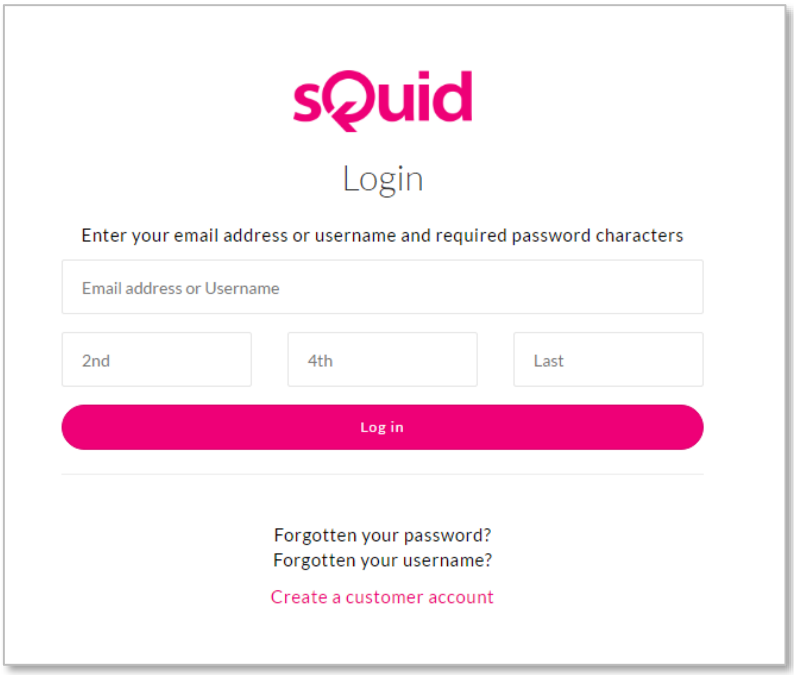
# User Guide v1.4

The latest version can be found at:
**squidcard.com/welcome/school-administrators**

# CONTENTS

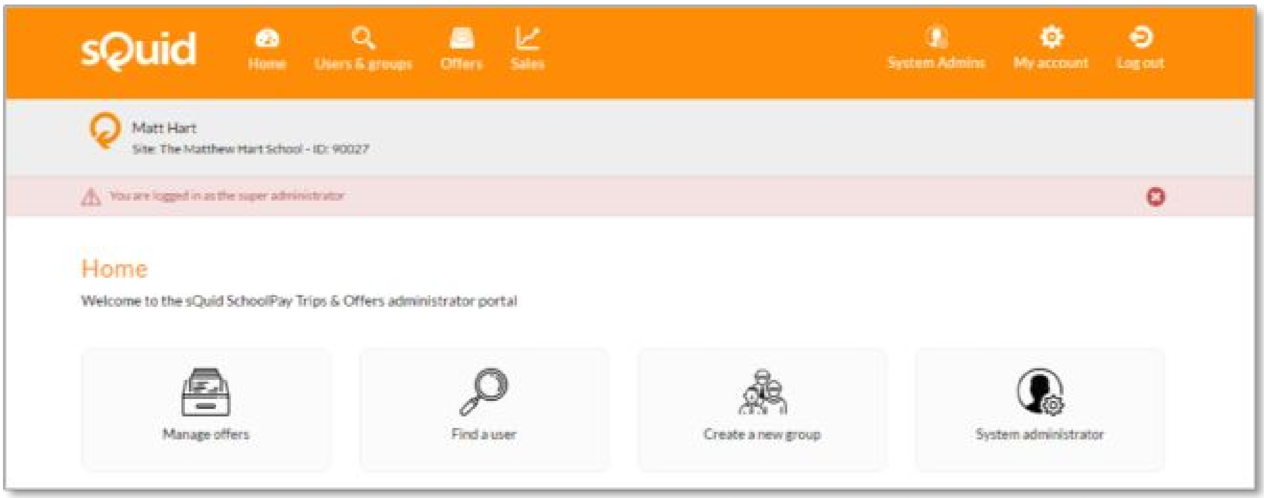
## 1. Login page

- 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




## 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.

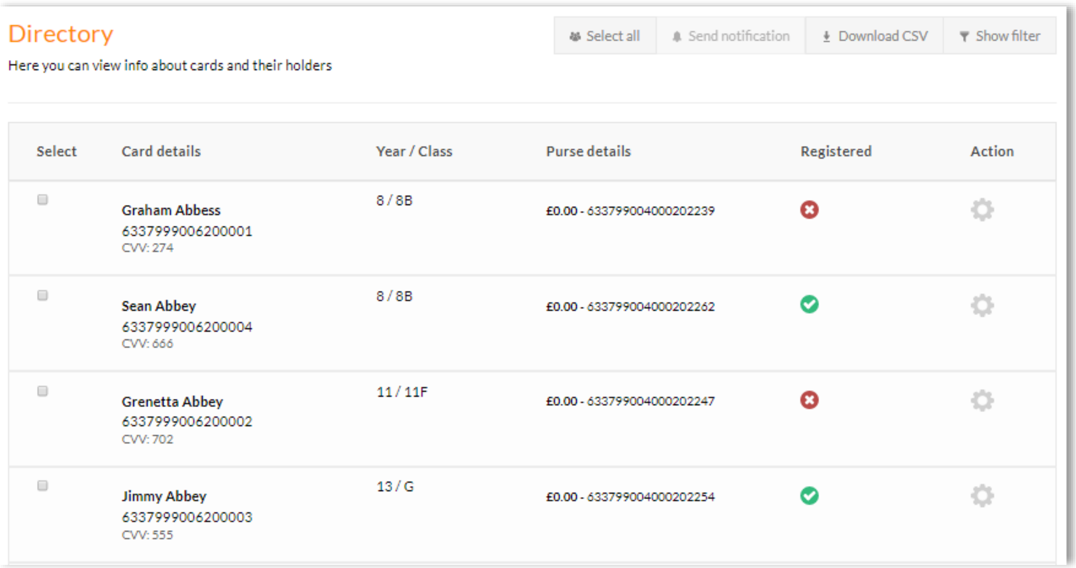
- **Change account details** – allows you to change your name
- **Change telephone number** – allows you to change your telephone number
- **Change email address** – allows you to change your email address
- **Change password** – allows you to change your password
- **Change security question** – allows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

## 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

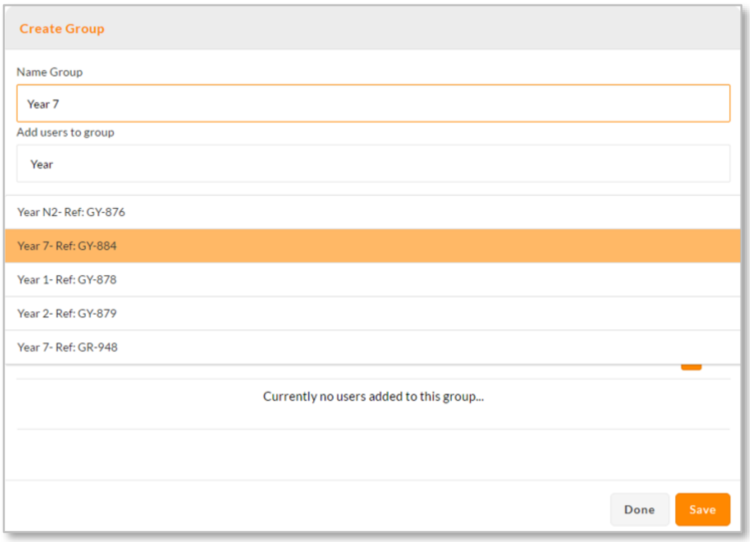


## 4.2. sQuid Groups

- 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**

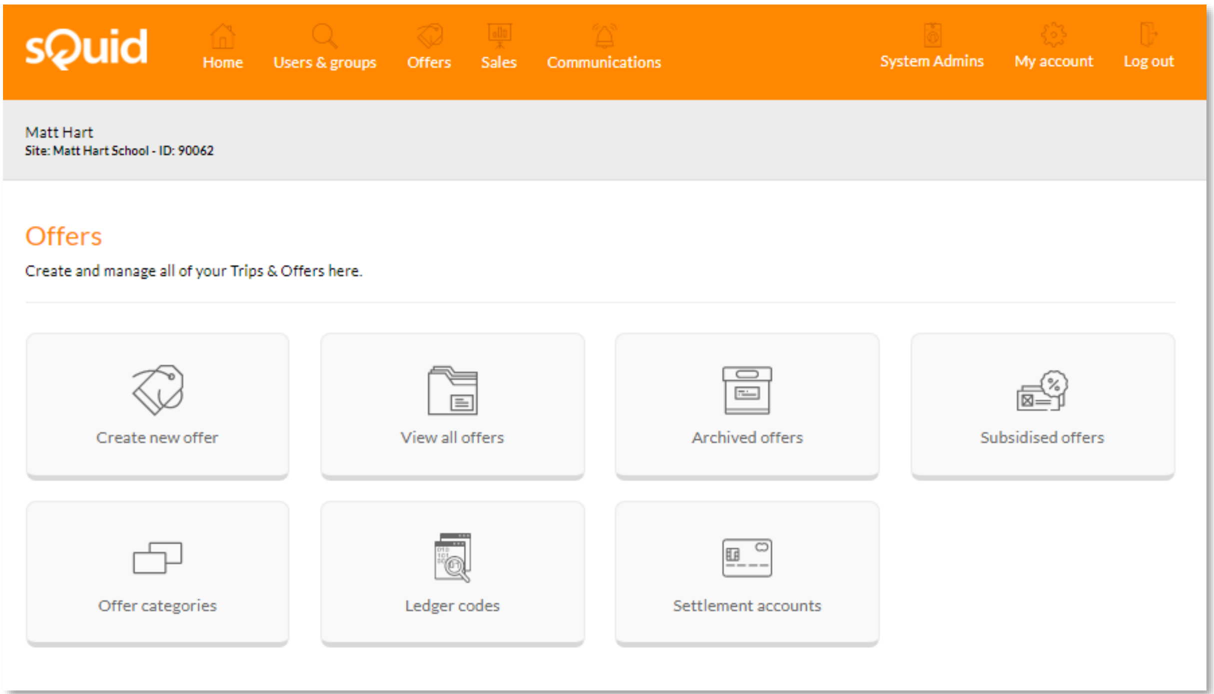
*Year groups will only be prepopulated if your school uses the Xporter and Xporter on Demand Integration otherwise year groups can be manually created.*

*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.*



## 5. Offers

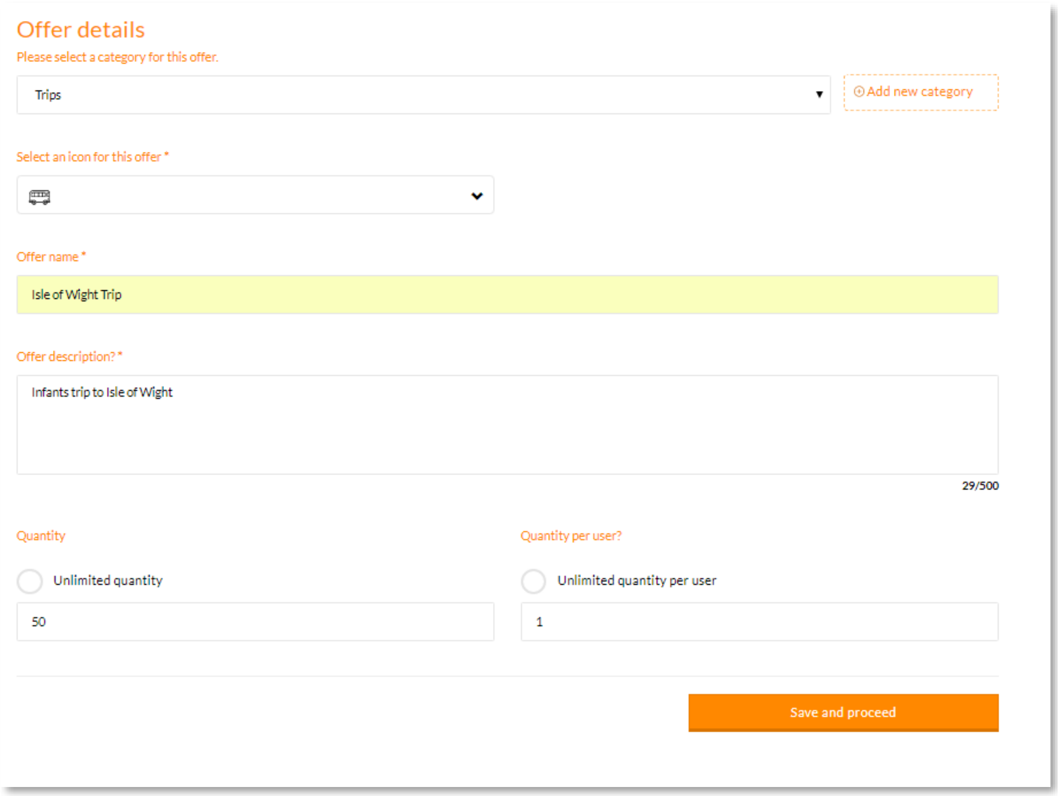
- **Continue where you left off** – allows you to continue creating an offer that was not completed
- **Create new offer** – allows you to create a new offer
- **View all offers** – this is where all live, upcoming, paused and expired offers are displayed. The offers can also be edited from this screen
- **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**.



