

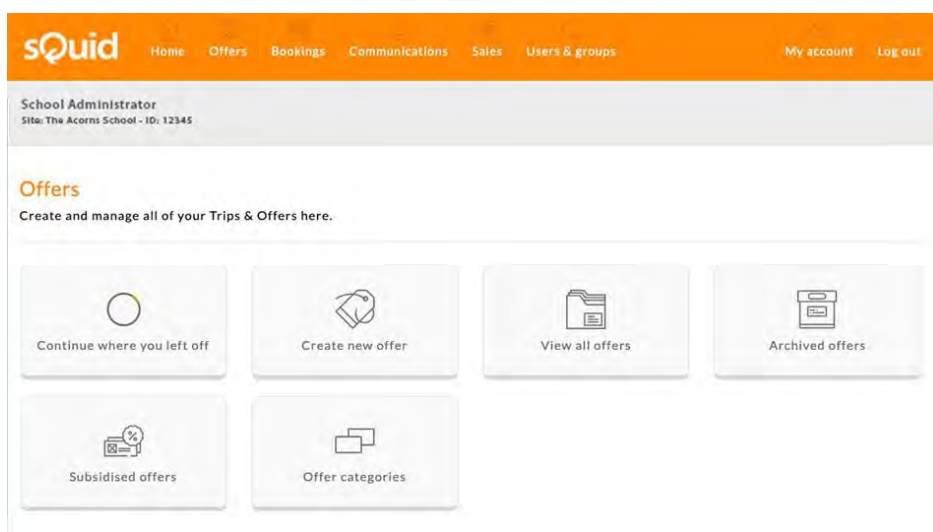
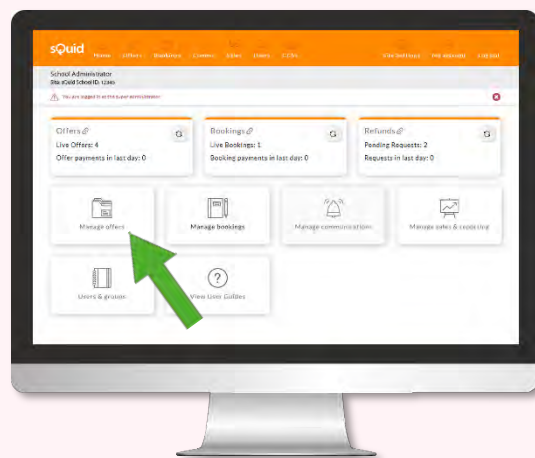
Offers

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- Select **Archived offers** to view all offers that have been archived.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

Please select a settlement bank account *

Select a ledger code

Please select a category for this offer

Select an icon for this offer *

Offer name *

Offer description *

When would you like this offer to go live?

When would you like this offer to be removed?

What is the final payment deadline for this offer?

When would you like this event to start? *

When would you like this event to end? *

Save and proceed

- 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

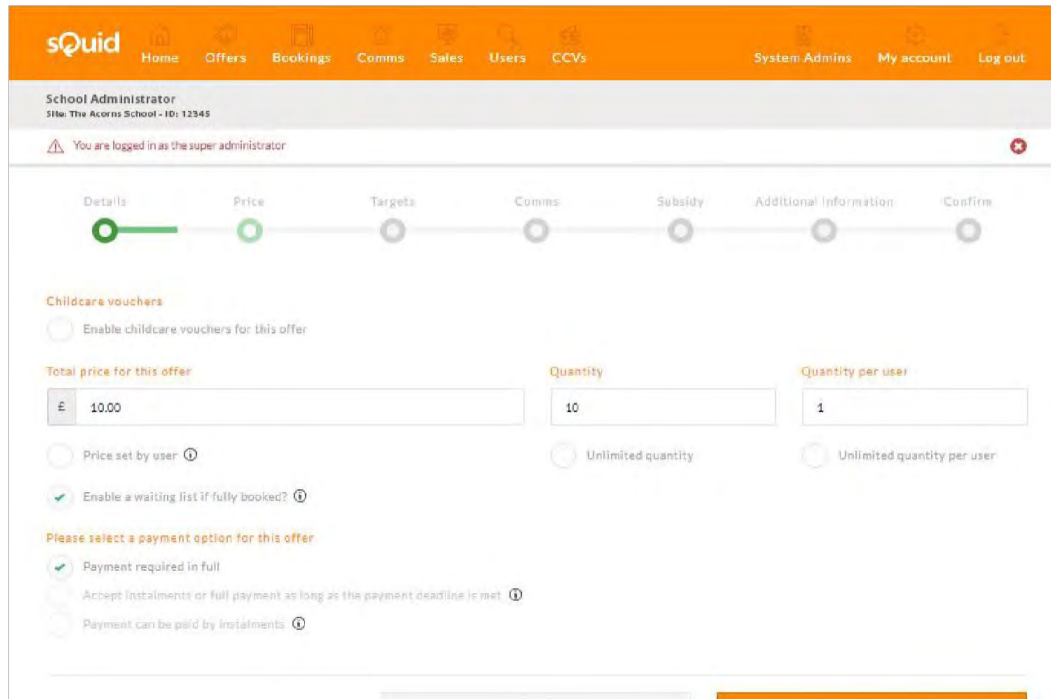
- Enter the **total price** for the offer – total price the end user will pay regardless of any VAT considerations
- Tick **Price set by user** if the amount to pay is to be defined by the user
- If you are accepting **childcare vouchers**, tick to enable this option (childcare vouchers **cannot be enabled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

