



# User Guide v1.4

The latest version can be found at:  
[squidcard.com/welcome/school-administrators](https://squidcard.com/welcome/school-administrators)

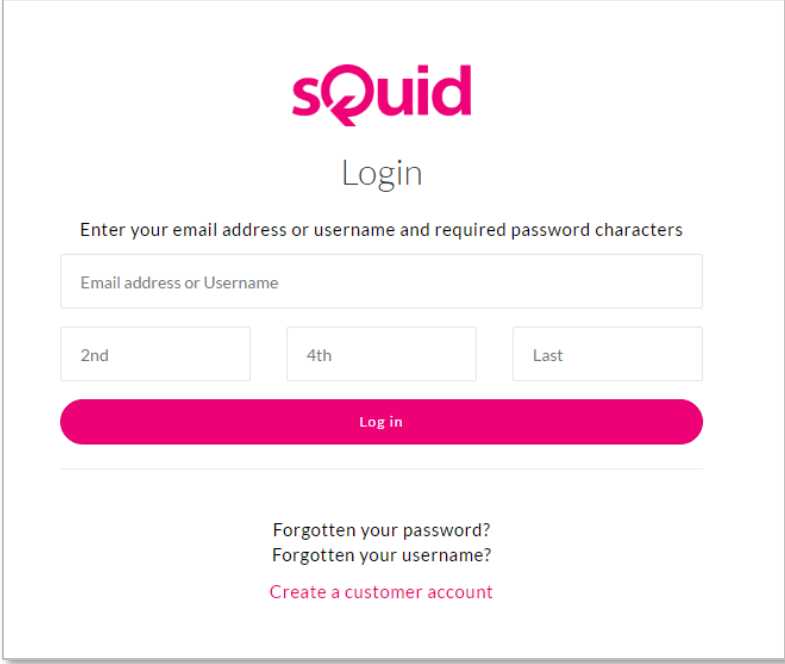
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## 1. Login page

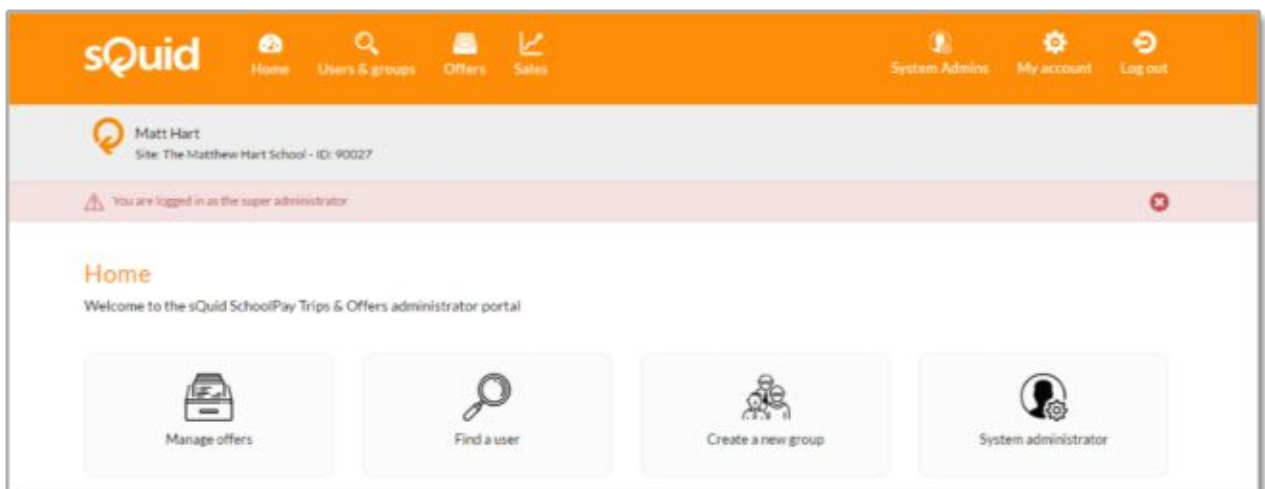
- Go to **portal.squidcard.com**
- Enter your email address to log in. This is the email address you have registered with sQuid to create your administrator account
- Enter the three characters requested from your password



The login page features the sQuid logo at the top. Below it is the word "Login". A prompt asks the user to "Enter your email address or username and required password characters". There is a text input field for the email address or username. Below this are three input fields for password characters: "2nd", "4th", and "Last". A large red "Log in" button is positioned below these fields. At the bottom, there are links for "Forgotten your password?", "Forgotten your username?", and "Create a customer account".

## 2. Home screen

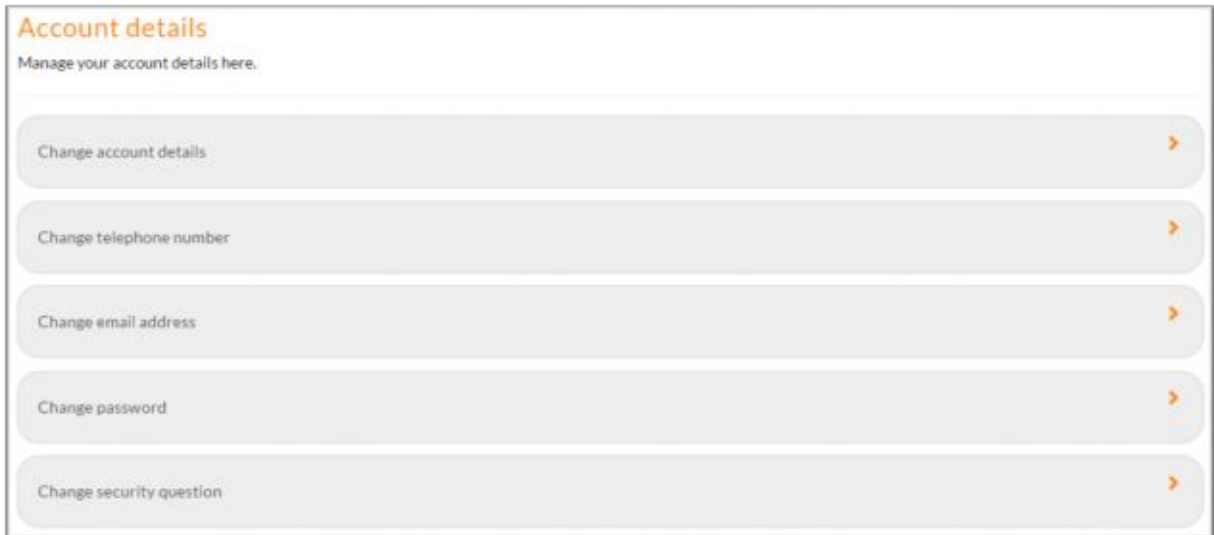
- Click **Manage Offers** to create or amend any offers, categories or groups
- Click **Find a user** to search and view details for all pupils or staff
- Click **Create a new group** to create and manage custom groups
- Click **System administrator** to manage system admins



### 3. My account

Within this section you can change any account details for the user.

- **Change account details** – allows you to change your name
- **Change telephone number** – allows you to change your telephone number
- **Change email address** – allows you to change your email address
- **Change password** – allows you to change your password
- **Change security question** – allows you to change your security question and answer



The screenshot shows a web interface titled "Account details" in orange text. Below the title is a subtitle "Manage your account details here." in a smaller, grey font. The main content area consists of five light grey rectangular buttons stacked vertically. Each button contains a text label and a small orange chevron icon pointing to the right. The labels on the buttons are: "Change account details", "Change telephone number", "Change email address", "Change password", and "Change security question".

## 4. Users & groups

In this section you can view and manage your users and custom groups. When you create an offer you can assign a particular group, or groups, to that offer. See 'Create an Offer' section for instructions.



### 4.1. User directory

- Enter name or sQuid registration number to search for a user
- Card details column shows a user's sQuid registration number and CVV number
- Purse details column shows a user's purse numbers
- Registered column shows whether a user has registered their online sQuid account
- Click on cog to view transactions, purchases or offers available to the individual

| Directory  |  |              |                            |            |        |
|--|--|--------------|----------------------------|------------|--------|
| Here you can view info about cards and their holders             |  |              |                            |            |        |
| <div>Select all Send notification Download CSV Show filter</div> |  |              |                            |            |        |
| Select   | Card details                                   | Year / Class | Purse details              | Registered | Action |
| <input type="checkbox"/>   | Graham Abbess<br>6337999006200001<br>CVV: 274  | 8 / 8B       | £0.00 - 633799004000202239 | ✗          | ⚙      |
| <input type="checkbox"/>   | Sean Abbey<br>6337999006200004<br>CVV: 666     | 8 / 8B       | £0.00 - 633799004000202262 | ✓          | ⚙      |
| <input type="checkbox"/>   | Grenetta Abbey<br>6337999006200002<br>CVV: 702 | 11 / 11F     | £0.00 - 633799004000202247 | ✗          | ⚙      |
| <input type="checkbox"/>   | Jimmy Abbey<br>6337999006200003<br>CVV: 555    | 13 / G       | £0.00 - 633799004000202254 | ✓          | ⚙      |

## 4.2. sQuid Groups

- Click **Show filter** to filter by group types. Click **Hide filter** to minimise filter
- You can search by group name and by group type
- Click the **Create a new group** icon
- Enter the group name in the first box
- You can select prepopulated year groups, enter names or enter sQuid registration numbers
- Click name to add to group
- Click **Save** and then **Done**

*Year groups will only be prepopulated if your school uses the Xporter and Xporter on Demand Integration otherwise year groups can be manually created.*

*Please note MIS group names cannot be amended in SchoolPay. The group name pulls through how it has been entered in the school's MIS.*

**Create Group**

Name Group

Year 7

Add users to group

Year

Year N2- Ref: GY-876

Year 7- Ref: GY-884

Year 1- Ref: GY-878

Year 2- Ref: GY-879

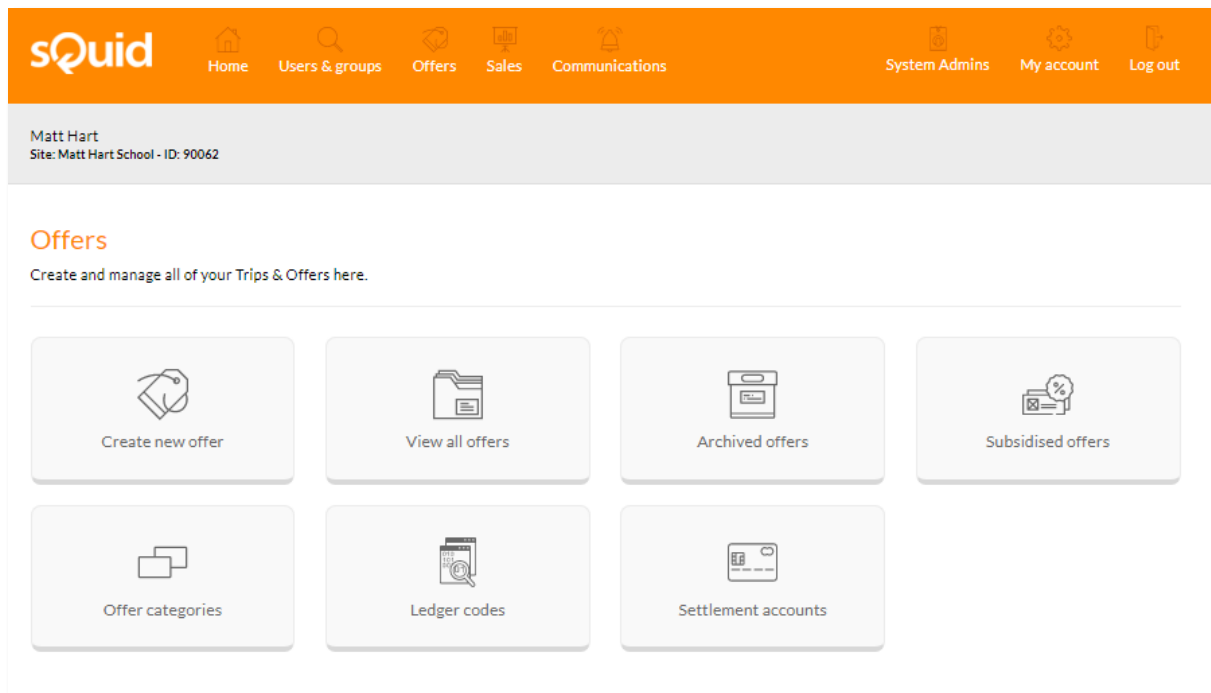
Year 7- Ref: GR-948

Currently no users added to this group...

