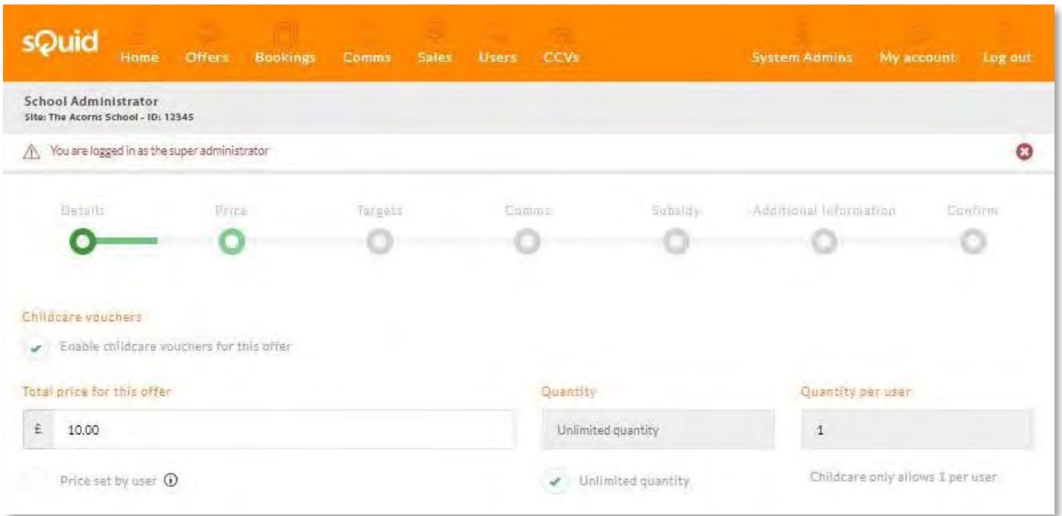


- First, select the **Settlement account** (bank account) that you wish to have funds for this offer transferred to upon payment
- Select the **ledger code** from the drop-down box.
  *NB: **Add new ledger code** may only be available to some administrators, depending on their permission rights*
- Select the **offer category** from the drop-down box.
  *NB: **Add new category** may only be available to some administrators, depending on their permission rights*
- Choose an **icon** for the offer from the drop-down box underneath
- Enter a **name** for your offer. This is the name that the end user will see when logged into their account
- You can enter a brief **description** for the offer in the box underneath. This can include any important information or further details (please note the 500-character limit)

- You can add **event start and end dates and times** for the offer which will be recorded in the **sales reports** as **revenue recognition dates**
- Select the **date and time** that you would like the offer **to go live**
  - If you do **not** want the offer to go live immediately, **untick and select the start date and time**
- Select the **date and time** that you would like the offer **to be removed**
  - If the offer has an **expiry date, untick and select the end date and time**
- Select the **final payment date and time deadline** for the offer - If the offer has a **due date**, **untick and select the date and time**.
  - The **final payment deadline date** needs to be **before the offer end date**
- **Dates** can be **manually typed** in or can be **selected from a calendar** when the box is selected.
- **Times** can be **manually typed** in, or select the up and down arrows to **scroll to the chosen time**.
- **The clock is a 24-hour** clock i.e. 3pm would need to be setup as 15:00.
- Once all the information has been completed for this section, **click Save and proceed**.

01.2 Step 2: Price, quantity and payment plans

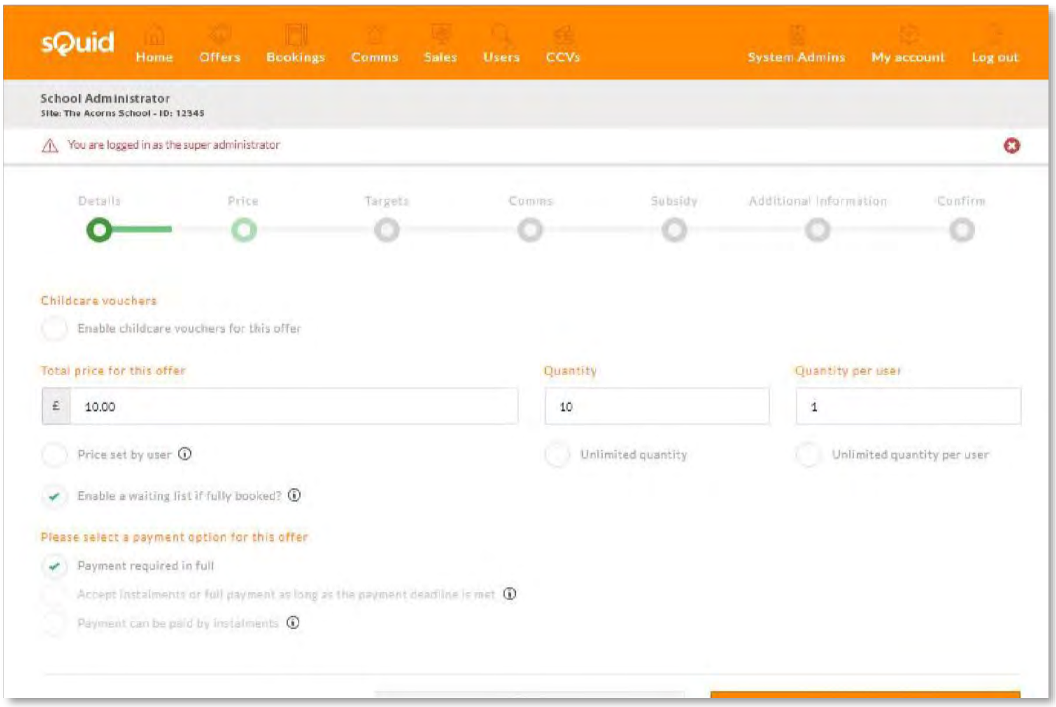
- Enter the **total price** for the offer – total price the end user will pay regardless of any VAT considerations
- Tick **Price set by user** if the amount to pay is to be defined by the user
- If you are accepting **childcare vouchers**, tick to enable this option (childcare vouchers **cannot be enabled by the user**) *Please note that the price cannot be £0.*



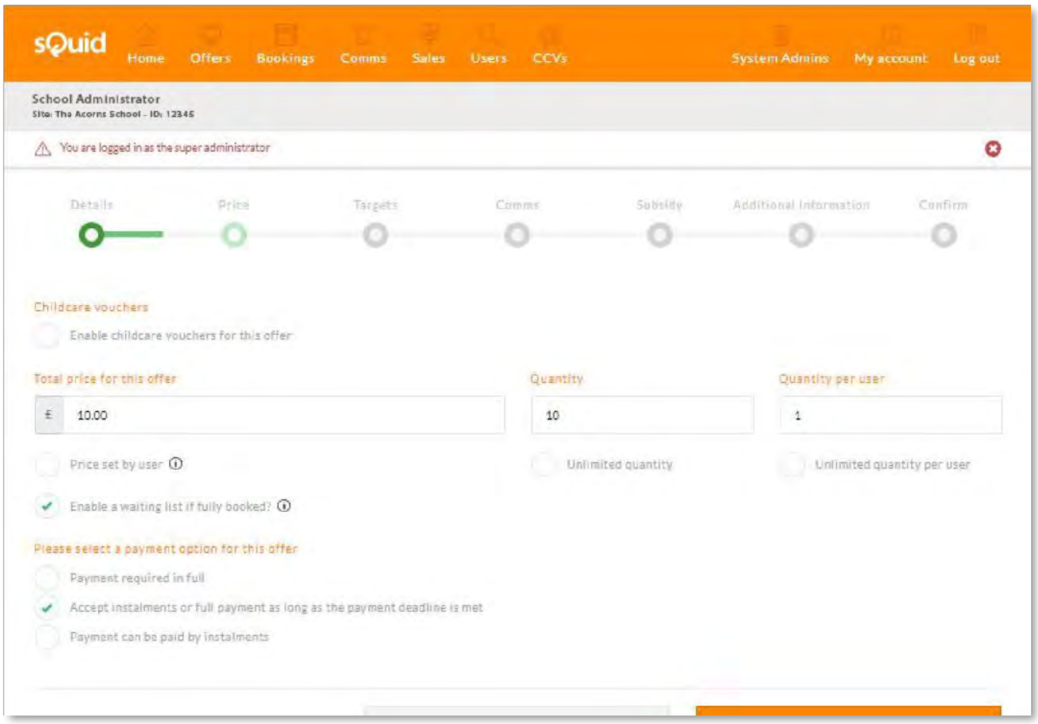
- If you have a **limited number of available spaces** on this offer, enter this in the **Quantity** section (uncheck the **Unlimited** option first).
  - If this is a trip or event that has been planned to ensure **all children applicable** can attend, leave this as **Unlimited** and continue on
- If you want to **limit the number of times** a user can purchase this offer, enter this in the **Quantity per user** field (uncheck the **Unlimited** option first)
  - Often this will be left as 1 for trips however for **event tickets** it may be set to a **certain figure** (e.g. 3 tickets per child)
- Select **Enable waiting list** if you wish to allow users to add themselves to a waiting list should the original quantity for sale be reached and additional quantities will be released. For instance, if you have 100 tickets for a show but will release in blocks of 25, or if an offer is oversubscribed, but there may be cancellations/returns.