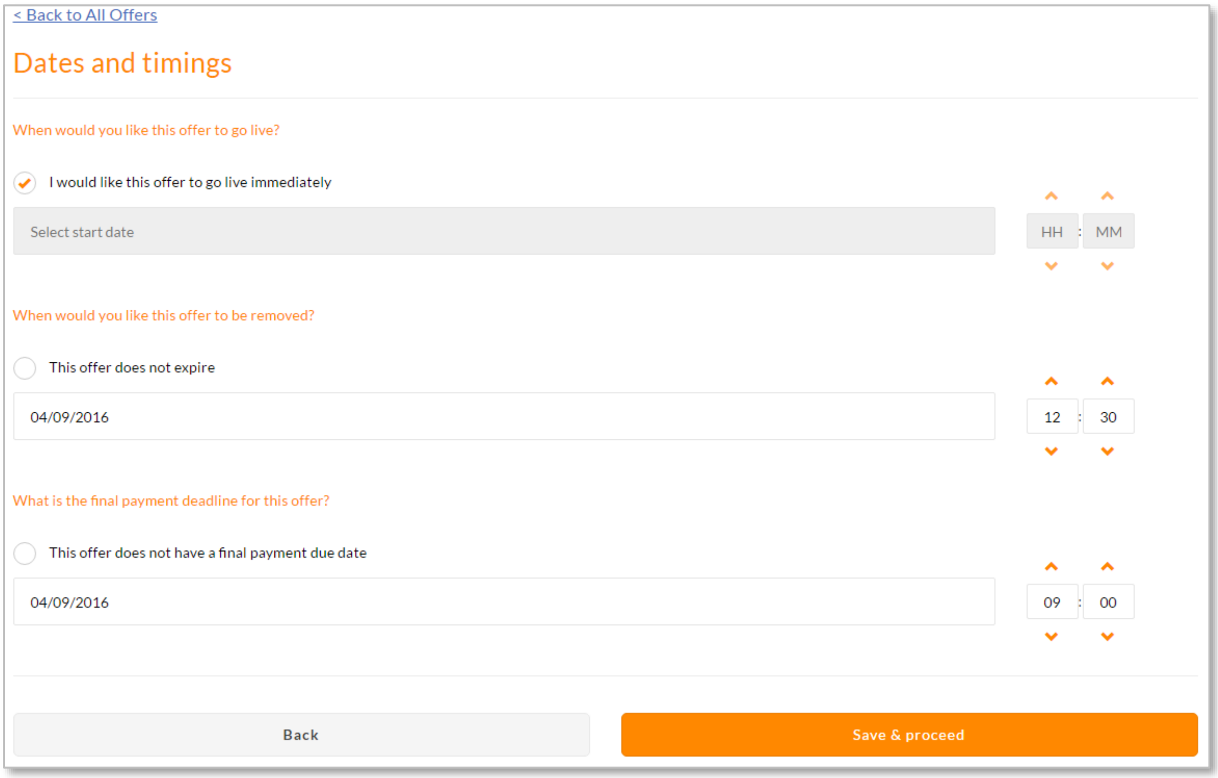
## 5.2. Dates and timings

- 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.*

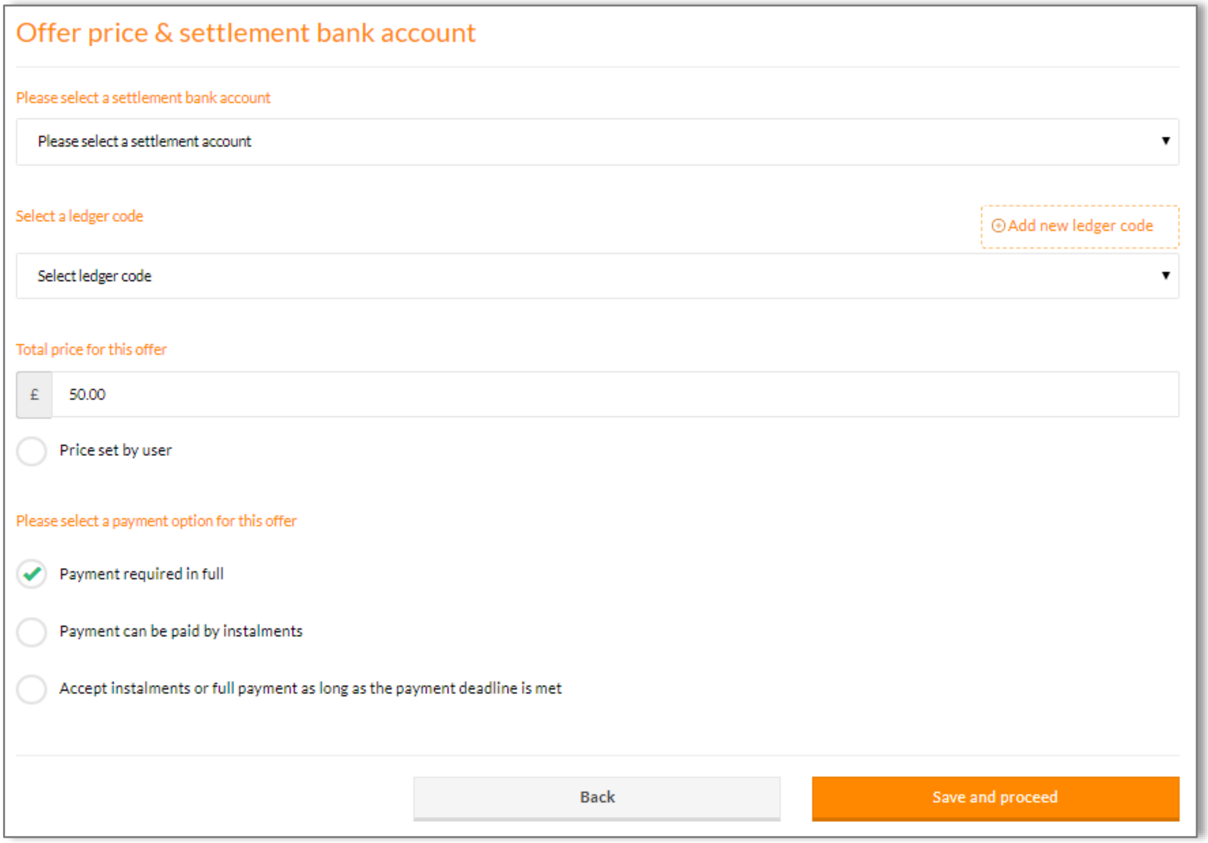
*The time can be manually typed in, or select the up and down arrows to scroll to the chosen time. The clock is a 24-hour clock i.e. 3pm would need to be setup as 15:00.*

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



## 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



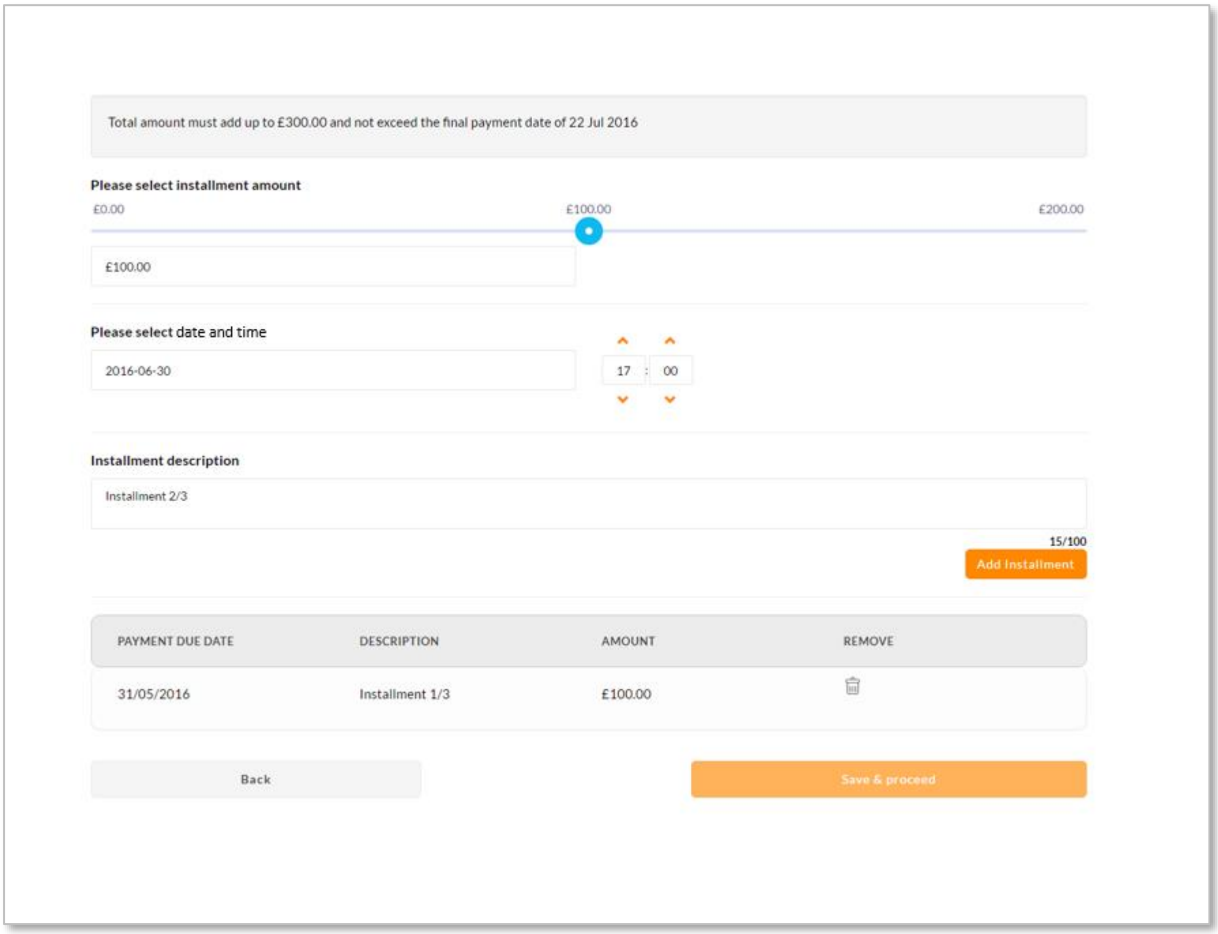
## 5.4. Payment required in full

- 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.*




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

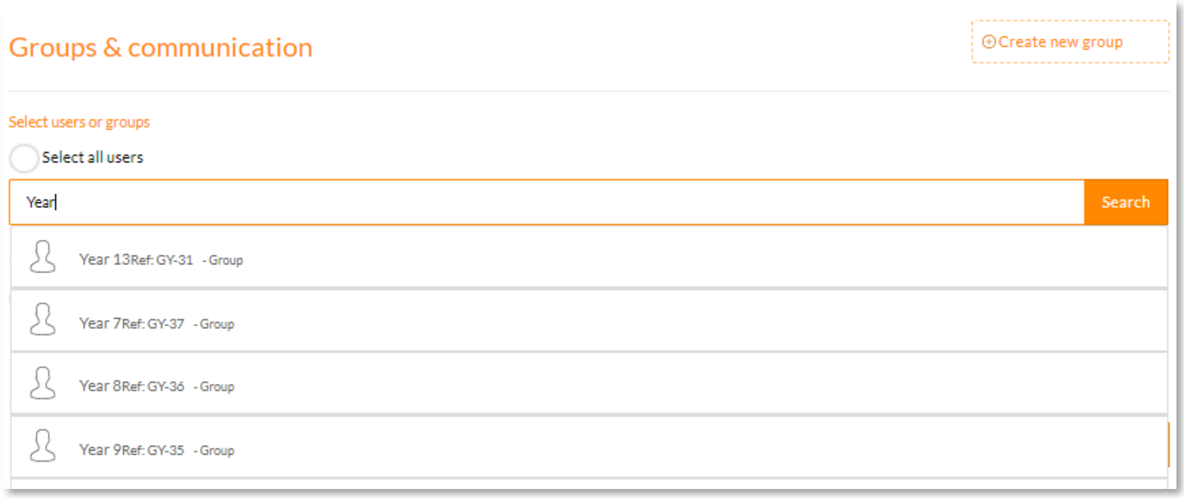
- No further setup required

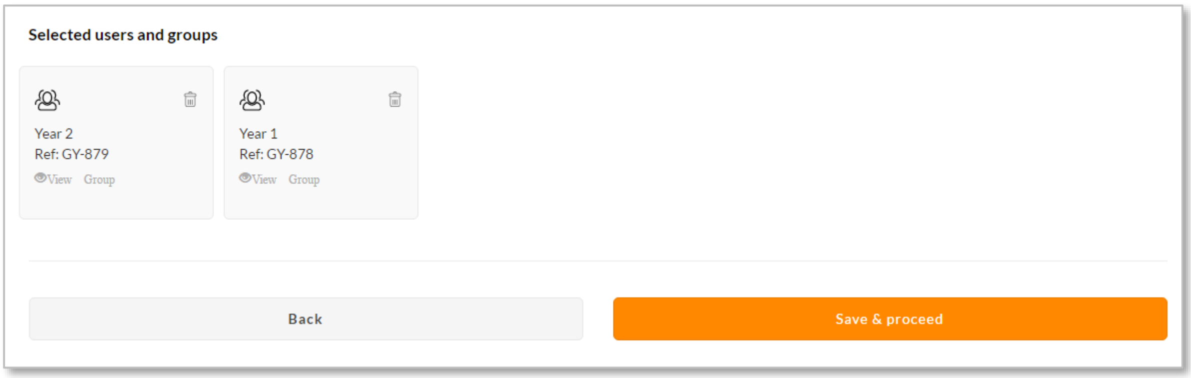
Once all of the information has been completed for this section, click **Save & Proceed**.

## 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 communication 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.*

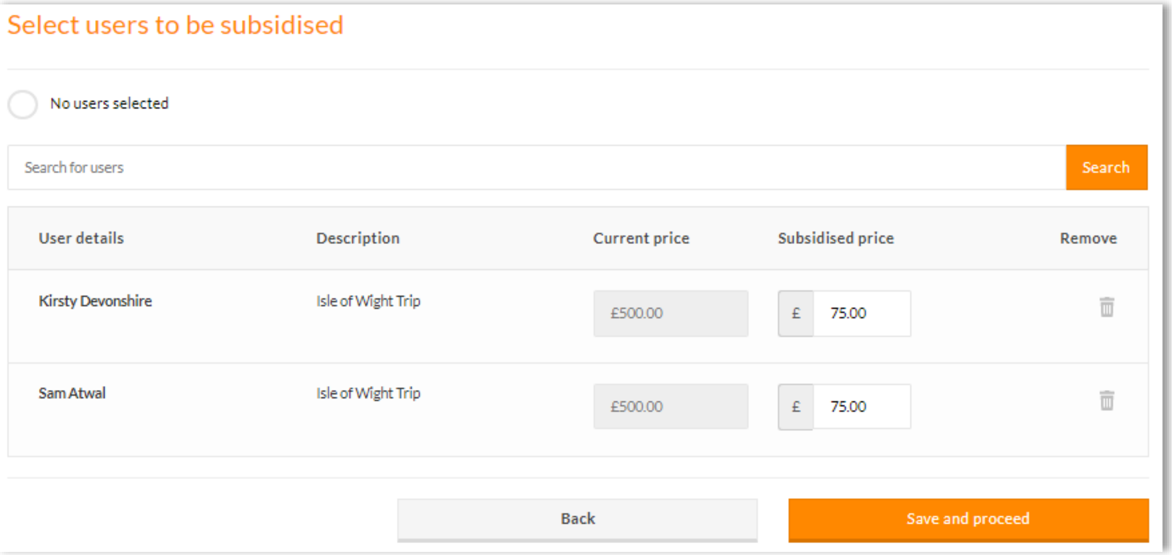


## 5.8. Subsidised users

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




## 5.9. Additional information

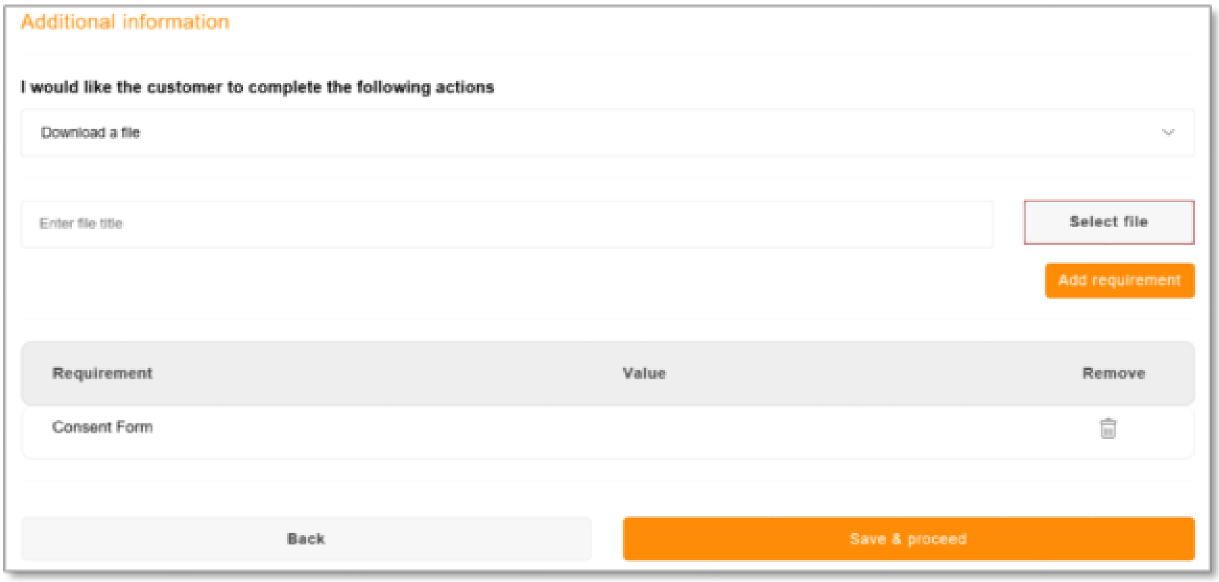
In this section, you can add any additional requirements to be completed for the offer by the end user i.e. Consent forms, information on the offer or any mandatory questions to be completed.