Done Save

## 5. Offers

- **Continue where you left off** – allows you to continue creating an offer that was not completed
- **Create new offer** – allows you to create a new offer
- **View all offers** – this is where all live, upcoming, paused and expired offers are displayed. The offers can also be edited from this screen
- **Archived Offers** – this is where all offers that have been archived are stored. Expired offers can be added to this section with the Offers page.
- **Subsidised offers** – this is where any offers with subsidised users will show
- **Offer categories** – this is where offer categories are created
- **Ledger codes** – allows you to manage ledger codes





## 5.1. Create new offer

- Select the offer category from the dropdown box
  - If the category required is not already setup you can click Add New Category
- Choose an icon for the offer from the dropdown box underneath
- Enter a name for your offer. This is the name that the end user will see when logged in to their account
- You can enter a brief description for the offer in the box underneath, this can include any important information or further details
- Enter the Quantity available for the offer
  - Leave blank for unlimited quantity
- Enter the Quantity available to purchase per user
  - For a school trip this would usually be '1', however for a uniform purchase, a user may be given the option to purchase more than one.
  - Leave blank if the offer is recurring and can be purchased an unlimited number of times e.g. Breakfast Club

Once all of the information has been completed for this section, click **Save & Proceed**.

### Offer details


Please select a category for this offer.

Trips

⌵

Add new category

Select an icon for this offer \*



⌵

Offer name \*

Isle of Wight Trip

Offer description? \*

Infants trip to Isle of Wight

29/500

Quantity

☐ Unlimited quantity

50

Quantity per user?

☐ Unlimited quantity per user

1

Save and proceed

## 5.2. Dates and timings

- 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, then 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, then untick and select end date and time
- Select the final payment date and time deadline for the offer
  - If the offer has a due date, then untick and select the date and time. The final payment deadline date needs to be before the offer removed date

*The date can be manually typed in, or can be selected from a calendar when the box is selected.*

*The time 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 of the information has been completed for this section, click **Save & Proceed**.

[< Back to All Offers](#)

### Dates and timings

When would you like this offer to go live?

☒ I would like this offer to go live immediately

HH

:

MM

When would you like this offer to be removed?

☐ This offer does not expire

12

:

30

What is the final payment deadline for this offer?

☐ This offer does not have a final payment due date

09

:

00

Back

Save & proceed

### 5.3. Offer price and settlement bank account

- Select a settlement bank account from the dropdown box
- Select a ledger code from the dropdown box
  - A ledger code can be created at this point by clicking **Add new ledger code**
- Enter the total price for the offer
- Tick **Price set by user** if the amount to pay is defined by the user
- Select a payment option:
  - **Payment required in full** – full payment required when the offer is purchased
  - **Payment can be paid by instalments** – payment to be made in planned instalments
  - **Accept instalments or full payment as long as the payment deadline is met** – payments can be made for any amount as long as total payment is made by the deadline date

#### Offer price & settlement bank account

Please select a settlement bank account

Please select a settlement account ▼

Select a ledger code

Select ledger code ▼

Add new ledger code

Total price for this offer

£ 50.00

☐ Price set by user

Please select a payment option for this offer

☒ Payment required in full

☐ Payment can be paid by instalments

☐ Accept instalments or full payment as long as the payment deadline is met

Back

Save and proceed

## 5.4. Payment required in full

- No further setup required

## 5.5. Payment can be paid by instalments

- 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

*The instalment amount can be entered by either typing into the price box or by sliding the bar across.*

Total amount must add up to £300.00 and not exceed the final payment date of 22 Jul 2016

Please select instalment amount

£0.00 £100.00 £200.00

£100.00

Please select date and time

2016-06-30 17 : 00

Instalment description

Instalment 2/3

15/100

Add Instalment

| PAYMENT DUE DATE | DESCRIPTION    | AMOUNT  | REMOVE |
|------------------|----------------|---------|--------|
| 31/05/2016       | Instalment 1/3 | £100.00 |        |

Back Save & proceed

## 5.6. Accept instalments or full payment as long as the payment deadline is met

- No further setup required

Once all of the information has been completed for this section, click **Save & Proceed**.

## 5.7. Groups & communication

- Select who the offer is to be targeted at. This can be specific year groups, classes, users or clubs
- Tick **Select all users** should you wish to make the offer available to all users  
*If the group required is not already setup you can click **Create new group** at this point, see the 'Groups' section for instructions on how to do this.*
- Leave the box unticked 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 and groups. When typing the name of a group press Search or Enter on your keyboard to search.
- Tick **Send go live notification with this offer** should you wish to communicate to users at the same time the offer goes live. A communication template needs to be already setup.  
*Please see section 6 on how to do this.*


### Groups & communication


Create new group


Select users or groups


☐ Select all users

Search


 Year 13Ref: GY-31 - Group

 Year 7Ref: GY-37 - Group


 Year 8Ref: GY-36 - Group


 Year 9Ref: GY-35 - Group

#### Selected users and groups




Year 2  
Ref: GY-879  
[View](#) Group





Year 1  
Ref: GY-878  
[View](#) Group



Back

Save & proceed

## 5.8. Subsidised users

In this section, you can select users to be subsidised on the price of an offer, so the user does not pay the full amount.

- Untick **No users selected**
- Search the names of any users who are being subsidised on the price of the offer
- The users will appear in the box underneath
- In the **Subsidised price** box enter the total amount the user is required to pay
- Click **Save and proceed** once all users have been added

Select users to be subsidised

☐ No users selected

Search for users Search

| User details      | Description        | Current price | Subsidised price | Remove |
|-------------------|--------------------|---------------|------------------|--------|
| Kirsty Devonshire | Isle of Wight Trip | £500.00       | £ 75.00          |        |
| Sam Atwal         | Isle of Wight Trip | £500.00       | £ 75.00          |        |

Back Save and proceed

## 5.9. Additional information

In this section, you can add any additional requirements to be completed for the offer by the end user i.e. 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, i.e. a consent form
- **Upload a file** – allows a file to be uploaded by the end user, i.e. 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, i.e. 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 list of options** – allows the end user to select from different options, i.e. Uniform size

*Please note, you are able to add more than one additional requirement for each offer.*

### 5.10. Download a file

- Select **Download a file** from the dropdown 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**
- You will now see the file added in the table below

The screenshot shows a form titled "Additional information" with the heading "I would like the customer to complete the following actions". A dropdown menu is set to "Download a file". Below it is a text input field labeled "Enter file title". To the right of this field are two buttons: "Select file" (outlined in red) and "Add requirement" (orange). Below these is a table with three columns: "Requirement", "Value", and "Remove". The table contains one row with "Consent Form" in the "Requirement" column and a trash icon in the "Remove" column. At the bottom are two buttons: "Back" (grey) and "Save & proceed" (orange).

| Requirement  | Value | Remove |
|--------------|-------|--------|
| Consent Form |       |        |

Once all information is complete for this section, click **Save & Proceed**.

### 5.11. Upload a file

- Select **Upload a file** from the dropdown box
- Enter a description for the file in the box
- You will now see the file added in the box below
- Tick the **Is this a mandatory question box** if the question is mandatory
- Once the description and file are added, click **Add requirement**

The screenshot shows a form titled "Additional information" with the heading "I would like the customer to complete the following actions". A dropdown menu is set to "Upload a file". Below it is a text input field containing "Signed Consent Form". Below this field is a radio button followed by the text "Is this a mandatory question?". To the right of this is an orange "Add requirement" button. At the bottom are two buttons: "Back" (grey) and "Save & proceed" (orange).

### 5.12. Answer a question

- Select **Answer a question** from the dropdown box
- Enter further information in the box below
- Tick the **Is this a mandatory question** box if the question is mandatory
- Once the question is entered, click **Add requirement**

The screenshot shows a form titled 'Additional information' with a sub-header 'I would like the customer to complete the following actions'. A dropdown menu is set to 'Answer a question'. Below it is a large text area labeled 'Enter further information'. To the right of the text area is a character count '0/500'. Below the text area is a checkbox labeled 'Is this a mandatory question?'. To the right of the checkbox is an orange button labeled 'Add requirement'. At the bottom of the form are two buttons: a grey 'Back' button and an orange 'Save & proceed' button.

### 5.13. Answer a yes/no question

- Select **Answer a yes/no question** from the dropdown box
- Enter the question in the box below
- Tick the **Does this require a response** box if the question is mandatory
- Once the question has been entered, click **Add requirement**

The screenshot shows a form titled 'Additional information' with a sub-header 'I would like the customer to complete the following actions'. A dropdown menu is set to 'Answer a yes/no question'. Below it is a text area containing the question 'Will your child be bringing a packed lunch?'. To the right of the text area is a checkbox labeled 'Does this require a response?'. To the right of the checkbox is an orange button labeled 'Add requirement'. At the bottom of the form are two buttons: a grey 'Back' button and an orange 'Save & proceed' button. A link '+ Back to All Offers' is visible at the top left of the form.



### 5.14. View a web link

- Select **View a web link** from the dropdown 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**

**Additional information**

I would like the customer to complete the following actions

View a web link

London Zoo

<https://www.zsl.org/zsl-london-zoo>

Add requirement

Back Save & proceed

### 5.15. View additional information

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

**Additional information**

I would like the customer to complete the following actions

View additional information

London Zoo Trip Information

Coach leaves the school at 7am

30/500

Add requirement

Back Save & proceed

### 5.16. Select from a list of options

- Choose **Select from a list of options** from the dropdown 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**

The screenshot shows a form titled "Additional information" with a subtitle "I would like the customer to complete the following actions". A dropdown menu is set to "Select from a list of options". Below this, a text input field contains the question "Size of Jumper". Underneath the question, there are three rows of options: "Small", "Medium", and "Large", each in a grey box with a corresponding "Remove" button to its right. At the bottom of the options list is a text input field labeled "Enter an option" with a red border, and an orange "Add" button to its right. At the very bottom of the form, there is a checkbox labeled "Is this a mandatory question?" which is checked, and an orange "Add requirement" button.


Once all of the information has been complete for this section, click **Save & Proceed**.