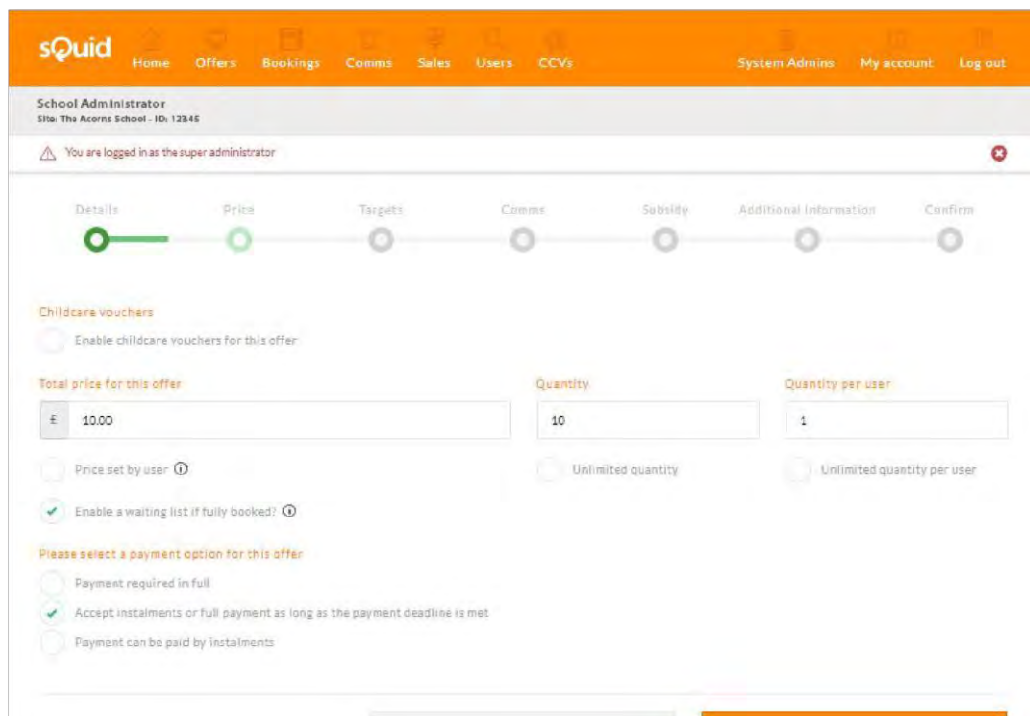
- Payment required in full

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**

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

Childcare vouchers
 Enable childcare vouchers for this offer

Total price for this offer: £ 10.00
Quantity: 10
Quantity per user: 1

Price set by user Unlimited quantity Unlimited quantity per user

Enable a waiting list if fully booked?