- **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



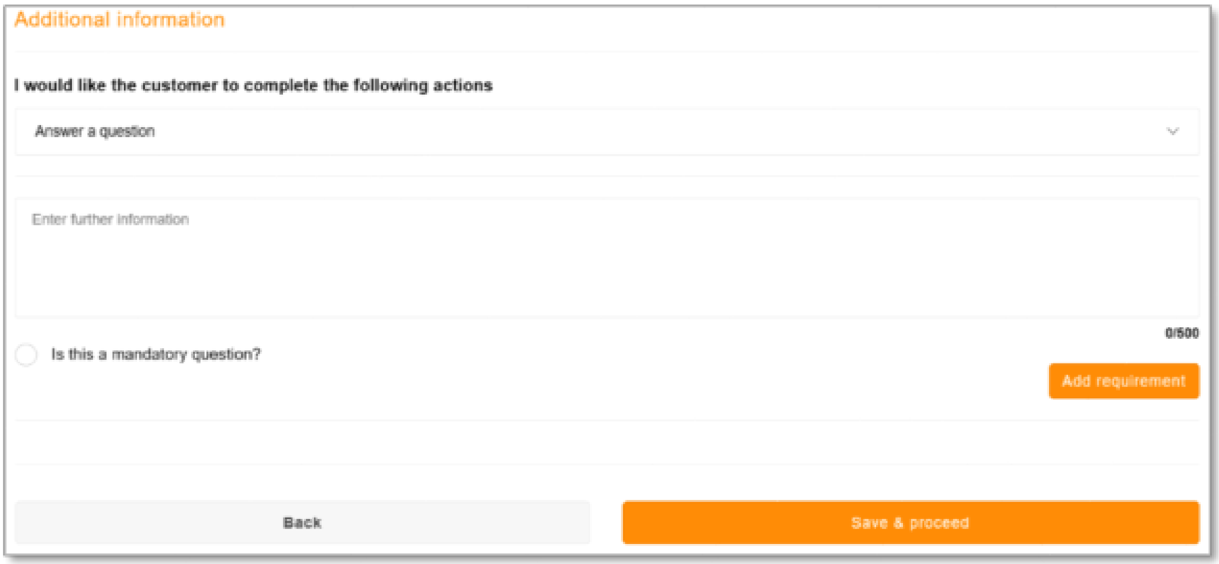

Once all information is complete for this section, click **Save & Proceed**.

## 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**

## 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**

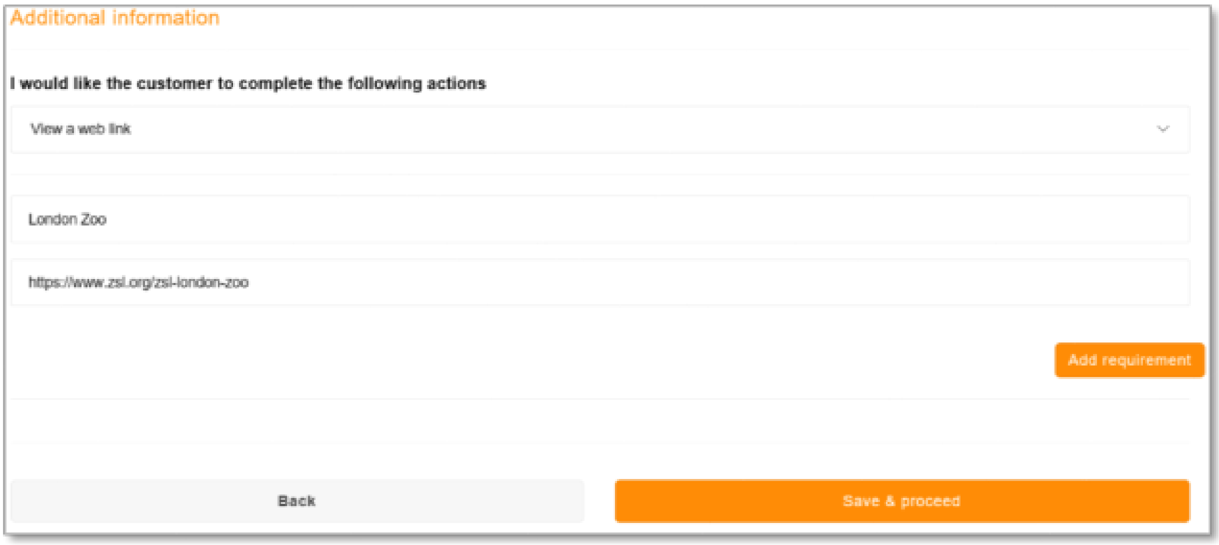



## 5.13. Answer a yes/no question

- 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**

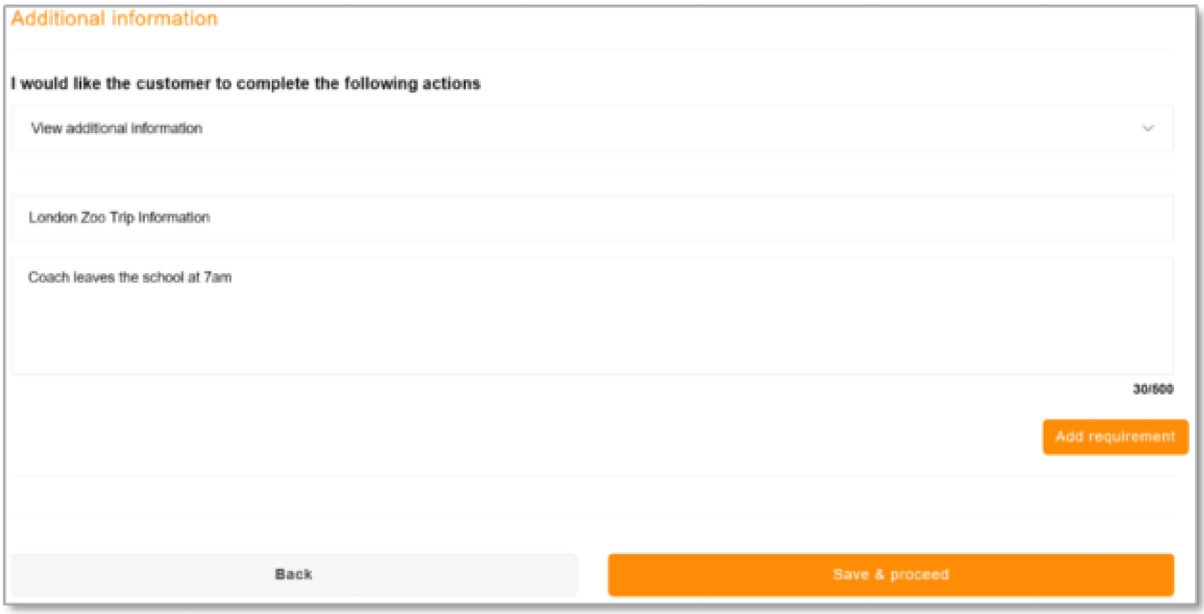
## 5.14. View a web link

- 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**




## 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**



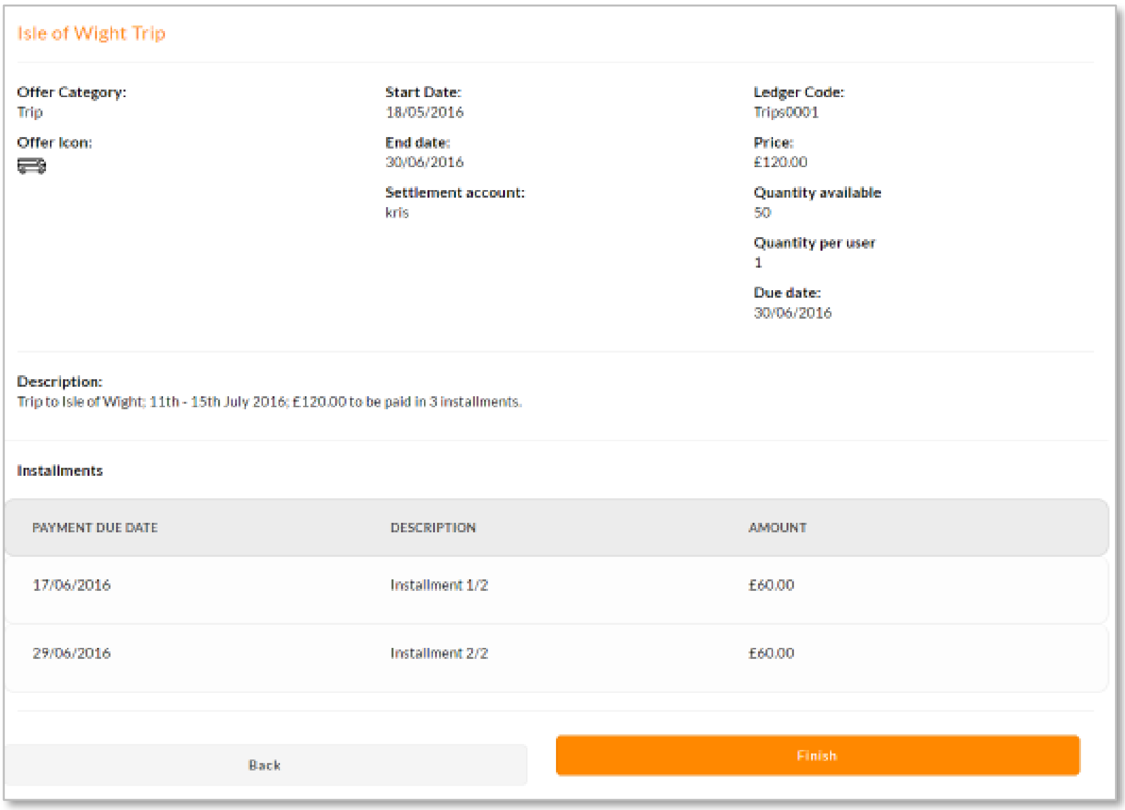
## 5.16. Select from a list of options

- 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**


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

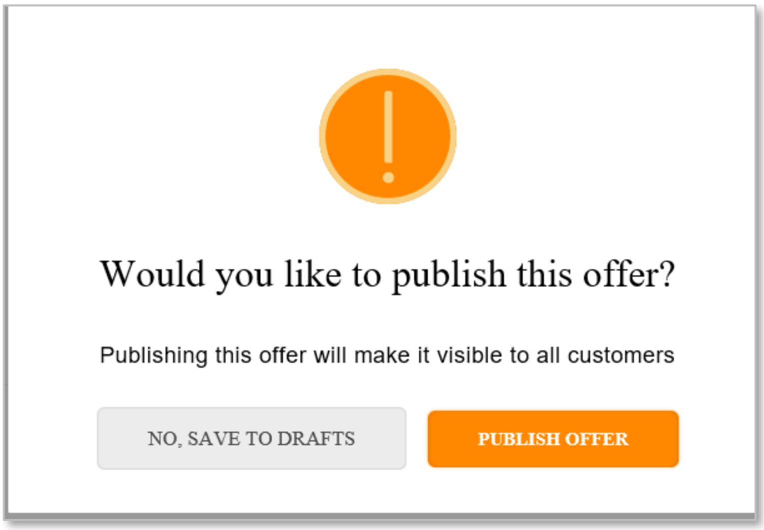
## 5.17. Offer Overview

- 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




## 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

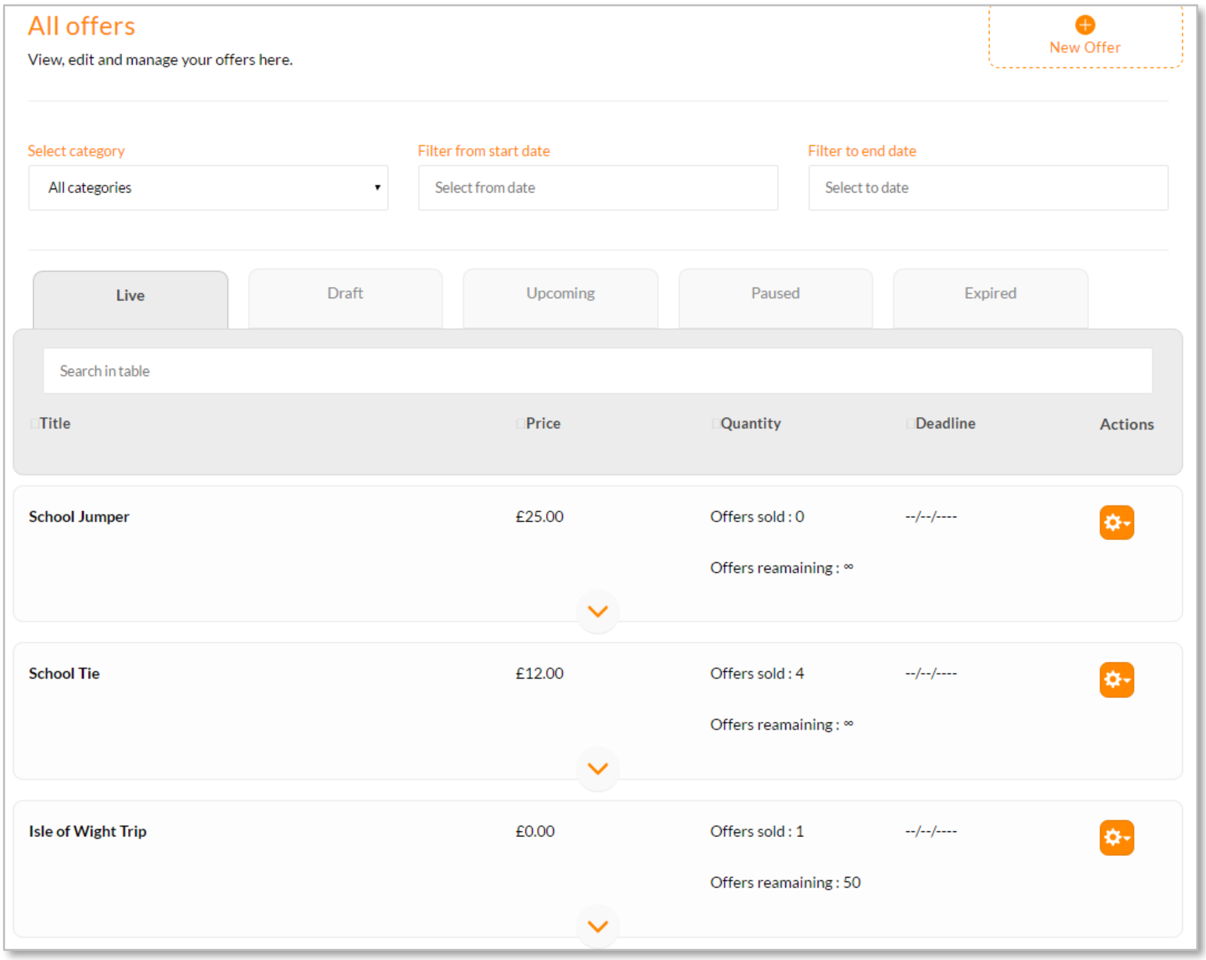


## 5.19. View all offers

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.



## 5.20. Archived offers

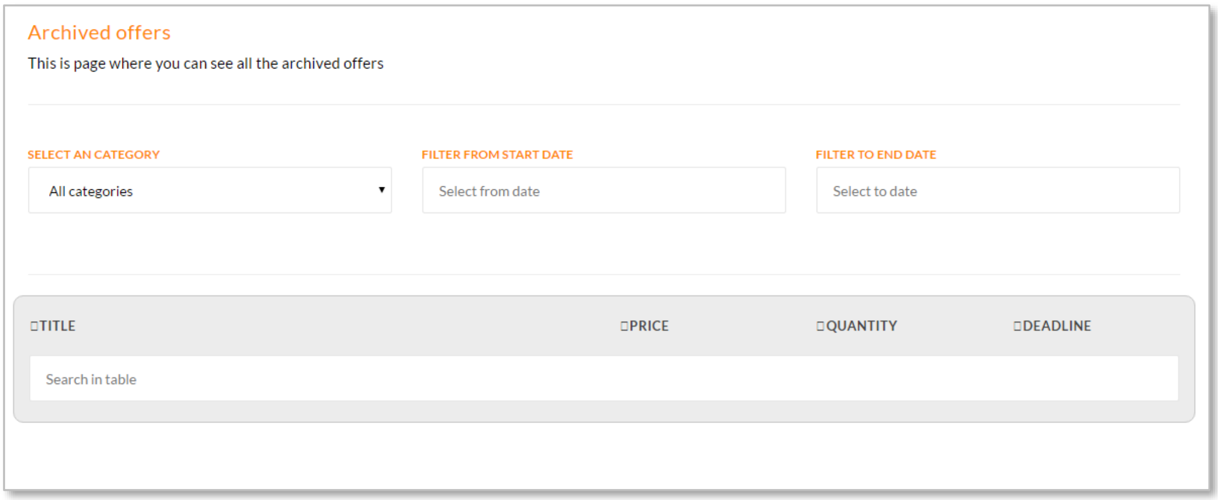
Once you are finished with an offer and you no longer need to manage it you can move it to your archived offers folder. This is a tool to allow you to keep your Manage Offers screen clean and up to date.