### 5.17. Offer Overview

- Once all of the steps have been completed, you will be shown an Offer Overview
- Double check all of the information on the page and then click **Finish**
- Should you need to change any offer details, you can click **Back** to the relevant page and make any amendments. You can also skip back by clicking on the wizard section icons

**Isle of Wight Trip**

---

|   |                                    |                                  |
|---|------------------------------------|----------------------------------|
| <b>Offer Category:</b><br>Trip  | <b>Start Date:</b><br>18/05/2016   | <b>Ledger Code:</b><br>Trips0001 |
| <b>Offer Icon:</b><br> | <b>End date:</b><br>30/06/2016     | <b>Price:</b><br>£120.00         |
|   | <b>Settlement account:</b><br>kris | <b>Quantity available:</b><br>50 |
|   |                                    | <b>Quantity per user:</b><br>1   |
|   |                                    | <b>Due date:</b><br>30/06/2016   |

---

**Description:**  
Trip to Isle of Wight; 11th - 15th July 2016; £120.00 to be paid in 3 installments.

---

**Installments**


| PAYMENT DUE DATE | DESCRIPTION     | AMOUNT |
|------------------|-----------------|--------|
| 17/06/2016       | Installment 1/2 | £60.00 |
| 29/06/2016       | Installment 2/2 | £60.00 |

---

Back
Finish

### 5.18. Publish Offer

- If you click **No, save to drafts** the offer will be saved in your draft offers
- If you click **Publish offer** then your offer will be complete



Would you like to publish this offer?

Publishing this offer will make it visible to all customers

NO, SAVE TO DRAFTS
PUBLISH OFFER

## 5.19. 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 and Expired 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**.

If you click on the cog icon next to the trip you can edit or pause the offer.

### All offers

View, edit and manage your offers here.

New Offer

Select category

Filter from start date

Filter to end date

All categories

Select from date

Select to date

Live

Draft

Upcoming

Paused

Expired

Search in table

| Title              | Price  | Quantity                                 | Deadline   | Actions |
|--------------------|--------|--|------------|---------|
| School Jumper      | £25.00 | Offers sold : 0<br>Offers remaining : ∞  | --/--/---- |         |
| School Tie         | £12.00 | Offers sold : 4<br>Offers remaining : ∞  | --/--/---- |         |
| Isle of Wight Trip | £0.00  | Offers sold : 1<br>Offers remaining : 50 | --/--/---- |         |

## 5.20. Archived offers

Once you are finished with an offer and you no longer need to manage it you can move it to your archived offers folder. This is a tool to allow you to keep your Manage Offers screen clean and up to date.

Please be aware, offers are kept here for reference only, once an offer is moved to archived you will no longer be able to download any information regarding the offer. Only move offers here if you no longer need to know anything about the offer. It is recommended that you download and store all offer details from the Sales Management section before archiving an offer e.g. all transactions.

Archiving an offer is an irreversible action.

You can filter between offer categories and start and end dates at the top of the page.

- To add an offer to the Archived offers you can click on the cog icon and then click **Archive offer**

### Archived offers

This is page where you can see all the archived offers

**SELECT AN CATEGORY**  
All categories ▼

**FILTER FROM START DATE**  
Select from date

**FILTER TO END DATE**  
Select to date

| ☐TITLE          | ☐PRICE | ☐QUANTITY | ☐DEADLINE |
|-----------------|--------|-----------|-----------|
| Search in table |        |           |           |


## 5.21. Offer categories











Create and amend categories for your offers

[< Back to Offers](#)

### Offer categories

Create different categories to group your Trips & Offers.

 Add new category

| Category title | Edit   | Delete  |
|----------------|--|---|
| Tickets        |  |  |
| Uniform        |  |  |
| Textbooks      |  |  |
| Trips          |  |  |
| Clubs          |  |  |

## 5.22. Add new category

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

### Add Offer Category

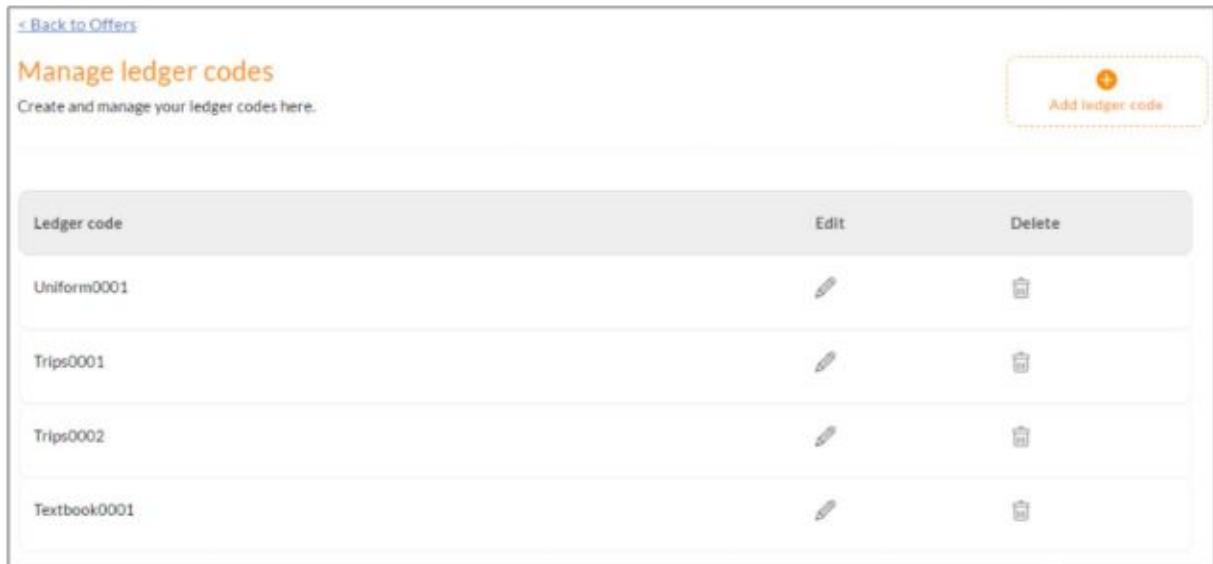


Category Name

### 5.23. Ledger codes

This section allows you to create Ledger Codes, i.e. for uniform purchases.

- Click **Add Ledger Code**
- Enter ledger code name
- Click **Save Ledger Code** to finish











< Back to Offers

### Manage ledger codes

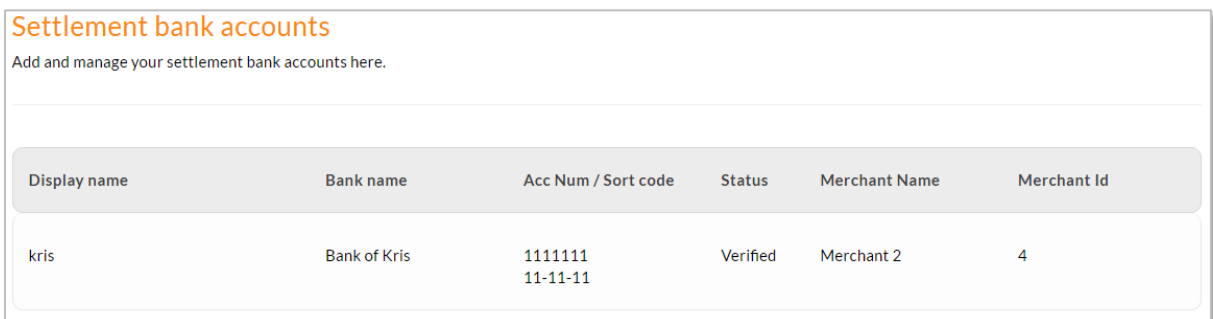
Create and manage your ledger codes here.

[+ Add ledger code](#)

| Ledger code  | Edit  | Delete  |
|--------------|---|---|
| Uniform0001  |  |  |
| Trips0001    |  |  |
| Trips0002    |  |  |
| Textbook0001 |  |  |

### 5.24. Settlement accounts

This page displays the bank account details where any trips and offers settlement is made. Should you wish to change any bank details please contact sQuid directly.



### Settlement bank accounts

Add and manage your settlement bank accounts here.

| Display name | Bank name    | Acc Num / Sort code | Status   | Merchant Name | Merchant Id |
|--------------|--------------|---------------------|----------|---------------|-------------|
| kris         | Bank of Kris | 1111111<br>11-11-11 | Verified | Merchant 2    | 4           |

**If additional settlement accounts are required, please let your sQuid Account Manager know and they will supply you with a form to complete so these can be setup.**

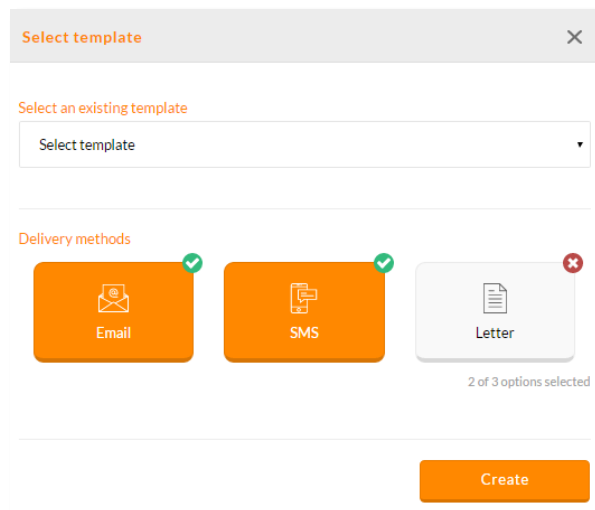
## 6. Communications

In this section you can create Emails, SMS and Letters to send to users in relation to any trips, offers, or anything else school related.

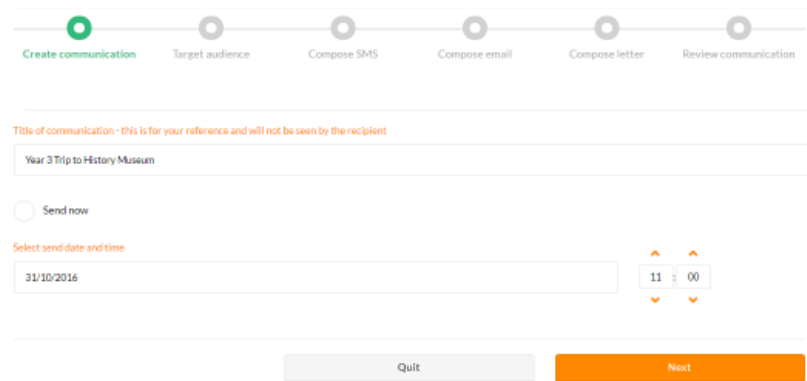
*If your school uses SIMS, please ensure that your MIS is up to date with the correct priority levels for parents, parental responsibilities and contact email address.*

### 6.1. Create communications

- Click the **Create communication** icon
- **Select an existing template** should you wish to use one. Leave this blank to create a new one
- Choose the communication **delivery methods** by clicking on them. The delivery method will have a green tick on the top right hand corner once it has been selected
- Click **Create**



- On the next screen please enter a **Title of communication**. This title will only be visible internally
- Tick **Send now** to send the communication once the offer has been created, or leave this box unticked, and enter a date and time underneath to send the communication at a specific time
- Click **Next**





- On the **Target audience** screen you can choose who the communication will be sent to
- Tick **Primary contacts** to send to the primary contact on SIMs only
- Tick **Primary and secondary contacts** to send to the primary contact and any secondary contacts on SIMs only
- Tick **Include all sQuid user accounts in this communication** to include the sQuid account holder in any communication
- Tick **All** to communicate with primary, secondary and sQuid account contacts

The screenshot shows a progress bar at the top with six steps: 'Create communication', 'Target audience' (highlighted in green), 'Compose SMS', 'Compose email', 'Compose letter', and 'Review communication'. Below the progress bar, the heading 'Select target contact' is followed by three radio button options: 'Primary contacts' (selected with a green checkmark), 'Primary and secondary contacts', and 'All'. Below these is a checkbox option 'Include all sQuid user accounts in this communication' which is currently unchecked.