Please select a payment option for this offer
 Payment required in full
 Accept instalments or full payment as long as the payment deadline is met
 Payment can be paid by instalments

Total amount must add up to £10.00 and not exceed the final payment date of 23/07/2020 23:59:59

Use the slider to indicate the value of each instalment
£2.00
£0.00 £8.00 £ 2.00

Please select instalment date: 22/07/2020 00:00
Instalment description: Instalment 2

12/100
Add instalment

PAYMENT DUE DATE	DESCRIPTION	AMOUNT	REMOVE
20/07/2020 00:00:00	Instalment 1	£2.00	

Total : £2.00

Back Save and proceed

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

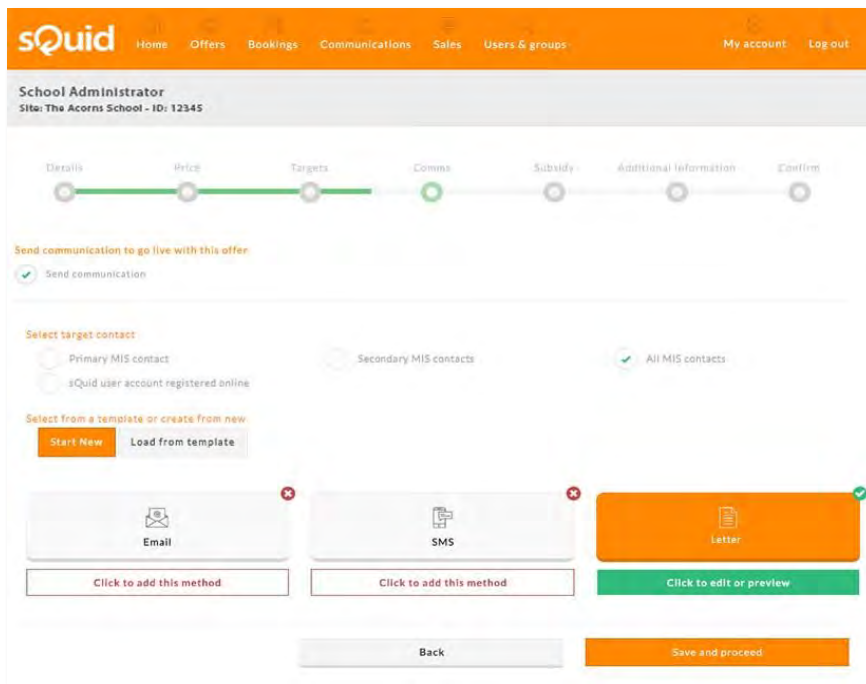
- Select your **target offer audience**. This can be specific year groups, classes, users or clubs:
 - These groups will be **mirrored from the MIS** as pulled over by sQuid
 - You are also able to create your own **payment only custom groups**
- Leave **Select all users** ticked should you wish to make 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**

The screenshot shows the sQuid web interface for a School Administrator. The top navigation bar includes Home, Offers, Bookings, Communications, Sales, Users & groups, My account, and Log out. The user is logged in as 'School Administrator' for 'The Acorns School - ID: 12345'. A progress bar at the top indicates the current step is 'Target', with other steps being 'Details', 'Price', 'Comm', 'Audience', 'Additional Info/Options', and 'Confirm'. Below the progress bar, there is a section titled 'Select users or groups' with a radio button for 'Select all users' and a search box. A table below the search box lists user details, including names, SRNs, and references. At the bottom, there are 'Back' and 'Save and proceed' buttons.

USER DETAILS	SRN	REFERENCE	REMOVE
name03 Student	6337991096200004	JDJD9292	
name01 Student2	6337991096200002	ABCDEF555	
name03 Student1	6337991096200005	DASD2EC433	

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.**

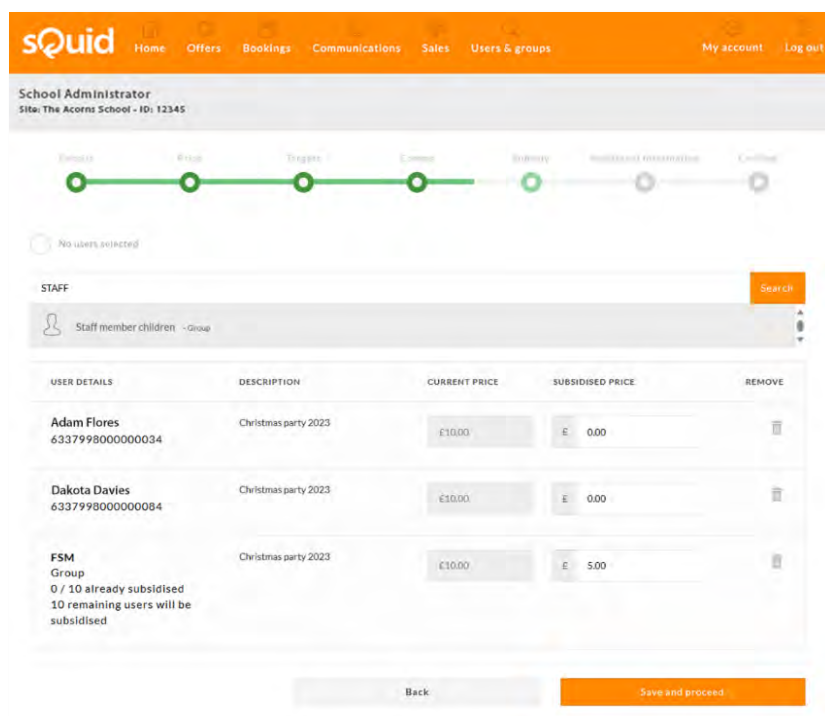
If you selected **Go live immediately at the start, **the message will send upon completion of the offer..**