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.

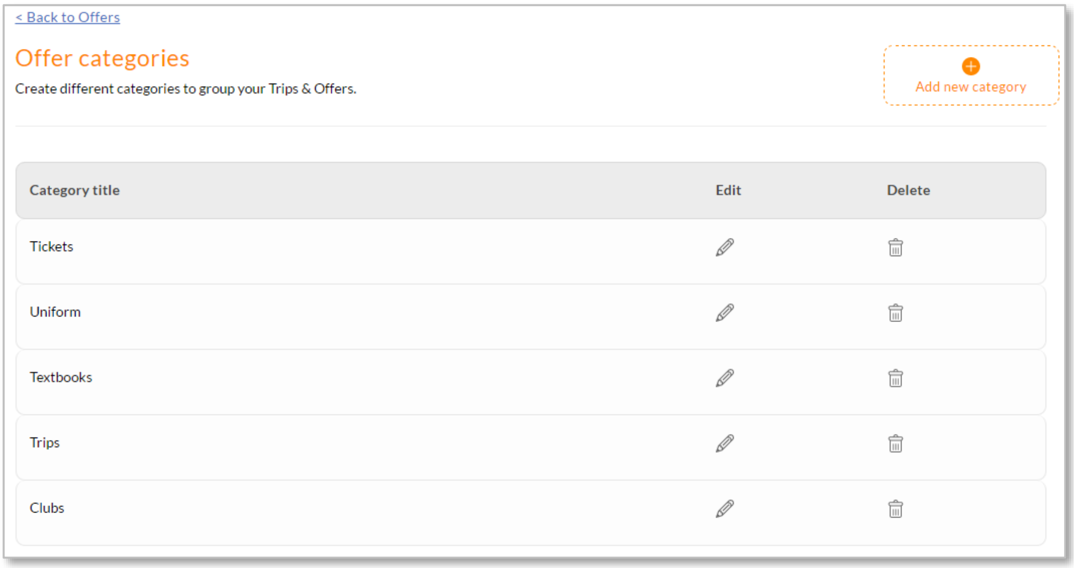
You can filter between offer categories and start and end dates at the top of the page.

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



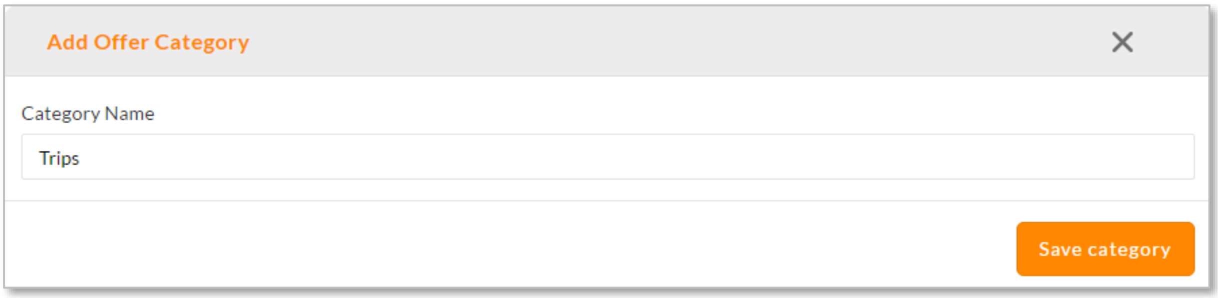
## 5.21. Offer catergories

Create and amend categories for your offers




## 5.22. Add new category

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



## 5.23. Ledger codes

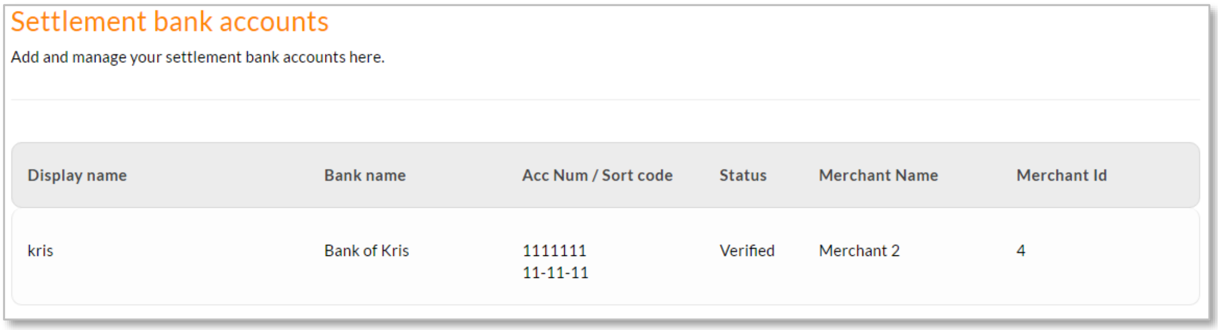
This section allows you to create Ledger Codes, i.e. for uniform purchases.

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


| 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.




| 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.**

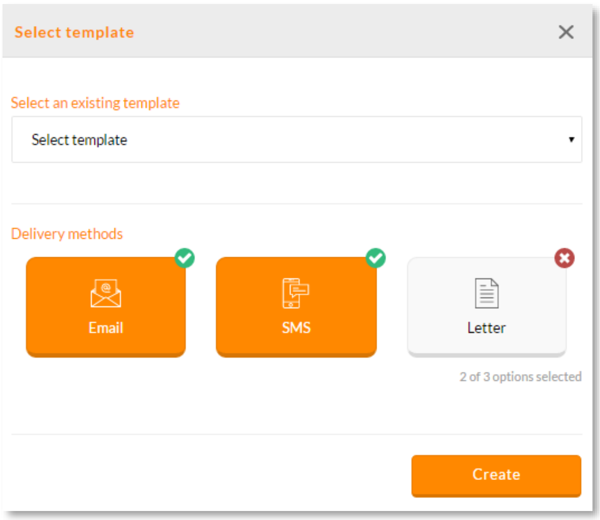
# 6. Communications

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.

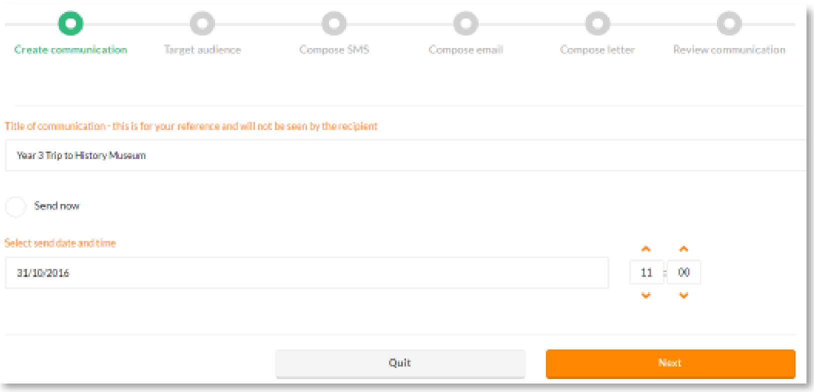
*If your school uses SIMS, please ensure that your MIS is up to date with the correct priority levels for parents, parental responsibilities and contact email address.*

## 6.1. Create communications

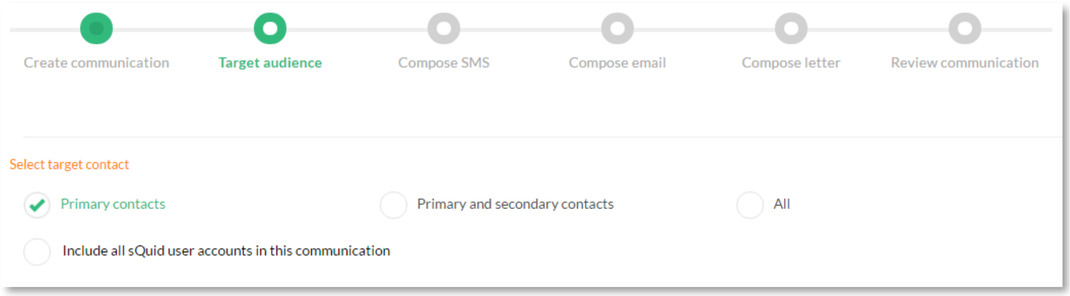
- Click the **Create communication** icon
- **Select an existing template** should you wish to use one. Leave this blank to create a new one
- Choose the communication **delivery methods** by clicking on them. The delivery method will have a green tick on the top right hand corner once it has been selected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



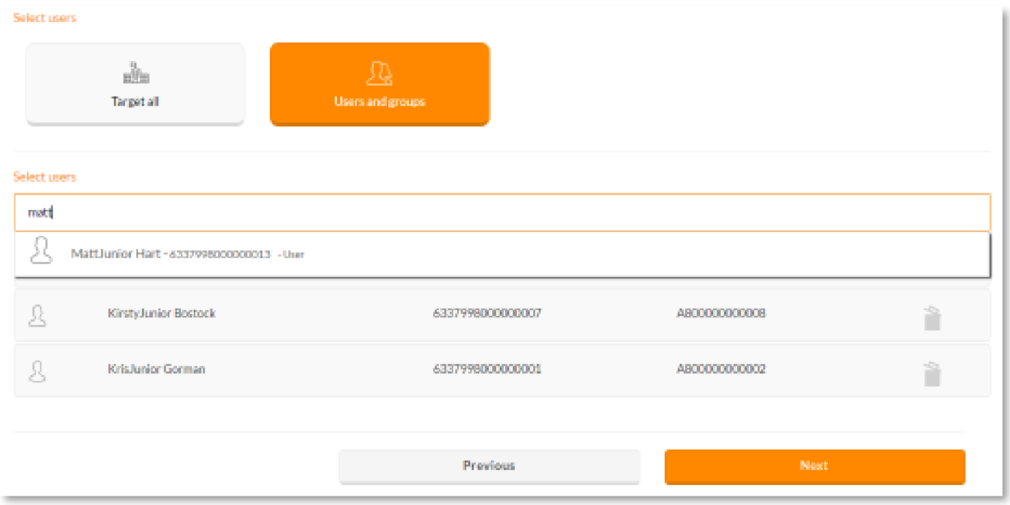

- On the next screen please enter a **Title of communication.** This title will only be visible internally
- Tick **Send now** to send the communication once the offer has been created, or leave this box unticked, and enter a date and time underneath to send the communication at a specific time
- Click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

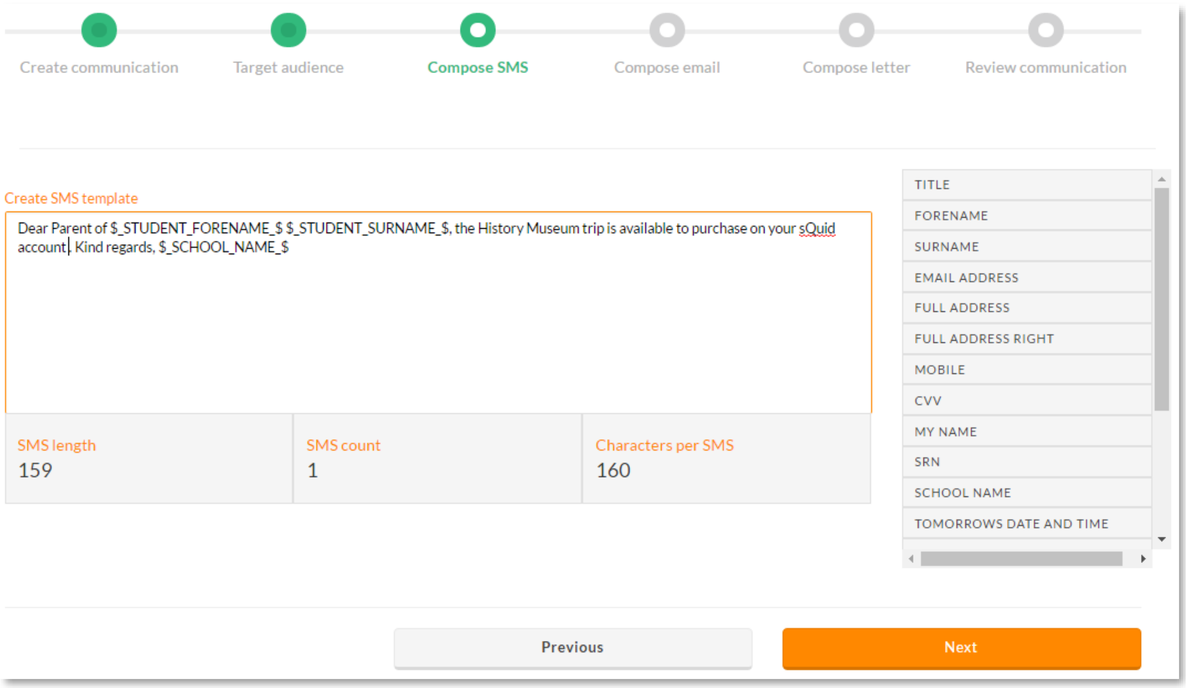



- Click **Target all** to communicate with all users
- Click **Users and groups** to target specific pupils or groups of pupils. Type the name of the user or group in the box underneath **Select users**, then click on the name where the user will be added and shown underneath the box
- Click **Next**