- Click **Target all** to communicate with all users
- Click **Users and groups** to target specific pupils or groups of pupils. Type the name of the user or group in the box underneath **Select users**, then click on the name where the user will be added and shown underneath the box
- Click **Next**

The screenshot shows the 'Select users' screen. At the top, there are two buttons: 'Target all' (grey) and 'Users and groups' (orange). Below these, the heading 'Select users' is followed by a search input field containing the text 'mat'. Below the search field, a list of users is displayed. The first user is 'Matt Junior Hart - 6337998000000013 - User'. Below this, there are two more users: 'Kirsty Junior Bostock' and 'Kris Junior Gorman'. Each user entry includes a profile icon, the name, a phone number, an ID number, and a trash icon. At the bottom of the screen, there are two buttons: 'Previous' (grey) and 'Next' (orange).

| Profile Icon | Name                                       | Phone Number     | ID Number      | Trash Icon |
|--------------|--|------------------|----------------|------------|
|              | Matt Junior Hart - 6337998000000013 - User |                  |                |            |
|              | Kirsty Junior Bostock                      | 6337998000000007 | A8000000000008 |            |
|              | Kris Junior Gorman                         | 6337998000000001 | A8000000000002 |            |

## 6.2. Compose SMS

- To compose a new SMS type your message in the box underneath **Create SMS template**
- If selecting an existing template, the message will be populated in the box. Changes can be made to the message
- Within your message you can enter pre-selected tokens from the right hand box by clicking on them, such as FORENAME or SURNAME
- The number of characters per SMS is 160. A current count of the number of characters used is recorded underneath where it says **SMS length**
- **SMS count** is the number of SMS messages that will be sent due to the number of characters used

The interface shows a progress bar at the top with six steps: 'Create communication', 'Target audience', 'Compose SMS' (active), 'Compose email', 'Compose letter', and 'Review communication'. Below the progress bar is a large text area for the message template. To the right of the text area is a list of tokens that can be inserted into the message. Below the text area is a summary table showing the SMS length, SMS count, and characters per SMS. At the bottom are 'Previous' and 'Next' buttons.

Create SMS template

Dear Parent of \$ \_STUDENT\_FORENAME\_ \$ \$ \_STUDENT\_SURNAME\_ \$, the History Museum trip is available to purchase on your sQuid account| Kind regards, \$ \_SCHOOL\_NAME\_ \$

|            |           |                    |
|------------|-----------|--------------------|
| SMS length | SMS count | Characters per SMS |
| 159        | 1         | 160                |

- TITLE
- FORENAME
- SURNAME
- EMAIL ADDRESS
- FULL ADDRESS
- FULL ADDRESS RIGHT
- MOBILE
- CVV
- MY NAME
- SRN
- SCHOOL NAME
- TOMORROWS DATE AND TIME

Previous Next

### 6.3. Compose email

- To compose a new email type your message in the box underneath **Create email**
- If selecting an existing template, the message will be populated in the box. Changes can be made to the existing template
- Within your message you can enter pre-selected tokens from the right hand box by clicking on them, such as FORENAME or SURNAME
- A file can be selected to add as an attachment by clicking **Select file**
- Click **Next** when the email is complete

The screenshot shows a multi-step process for creating a communication. At the top, a progress bar has six steps: 'Create communication', 'Target audience', 'Compose SMS', 'Compose email' (which is highlighted with a green circle and text), 'Compose letter', and 'Review communication'. Below the progress bar, the 'Subject' field contains 'History Museum Trip'. To the right of the subject field is a 'Select file' button. Below the subject field is a rich text editor with a toolbar containing various formatting options (H1-H6, P, pre, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, undo, redo, and a clear icon). The text area of the editor contains the following content: 'Dear Parent/Guardian of \$\_STUDENT\_FORENAME\_\$ \$\_STUDENT\_SURNAME\_\$,' followed by a paragraph: 'The school trip to National History Museum will be available to purchase on your Trips and Offers purse on your sQuid account \$ \_SRN\_\$ at \$\_TOMORROWS\_DATE\_TIME\_\$.' Below this is 'Kind regards,' followed by two lines of tokens: '\$\_MY\_NAME\_\$' and '\$\_SCHOOL\_NAME\_\$'. To the right of the text editor is a scrollable list of tokens: 'FULL ADDRESS RIGHT', 'MOBILE', 'CVV', 'MY NAME', 'SRN', 'SCHOOL NAME', 'TOMORROWS DATE AND TIME', 'TOMORROW'S DATE', 'DATE AND TIME', 'DATE', 'TIME', and 'STUDENT NAME'. At the bottom of the form are two buttons: 'Previous' (disabled) and 'Next' (active, highlighted in orange).

### 6.4. Compose letter

- To compose a new letter, type your message in the box underneath **Create letter template**
- If selecting an existing template, the message will be populated in the box. Changes can be made to the letter template
- Within your letter you can enter pre-selected tokens from the right hand box by clicking on them, such as FORENAME or SURNAME
- Click **Print preview** to open a preview of the letter
- Click **Next** when the letter is complete



## Letter

Compose letter

Create letter template

| H1   | H2 | H3 | H4 | H5 | H6 | P | pre | B | I | U | ☞ | ☛ | ☞ | ☛ | ☞ | ☛ |
|--|----|----|----|----|----|---|-----|---|---|---|---|---|---|---|---|---|
| <div> <div> <div>☛</div> <div>☛</div> <div>☛</div> <div>☛</div> <div>☛</div> </div> <div> <div>&lt;/&gt;</div> <div>☛</div> <div>☛</div> </div> <div>Words: 100</div> <div>Characters: 660</div> </div>  |    |    |    |    |    |   |     |   |   |   |   |   |   |   |   |   |
| <div> <div>EMAIL ADDRESS</div> <div>FULL ADDRESS</div> <div>FULL ADDRESS RIGHT</div> <div>MOBILE</div> <div>CVV</div> <div>MY NAME</div> <div>SRN</div> <div>SCHOOL NAME</div> <div>TOMORROWS DATE AND TIME</div> <div>TOMORROW'S DATE</div> </div>  |    |    |    |    |    |   |     |   |   |   |   |   |   |   |   |   |
| <div> <div>\$_FULL_ADDRESS_\$</div> <div>Dear Parent/Guardian of \$_STUDENT_FORENAME_\$ \$_STUDENT_SURNAME_\$,</div> <div>Below is a list of the After School Clubs and dates for the Spring term, commencing the first week after half term:</div> <div> <div>Monday - Football Club</div> <div>Tuesday - Dance Club</div> <div>Wednesday - Gymnastics Club</div> <div>Thursday - Cooking Club</div> <div>Friday - Singing Club</div> </div> <div>Please let your child's teacher know should \$_STUDENT_FORENAME_\$ want to attend any of the clubs. Places are limited so please be aware spaces will be allocated on a first come first served basis. Please also ensure that your child has their PE Kit should they attend the Football, Dance and/or Gymnastic clubs.</div> <div>Kind regards,</div> <div>\$_MY_NAME_\$</div> <div>\$_SCHOOL_NAME_\$</div> </div> |    |    |    |    |    |   |     |   |   |   |   |   |   |   |   |   |

[Print preview](#)[Previous](#)

## 6.5. Review communication

In this section you will be taken to an overview of the communication, which shows the delivery methods that have been setup and who the communication will be sent to.

- Click the boxes underneath the orange icons to **preview email, SMS or Letter**
- Click **Create**

The screenshot displays the 'Review communication' step in a multi-step process. The progress bar at the top shows five steps: 'Create communication', 'Target audience', 'Compose SMS', 'Compose email', 'Compose letter', and 'Review communication' (the current step, highlighted with a green circle). Below the progress bar, the communication details are shown: 'Description: History Museum Trip', 'Created by: superAdmin superAdmin', and 'Send date and time: Send instantly'. The 'Delivery method' section shows three orange buttons: 'Email', 'SMS', and 'Letter', each with a green checkmark. Below these buttons are three buttons: 'Click to preview email', 'Click to preview SMS', and 'Click to preview letter'. The 'Send to' section shows two options: 'Send to user account' (selected with a green checkmark) and 'Send to contacts'. Below this is a table of selected users:

| Select users |                      |                  |                |
|--------------|----------------------|------------------|----------------|
|              | MattJunior Hart      | 6337998000000013 | A8000000000014 |
|              | KirstyJunior Bostock | 6337998000000007 | A8000000000008 |

At the bottom, there are two buttons: 'Previous' and 'Create'.

## 6.6. Upcoming communication

In this section you can add, edit and manage all of your communications.

- The **Filter communication type** box is prepopulated with Email, SMS and Letter. To remove any of these communication types from the search, click on the box and then push the back space
- Enter dates in the **Date From** and **Date To** boxes to filter between specific dates. Leave these fields blank to view all communication
- Enter the name of a communication in the box underneath **Search upcoming communications** to filter by communication title
- To view a summary of an upcoming communication, click the cog icon in the Actions tab, then **View summary**
- Click **Edit notification** to make changes to the notification name and/or recipients
- Click **Delete notification** to remove it from this list

**Upcoming communications**  
Here you can add, edit and manage all of your upcoming communications.

Filter communication type: EMAIL SMS LETTER

Date from: 01/11/2016 Date to: 31/12/2016

Search upcoming communications  
Search notification by title here

| Title             | Type  | Estimated cost | Created by            | Send date          | Actions |
|-------------------|-------|----------------|-----------------------|--------------------|---------|
| Christmas Holiday | EMAIL | -              | superAdmin superAdmin | 25/11/2016 - 11:00 |         |

Previous 1 Next

## 6.7. Processed communication

In this section you can view any sent communication.

- The **Filter communication type** box is prepopulated with Email, SMS and Letter. To remove any of these communication types from the search, click on the box and then push the back space
- Enter dates in the **Date From** and **Date To** boxes to filter between specific dates. Leave these fields blank to view all communication
- Enter the name of a communication in the box underneath **Search communications** to filter by communication title
- Click **Hide filter** to minimise the filter box

**Processed communications**  
Here you can view all sent communications.

Filter communication type: EMAIL SMS LETTER

Date from: 24/10/2016 Date to: 11/11/2016

Search communication  
Search communication by title here

| Communication title | Date sent                                    | Delivery types | Count                           | Cost | More |
|---------------------|--|----------------|---------------------------------|------|------|
| History Museum Trip | 26/10/2016<br>11:21<br>superAdmin superAdmin | SMS            | Total sent: 2<br>✔ - 0<br>✘ - 2 |      | ⚙    |
| History Museum Trip | 26/10/2016<br>11:21<br>superAdmin superAdmin | LETTER         | Total sent: 2<br>✔ - 0<br>✘ - 2 |      | ⚙    |
| History Museum Trip | 26/10/2016<br>11:21<br>superAdmin superAdmin | EMAIL          | Total sent: 2<br>✔ - 0<br>✘ - 2 |      | ⚙    |

- Click the **cog icon** and then **View targets** to see all users who have been sent communication for that title
- The Success icon indicates that the communication has been sent successfully

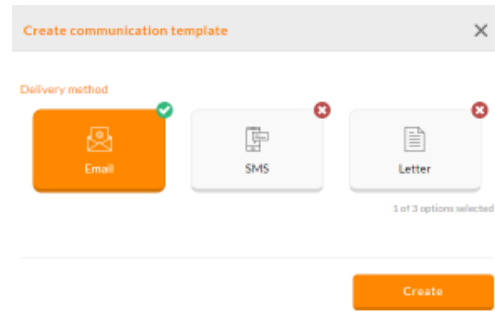
**Processed communication**  
Here you can view if the communication has been successfully received by the recipient.