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

The screenshot shows the 'Additional Information' step in the Squid School Administrator interface. A dropdown menu is open, listing various requirement types, with 'Download a file' selected. Below the menu is a text input field for the requirement description and a 'Select file' button. The 'Add requirement' button is visible at the bottom right of the form area.

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**

The screenshot shows the 'Additional Information' step in the Squid School Administrator interface. A table of added requirements is visible. The table has columns for Type, Requirement, Value, Mandatory, and Remove. One requirement is listed: 'Download file' with 'Permissions' as the requirement and 'permission.docx' as the value.

TYPE	REQUIREMENT	VALUE	MANDATORY	REMOVE
Download file	Permissions	permission.docx	No	

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**

TYPE	REQUIREMENT	VALUE	MANDATORY	REMOVE
Download file	Permissions	permission.docx	No	
File upload	Completed Permission Form	N/A	Yes	

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**

TYPE	REQUIREMENT	VALUE	MANDATORY	REMOVE
Question	Will you provide a packed lunch for your child?	N/A	Yes	

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**

The screenshot shows the 'Additional Information' step of a process flow. A dropdown menu is open, showing the option 'Please select from the following options'. Below the dropdown is a table with the following data:

TYPE	REQUIREMENT	VALUE	MANDATORY	REMOVE
Web link	news item about the topic	http://www.bbc.co.uk	No	

At the bottom of the form, there are two buttons: 'Back' and 'Save and proceed'.

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**

The screenshot shows the 'Additional Information' step of a process flow. The dropdown menu is set to 'View additional information'. The form is filled with the following information:

Enter the title.*
More Info On The Offer

Enter the information.*
Here you can enter a more detailed piece of information relating to the offer, this gives the ability to make more content available for parents to view

152/500
Add requirement

ADD ADDITIONAL INFORMATION HERE

Enter some user requests or press Next to skip this step

At the bottom of the form, there are two buttons: 'Back' and 'Save and proceed'.

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**.

Squid School Administrator
Site: The Acorns School - ID: 12345

Details Price Targets Comms Subsidy **Additional Information** Confirm

I would like the customer to complete the following actions

Answer a yes/no question

Enter a question that requires the users to answer YES or NO *

Will you provide a packed lunch for this trip

* This question requires the user answer YES or NO.

Add requirement

ADD ADDITIONAL INFORMATION HERE

Enter some user requests or press Next to skip this step

Back Save and proceed

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**

Squid School Administrator
Site: The Acorns School - ID: 12345

Details Price Targets Comms Subsidy **Additional Information** Confirm

I would like the customer to complete the following actions

Select from a list of options

Enter the question you would like to ask. *

Select Size of Blazer

Add options *

Small
Medium
Large

Enter an option

Mandatory question?