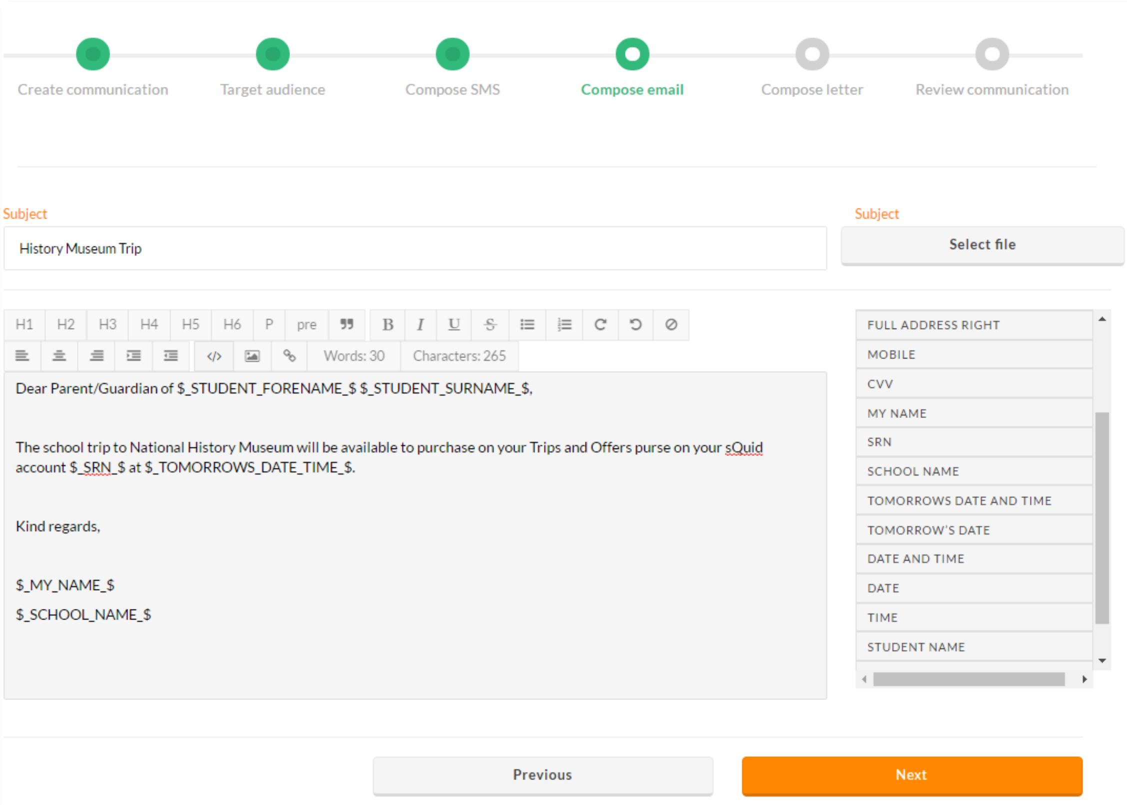
## 6.2. Compose SMS

- 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



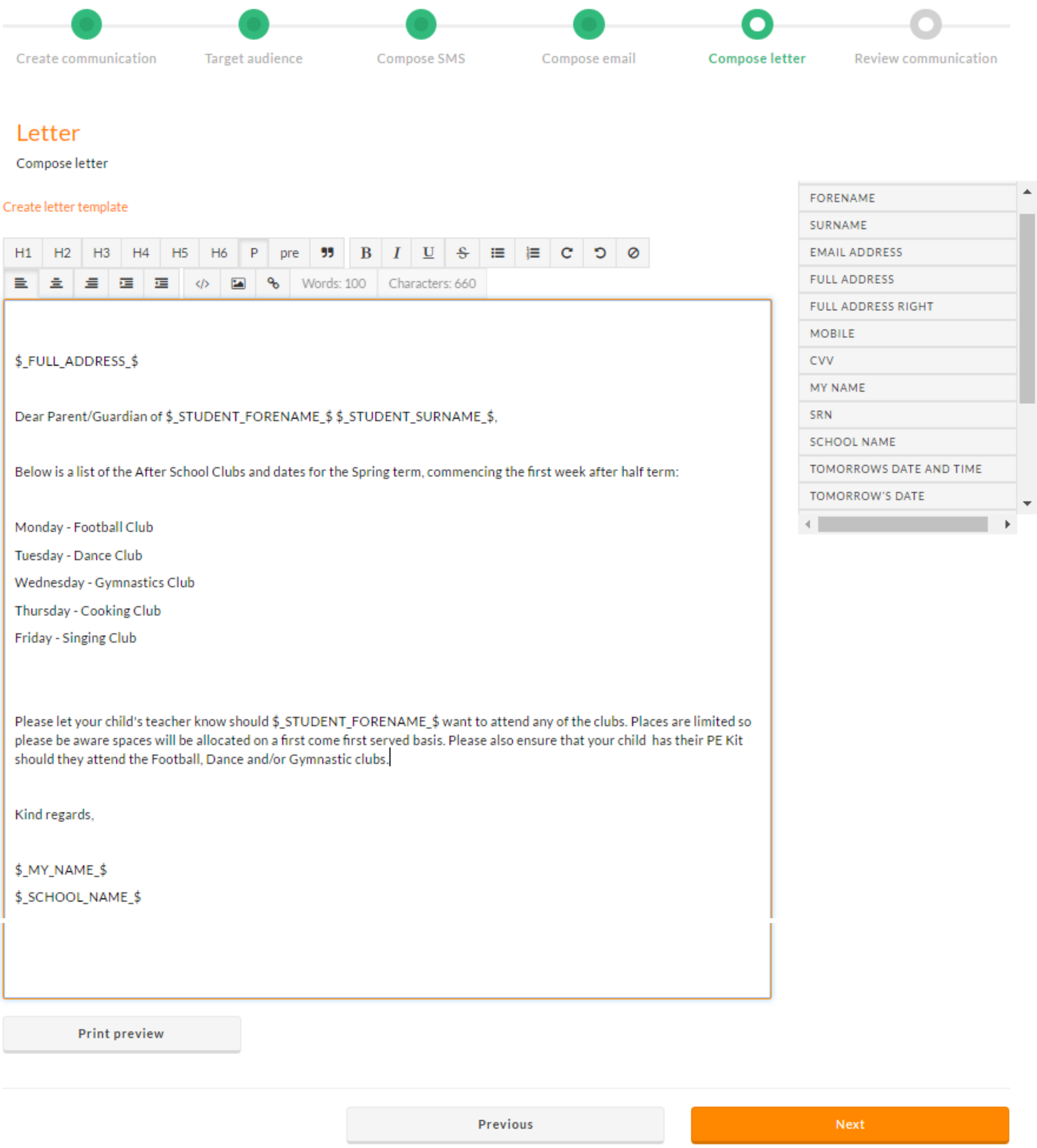
## 6.3. Compose email

- 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



## 6.4. Compose letter

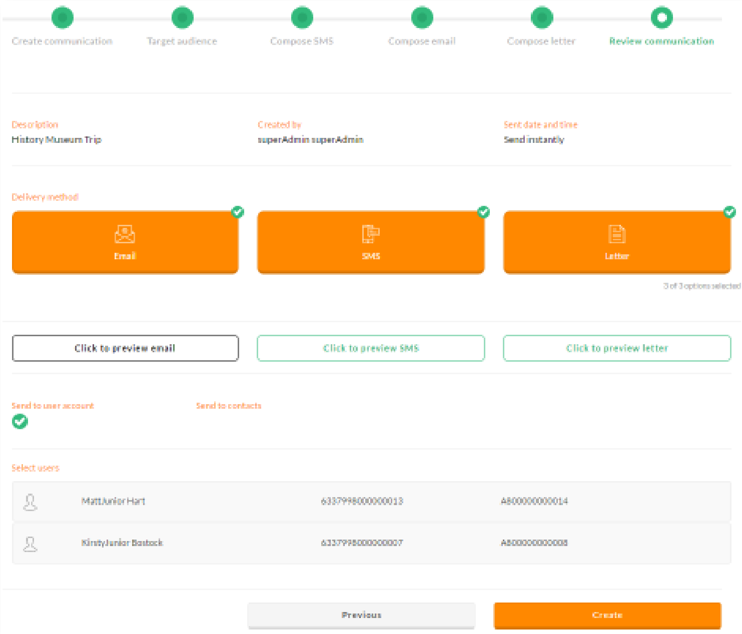
- To compose a new letter, type your message in the box underneath **Create letter template**
- If selecting an existing template, the message will be populated in the box. Changes can be made to the letter template
- Within your letter you can enter pre-selected tokens from the right hand box by clicking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



## 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.

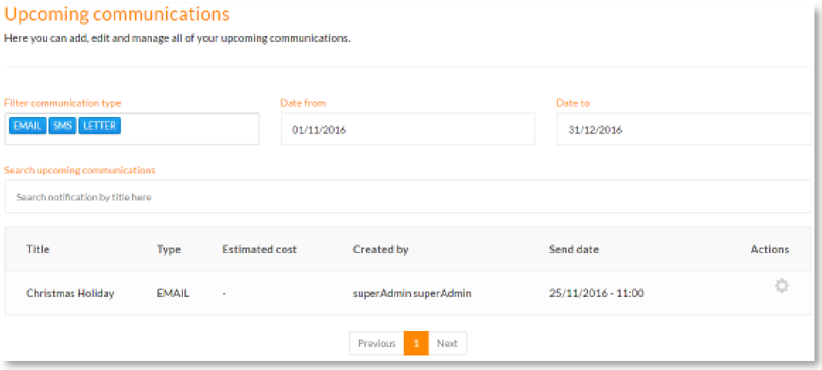
- Click the boxes underneath the orange icons to **preview email, SMS or Letter**
- Click **Create**



## 6.6. Upcoming communication

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

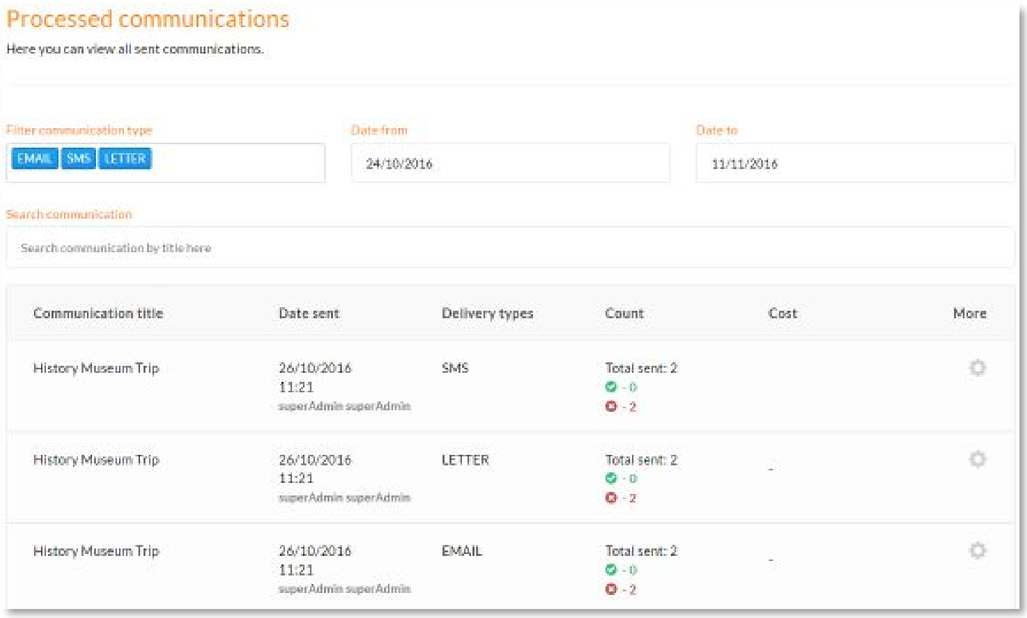
- The **Filter communication type** box is prepopulated with Email, SMS and Letter. To remove any of these communication types from the search, click on the box and then push the back space
- Enter dates in the **Date From** and **Date To** boxes to filter between specific dates. Leave these fields blank 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



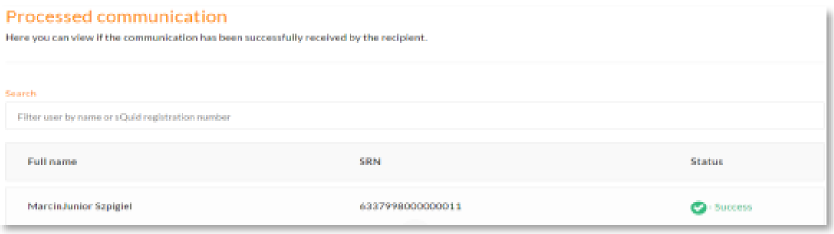
## 6.7. Processed communication

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

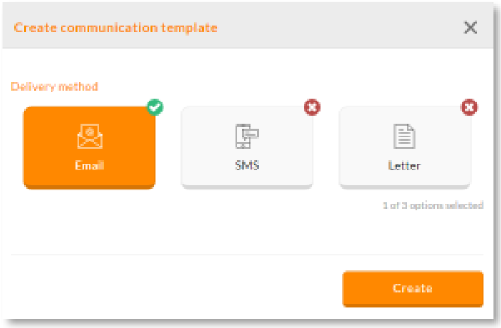



- Click the **cog icon** and then **View targets** to see all users who have been sent communication for that title
- The Success icon indicates that the communication has been sent successfully



## 6.8. Create template

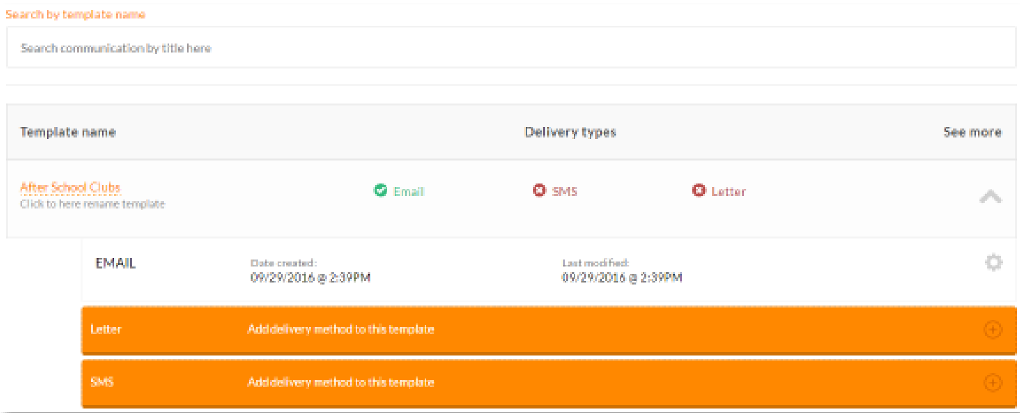
In this section you can create communication templates. Please see Create SMS, Create Email and Create Letter sections for instructions on how to do this.




## 6.9. Manage templates

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

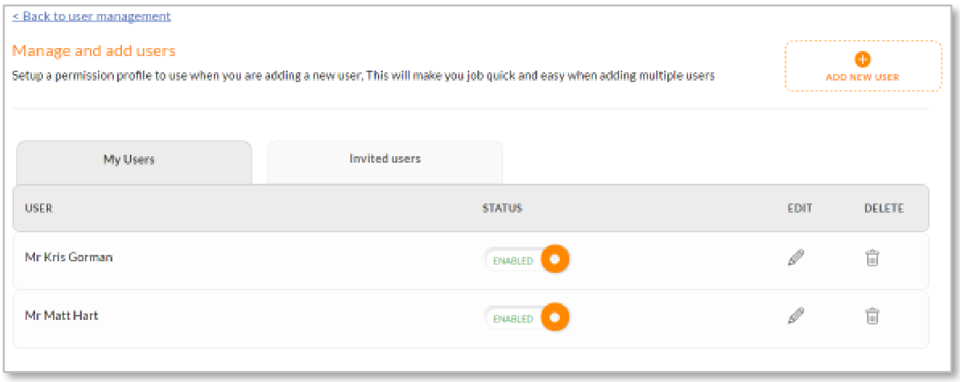
- Click the **down arrow** to see the communication methods that are setup for this template, and the date this was created
- Click **Add delivery method to this template** to add another communication method
- Click **Preview template** for a snapshot of the template
- Click **Edit template** to make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