Search  
Filter user by name or sQuid registration number

| Full name             | SRN             | Status    |
|-----------------------|-----------------|-----------|
| Marcin Junior Szpigel | 633799800000011 | ✔ Success |

## 6.8. Create template

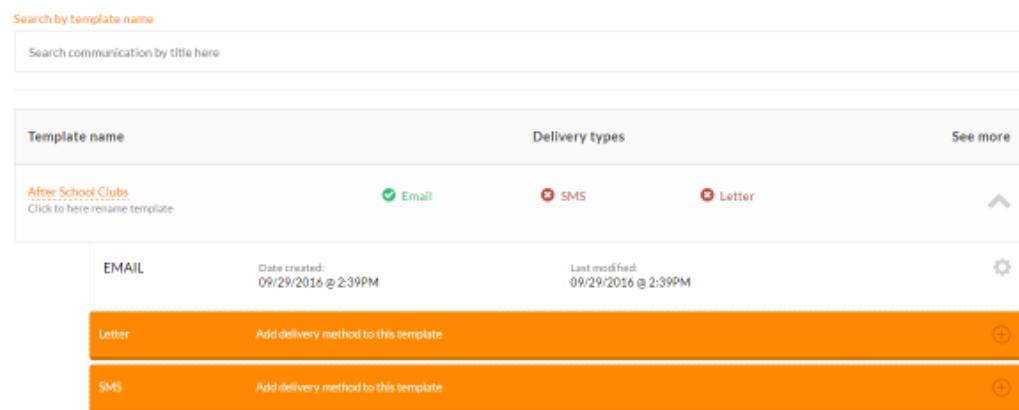
In this section you can create communication templates. Please see Create SMS, Create Email and Create Letter sections for instructions on how to do this.



## 6.9. Manage templates

In this section you can manage any communication templates that have been created.

- Click the **down arrow** to see the communication methods that are setup for this template, and the date this was created
- Click **Add delivery method to this template** to add another communication method
- Click **Preview template** for a snapshot of the template
- Click **Edit template** to make changes to the notification name and/or recipients
- Click **Delete** to remove the communication type from the template

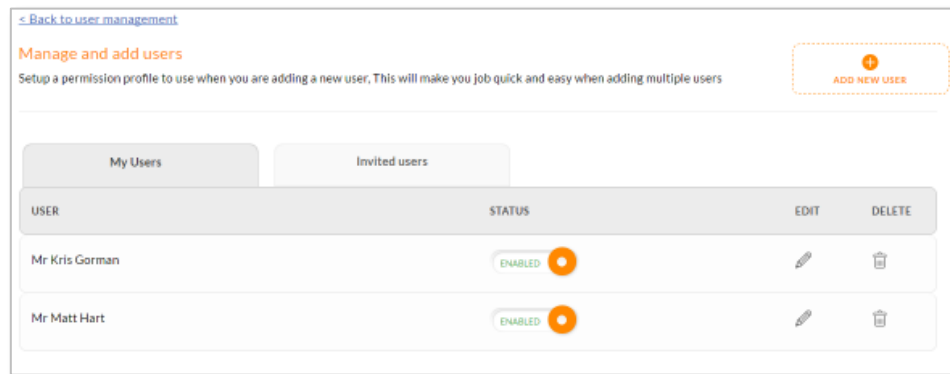




## 7. System admins

### 7.1. Add new user

- Click **System admins** on the top toolbar and then **Add new user**



- Enter the users email address in the box
- Choose a Permission Profile by either ticking the box next to **Use existing user**, which will give the new user the same permissions as the selected user; or tick **Create a New Profile?** and then enter the name for the new permission profile.
- Choose the permissions for the new user by ticking the relevant boxes
- **Save user** to confirm

The screenshot shows a 'Add user' form. It has a title bar 'Add user' with a close button. The form contains several sections: 'User email address' with a text input field labeled 'Email address'; 'Permission Profiles' with a section 'Use existing profile' containing radio buttons for 'Kris' and 'Kirsty', and a section 'Or create a new one' with a radio button for 'Create a new profile?'; and 'User will be able to:' with a grid of 18 radio buttons for various permissions: Manage offers, Read Offers, Manage Offer Templates, Manage Offer Categories, Manage Ledger Codes, Manage Groups, Publish Offer, Pause Offer, Delete Offer, Archive Offer, Archive offer page, Edit draft offer, Edit upcoming offer, Edit paused offer, Edit live offer, Manage sales, Review draft offer, Review live offer, Review paused offer, Review upcoming offer, Review expired offer, Review archived offer, On site purchase, Manage card, View Transactions, View purchases, and View available.

## 7.2. Edit an existing user

- To edit an existing user, click the pencil icon. To confirm any changes, click **Save user**
- The new user will receive an invitation email which they will need to verify. Once verified, they will change from the **Invited users** tab to the **My users** tab
- You can disable or enable an existing user by clicking on the **Disabled** or **Enabled** status
- To delete an existing user, click the trash-can icon

## 7.3. Manage system permissions

- Click **Add profile** to add a new permission profile
- Enter a name for your permissions setting
- Choose the permissions for the new user by ticking the relevant boxes
- **Save user** to confirm
- You can disable or enable an existing user by clicking on the **Disabled** or **Enabled** status
- To edit an existing user, click the pencil icon. To confirm any changes, click **Save user**

## 8. Sales and Reports

### 8.1. Sales

- Click **Sales**
- Click **Show filter** to filter by group types. Click **Hide filter** to minimise filter
- Choose the category for the offer by clicking **Select a category** and then clicking on the relevant category
- Enter the start date and end date for the period you would like the report to cover
  - If you enter the start date as the date the offer went live and today's date as the end date, this will show all sales for this offer to date
- Click on the **Live**, **Paused** and **Expired** tabs to filter between these offers
- You can enter an offer name in the box underneath Live, Paused and Expired, to search for a particular offer. You are also able to filter by using the table headings

[< Back to management sale panel](#)

Manage sales

All sales

---

SELECT A CATEGORY

2016-04-03

2016-05-20

Export CSV

Live

Paused

Expired

Search in table

| TITLE               | PRICE | QUANTITY SOLD | DEADLINE   | VIEW |
|---------------------|-------|---------------|------------|------|
| English - Hamlet    | £5.00 | 0 / 50        | --/--/---- |      |
| Maths GCSE Textbook | £4.50 | 16 / 284      | --/--/---- |      |

You can also view all users that have paid for a particular offer.

- Click on the **cog icon** on the right hand side of the offer and then **View purchases**
- The **Sales Status** column shows whether the offer is **Paid**, **Part Paid** or **Awaiting purchase** by the user
- This is only for offers that have been setup for a particular group, as opposed to an offer that has been made available to all users

SORT BY SALE STATUS

All statuses

FILTER FROM START DATE

Select from date

FILTER TO END DATE

Select to date

Search table

Export CSV

Download files

| CUSTOMER DETAILS                           | DATE OF SALE | AMOUNT PAID | SALE STATUS       | ACTION        |
|--|--------------|-------------|-------------------|---------------|
| Jasper Clarke<br>SRN: 6337999002700019     |              |             | Awaiting purchase | Not purchased |
| McKaulie Stewart<br>SRN: 6337999002700107  |              |             | Awaiting purchase | Not purchased |
| Kirk Manley<br>SRN: 6337999002700066       |              |             | Awaiting purchase | Not purchased |
| Seth Watts<br>SRN: 6337999002700123        |              |             | Awaiting purchase | Not purchased |
| Nathaniel Enyiazu<br>SRN: 6337999002700032 |              |             | Awaiting purchase | Not purchased |
| Phoenix Start<br>SRN: 6337999002700104     | 26/05/2016   | £5.00       | Paid              |               |

## 8.2. Transactions

- Click **Transactions**
- Click **Show filter** to filter by group types. Click **Hide filter** to minimise filter
- Choose an **Offer status**, or status's, for the transaction data
  - The boxes are prepopulated. To remove a category, select it and then press delete on the keyboard
- Choose an **Offer category**, or categories, for the transactions data
- Enter the **Offer name**
  - Leave this blank for to display all offers
- Enter a **Start Date** and **End Date** for the transaction period
  - Leave this blank to display all offers
- All payments for the selected offer, or offers, will be displayed underneath

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### Transactions

Transactions

SELECT A CATEGORY  

LIVE PAUSED EXPIRED

SELECT A CATEGORY  

Trip

SELECT A CATEGORY  


London Zoo

SELECT A CATEGORY  

Start date

SELECT A CATEGORY  

End date



| Offer Id | Purchase Id | Offer Title | Name  | Surname | SRN              | Student Id | Sale Date Time          | Class | Previous balance | Amount | Amount to Pay |
|----------|-------------|-------------|-------|---------|------------------|------------|-------------------------|-------|------------------|--------|---------------|
| 596      | 234         | London Zoo  | Talia | Thorn   | 6337991234500113 | PL-43      | 17-May-2016<br>15:11:26 |       | £0.00            | £50.00 | £-50.00       |

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### 8.3. Exporting sales data

You are able to download all sales and transactional data in an Excel document by clicking **Export CSV** on the relevant screens.