- Select a **payment option**:

  - **Payment required in full**
    If payment in full at the point of purchase is required **highlight this option**. No further setup is required, and you can click **Save and proceed**



  - **Accept instalments or full payment as long as the payment deadline is met**
    Allows payments to be made for any amount as long as the total offer amount requested is paid by the payment deadline date (offer start, end and deadline dates must be set). To use this option, **highlight the option** – no further setup is required and you can click **Save and proceed**



- **Payment can be made in instalments**

  Select this option if allowing payment to be made in **planned instalments** (offer start, end and deadline dates must be set):

  Enter the **amount** for the first instalment

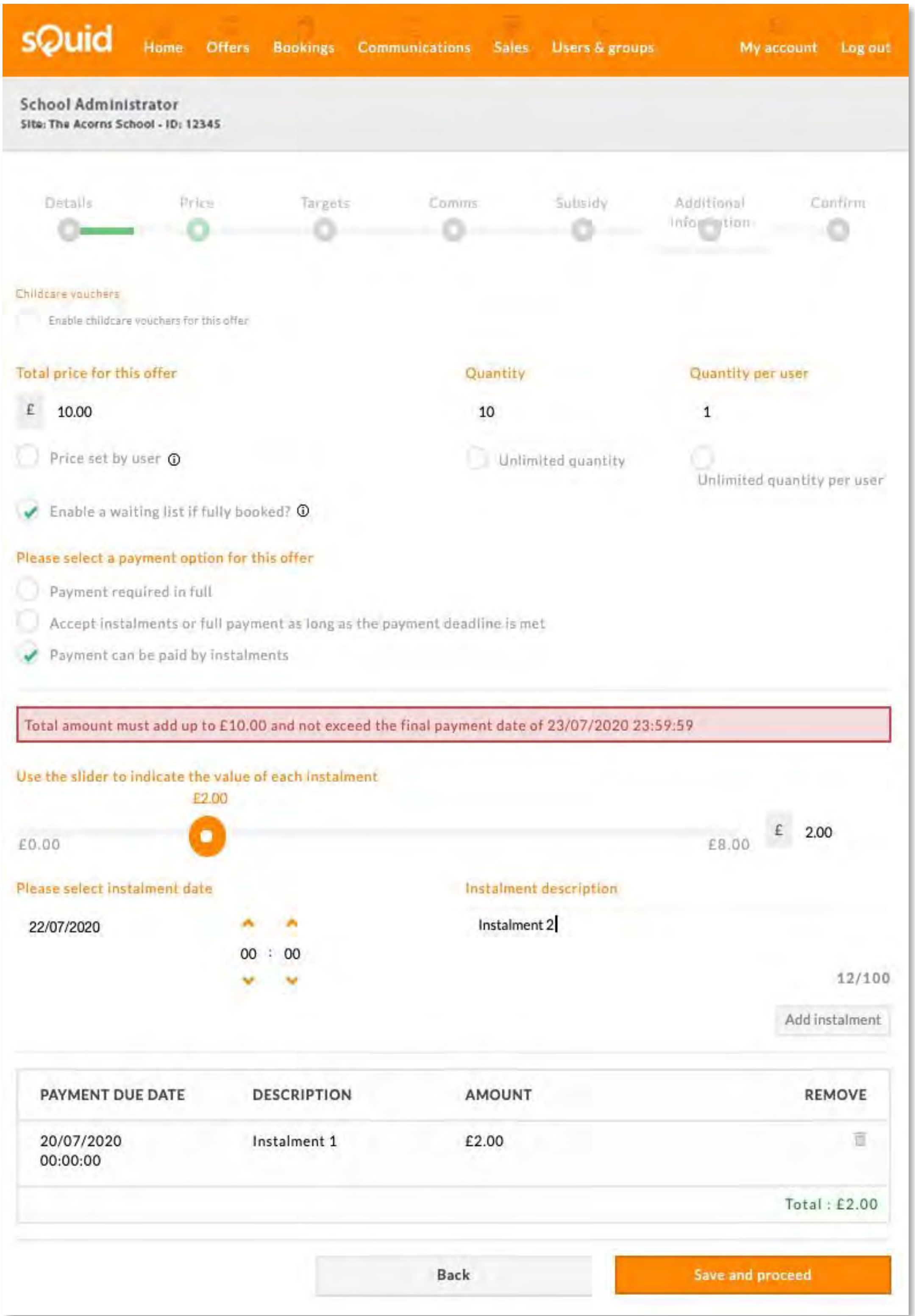
  Enter the **date and time** you would like the first instalment to be paid by

  Enter a **description** for the instalment

  Add the **instalment**

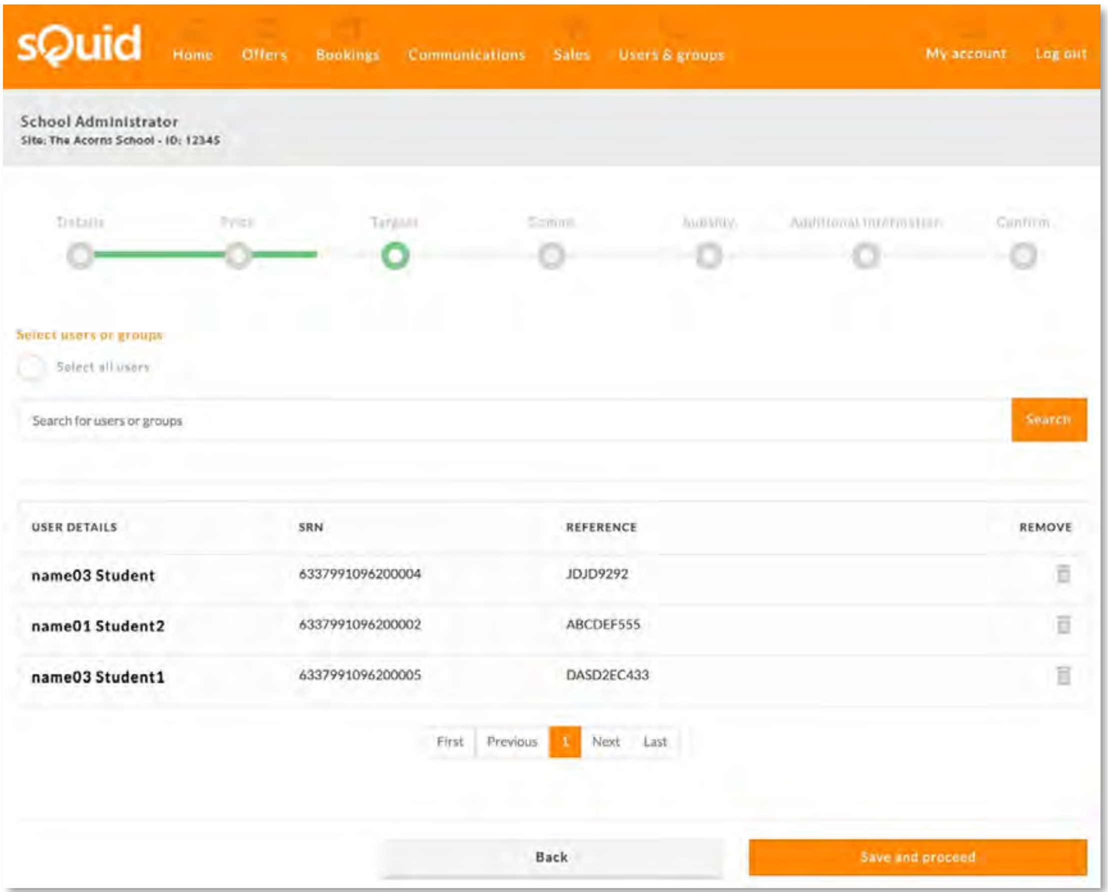
  Repeat the process for all instalments

  Once all instalments have been added, click **Save and proceed**



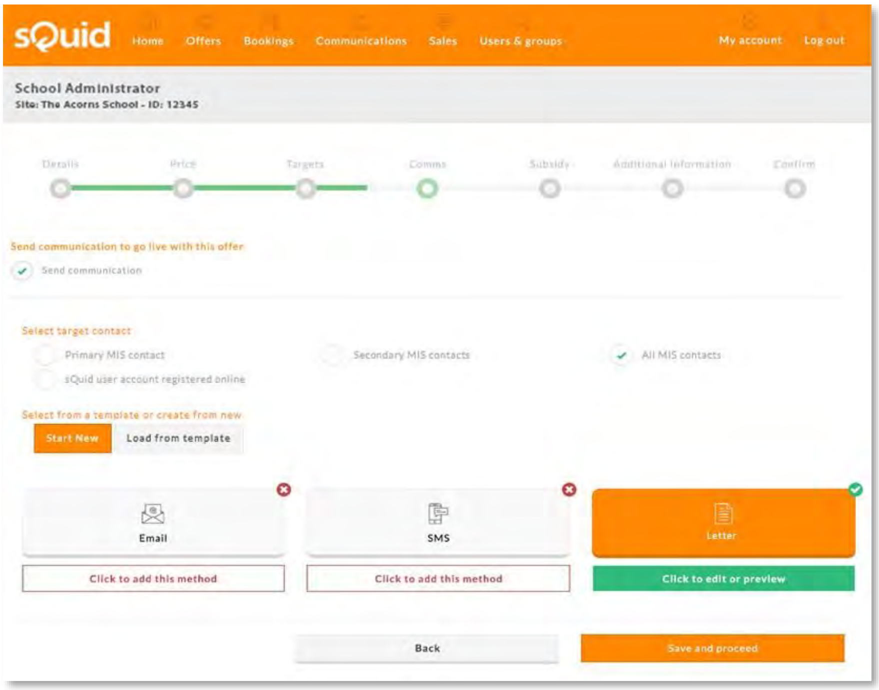
01.3 Step 3: Target offer to individuals, classes or groups

- Select your **target offer audience**. This can be specific year groups, classes, users or clubs:
    - These groups will be **mirrored from the MIS** as pulled over by sQuid
    - You are also able to create your own **payment only custom groups**
- Leave **Select all users** ticked should you wish to make the offer available to all users
- Untick if you would like to target the offer to a **particular group** i.e. Year 1
- You can select **multiple users or groups**, which will appear under **Selected users or groups**
    - When typing the name of a group, press **Search** or **Enter** on your keyboard to search.
    - When the user, class or group you are searching for is displayed, **click on their name** to add a target. - When you have added all targets, click **Save and proceed**