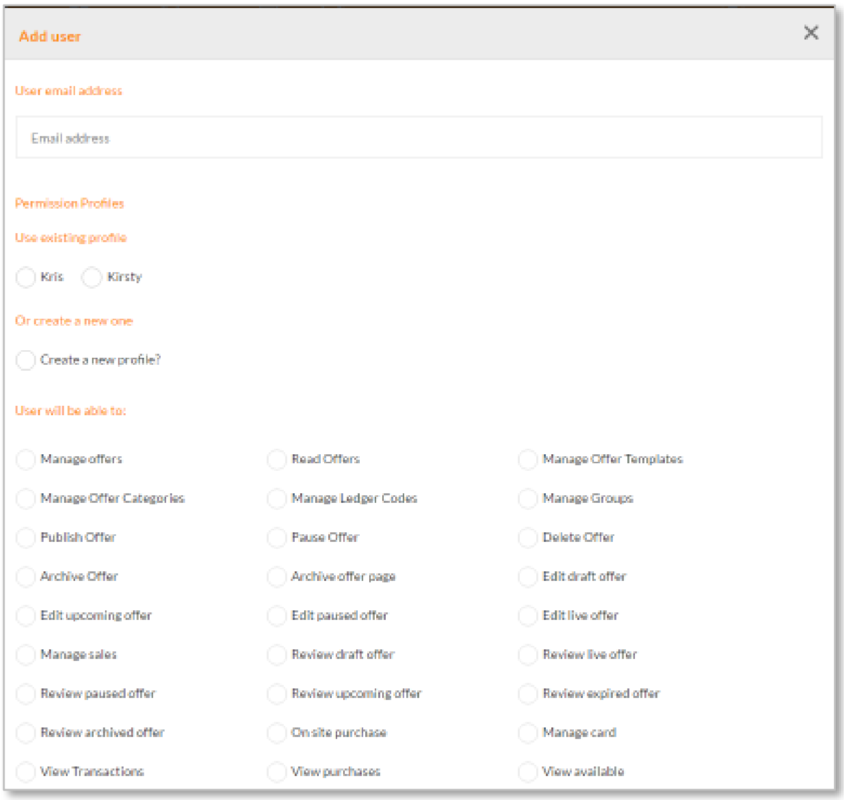
# 7. System admins

## 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



## 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

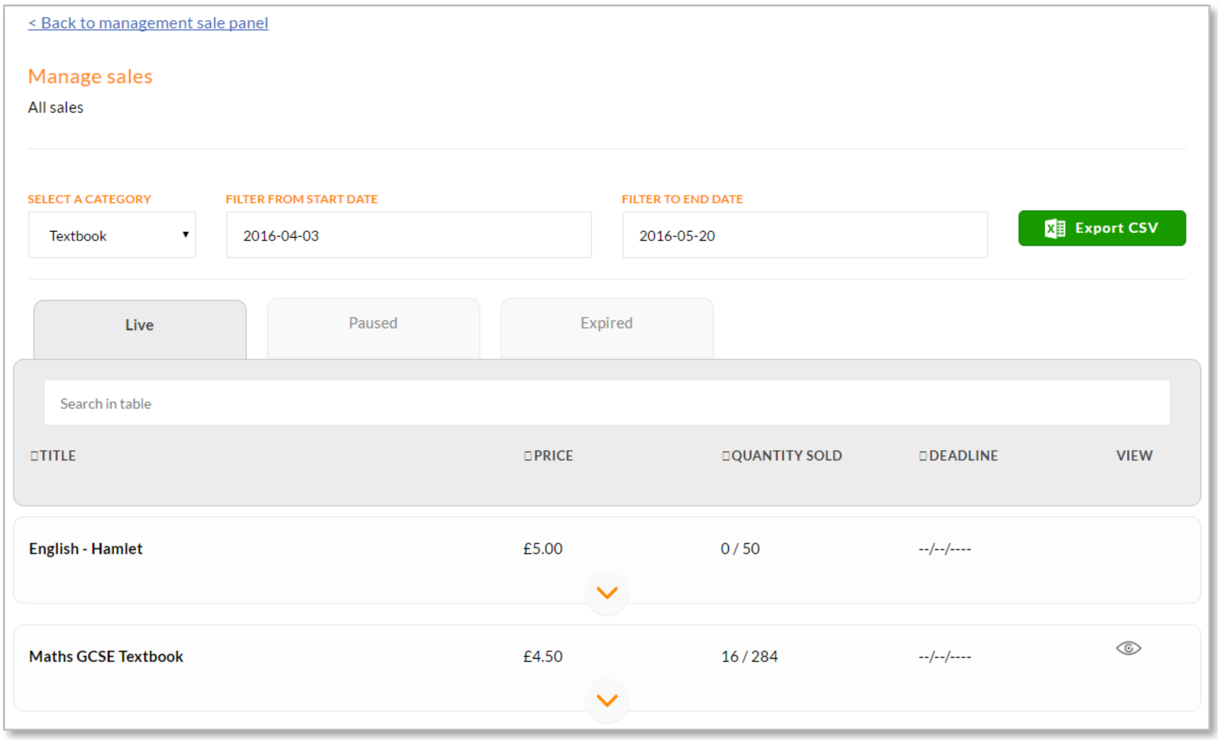
## 7.3. Manage system permissions

- 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

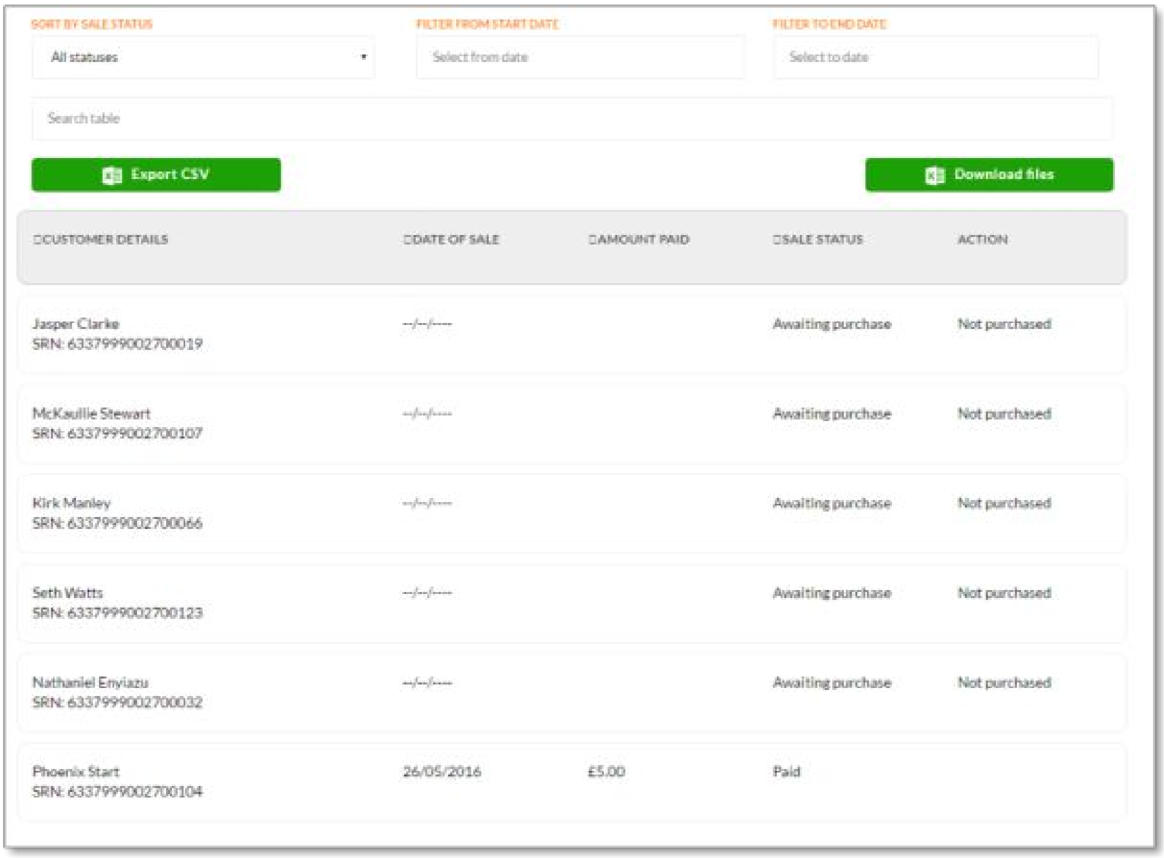
## 8.1. Sales

- 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



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

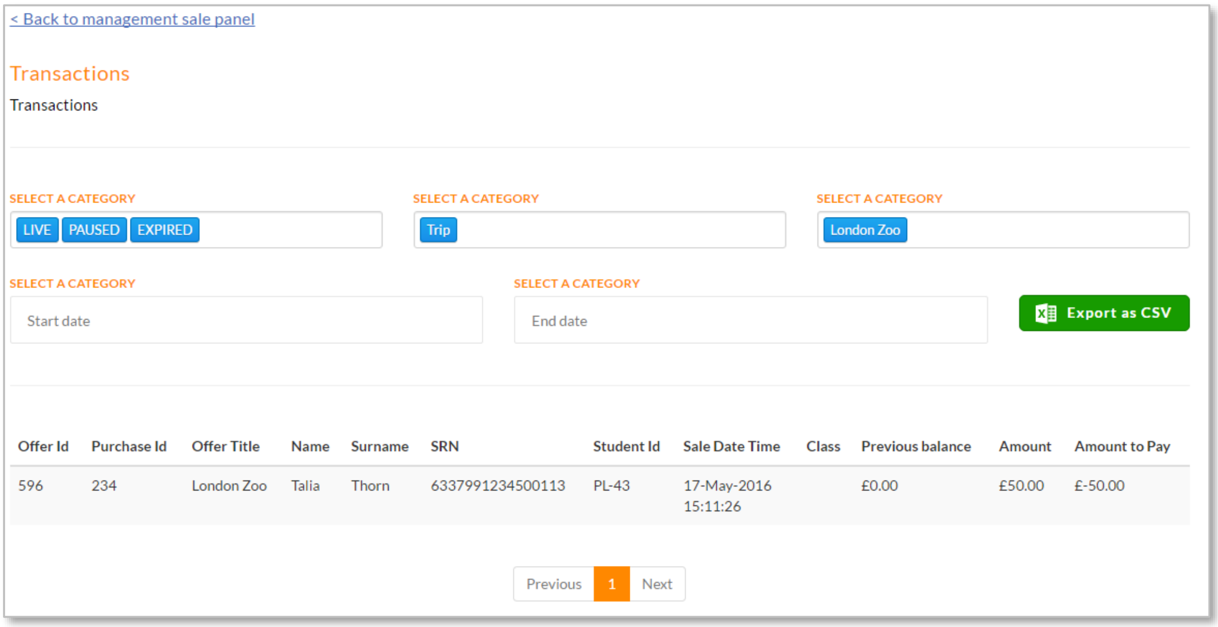
- Click on the **cog icon** on the right hand side of the offer and then **View purchases**
- The **Sales Status** column shows whether the offer is **Paid**, **Part Paid** or **Awaiting purchase** by the user
- This is only for offers that have been setup for a particular group, as opposed to an offer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




| CUSTOMER DETAILS | DATE OF SALE | AMOUNT PAID | SALE STATUS | ACTION |
|---|---|---|---|---|
| Jasper Clarke<br>SRN: 6337999002700019 | --/--/---- | | Awaiting purchase | Not purchased |
| McKaullie 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



## 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 23741 | 171518 | | Madrid 2018 - Installements | Trips | Wilson Harry 6337991030201911 | | 30/Jul/2017 21:24:57 | £38.00 | £38.00 | £0.00 | Online |
| 39181 | 171061 | | Pencil Case and contents | Miscellaneous | Reeman Taylor 6337991030201779 | | 27/Jul/2017 15:54:38 | £4.00 | £4.00 | £0.00 | Online |
| 21464 | 171029 | | Iceland 2018 | Trips | FRY DEVIN 6337991030201577 | | 27/Jul/2017 14:52:49 | £75.00 | £75.00 | £0.00 | Online |
| 21464 | 170362 | | Iceland 2018 | Trips | JAMES ALASARA 6337991030201623 | | 25/Jul/2017 13:16:13 | £75.00 | £75.00 | £0.00 | Online |
| 23741 | 169881 | | Madrid 2018 - Installements | Trips | Carroll Ellie-Mae 6337991030201933 | | 24/Jul/2017 10:27:45 | £38.00 | £38.00 | £0.00 | Online |

Previous 1 Next

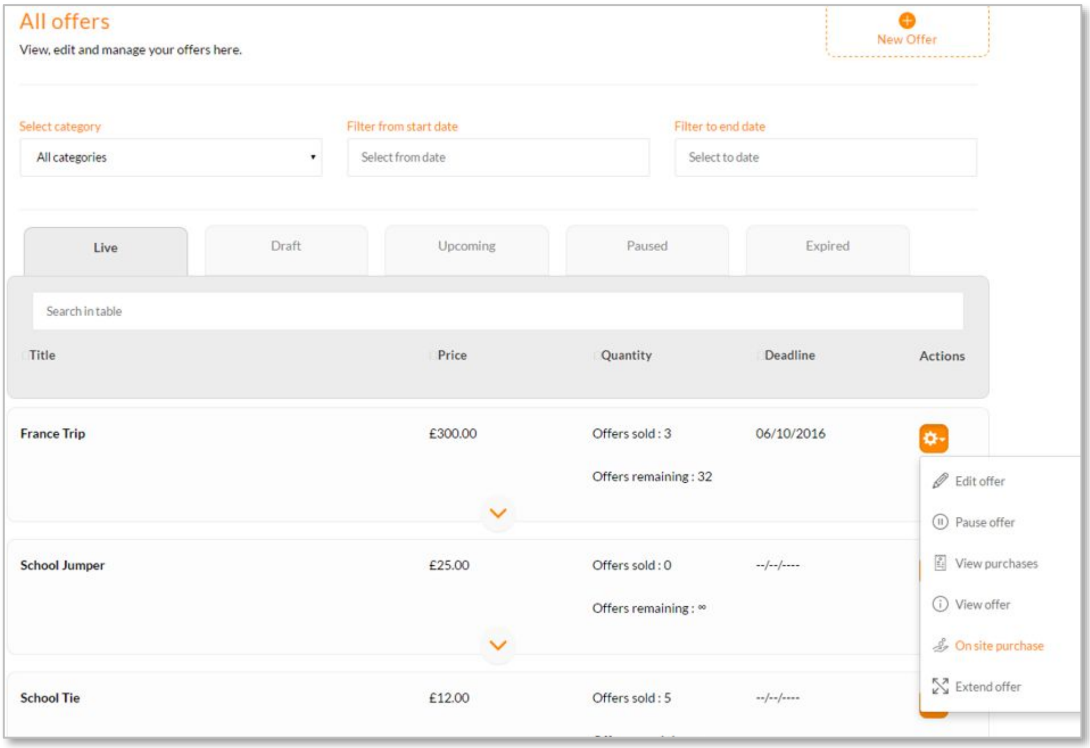
| | Net Amount |
|---|---|
| **TRANSACTIONS: (For the week analysed below)** | |
| Purchases | £(230.00) |
| Store Top Ups | [illegible] |
| Refunds | £ 0.00 |
| Redeems | £ 0.00 |
| Net of All Transactions | **£(230.00)** |
| **FEES: Transaction fees** | |
| Transaction fee percentage charged | 1.50%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

## 9. On site purchase

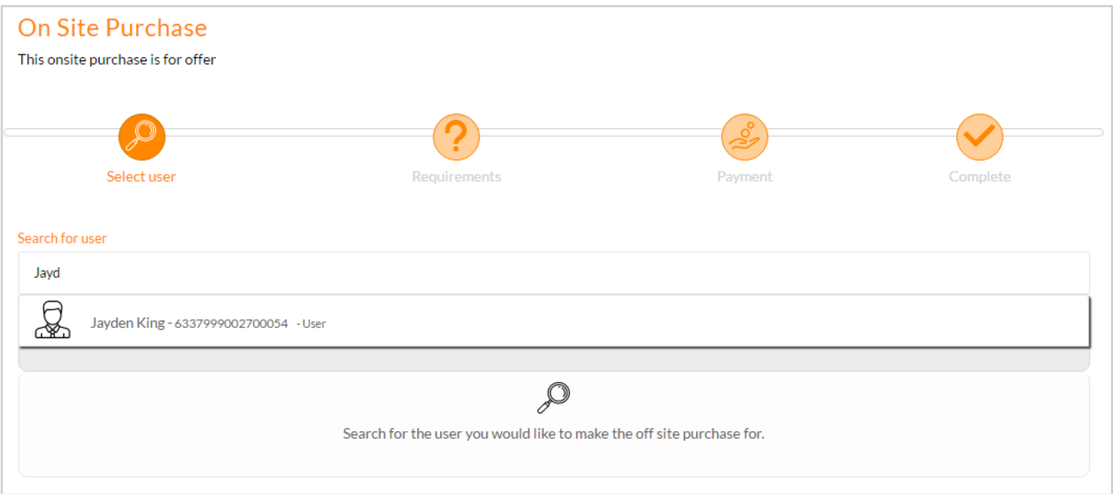
Input cash or cheque payments made by an individual to pay for an offer.