To download sales data for all offers:

- Click **Sales Management**
- Click **Sales**
- Click **Export CSV**
- The Excel document will download to your computer so you can open the document

|    | A                               | B           | C                 | D                 | E                 | F                  | G             |
|----|---------------------------------|-------------|-------------------|-------------------|-------------------|--------------------|---------------|
| 1  | Offer Title                     | Offer Price | Start Date        | End Date          | Due Date          | Quantity available | Quantity Sold |
| 2  | English - Hamlet                | 5           | 20/05/2016, 11:41 | n/a               | n/a               | 50                 | 0             |
| 3  | Hockey Tour                     | 150         | 20/05/2016, 09:15 | 02/09/2016, 23:59 | 02/09/2016, 09:15 | 30                 | 0             |
| 4  | Ski Trip                        | 200         | 19/05/2016, 12:05 | 22/06/2016, 12:05 | 21/06/2016, 12:05 | Unlimited          | 0             |
| 5  | Year 8 Ski Trip                 | 300         | 18/05/2016, 14:37 | 22/07/2016, 17:00 | 22/07/2016, 17:00 | 50                 | 0             |
| 6  | Isle of Wight Trip              | 120         | 18/05/2016, 10:16 | 30/06/2016, 17:00 | 30/06/2016, 00:00 | Unlimited          | 0             |
| 7  | Year 1 London Zoo Trip          | 5           | 17/05/2016, 17:10 | 31/05/2016, 17:10 | 30/05/2016, 17:10 | 30                 | 0             |
| 8  | Jumper                          | 10          | 17/05/2016, 15:36 | n/a               | n/a               | 1                  | 1             |
| 9  | Swimming team subscription      | 150         | 17/05/2016, 13:57 | 02/02/2017, 13:56 | 02/02/2017, 13:56 | Unlimited          | 1             |
| 10 | Rugby Team trip to South Africa | 1200        | 20/05/2016, 10:51 | 17/11/2016, 00:00 | 21/09/2016, 00:00 | 40                 | 0             |
| 11 | Maths GCSE Textbook             | 4.5         | 17/05/2016, 10:32 | n/a               | n/a               | 284                | 16            |
| 12 | London Zoo                      | 50          | 17/05/2016, 09:53 | 02/08/2016, 09:52 | 05/07/2016, 09:52 | 49                 | 1             |

To download sales data for a particular offer:

- Click **Sales Management**
- Click **Sales**
- Search for the offer and click on the eye icon within the **View** column
- This will take you to a page where all sales data for that offer is displayed, where you can then click **Export CSV**
- The Excel document will download to your computer so you can open the document

#### Swimming team subscription

Pay off swimming subs over the year or up front

##### Offer additional information

| QUESTION        | VALUE |
|-----------------|-------|
| Child can swim? | true  |

##### Freeform payments table

| Payment date | Balance before | Amount  | Remaining |
|--------------|----------------|---------|-----------|
| 17/05/2016   | £150.00        | -£10.00 | £140.00   |
| 17/05/2016   | £160.00        | -£20.00 | £120.00   |
| 17/05/2016   | £200.00        | -£80.00 | £40.00    |
| 17/05/2016   | £80.00         | -£40.00 | £0.00     |

## 8.4. Comparing Transactions report with sQuid Weekly Transaction Summary

A weekly transaction report is sent by our sQuid Finance department. To reconcile the purchases in the two reports:

- Go to Transactions
- Select statuses **LIVE**, **PAUSED** and **EXPIRED** to show transactions for all offers
- Select start date and end date to match with the date range in the Weekly Transaction Report, which will be Monday to Sunday.
- Click **Apply Filter**
- The total value of purchases in the **Amount** column should match up with the Purchases total in the Weekly Transaction Report. Please see screenshots below.
- Click Export as CSV to compare the totals in a spreadsheet format.

| Offer ID              | Purchase ID | Ledger code | Offer Title                | Category      | Name / SRN                            | Student ID | Sale Date Time       | Previous balance | Amount | Amount to pay | Type   |
|-----------------------|-------------|-------------|----------------------------|---------------|---------------------------------------|------------|----------------------|------------------|--------|---------------|--------|
| <a href="#">23741</a> | 171518      |             | Madrid 2018 - Installments | Trips         | Wilson Harry<br>6337991030201911      |            | 30/Jul/2017 21:24:57 | £38.00           | £38.00 | £0.00         | Online |
| <a href="#">29181</a> | 171061      |             | Pencil Case and contents   | Miscellaneous | Reeman Taylor<br>6337991030201779     |            | 27/Jul/2017 15:54:38 | £4.00            | £4.00  | £0.00         | Online |
| <a href="#">21464</a> | 171029      |             | Iceland 2018               | Trips         | FRY DEVIN<br>6337991030201577         |            | 27/Jul/2017 14:52:49 | £75.00           | £75.00 | £0.00         | Online |
| <a href="#">21464</a> | 170362      |             | Iceland 2018               | Trips         | JAMES ALASARA<br>6337991030201623     |            | 25/Jul/2017 13:16:13 | £75.00           | £75.00 | £0.00         | Online |
| <a href="#">23741</a> | 169881      |             | Madrid 2018 - Installments | Trips         | Carroll Ellie-Mae<br>6337991030201933 |            | 24/Jul/2017 10:27:45 | £38.00           | £38.00 | £0.00         | Online |

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|   | Net Amount |
|---|------------|
| <b>TRANSACTIONS: (For the week analysed below)</b>      |            |
| Purchases   | £(230.00)  |
| Store Top Ups   | £ 0.00     |
| Refunds   | £ 0.00     |
| Redeems   | £ 0.00     |
| Net of All Transactions                                 | £(230.00)  |
| <b>FEES: Transaction fees</b>                           |            |
| Transaction fee percentage charged                      | 1.50%      |
| Transaction fee (Exempt from VAT)                       | £ 3.45     |
| <b>Amount due (to)/from you for this weeks activity</b> | £(226.55)  |
| Amount due (to)/from you from previous weeks            | £ 0.00     |
| <b>Cumulative Total due (to)/from you</b>               | £(226.55)  |

## 9. On site purchase

Input cash or cheque payments made by an individual to pay for an offer.

### 9.1. On site purchase – payment required in full

- Within the **View all offers** section click on the **cog icon**
- Click **On site purchase**


**All offers**  
View, edit and manage your offers here.

**New Offer**

Select category: All categories | Filter from start date: Select from date | Filter to end date: Select to date

Live | Draft | Upcoming | Paused | Expired

Search in table

| Title         | Price   | Quantity                                 | Deadline   | Actions  |
|---------------|---------|--|------------|--|
| France Trip   | £300.00 | Offers sold : 3<br>Offers remaining : 32 | 06/10/2016 | <br>Edit offer<br>Pause offer<br>View purchases<br>View offer<br>On site purchase<br>Extend offer |
| School Jumper | £25.00  | Offers sold : 0<br>Offers remaining : ∞  | --/--/---- |  |
| School Tie    | £12.00  | Offers sold : 5                          | --/--/---- |  |

- You can search for the user's name in the search box, or find the user by scrolling down
- Click the name of the user

**On Site Purchase**  
This onsite purchase is for offer

Select user | Requirements | Payment | Complete

Search for user

Jayd

Jayden King - 6337999002700054 - User

Search for the user you would like to make the off site purchase for.

- If the offer has any requirements, these should then be entered (e.g. size for a uniform purchase)



- Click **Save and proceed**

**On Site Purchase**  
This onsite purchase is for offer

Progress bar: Select user (✓), **Requirements** (?), Payment (💰), Complete (✓)

| Offer Requirements | Offer Details |
|--------------------|---------------|
| Size required *    | Medium        |

6/500

Previous Save and proceed

- Select **Customer is paying by cash** or **Customer is paying by cheque**
  - If it is a cash payment, you can enter the denominations used to make the payment. You can also include whether the customer receives any change i.e. If the customer uses 3 x £20 notes to pay for a £50 instalment, tick the **Would you like to add denominations** box and enter '3' in the box underneath '£20'. If the customer receives a £10 note as change, then tick **Does the customer require any change?** and enter '1' in the box underneath '£10'. See the screenshot below as an example.
- Once the cash or cheque amount has been entered click **Buy**

**On Site Purchase**  
This onsite purchase is for offer

Progress bar: Select user (✓), Requirements (?), **Payment** (💰), Complete (✓)

☒ Customer is paying by cash
 ☐ Customer is paying cheque

☒ 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  | 0  | 0   | 0   | 0   |

☒ Does the customer require any change?

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

- You are then taken to an overview page where you can print a **sales receipt**
- Click **Finish**

**On Site Purchase**  
This onsite purchase is for offer

Select user  
✓

Requirements  
✓

Payment  
✓

Complete

**Sales receipt**

Full name:  
Jayden King  
SRN:  
6337999002700054

Offer title:  
School Jumper

Administrator details:  
Matt Hart  
Date of sale:  
25-08-2016  
15:24:30

| Item:         | Payment type: | Offer price: | Paid:  | Remaining to pay |
|---------------|---------------|--------------|--------|------------------|
| School Jumper | CASH          | £25.00       | £25.00 | £0.00            |

Print receipt

Finish

## 9.2. On site purchase – payment can be paid by instalments

- Within the **View all offers** section click on the **cog icon**
- Click **On site purchase**

**All offers**  
View, edit and manage your offers here.

Select category  
All categories

Filter from start date  
Select from date

Filter to end date  
Select to date

Live

Draft

Upcoming

Paused





Expired

Search in table

| Title               | Price   | Quantity                                | Deadline   | Actions  |
|---------------------|---------|---|------------|--|
| Year 9 Iceland Trip | £500.00 | Offers sold : 0<br>Offers remaining : ∞ | 30/11/2016 | <div> <div>⚙</div> <div>Edit offer</div> <div>⏸</div> <div>Pause offer</div> <div>🔍</div> <div>View offer</div> <div>📄</div> <div>On site purchase</div> <div>🔄</div> <div>Extend offer</div> </div> |
| Music Club          | £100.00 | Offers sold : 0<br>Offers remaining : ∞ | 24/11/2016 |  |

- You can search by the user's name in the search box, or find the user by scrolling down
- Click the name of the user
- If the offer has any requirements, these should then be entered (e.g. trip consent form)

**On Site Purchase**  
This onsite purchase is for offer

 Select user
  Instalments
  Payment
  Complete

Search for user





smith

| SRN              | Forename | Surname | Reference     |
|------------------|----------|---------|---------------|
| 6337999002700099 | Harry    | Smith   | R878401315054 |

Previous **1** Next

- Check the box next to the instalment amount, or amounts, being paid
- Click **Save and proceed**

**On Site Purchase**  
This onsite purchase is for offer

 Select user
  Instalments
  Payment
  Complete

| Date       | Description    | Price   | Status | Pay                                 |
|------------|----------------|---------|--------|-------------------------------------|
| 30/09/2016 | Deposit        | £50.00  | Unpaid | <input checked="" type="checkbox"/> |
| 28/10/2016 | 1st Instalment | £150.00 | Unpaid | <input type="checkbox"/>            |
| 11/11/2016 | 2nd Instalment | £150.00 | Unpaid | <input type="checkbox"/>            |
| 30/11/2016 | 3rd Instalment | £150.00 | Unpaid | <input type="checkbox"/>            |

Payment total: £50.00

Previous **Save and proceed**

- Select **Customer by paying in cash** or **Customer is paying by cheque**
- Once the cash or cheque amount has been entered click **Buy**

### On Site Purchase

This onsite purchase is for offer

Select user

Installments

Payment

Complete

Customer is paying by cash

Customer is paying cheque

✓ Customer is paying cheque

Cheque reference

Enter reference number

Payment total: £50.00

Previous Buy

- You are then taken to an overview page where you can print a **sales receipt**
- Click **Finish**

### On Site Purchase

This onsite purchase is for offer

Select user

Installments

Payment

Complete

### Sales receipt

Full name:  
Harry Smith

SRN:  
6337999002700099

Offer title:  
Year 9 Iceland Trip

Administrator details:  
Matt Hart

Date of sale:  
25-08-2016  
15:46:58

| Item:               | Payment type: | Offer price: | Paid:  | Remaining to pay |
|---------------------|---------------|--------------|--------|------------------|
| Year 9 Iceland Trip | CHEQUE        | £500.00      | £50.00 | £450.00          |

Print receipt Finish

### 9.3 On site purchase – Accept instalments or full payments as long as the payment deadline is met

- Within the **View all offers** section click on the **cog icon**
- Click **On site purchase**
- You can search for user's name in the search box, or find the user by scrolling down
- Click the name of the user
- If the offer has any requirements these should then be entered (e.g. trip consent form)
- Enter the **Amount to pay** and click **Save and proceed**