01.4 Step 4: Add a communication to the offer

- If you wish to send a communication with this offer, tick the **Send communication** box
    - If you don't wish to send any communication, leave this **unticked** and then click **Save and proceed**
- Choose **which contact** will receive this message by ticking either **Primary**, **Secondary** or **All MIS contacts**, *or* **sQuid user account registered online**
- Choose whether to **Select from a template or create from new**, then choose the **method** in which you wish to send the message (email, text or letter)
- By clicking the green **Click to edit or preview** button under your chosen method, you can customise the message you are about to send to parents
- Once finished, click **Save and proceed**



*Please note that **any communication created will not be sent until the offer goes live to parents.**

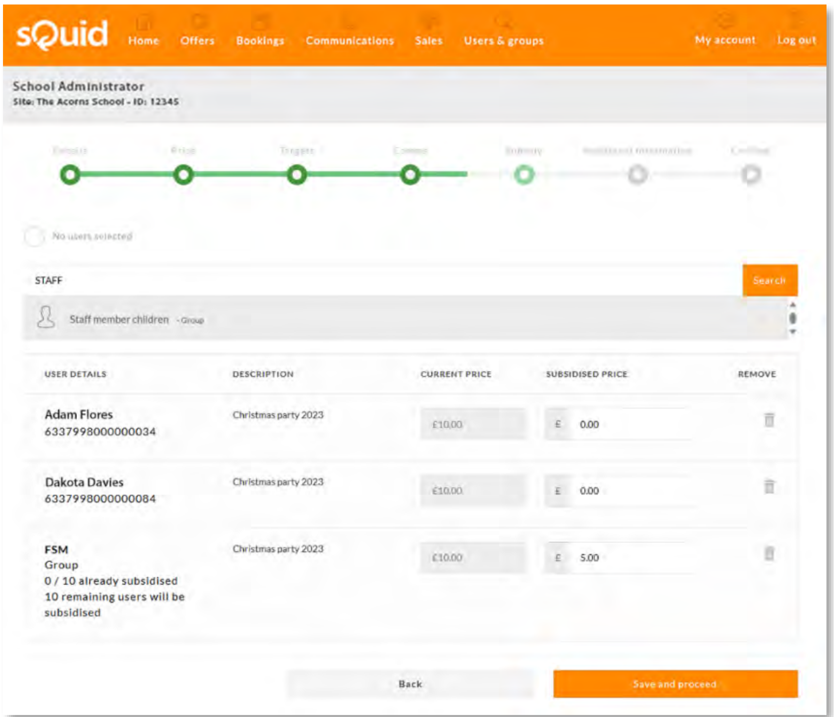
If you selected **Go live immediately at the start, **the message will send upon completion of the offer.**.

01.5 Step 5: Apply a subsidy

In this step, you can select **individual users or groups** (for example pupils eligible for FSM, who might also be eligible for trip discounts, or the children of staff members, who might be eligible for certain discounts) **to be subsidised** on the price of an offer, so the user does not pay the full amount.

This section will only show if there is a **set cost to the offer.*

- Untick **No users selected**
- Search the **names** of any users or groups who are being subsidised on the price of the offer
- Click on the **user/group name** when found, and they will appear in the box underneath
- In the **Subsidised price** box enter the total amount the user is required to pay
  Please note that any existing subsidies for users in a group will not be overwritten.
- Click **Save and proceed** once all users have been added

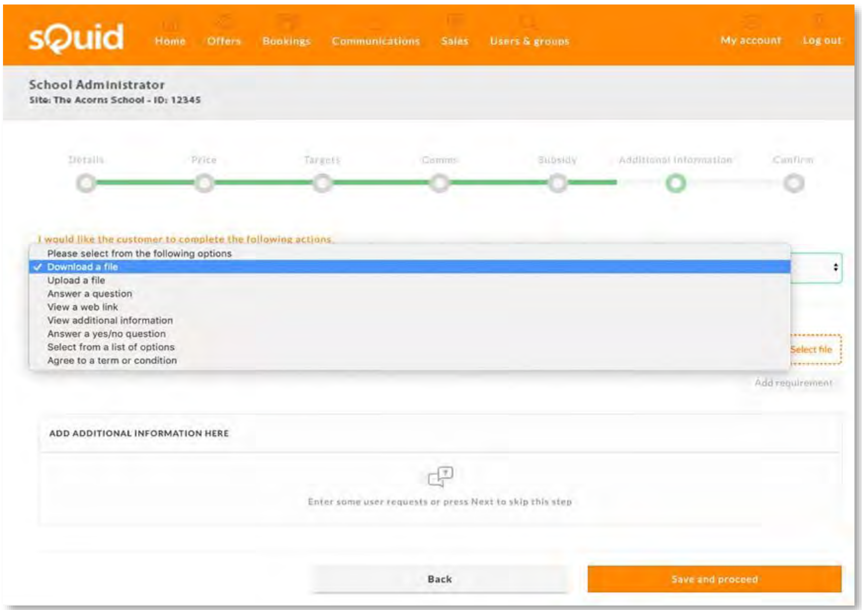


01.6 Step 6: Additional information

In this section, you can add any additional requirements to be completed for the offer by the end user, e.g. consent forms, information on the offer or any mandatory questions to be completed.

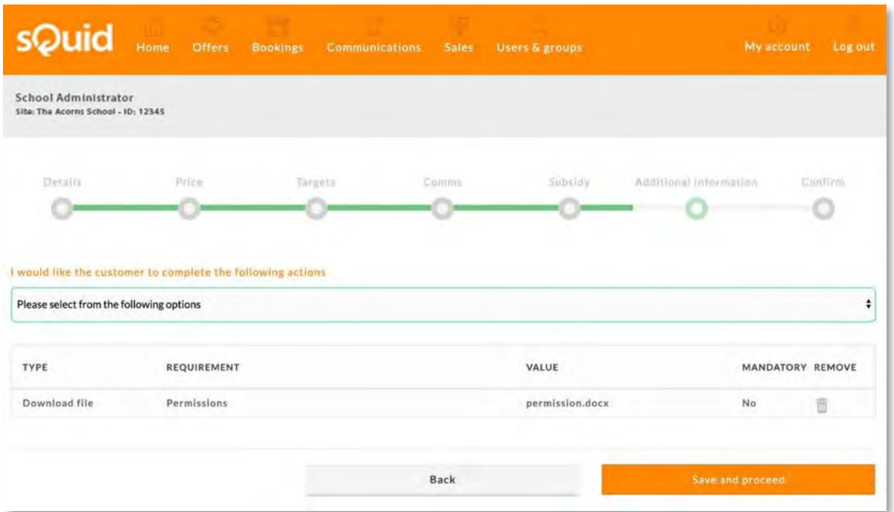
- **Download a file** – allows a file to be downloaded by the end user, e.g. a consent form
- **Upload a file** – allows a file to be uploaded by the end user, e.g. a signed consent form
- **Answer a question** – allows the end user to answer a question
- **View a web link** – allows the end user to view a web link for more information, e.g. London Zoo website
- **View additional information** – allows the end user to view any additional information regarding the offer
- **Answer a yes/no question** – allows the end user to answer a yes/no question
- **Select from a list of options** – allows the end user to select from different options, e.g. uniform size
- **Agree to a term or condition** - allows the user to accept Ts & Cs

*Please note, you are able to **add multiple additional requirements** for each offer*



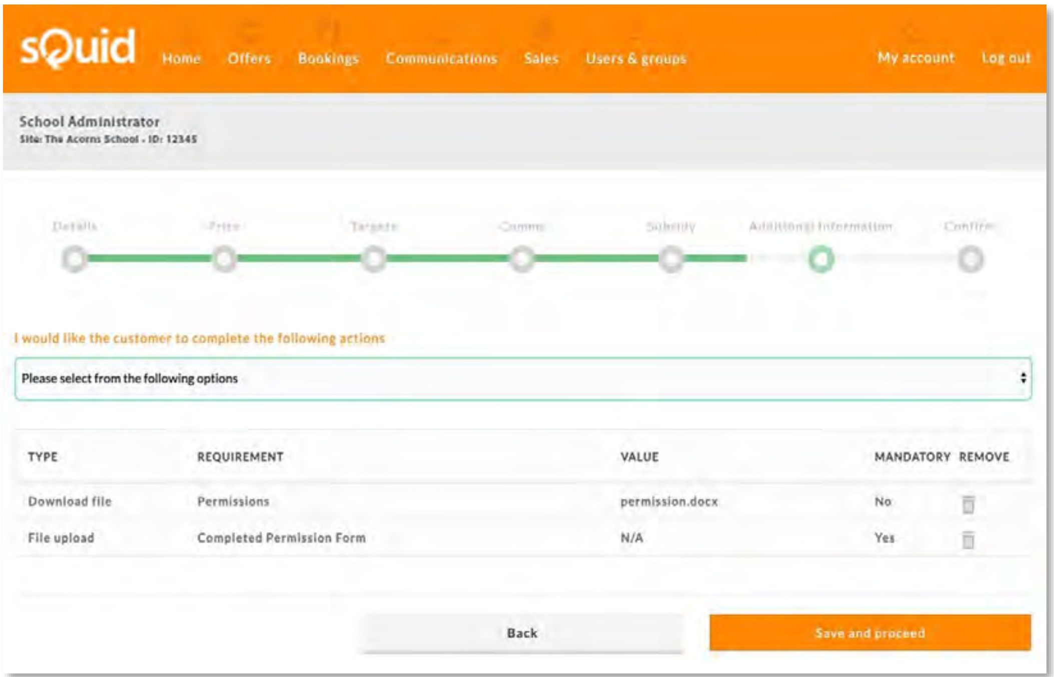
01.6.1 Download a file

- Select **Download a file** from the drop-down box
- Enter a **description** for the file in the box
- Click **Select file** and choose the file required from your computer
- Once the description and file are added click **Add requirement**