Add requirement

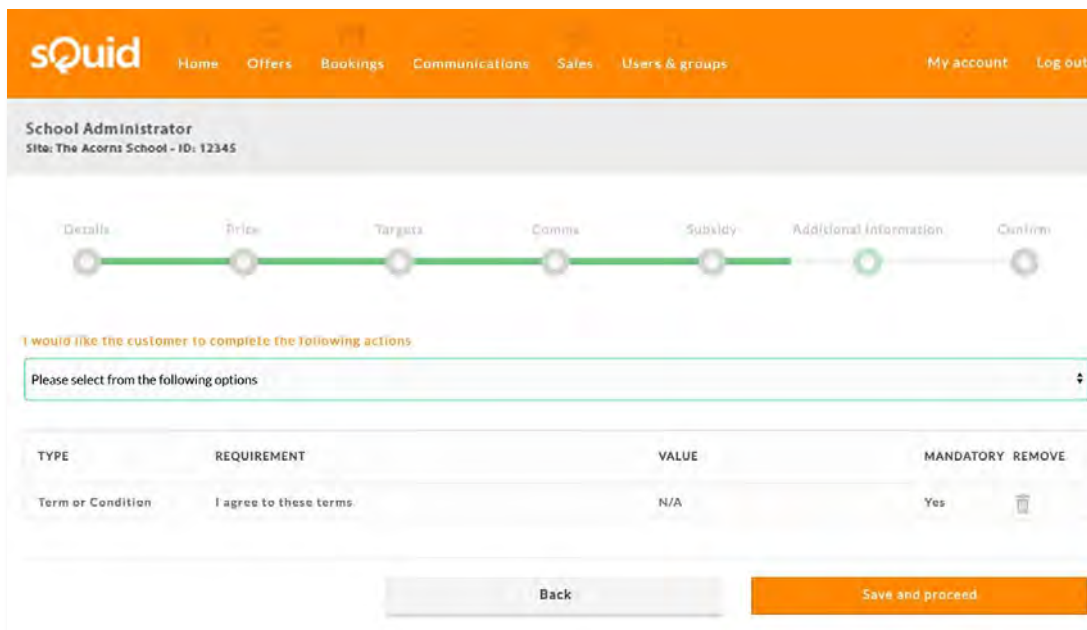
ADD ADDITIONAL INFORMATION HERE

Enter some user requests or press Next to skip this step

Back Save and proceed

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**



The screenshot shows the Squid School Administrator interface. At the top, there is a navigation bar with the Squid logo and links for Home, Offers, Bookings, Communications, Sales, Users & groups, My account, and Log out. Below the navigation bar, the user is identified as 'School Administrator' for 'Site: The Acorns School - ID: 12345'. A progress bar indicates the current step is 'Additional Information', with other steps being Details, Price, Targets, Comms, Subsidy, and Confirm. Below the progress bar, a message states 'I would like the customer to complete the following actions'. A dropdown menu is open, showing 'Please select from the following options'. Below the dropdown, a table lists the requirements:

TYPE	REQUIREMENT	VALUE	MANDATORY	REMOVE
Term or Condition	I agree to these terms	N/A	Yes	

At the bottom of the form, there are two buttons: 'Back' and 'Save and proceed'.

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:	Settlement account:	Price:
17/01/2024	sQuid Bank	£6.00
End date:	Ledger Code:	Quantity available:
End date not assigned	1	Unlimited
Due date:		Quantity per user:
Due date not assigned		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.



A4 sketchbook

Price: £6.00
Quantity available: Unlimited

POSTED ON
17/01/2024

[View details](#)

[Add to Basket](#)

This offer does not expire

[OK](#)

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**.

The screenshot shows the 'All offers' page in the Squid application. The page header includes the Squid logo and navigation links: Home, Offers, Bookings, Communications, Sales, Users & groups, My account, and Log out. The user is identified as 'School Administrator' for 'The Acorns School - ID: 12345'. A breadcrumb link '< Back to Offers management' is visible. The page title is 'All offers' with a subtitle 'View, edit and manage your offers here.' There are buttons for 'New Offer' and 'Show filter', and a 'Result' dropdown set to '10'. Below the title, there are tabs for offer status: LIVE (4), DRAFT (2), UPCOMING (1), PAUSED (1), EXPIRED (1), and ARCHIVED (19). The main table lists offers with columns: ID, TITLE, PRICE, QUANTITY, PAYMENT DEADLINE, and ACTIONS. The table contains four rows of offers. A dropdown menu is open for offer ID 6412, showing options: Edit offer, Edit price, Pause offer, View purchases, On site purchase, Extend offer, Convert to draft, and View subsidised users. At the bottom, there is a pagination control with buttons for First, Previous, 1, Next, and Last.

ID	TITLE	PRICE	QUANTITY	PAYMENT DEADLINE	ACTIONS
6413	Elocution Lessons <i>Pay in full</i>	£7.50	Total : 30 Sold : 0 Remaining : 30	Ongoing	
6412	Guitar Class <i>Pay in full</i>	£7.50	Total : 5 Sold : 0 Remaining : 5	Ongoing	
6406	Year 10 Exam <i>Pay in full</i>	£5.00	Total : 15 Sold : 4 Remaining : 11	Ongoing	
6405	Trip to City Museum <i>Pay in full</i>	£10.00	Total : 7 Sold : 3 Remaining : 4	Ongoing	

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**

The screenshot shows a modal window titled "Edit price" for an offer named "Year 1 trip to the Zoo". It prompts the user to "Enter the new price for this offer" and notes that "Editing the price will only affect users who have not yet purchased this offer." The current offer price is displayed as £30.00. A new offer price field is shown with a red border and the value 0.00.