**On Site Purchase**  
This onsite purchase is for offer

Progress bar: Select user (green dot), Instalments (orange dot), Payment (orange dot), Complete (orange checkmark)

| Offer title | Offer price | Amount to pay |
|-------------|-------------|---------------|
| Art Club    | £100.00     | £ 50.00       |

Payment total: £50.00

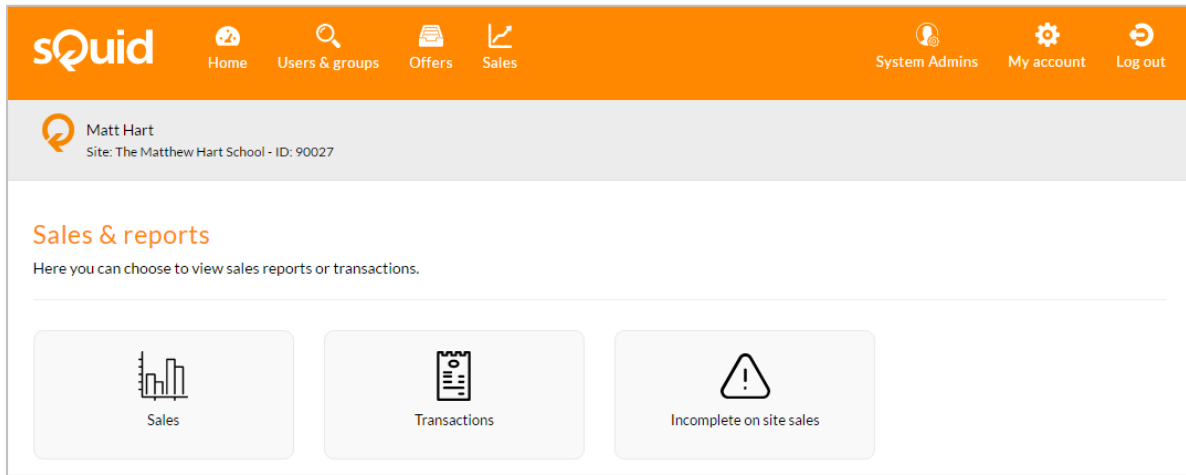
Buttons: Previous, Save and proceed

- Select **Customer is paying by cash** or **Customer is paying by cheque**
- Once the cash or cheque amount has been entered click **Buy**
- You are then taken to an overview page where you can print a **sales receipt**
- Click **Finish**

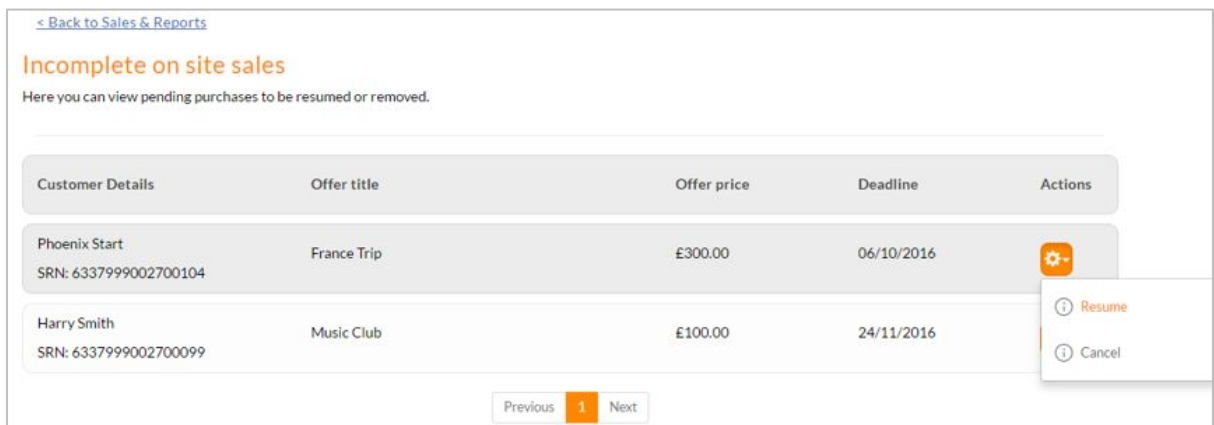
## 9.4. Incomplete on site sales

In this section you can view any purchases that are incomplete.

- Click on **Sales** on the top toolbar and then **Incomplete on site sales**



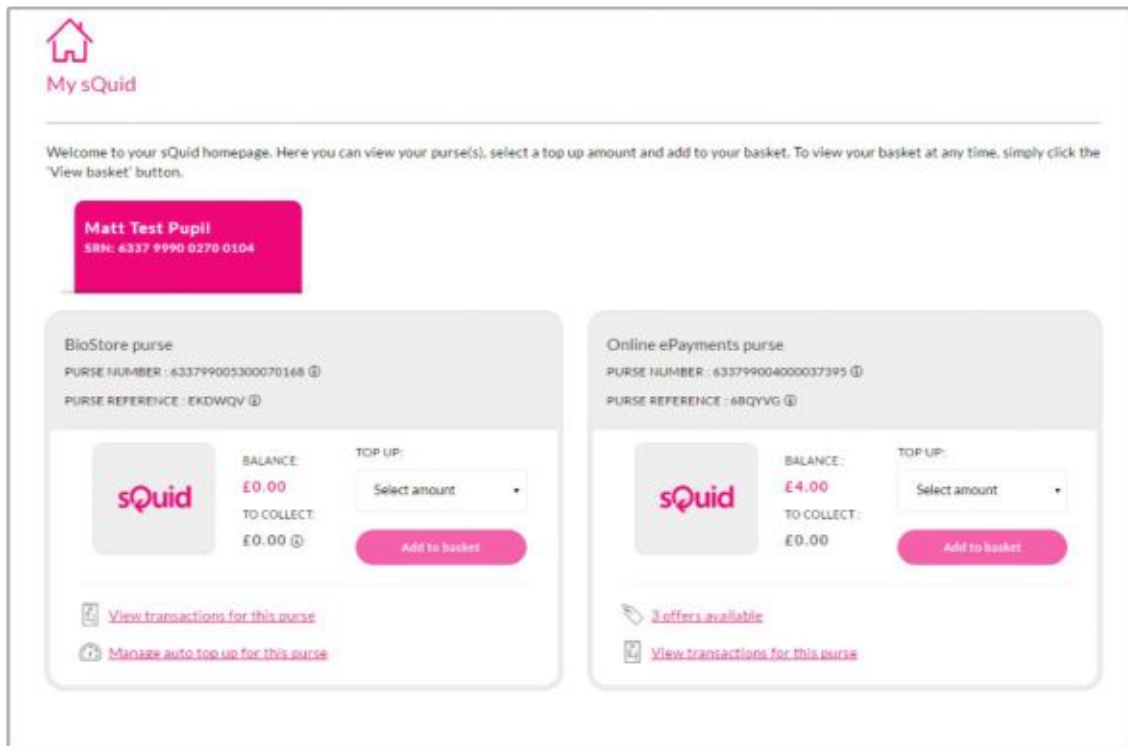
- To resume making payment click the **cog icon**. You can also cancel the purchase by selecting cancel



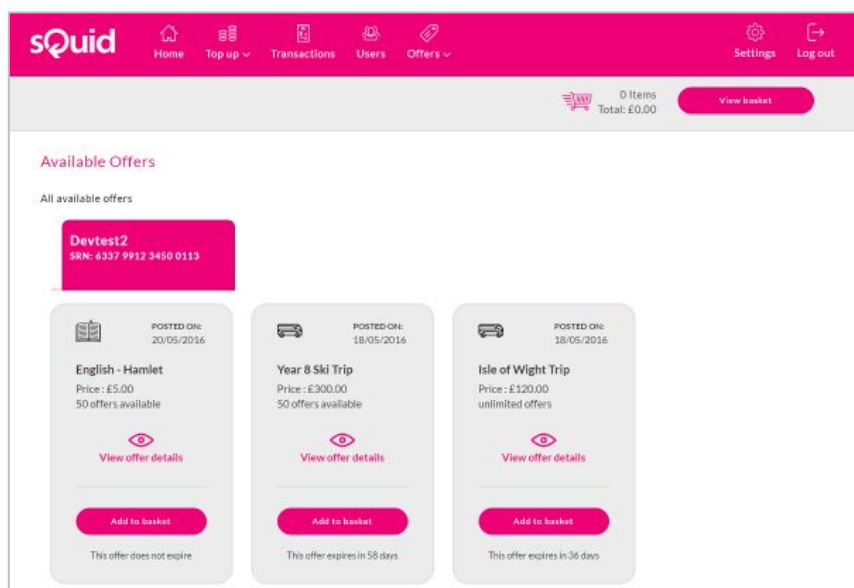
- If resuming payment, select the amount being paid
- Click **Save and proceed**
- Select whether the customer is paying by cash or cheque
- You can enter the denominations used to make payment if required
- Once the cash or cheque amount has been entered click **Buy**
- Review the overview page and print a receipt for the payment if required
- Click **Finish**

## 10. Completing a purchase as an end user

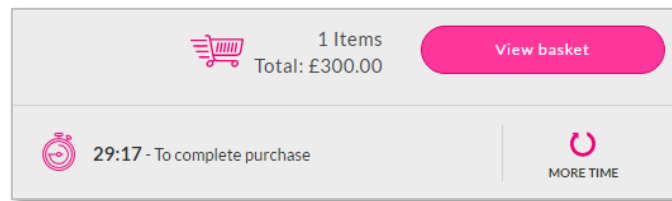
- When a user accesses their sQuid account they will see all purses displayed on the **Home** screen
- Within the **Trips and Offers** purse, the user will be able to click '**X**' offers available to be taken to any available offers



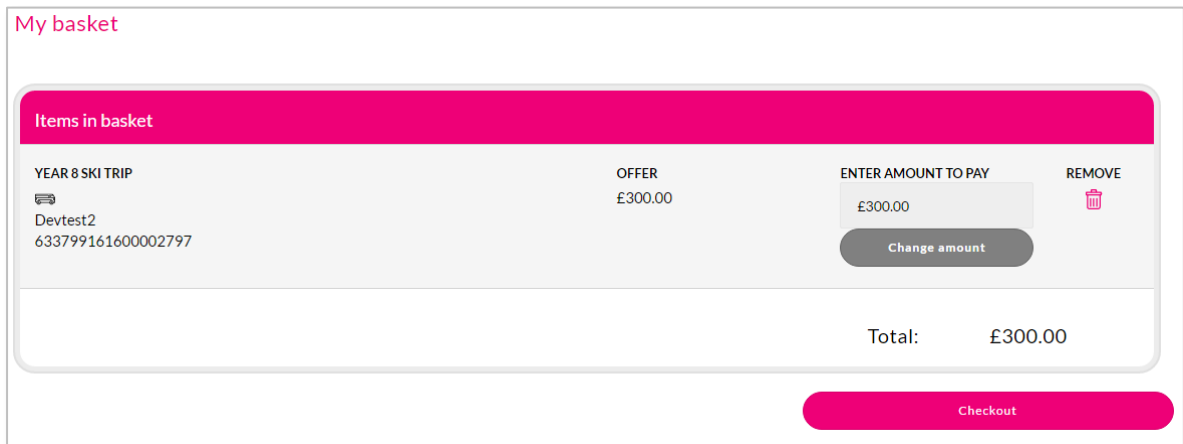
- Within this page the user can select **Add to basket** to add any offers to their basket
  - the item will remain in the basket for 30 minutes in order to complete purchase