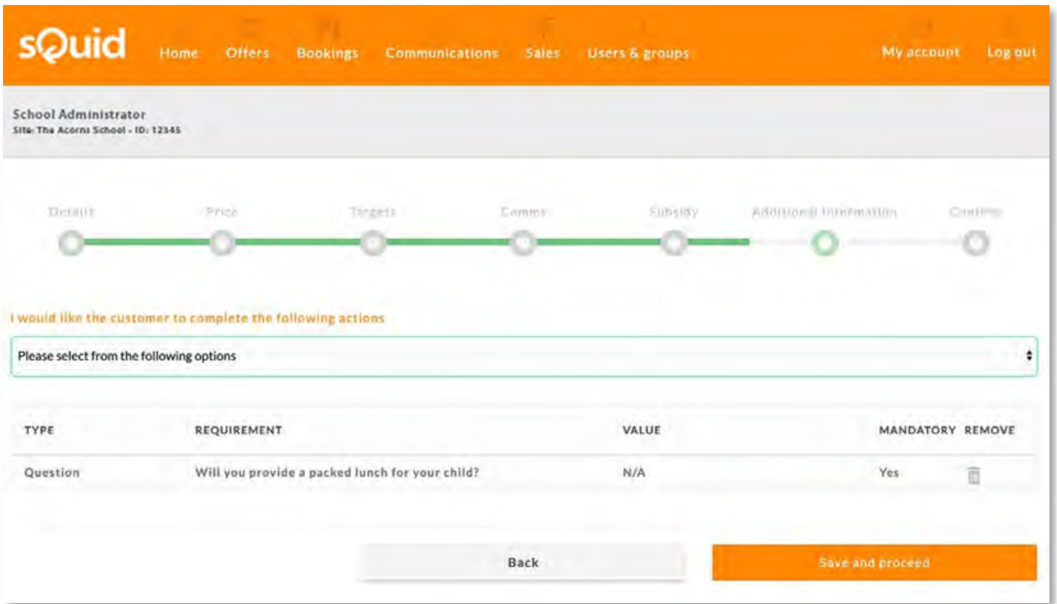
01.6.2 Upload a file

- Select **Upload a file** from the drop-down box
- Enter a **description** for the file in the box
- You will now **see the file added** in the box below
- Tick the **Is it mandatory for the user to upload file?** box if the question is mandatory
- Once the description and file are added, click **Add requirement**



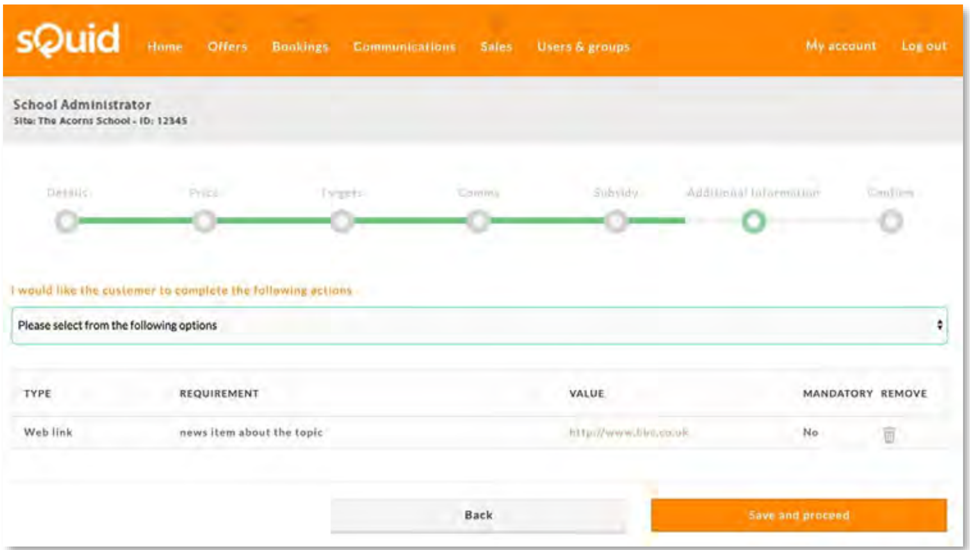
01.6.3 Answer a question

- Select **Answer a question** from the drop-down box
- Enter **further information** in the box below
- Tick the **Is it mandatory for the user to answer this question?** box if the question is mandatory
- Once the question is entered, click **Add requirement**



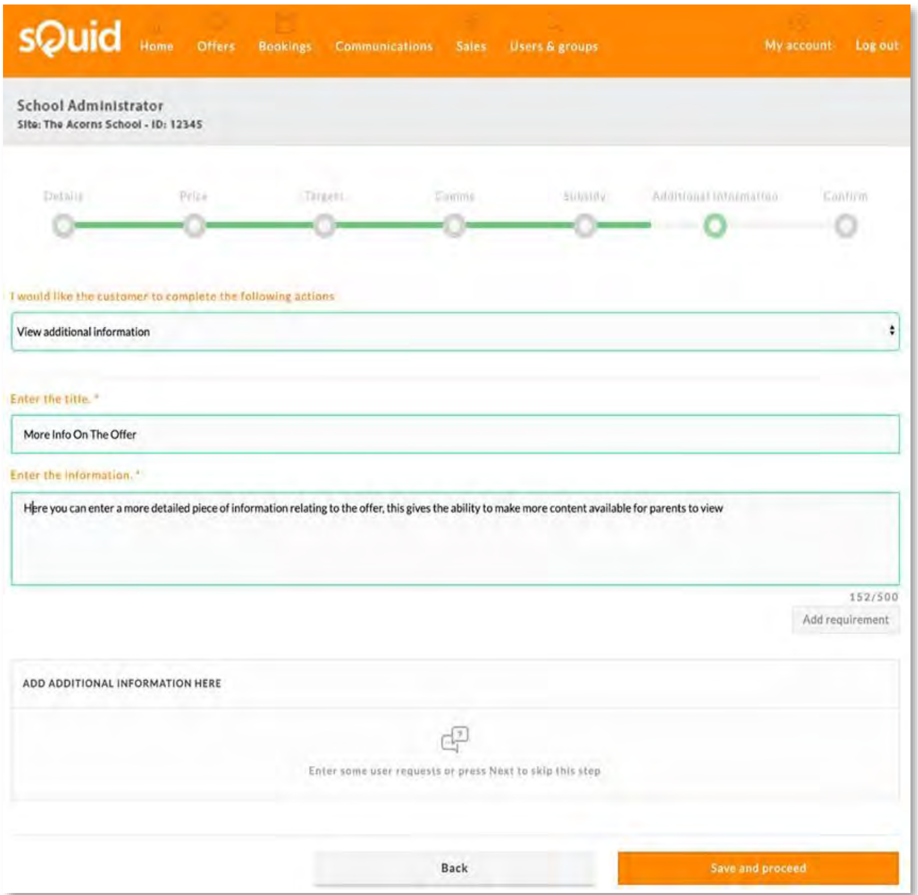
01.6.4 View a web link

- Select **View a web link** from the drop-down box
- Enter a **description** for the link in the box below
- Enter the **web address** for the link in the box underneath
- Once the link has been entered, click **Add requirement**



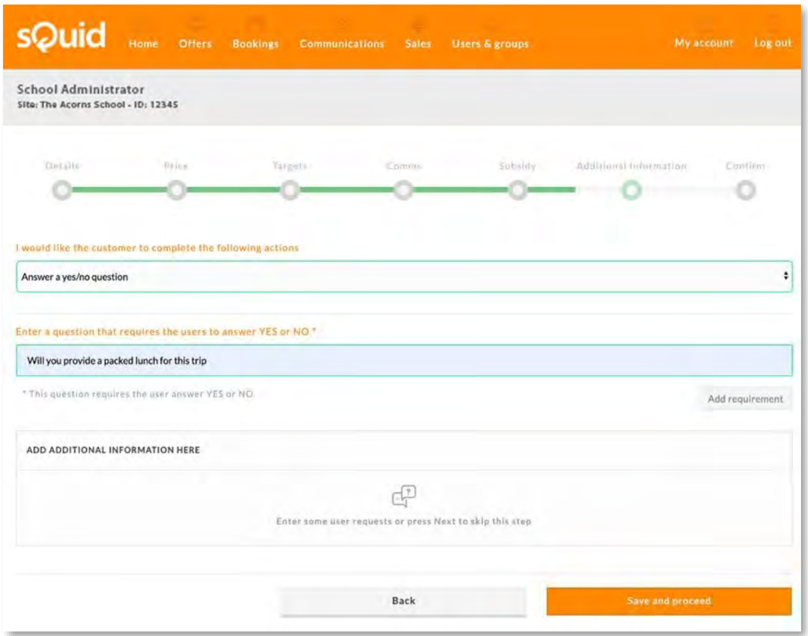
01.6.5 View additional information

- Select **View additional information** from the drop-down box
- Enter a **title** for the additional information
- Enter a **description** in the additional information box and click **Add requirement**



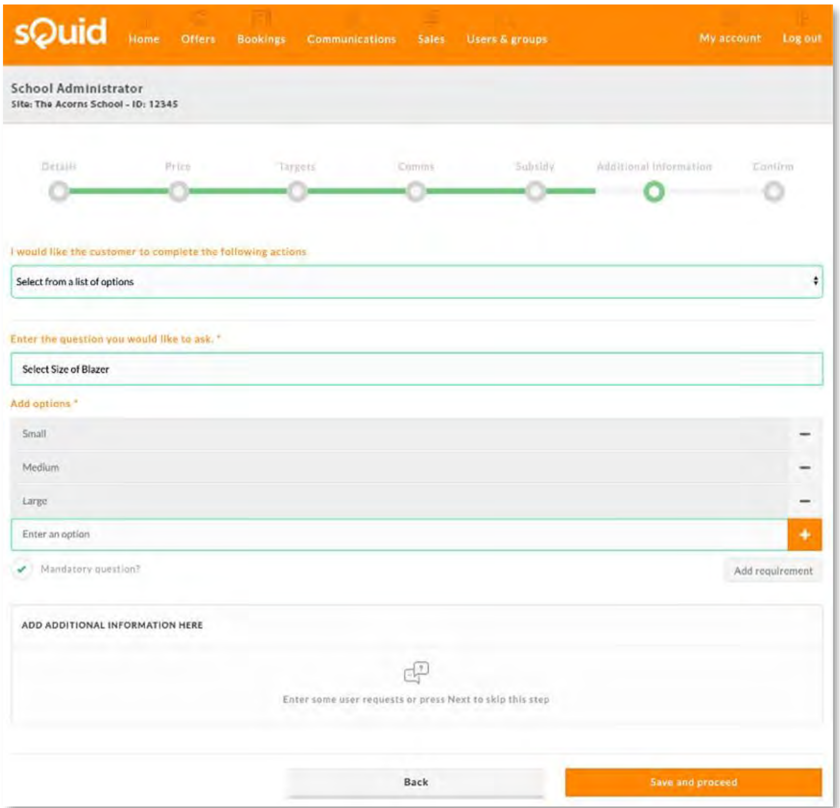
01.6.6 Answer a yes/no question

- Select **Answer a yes/no question** from the drop-down box
- Enter the **question** in the box below
- Once the question has been entered, click **Add requirement**
- The response **Yes/No** will be required at **Checkout**.