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.

The screenshot shows the offer page for "Residential trip to Rugby Competition". It features buttons for "Generate Reports", "Download files", "Bulk Refund", and "Generate Communications". A table lists purchases, with one entry for "Test User33" on "17/01/2024 13:35" for "£500.00" with a status of "Incomplete". A dropdown menu is open over the "Generate Communications" button, showing options: "Communication for Not Purchased", "Communication for Purchased", and "Communication for Part Purchased".

The screenshot shows a "Select template" modal window. It prompts the user to "Select an existing template" and provides a dropdown menu. Below, there are three delivery method options: "Email", "SMS", and "Letter", each with a red 'x' icon. At the bottom, it says "0 of 3 options selected" and has a "Create" button.

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**

sQuid Home Offers Bookings Comms Sales Users Shop CCVs TPI System Admins My account Log out

School Administrator
Site: The Acorns School - ID: 12345

You are logged in as the super administrator

On Site Offer Purchase

This on site offer purchase is for:
Dakota Cooper - A3 Sketch book

Offer open Payment Completed

Customer is paying by cash Customer is paying cheque Customer is paying by card

Would you like to add denominations

1p	2p	5p	10p	20p	50p	£1	£2	£5	£10	£20	£50
0	0	0	0	0	0	0	0	2	0	0	0

Does the customer require any change?

Denomination total: £10.00
Great, your denominations add up

Payment total: £10.00

Previous Buy

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)

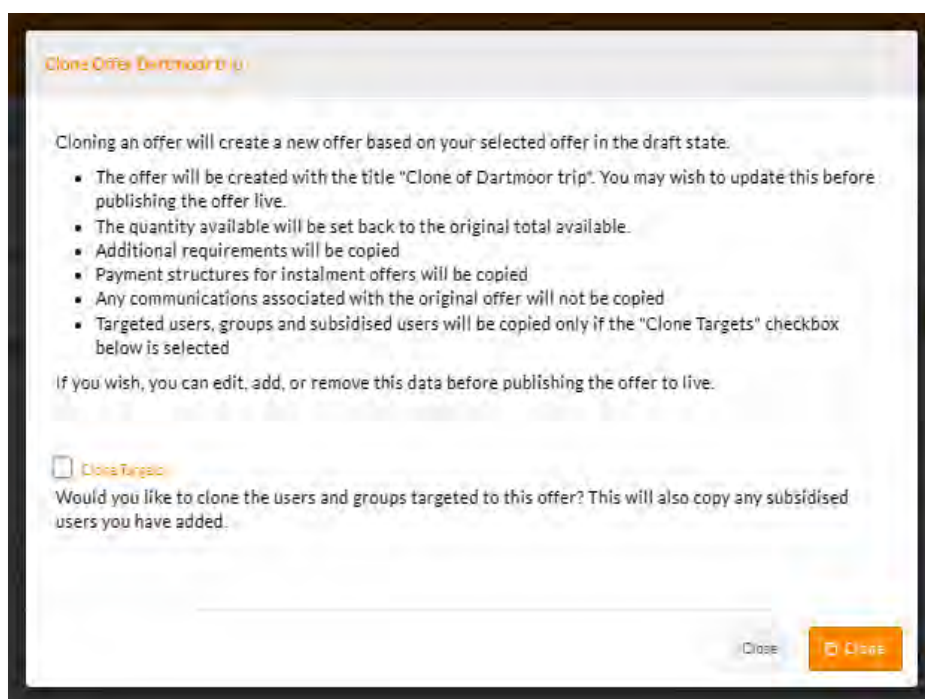
- Allows you to **convert the offer to draft** status, (suspending it), and allows you to **make changes to the offer**, store it as a **draft template**, or **delete it** (as long as no purchases have yet been made).

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**.