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

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

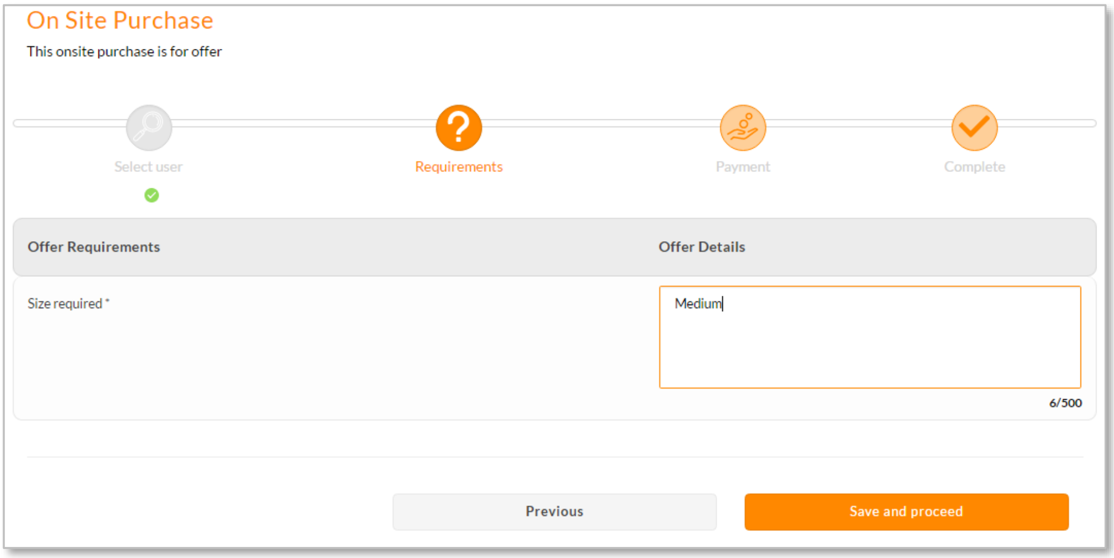



- You can search for the user’s name in the search box, or find the user by scrolling down
- Click the name of the user

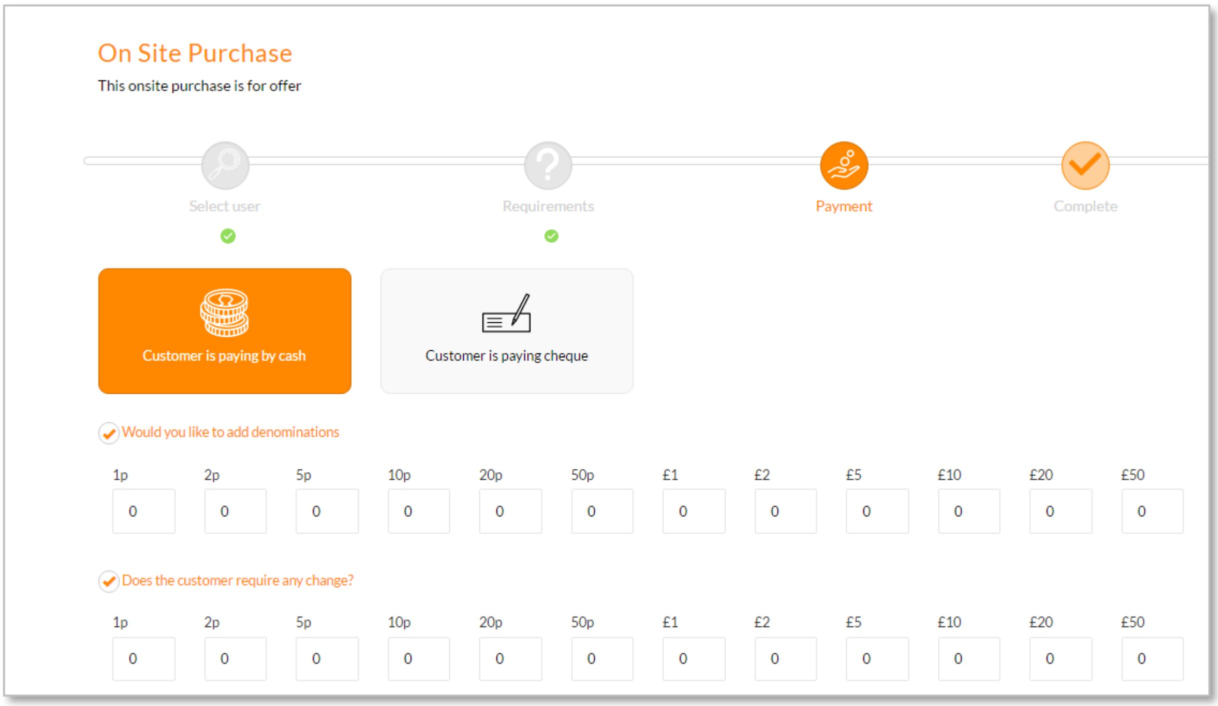



- If the offer has any requirements, these should then be entered (e.g. size for a uniform purchase)

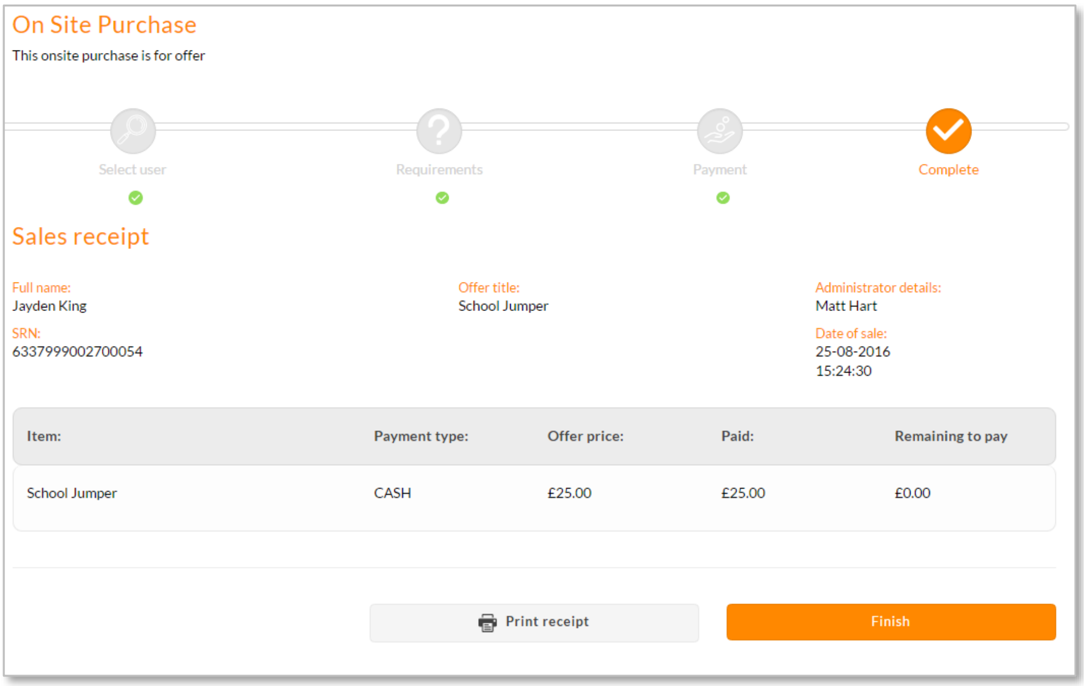
- Click **Save and proceed**




- 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**

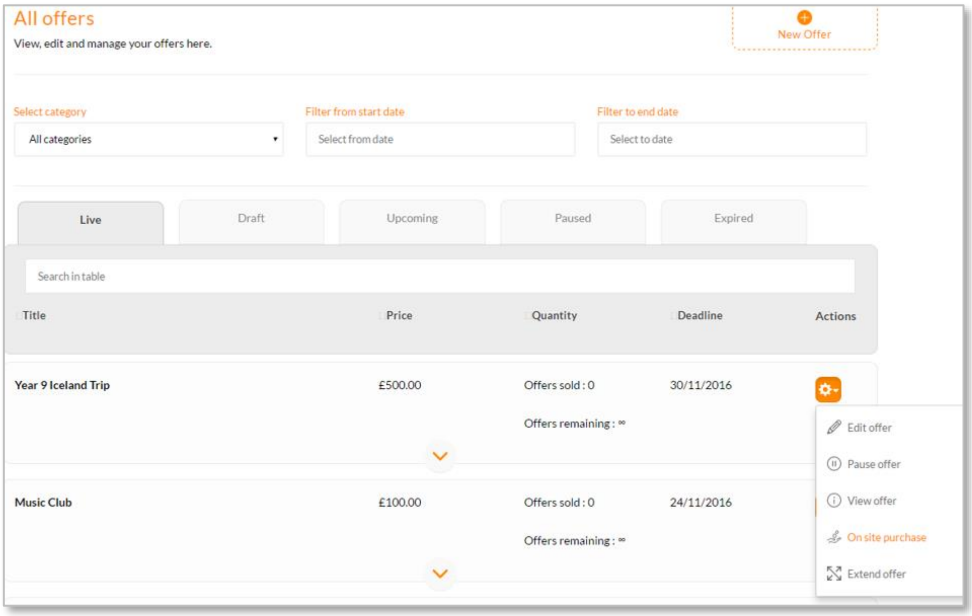



- You are then taken to an overview page where you can print a **sales receipt**
- Click **Finish**

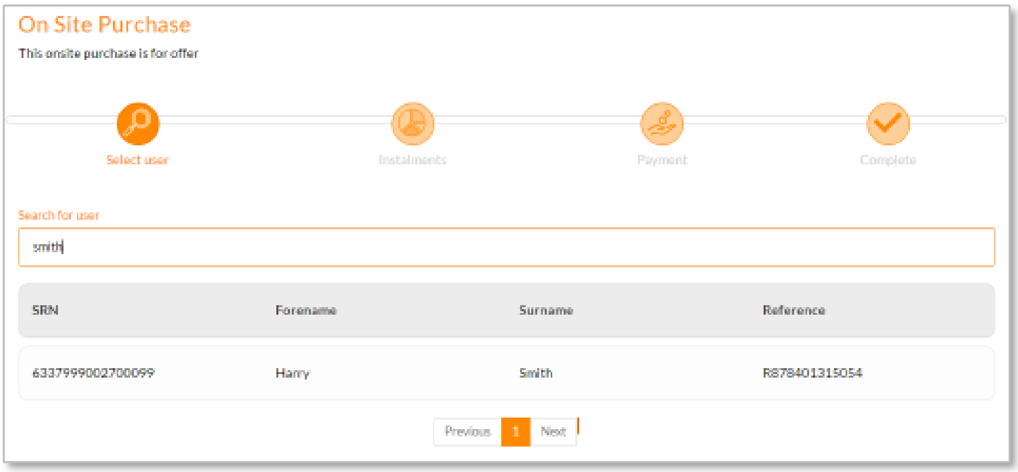



## 9.2. On site purchase – payment can be paid by instalments

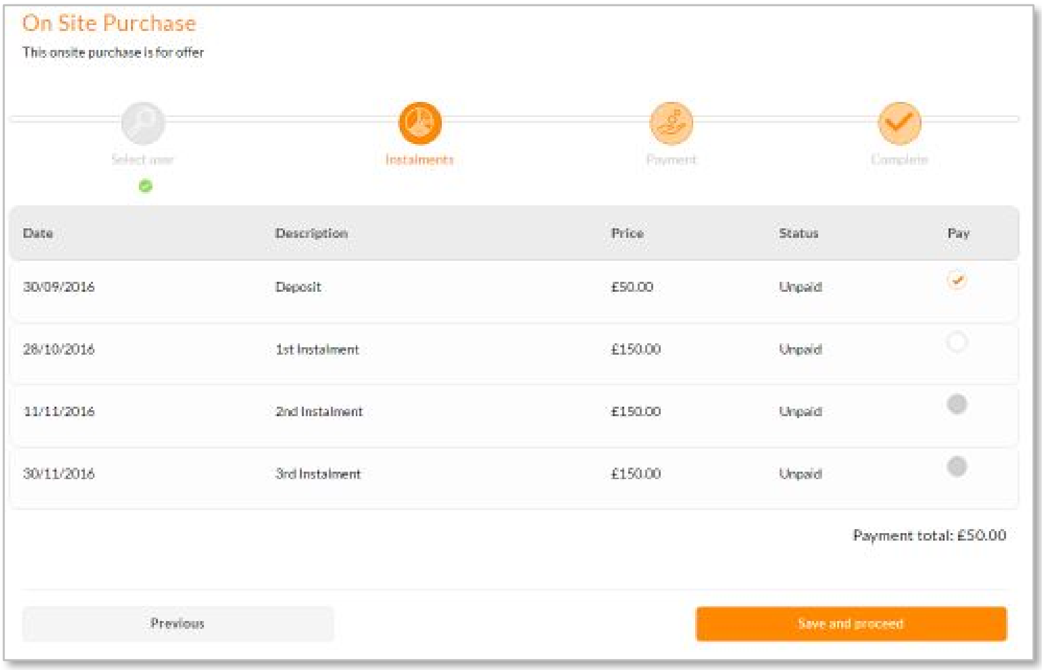
- Within the **View all offers** section click on the **cog icon**
- Click **On site purchase**



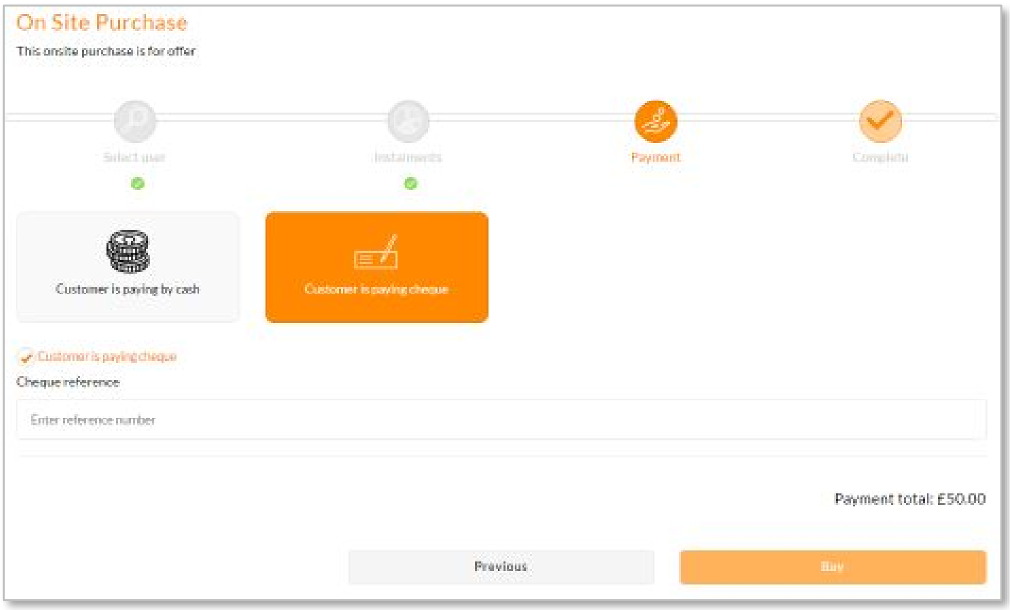

- You can search by the user's name in the search box, or find the user by scrolling down
- Click the name of the user
- If the offer has any requirements, these should then be entered (e.g. trip consent form)