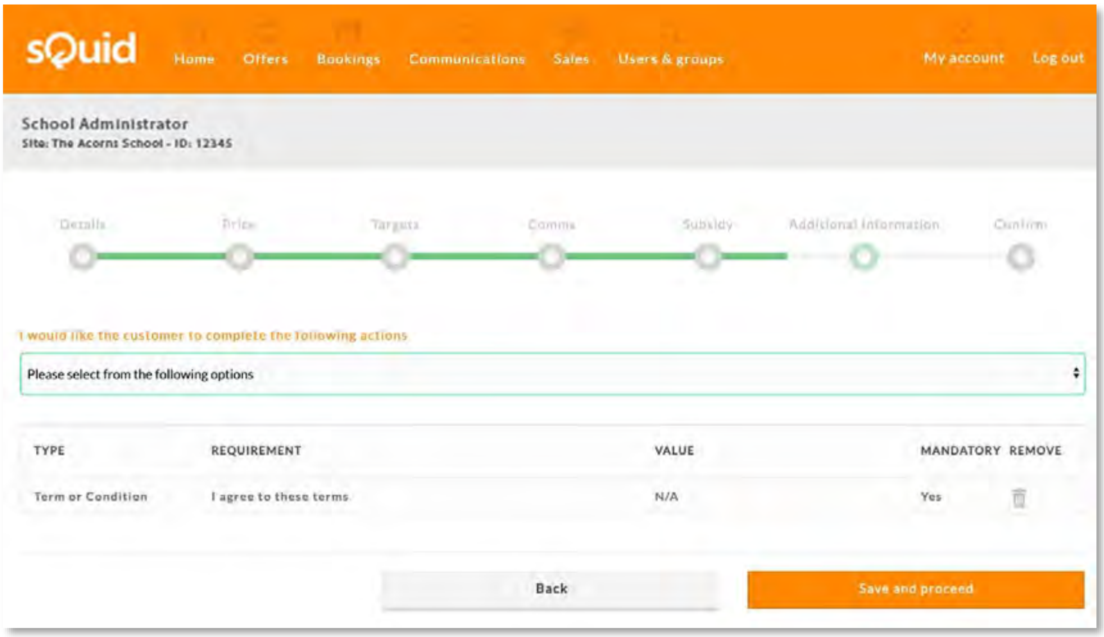
01.6.7 Select from a list of options

- Choose **Select from a list of options** from the drop-down box
- Enter your **question** in the box underneath
- Enter an **answer** to the question in the option box and **click Add**
- **Repeat** this step for all options
- Once all options have been created, click **Add requirement**



01.6.8 Agree to a term or condition

- Choose **Agree to a term or condition** from the list
- Type in the **terms or conditions** that you require the user to agree with
- Click **Add requirement**



01.7 Step 7: Confirm offer

From here you can **review the offer details** you have entered during the offer creation process, and if required go back through any steps to **amend before publishing.**

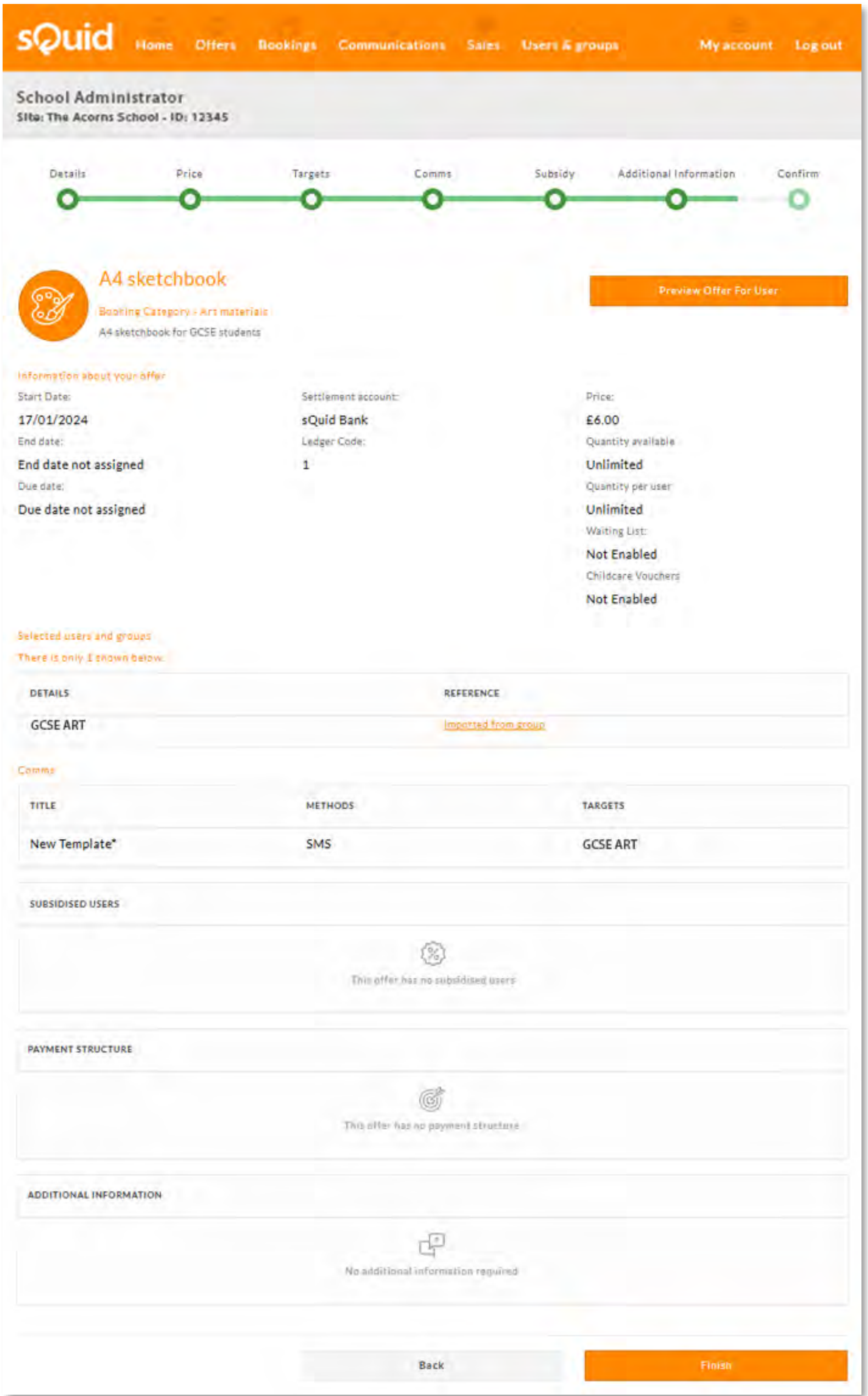
You can also see how the **offer will look to the user** by clicking the orange **Preview Offer For User** button on the top right of the screen, then clicking **OK** to go back.

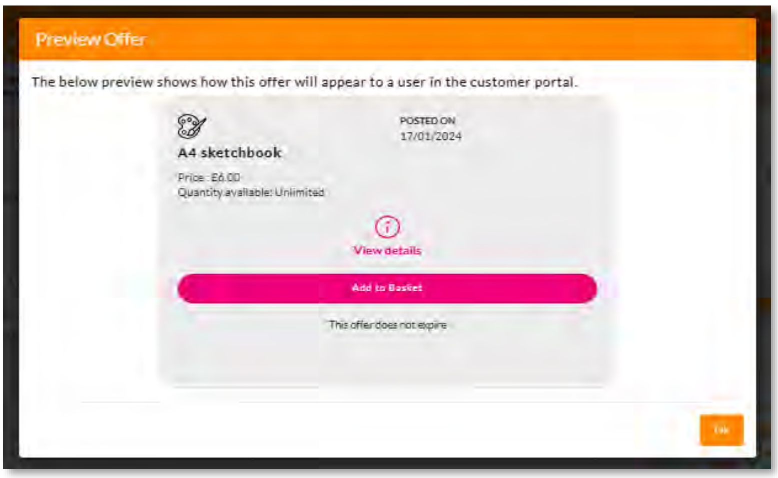
- If you have made an **error** at any point, **click Back** until you reach the appropriate step, **make the correction** and then return to this screen
- If you are happy with all the details **click Finish**. You will be prompted to **Save the offer to drafts** or to **Publish offer**
  - If you click **Save to drafts** the offer will be saved in your draft offers
  - If you click **Publish offer**, then your offer will be complete

01.8 Continue where you left off tile

This tile is **only visible on the main Offers screen** if, in the course of creating your offer, you had to stop, but were **not able to save to draft**