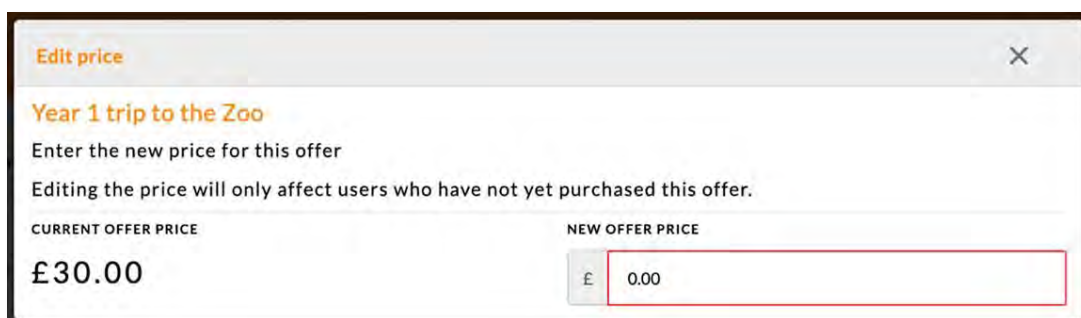
If you click on the **action cog** icon next to each offer in the **Paused offers** tab, you can **Edit offer**, **Edit price**, **Publish offer** (un-pausing it), **Extend offer**, **Archive offer**, **View purchases** (where any have previously been made prior to pausing), **View school notifications**,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



The screenshot shows a modal window titled "Edit price" with a close button (X) in the top right corner. The offer name is "Year 1 trip to the Zoo". Below the title, it says "Enter the new price for this offer" and "Editing the price will only affect users who have not yet purchased this offer." There are two columns: "CURRENT OFFER PRICE" showing "£30.00" and "NEW OFFER PRICE" showing a text input field with "£ 0.00" and a red border around the input area.

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 partial 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.

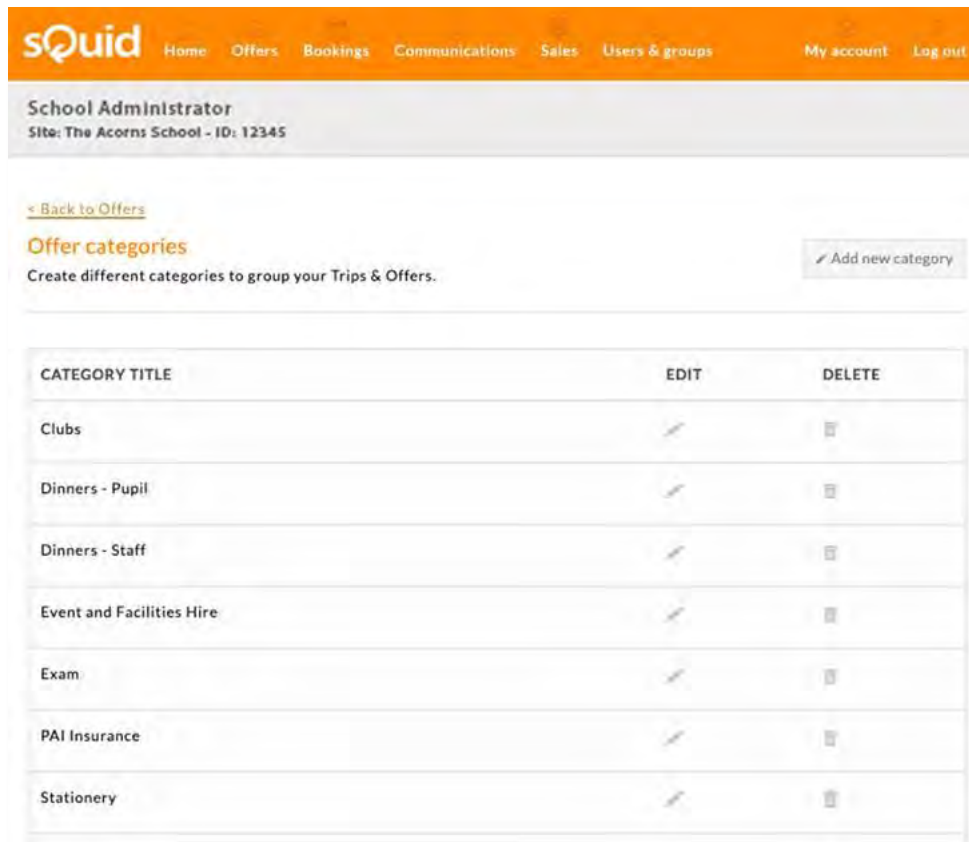
- You can filter the displayed results by **Offer category** and **Offer dates** by clicking **Show filter**.
- You can view the **Subsidised users** for **Live**, **Draft**, **Upcoming**, **Paused**, **Expired** or **Archived offers**.
- By clicking the **action cog** beside the offer you can select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