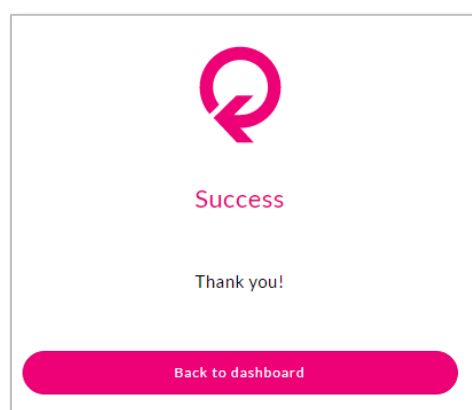
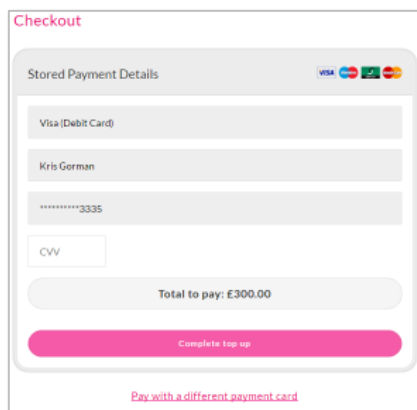
- The user can click on **View basket** to be taken to their basket and complete the purchase



- Within the **My basket** page the user can proceed to make payment by clicking on **Checkout**

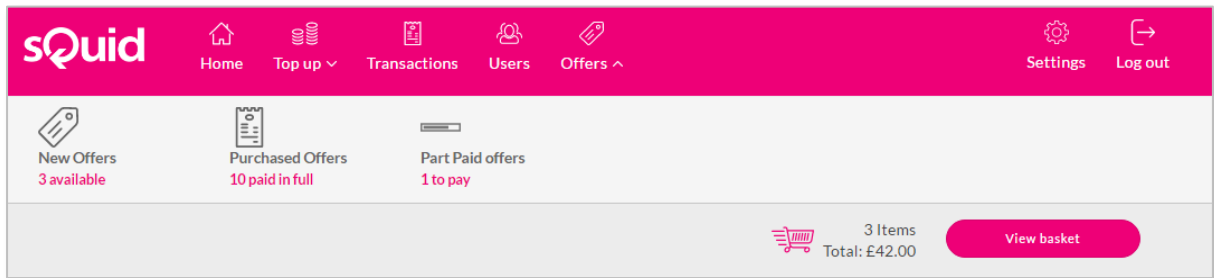


- The user will then be taken to the 'Checkout' screen
- If the user wants to pay for the offer with funds available from their Trips and Offers purse then they would click **Pay for this offer with the purse funds I have available**, and proceed to the next page
- If the user has no funds in their Trips and Offers purse and wishes to make payment using a debit or credit card, they will click on **Checkout** and then enter their payment card details
  - If the user has a stored payment card, then their payment card details will be populated
- If the user would like to make payment using a payment card other than their stored payment card, then they will click **Pay with a different payment card**
- Click **Complete top up** to confirm purchase





Any part paid offers are displayed when clicking on **Offers**. If the user clicks on '**X to pay**' under part paid offers they can continue making payment for an offer.



## 11. SchoolPay Training Checklist

School Name:

School Address:

Main Contact:

Training Provided By:

Date of Training:

This checklist is to be filled in onsite during training days to record training given to users. Once training has been completed please tick the box under training given. If training was not given on a certain section, please enter N/A.

| SETTINGS   | TRAINING RECEIVED |
|--|-------------------|
| Changing Account Details   |                   |
| SYSTEM ADMINS – MANAGE USERS   | TRAINING RECEIVED |
| MANAGE USERS – Adding a New User   |                   |
| MANAGE USERS – Creating New User Profile for access  |                   |
| MANAGE USERS – New User will receive an email they need to confirm before they move from the Invited Users tab to the My Users tab |                   |
| MANAGE USERS – Editing a User  |                   |
| MANAGE USERS – Deleting a User   |                   |
| MANAGE USERS – Enabling/Disabling an existing user   |                   |
| SYSTEM ADMINS – MANAGE PERMISSIONS   | TRAINING RECEIVED |
| MANAGE PERMISSIONS – Adding a new User Profile   |                   |
| MANAGE PERMISSIONS – Assigning what tasks a user profile can perform   |                   |
| MANAGE PERMISSIONS – Editing User Profile  |                   |
| MANAGE PERMISSIONS – Deleting a User Profile   |                   |
| MANAGE PERMISSIONS – Enabling/Disabling an existing User Profile   |                   |
| USERS & GROUPS – CUSTOM GROUPS   | TRAINING RECEIVED |
| CUSTOM GROUPS – How to create a new Custom Group   |                   |
| CUSTOM GROUPS – Searching for Year Groups, Classes or Individual Students  |                   |
| CUSTOM GROUPS – How to edit an existing Custom Group   |                   |
| CUSTOM GROUPS – How to delete an existing Custom Group   |                   |

| <b>OFFERS – OFFER CATEGORIES</b>  | <b>TRAINING RECEIVED</b> |
|---|--------------------------|
| <b>OFFER CATEGORIES</b> – How to create new Categories  |                          |
| <b>OFFER CATEGORIES</b> – How to edit existing Categories   |                          |
| <b>OFFER CATEGORIES</b> – How to delete Categories  |                          |
| <b>OFFERS – LEDGER CODES</b>  | <b>TRAINING RECEIVED</b> |
| <b>LEDGER CODES</b> – How to create a new Ledger Code   |                          |
| <b>LEDGER CODES</b> – How to edit an existing Ledger Code   |                          |
| <b>LEDGER CODES</b> – How to delete a Ledger Code   |                          |
| <b>OFFERS – SETTLEMENT ACCOUNTS</b>   | <b>TRAINING RECEIVED</b> |
| <b>SETTLEMENT ACCOUNTS</b> – View Bank Account Details  |                          |
| <b>OFFERS – CREATE NEW OFFER</b>  | <b>TRAINING RECEIVED</b> |
| <b>OFFER DETAILS</b> - Creating New offer   |                          |
| <b>OFFER DETAILS</b> - Adding a New Category during offer creation  |                          |
| <b>OFFER DETAILS</b> - Explaining about quantity available  |                          |
| <b>DATE AND TIMINGS</b> - Setting up Offer Start Dates, Offer End Date and Payment Deadline Dates (Payment Deadline Date should be before the Offer End Date) |                          |
| <b>DATE AND TIMINGS</b> - Explaining the clock is 24-hour clock ie 3pm would need to be set up at 15:00   |                          |
| <b>OFFER PRICE</b> - Selecting Bank Settlement account for the offer  |                          |
| <b>OFFER PRICE</b> - Adding a new Ledger Code during offer creation   |                          |
| <b>OFFER PRICE</b> - Explaining the different payment plans   |                          |
| <b>OFFER PRICE</b> – Setting up Planned Instalments   |                          |
| <b>GROUPS</b> – Creating a New Group during offer creation  |                          |
| <b>GROUPS</b> – Applying offer to Year Groups, Classes or Individual Students   |                          |
| <b>SUBSIDISED USERS</b> – Setting up subsidised offers for users  |                          |
| <b>ADDITIONAL INFORMATION</b> – Adding a file for the end user to download  |                          |
| <b>ADDITIONAL INFORMATION</b> – Adding a section for the end user to upload a file  |                          |
| <b>ADDITIONAL INFORMATION</b> – Asking the end user a question for them to answer   |                          |
| <b>ADDITIONAL INFORMATION</b> – Adding a web link for the end user to view  |                          |
| <b>ADDITIONAL INFORMATION</b> – Adding additional information for the end user to view  |                          |
| <b>ADDITIONAL INFORMATION</b> – Asking a yes or no question for the end user  |                          |
| <b>ADDITIONAL INFORMATION</b> – Select from a List of options which allows the end user to select from different options i.e. Uniform Sizes                   |                          |
| <b>ADDITIONAL INFORMATION</b> – Explaining about mandatory checkboxes   |                          |
| <b>ADDITIONAL INFORMATION</b> – Making sure site are aware they can add as many 'Additional Information' options as required                                  |                          |

| <b>OFFERS – CREATE NEW OFFER continued...</b>   | <b>TRAINING RECEIVED</b> |
|---|--------------------------|
| <b>OFFER OVERVIEW</b> – How to make amendments if required  |                          |
| <b>PUBLISH OFFER</b> – If you click NO then the offer will be saved in your draft offers            |                          |
| <b>PUBLISH OFFER</b> – If you click YES then your offer will be completed and published             |                          |
| <b>OFFERS – VIEW ALL OFFERS</b>   | <b>TRAINING RECEIVED</b> |
| <b>OFFERS</b> – How to filter between Offer Categories  |                          |
| <b>OFFERS</b> – How to filter between Start and End Dates   |                          |
| <b>OFFERS</b> – Using the “Tabs” to filter between live, draft, upcoming, paused and expired offers |                          |
| <b>OFFERS</b> – Editing Offers  |                          |
| <b>OFFERS</b> – Creating a New Offer while in Offers section  |                          |
| <b>OFFER MANAGEMENT – ARCHIVED OFFERS</b>   | <b>TRAINING RECEIVED</b> |
| <b>ARCHIVED OFFERS</b> – How to filter between Offer Categories                                     |                          |
| <b>ARCHIVED OFFERS</b> – How to filter between Start and End Dates                                  |                          |
| <b>ARCHIVED OFFERS</b> – Editing an Archived Offer to make it live                                  |                          |
| <b>ON SITE PURCHASE</b>   | <b>TRAINING RECEIVED</b> |
| Explain you can complete On Site purchase either through Offers or Find a User                      |                          |
| How to complete an on-site purchase   |                          |
| Explain the different payment options of on-site purchase   |                          |
| <b>SALES – INCOMPLETE ON SITE SALES</b>   | <b>TRAINING RECEIVED</b> |
| Looking for users with part paid offers   |                          |
| Paying for additional instalments of a part paid offer  |                          |
| <b>SALES - SALES</b>  | <b>TRAINING RECEIVED</b> |
| <b>SALES</b> – How to filter between different Offer Categories                                     |                          |
| <b>SALES</b> - How to filter between Start and End Dates  |                          |
| <b>SALES</b> - Using the “Tabs” to filter between live, paused and expired offers                   |                          |
| <b>SALES</b> - How to search for an offer by offer name   |                          |
| <b>SALES</b> - How to export data as csv file   |                          |

| <b>SALES - TRANSACTIONS</b>  | <b>TRAINING RECEIVED</b> |
|--|--------------------------|
| <b>TRANSACTIONS</b> – How to filter between different Offer Categories |                          |
| <b>TRANSACTIONS</b> - How to filter between Start and End Dates        |                          |
| <b>TRANSACTIONS</b> - How to search for an offer by offer name         |                          |
| <b>TRANSACTIONS</b> - How to export data as csv file                   |                          |

### Training Completed

**To be signed by Main Contact for the School.**

I confirm that training has been given for each area of the system and that I have understood the training provided. I have been given the opportunity to raise any questions on any of the areas I was unsure of and that my questions have been answered to my satisfaction.

**Signed:**

**Print Name:**

**Date:**

**Feedback:**