- If you have **partially completed** creating an offer and not yet saved to drafts, your **progress will have been saved** and the **Continue where you left off** tile will be displayed the next time you visit the main **Offers** screen.
- By selecting this tile, you can **continue creating** the offer that was not completed


sQuid
Home
Offers
Bookings
Communications
Sales
Users & groups
My account
Log out
School Administrator
Site: The Acorns School - ID: 12345
Details
Price
Targets
Comms
Subsidy
Additional Information
Confirm
A4 sketchbook
Booking Category - Art materials
A4 sketchbook for GCSE students
Preview Offer For User
Information about your offer
Start Date:
17/01/2024
End date:
End date not assigned
Due date:
Due date not assigned
Settlement account:
sQuid Bank
Ledger Code:
1
Price:
£6.00
Quantity available
Unlimited
Quantity per user
Unlimited
Waiting List:
Not Enabled
Childcare Vouchers
Not Enabled
Selected users and groups
There is only 1 shown below.
DETAILS
REFERENCE
GCSE ART
Imported from group
Comms
TITLE
METHODS
TARGETS
New Template*
SMS
GCSE ART
SUBSIDISED USERS
This offer has no subsidised users
PAYMENT STRUCTURE
This offer has no payment structure
ADDITIONAL INFORMATION
No additional information required
Back
Finish


Preview Offer
The below preview shows how this offer will appear to a user in the customer portal.
POSTED ON
17/01/2024
A4 sketchbook
Price: £6.00
Quantity available: Unlimited
View details
Add to Basket
This offer does not expire

sQuid

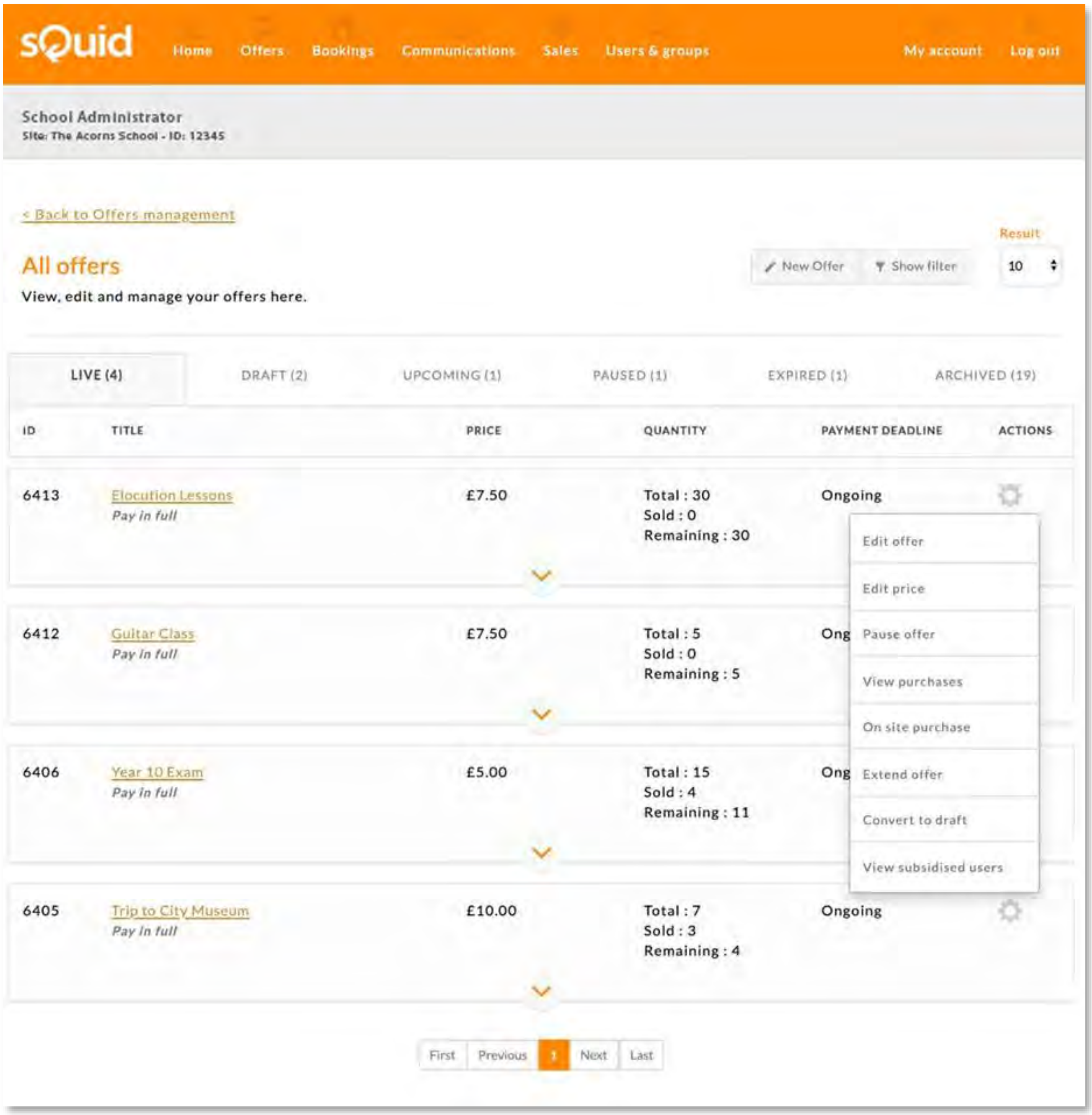
02 View all offers

In this section you can **view all offers** and **make any changes**. You can use the tabs to move between **Live**, **Draft**, **Upcoming**, **Paused**, **Expired** and **Archived** offers.

You can **filter between offer categories and start and end dates** at the top of the page by clicking **Show filter**. You can hide the filter by clicking **Hide filter**.

02.1 Live offers tab

If you click on the **action cog** icon next to each offer in the **Live offers tab**, you can **Edit offer**, **Edit price**, **Pause offer**, **View purchases**, **View waiting list** (where one exists for an offer), manage an **On-site purchase**, **Extend offer**, **Create communications**, **View school notifications**, **Convert to draft** (if no purchases have yet been made), **View subsidised users** for the offer, and **Clone offer**.

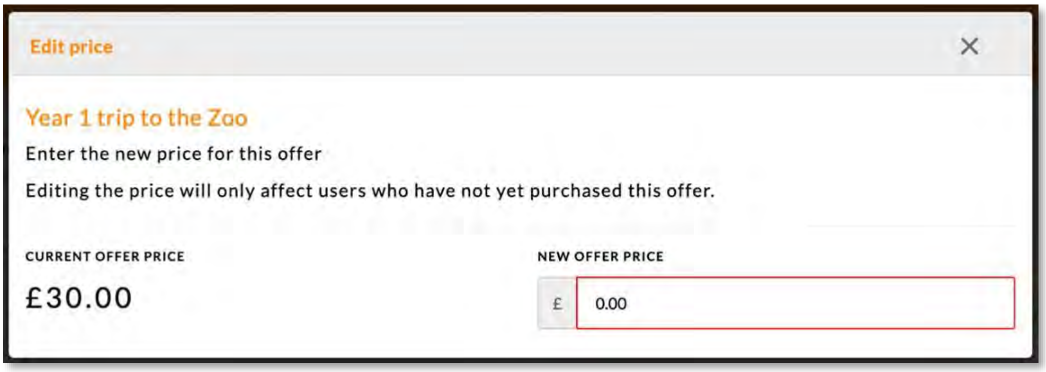


02.1.1 Edit offer

- Allows you to **make changes to the offer** following the steps in **0.1 Create new offer**

02.1.2 Edit price

- Allows you to **make changes to the offer price**



02.1.3 Pause offer

- Allows you to **pause the offer**. Once paused, you can un-pause or archive the offer

02.1.4 View purchases

- Allows you to **view any purchases** so far made, and to **refund purchases**, either in bulk or individually. You can also **add a communication** for a **purchase or part-purchase**.

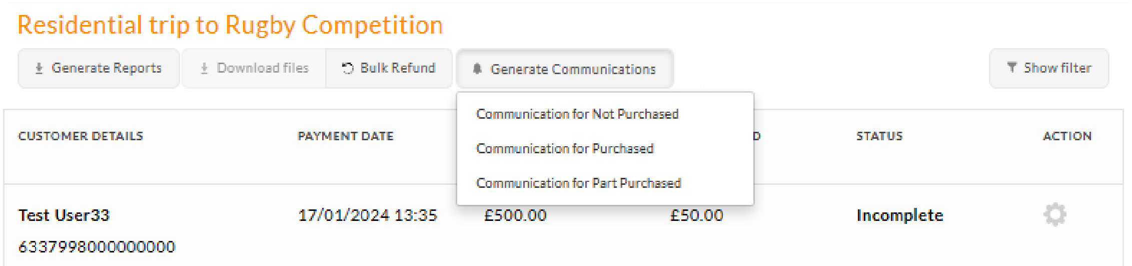
02.1.4.1 Refunding offers

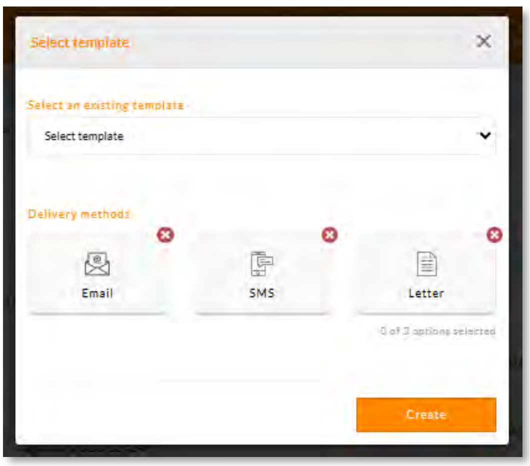
For information on how to issue a refund from the *Manage offers tile*, **please refer to the Refunds section of the sQuid Trips & Offers User Guide.**

02.1.4.2 Add communications for purchases or part-purchases

Where an offer has been **purchased, or part-purchased**, you can **add a communication**, e.g. to advise that the purchase is available for collection, or to remind that the next instalment is due.

- **Above the list of purchases** for the offer, click the **Generate Communications** button and select **Communication for Purchased** or **Communication for Part-Purchased**, as required. You will then be able to add a communication, either new or from a template, by following the steps in the pop-up box.