The screenshot displays the 'Subsidised offers list' interface. At the top, there's a navigation bar with 'Home', 'Offers', 'Bookings', 'Communications', 'Sales', and 'Users & groups'. The user is logged in as 'School Administrator' for 'The Acorns School - ID: 12345'. A link to '< Back to Offers management' is present. The main heading is 'Subsidised offers list' with a 'Show filter' button. Below this are tabs for 'LIVE', 'DRAFT', 'UPCOMING', 'PAUSED', 'EXPIRED', and 'ARCHIVED'. The 'DRAFT' tab is active. A table shows the following offer:

OFFER ID	OFFER TITLE	PAYMENT DEADLINE	SUBSIDISED USERS	ACTIONS
6422	Visit to City Museum and Art Gallery Pay in full	24/07/2020 23:59	1	 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.*



The screenshot shows the 'Offer categories' page in the Squid School Administrator interface. The page has an orange header with the 'Squid' logo and navigation links: Home, Offers, Bookings, Communications, Sales, Users & groups, My account, and Log out. Below the header, the user is identified as 'School Administrator' for 'Site: The Acorns School - ID: 12345'. A '< Back to Offers' link is present. The main heading is 'Offer categories' with a sub-heading 'Create different categories to group your Trips & Offers.' and an 'Add new category' button. A table lists the following categories:

CATEGORY TITLE	EDIT	DELETE
Clubs		
Dinners - Pupil		
Dinners - Staff		
Event and Facilities Hire		
Exam		
PAI Insurance		
Stationery		

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**

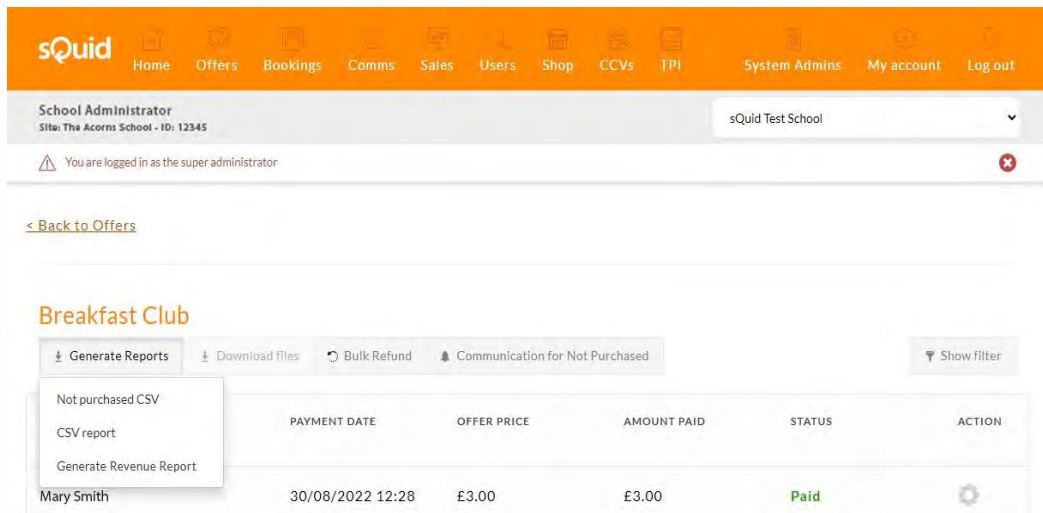
05.3 Delete category

- 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.



The screenshot displays the sQuid School Administrator interface. The top navigation bar includes links for Home, Offers, Bookings, Comms, Sales, Users, Shop, CCVs, TPI, System Admins, My account, and Log out. The user is logged in as the super administrator for 'The Acorns School - ID: 12345' at 'sQuid Test School'. The main content area shows the 'Breakfast Club' offer with a 'Generate Reports' button. A dropdown menu is open, showing options: 'Not purchased CSV', 'CSV report', and 'Generate Revenue Report'. Below the menu is a table with the following data:

	PAYMENT DATE	OFFER PRICE	AMOUNT PAID	STATUS	ACTION
Mary Smith	30/08/2022 12:28	£3.00	£3.00	Paid	