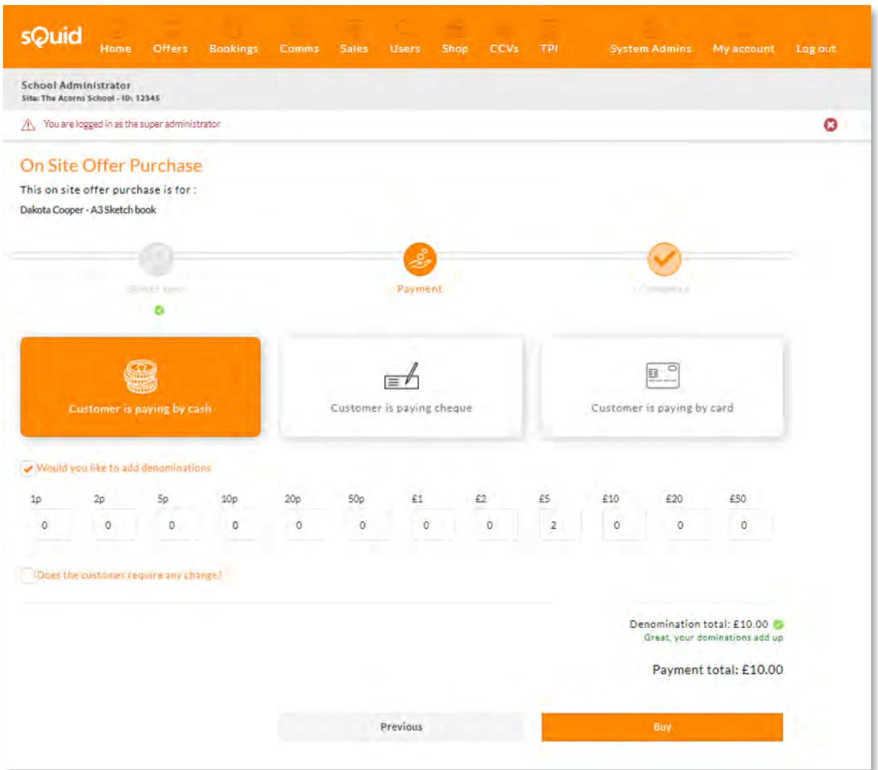
02.1.5 View waiting list (where one has been made for the offer)

- Allows you to view the **position** and **queue-joined date** of users on a waiting list

02.1.6 On-site purchases

- Allows you to record when a **cash, cheque or card* payment** for an offer needs to be made on-site. Your **system will be updated** so that e.g. there is no possibility of a trip or offer being oversubscribed. ****The school requires its own card payment device (chip and pin/Zettle/Sumup etc.). These are not supplied by sQuid.***
- Click on the **action cog** for an offer, and select **On-site purchase** from the drop-down menu
- Search for the user by name, **target** them if they have not already been targeted for this offer, then **click on the name** when displayed
- If the offer has **requirements**, these should then be entered (e.g. size for a uniform purchase)
- Click **Save and proceed**
- If there are **instalments** involved, you will be asked which instalment the customer will be paying for
- Select whether the payment is by **cash, cheque or card**.
- If by **cash**, you can enter **denominations** used, and whether there will be any **change**

  For example, the customer uses 2 x £5 notes to pay for a £10 offer: tick the **Would you like to add denominations?** box and enter '2' in the box underneath '£5'. If the customer receives some change, then tick **Does the customer require any change?** and enter the denominations in the same way.
- If **cheque or card** payment, click the box to **add a reference number** for the transaction.
- Once the cash, cheque or card amount has been entered, click **Buy**
- You are then taken to an **overview page**, from where you can print a **sales receipt**
- Click **Finish**



02.1.7 Extend offer

- Allows you to **extend the offer** end date

02.1.8 Create communications

- Allows you to **create a communication** if you have not previously done so

02.1.9 View school notifications

- Allows you to **add**, **edit** or **manage all school communications**

02.1.10 Convert to draft (if no purchases have yet been made)

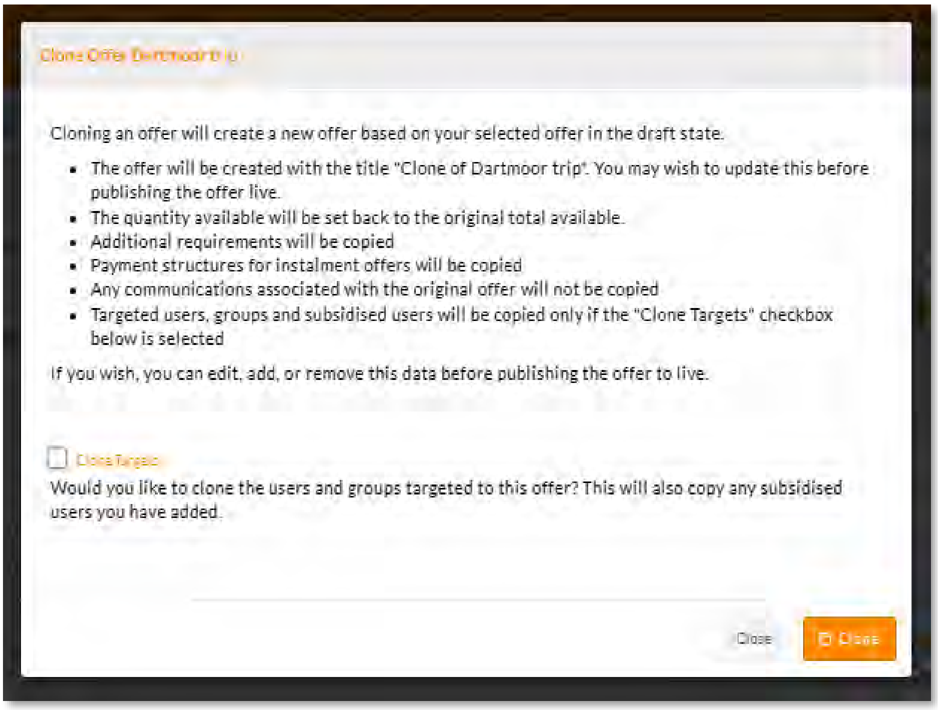
- Allows you to **convert the offer to draft** status, (suspending it), and allows you to **make changes to the offer**, store it as a **draft template**, or **delete it** (as long as no purchases have yet been made).

02.1.11 View subsidised users

- Allows you to **view any existing and add new subsidised users/groups** to the offer
- Click on **View subsidised users** to view a breakdown of all included users/groups
- You can **search** for users/groups to be added and clicking on the name when it appears.
- Add the **subsidised price** against each new user/group
- You can also **delete a subsidised user/group** by clicking on the red X on the subsidised price box.
- Click **Save** to keep your changes

02.1.12 Clone offer

- Click on the **action cog** next to the offer you want to clone to **create a new offer based on this one**, which will be saved in the **Draft state**, and entitled **'Clone of…'**, which you will be able to edit before publication
- The **quantity available** will be set back to the **original total available**
- **Additional requirements** and **payment instructions for instalments** *will be copied*
- Any **communications** associated with the original will *not be copied*
- **Targeted users, groups and subsidised users** *will be copied, only if the Clone Targets checkbox is selected* in the pop-up box.
- Click the orange **Clone** button to proceed. You can now **view, edit and publish** the cloned offer from the **Drafts tab**



02.2 Draft offers tab

Draft offers are offers you have created but **saved to draft** prior to publishing. Other offers that have been **cloned** will also appear here.

If you click on the **action cog** icon next to each offer in the **Draft offers** tab, you can **Edit offer** or **Delete offer** (see below).
Selecting **Edit offer** will take you through the offer in the steps outlined in **01 Create new offer**.

You can also **Create communications** or **View school notifications**, direct from here, as well as **Clone**

a draft offer (see **section 02.1.12**).

02.2.1 Deleting an offer

- If you need to delete an offer that has been published, but prior to any purchases of the offer being made, you can **Convert to draft** (see **section 02.1.10**), then select **Delete offer** from the **action cog** next to the draft offer, and **confirm the deletion** when prompted.

  ***It is not possible to Convert to draft/Delete a published offer once a purchase has been made.**

02.3 Upcoming offers tab

Upcoming offers are offers you have created and published but their **start date has not yet been reached**.

If you click on the **action cog** icon next to each offer in the **Upcoming offers** tab, you can **Edit offer** or **Delete offer**.

Selecting **Edit** will take you through the offer in the steps outlined in **0.1 Create new offer**.

You can also **Create communications** or **View school notifications** direct from here, and **Clone offer** (see **section 02.1.12**)

02.4 Paused offers tab

Paused offers are offers you have **created and published but paused**.

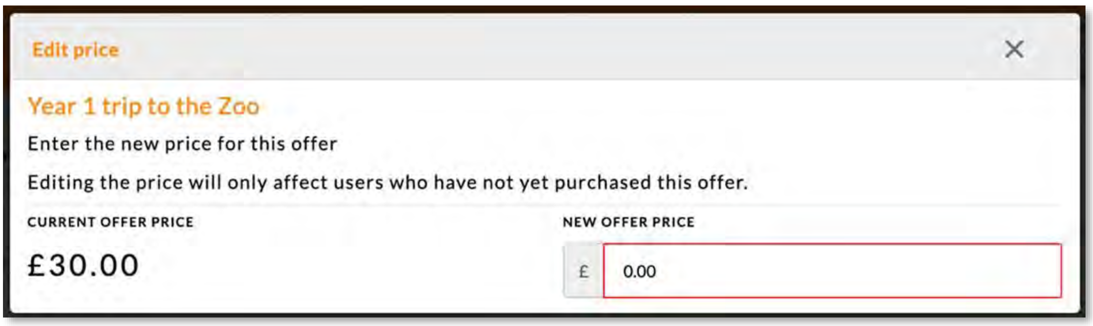
If you click on the **action cog** icon next to each offer in the **Paused offers** tab, you can **Edit offer**, **Edit price**, **Publish offer** (un-pausing it), **Extend offer**, **Archive offer**, **View purchases** (where any have previously been made prior to pausing), **View school notifications**, **View subsidised users** and **Clone offer**.

02.4.1 Edit offer

- Selecting **Edit offer** will let you edit the offer via the steps outlined in **0.1 Create new offer**

02.4.2 Edit price

- Allows you to **make changes** to the **offer price**



02.4.3 Publish offer

- Allows you to **publish** the offer, making it either **Live** or **Upcoming**, depending on offer start date

02.4.4 Extend offer

- Allows you to **extend** the offer **end date**

02.4.5 Archive offer

- Allows you to **end the offer** for audit purposes and **store all details** as part of the system archive

02.4.6 View purchases

- Allows you **view purchases or partial purchases** where the offer may *previously have been published*, prior to being paused. You may be able to issue a **refund or parial refund** from here (subject to conditions)
- You can **add a communication for a purchased or part-purchased offer** from here – see **section 02.1.4.2**

02.4.7 View school notifications

- Allows you to **add**, **edit** or **manage all school communications**

02.4.8 View subsidised users

- Allows you to view any existing, and add new, **subsidised users/groups** to the offer (see **section 02.1.11**)

02.4.9 Clone offer

- You can **clone a paused offer** by clicking on the **action cog** next to the offer (see **section 02.1.12**)

02.5 Expired offers tab

Expired offers are offers you have created and published, but have reached their end date, meaning they are no longer accessible for purchase by end users.

If you click on the **action cog** icon next to each offer in the **Upcoming offers** tab, you can **Archive offer**, **View purchases**, **Extend offer** and **View subsidised users**.

02.5.1 Archive offer

- Allows you to **archive** the offer, retaining offer records

02.5.2 View purchases

- Allows you to **view any purchases** made while the offer was active
- You can **add a communication for a purchased or part-purchased offer** from here – see **section 02.1.4.2**

02.5.3 Extend offer

- Allows you to **re-activate the offer** by extending the offer end date
- If an offer has been extended it goes back into the **Live tab**, with previous capability restored

02.5.4 View school notifications

- Allows you to **add**, **edit** or **manage all school communications**

02.5.5 View subsidised users

Allows you to view any existing, and add new, **subsidised users/groups** to the offer *if it has been extended* (see **section 02.1.11**)

02.5.6 Clone offer

- You can **clone an expired offer** by clicking on the **action cog** next to the offer (see **section 02.1.12**)

02.6 Archived offers tab

Archived offers are offers you have decided are no longer relevant to have **Live**, or stored as **Upcoming**, **Paused** or **Expired offers**. *Archived offers remain on the system at all times.*

If you click on the **action cog** icon next to each offer in the **Archived offers** tab, you can view purchases relating to the offer. (Some offers may not have an **action Cog** available, for instance if there were no sales recorded for the offer).

03 Archived offers

Archiving is a tool to allow you to keep your **Manage offers** area clean and up-to-date. Once you are finished with an offer and you no longer need to manage it, you can move it to your **Archived offers** folder. You view this folder by selecting the **Archive offers** tile.

N.B.: Archiving an offer is an irreversible action.

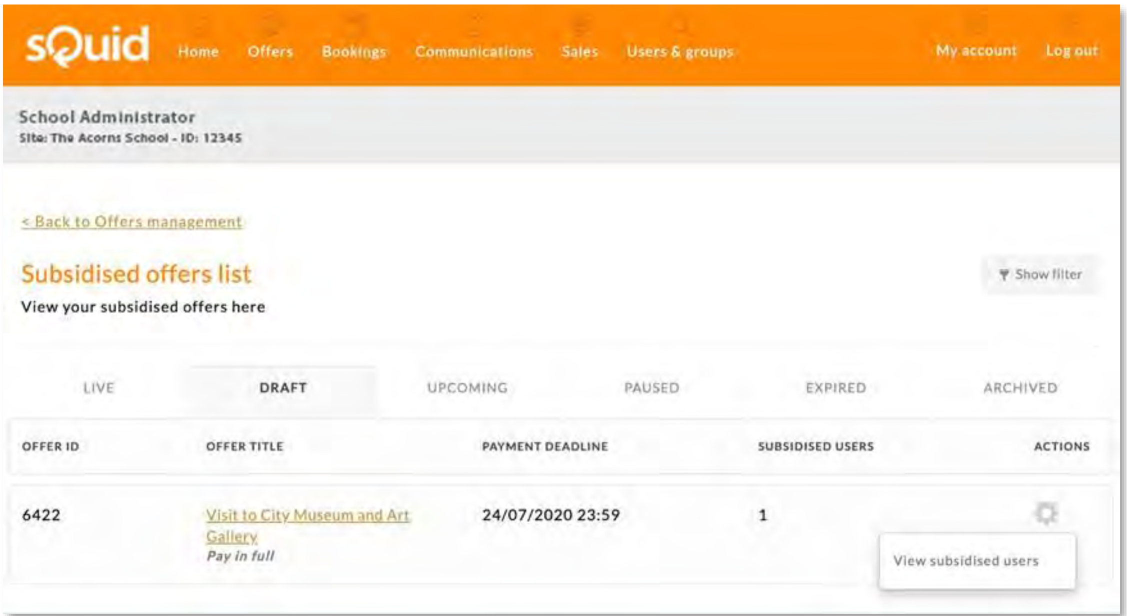
Please be aware, offers are kept here ***for reference only****. Once an offer is moved here, you are* ***no longer able to edit details, log payments against it or reuse the information****. It will however remain in the system for reporting and reconciliation purposes.*

- You can **filter** the displayed results by offer categories and start and end dates at the top of the page.
- Click on any listed offer to view the **offer summary**
- To add an offer to the archived offers, you can click on the **action cog** icon next to any offer in the **View all offers** area and then click **Archive offer**

04 Subsidised offers

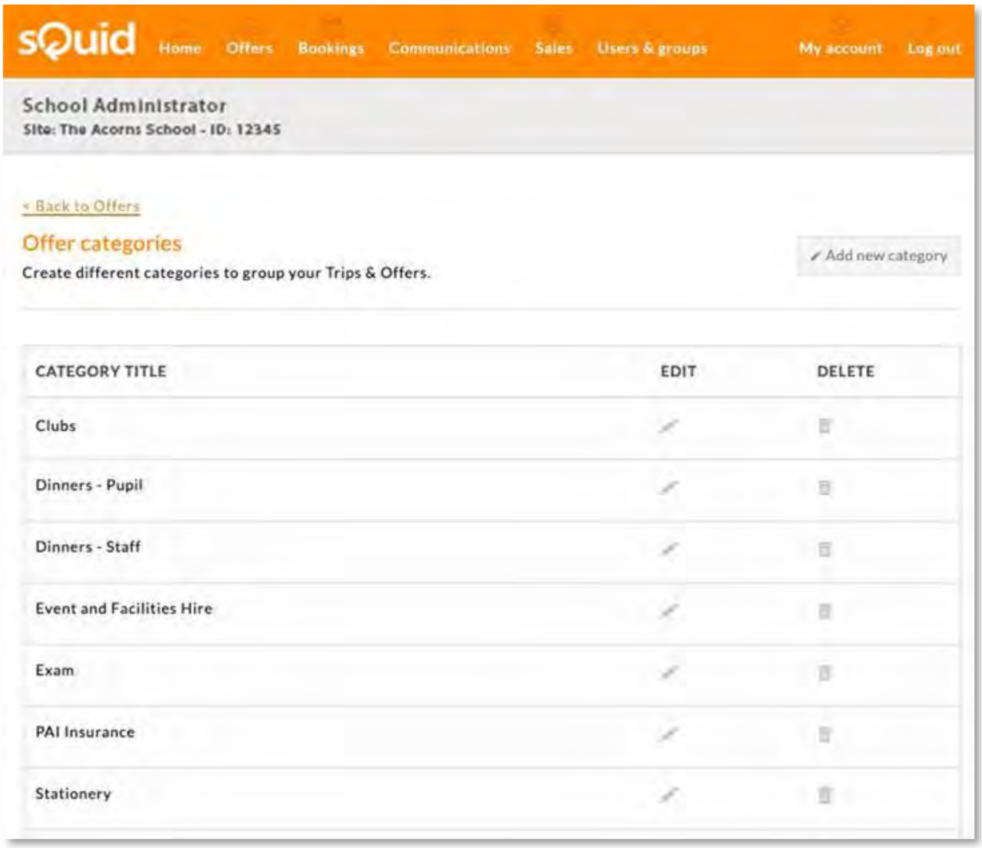
The **Subsidised offers** tile allows you to access all offers that have existing subsidised users.

- You can filter the displayed results by **Offer category** and **Offer dates** by clicking **Show filter**.
- You can view the **Subsidised users** for **Live**, **Draft**, **Upcoming**, **Paused**, **Expired** or **Archived offers**.
- By clicking the **action cog** beside the offer you can select to **View subsidised users**.



05 Offer categories

Selecting the **Offer Categories** tile allows you to view, create and edit the offer categories. ***N.B.: Not all administrators will have the permission rights to complete these actions.***



05.1 Add new category

- Click on **Add new category**
- Enter **Category name** in the box provided
- Click **Save category**

05.2 Edit category

- Click on the **pencil** icon (in the **Edit** column) beside the category you wish to edit
- Enter the new **category name** in the box provided
- Click **Save category**

05.3 Delete category

- Click on the **trash** icon (in the **Delete** column) beside the category you wish to delete.
- A **confirmation prompt** will be displayed. Either **Cancel** or **Confirm** deletion

06 Offers reporting

You can generate **revenue reports** by date for a **specific offer**.

- Click on the **View all offers** tile
- Click on the **action cog** next to the **specific offer** you wish to report on, in either in **Live, Paused, Expired or Archived offers**
- Select **View purchases** from the drop-down menu
- Click on **Generate Reports** on the left of the screen, and from the drop-down menu select **Generate revenue report.** Fill in the **dates** you wish to report on.