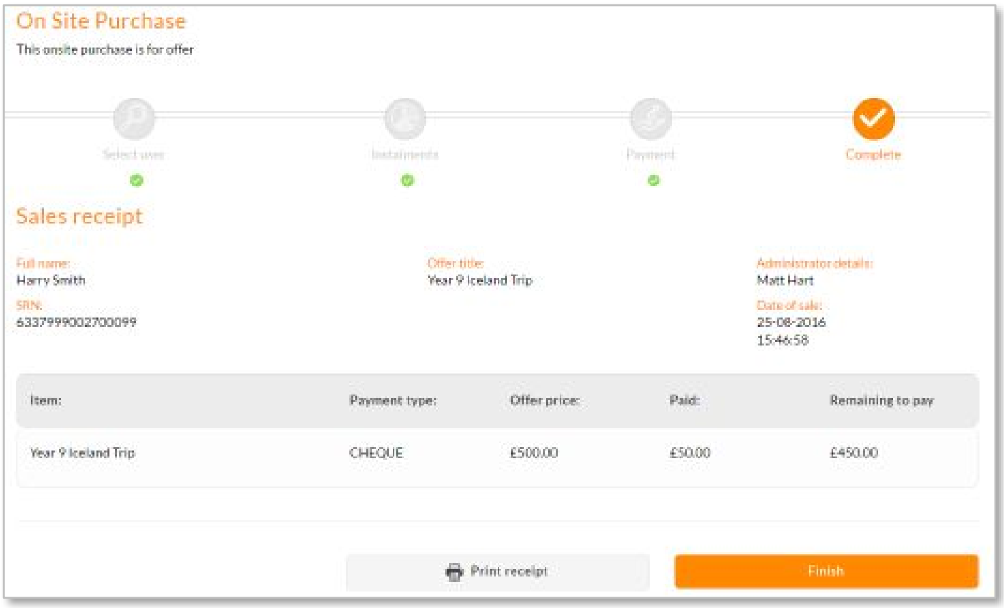

- Check the box next to the instalment amount, or amounts, being paid
- Click **Save and proceed**




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

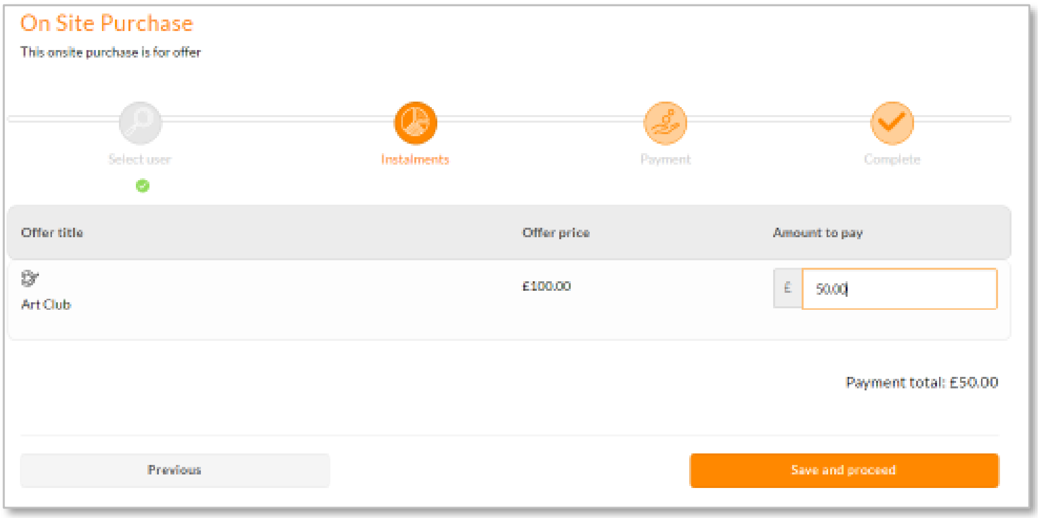



- You are then taken to an overview page where you can print a **sales receipt**
- Click **Finish**



## 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**

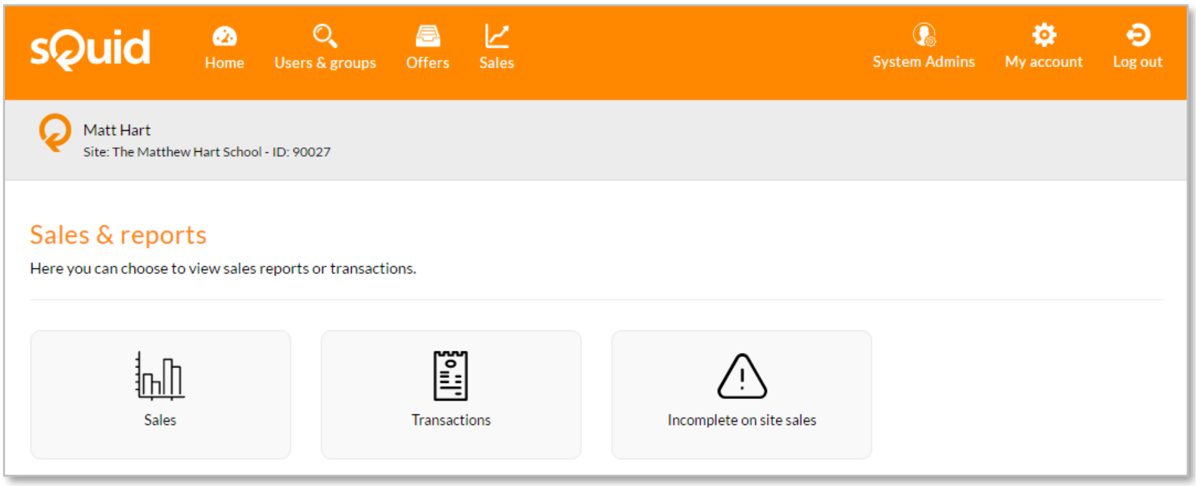



- Select **Customer is paying by cash** or **Customer is paying by cheque**
- Once the cash or cheque amount has been entered click **Buy**
- You are then taken to an overview page where you can print a **sales receipt**
- Click **Finish**

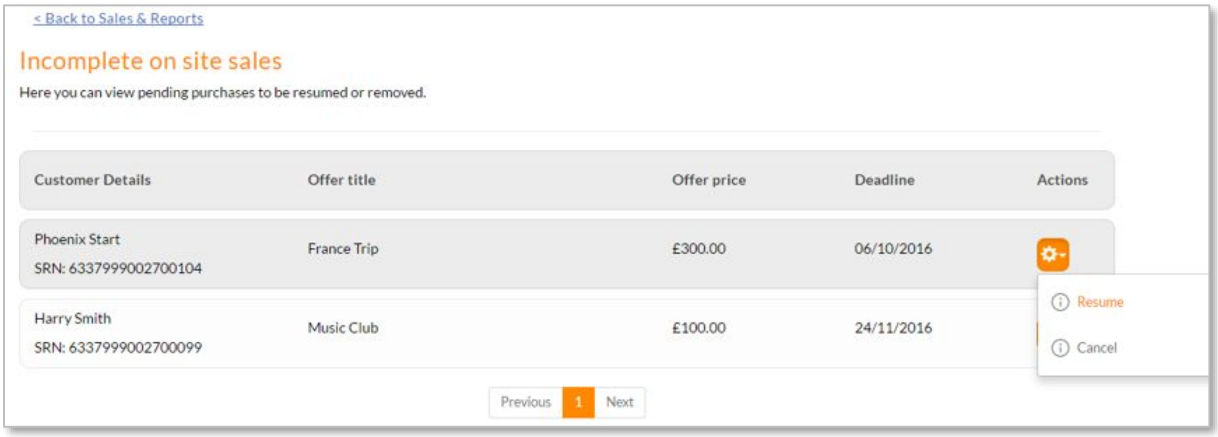
## 9.4. Incomplete on site sales

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

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



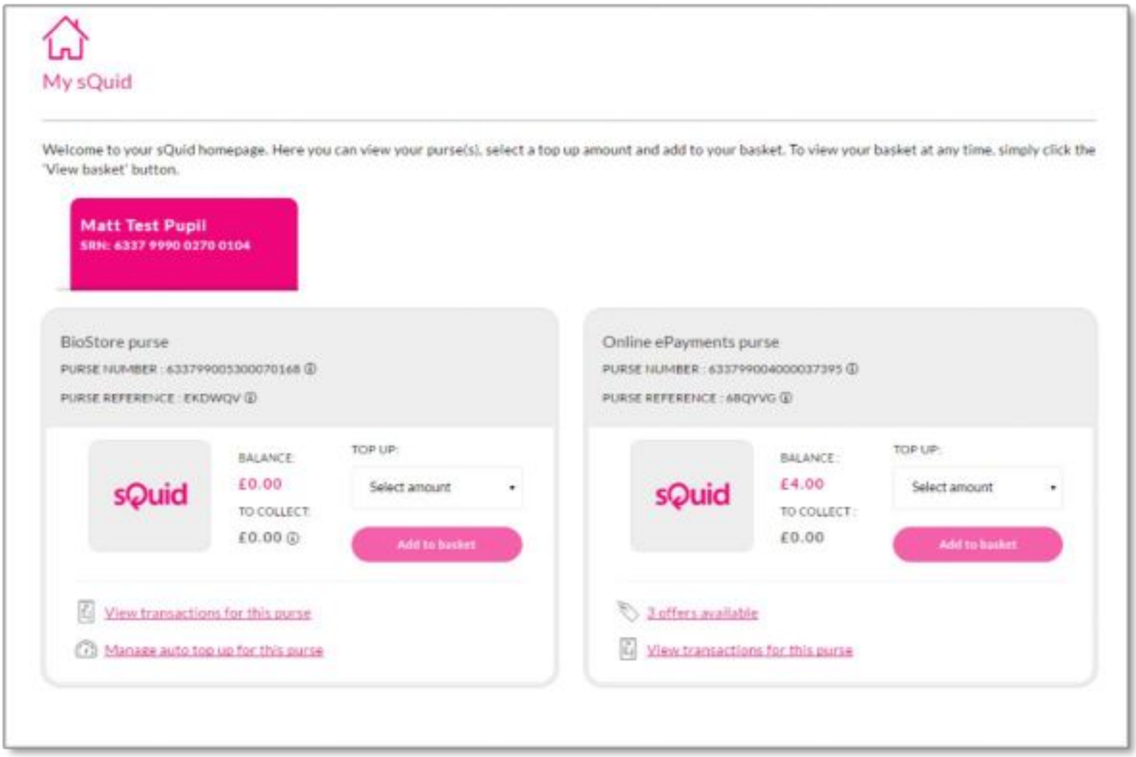

- To resume making payment click the **cog icon.** You can also cancel the purchase by selecting cancel



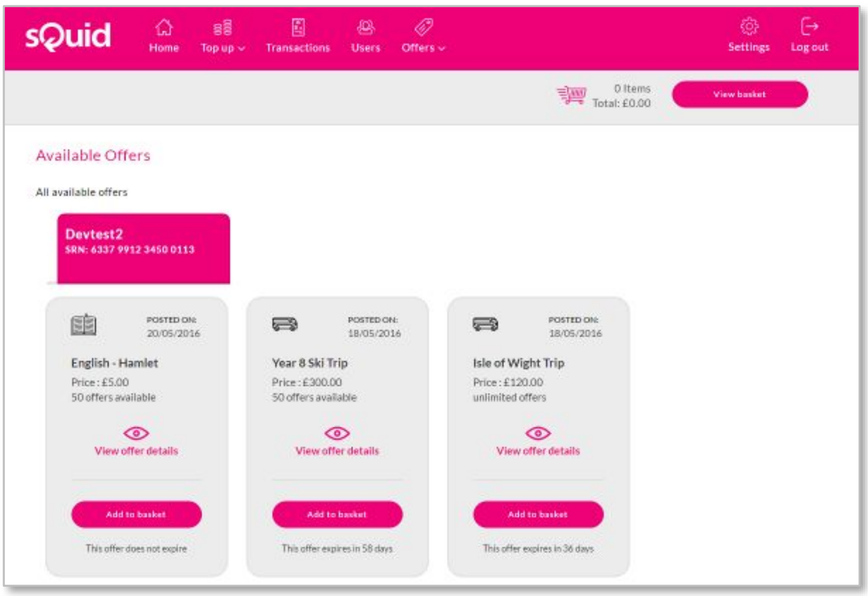

- If resuming payment, select the amount being paid
- Click **Save and proceed**
- Select whether the customer is paying by cash or cheque
- You can enter the denominations used to make payment if required
- Once the cash or cheque amount has been entered click **Buy**
- Review the overview page and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

## 10. Completing a purchase as an end user

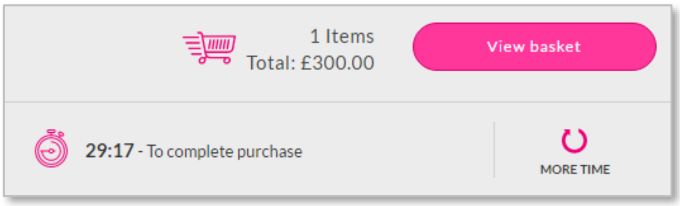
- When a user accesses their sQuid account they will see all purses displayed on the **Home** screen
- Within the **Trips and Offers** purse, the user will be able to click **'X' offers available** to be taken to any available offers



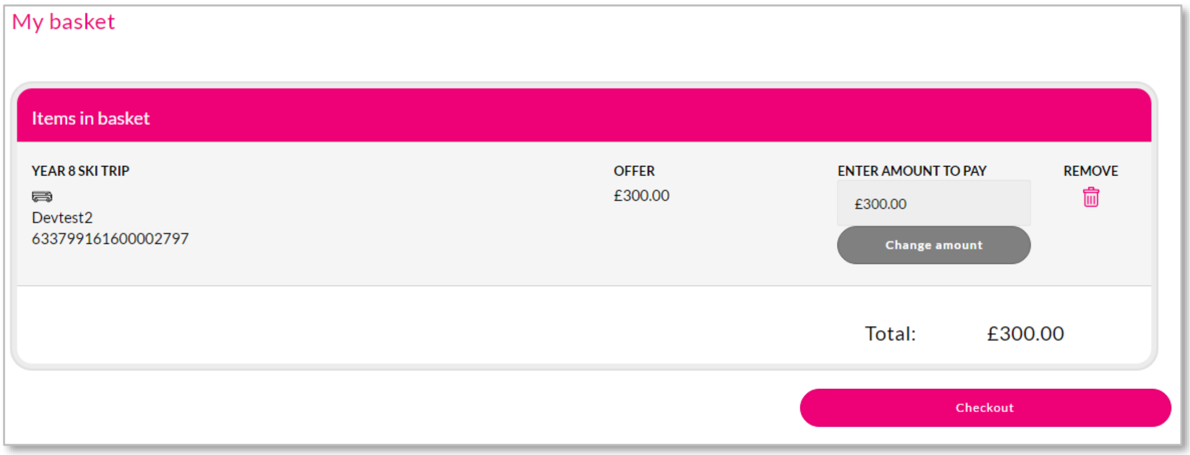

- Within this page the user can select **Add to basket** to add any offers to their basket
  - the item will remain in the basket for 30 minutes in order to complete purchase



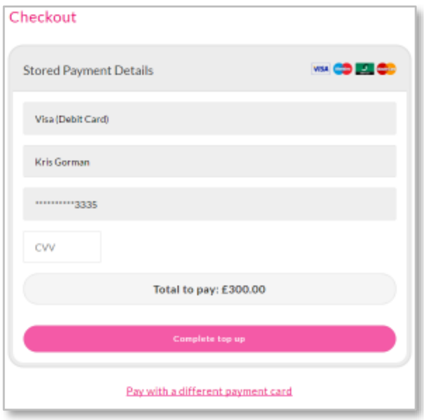

- The user can click on **View basket** to be taken to their basket and complete the purchase

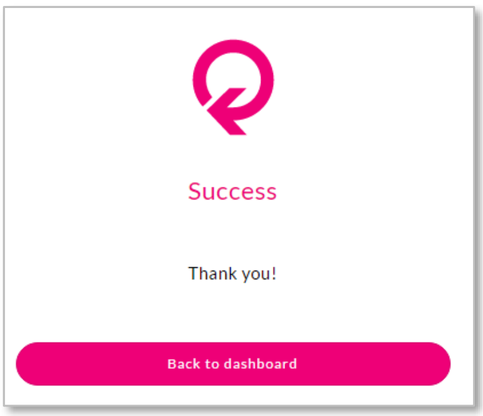



- Within the **My basket** page the user can proceed to make payment by clicking on **Checkout**

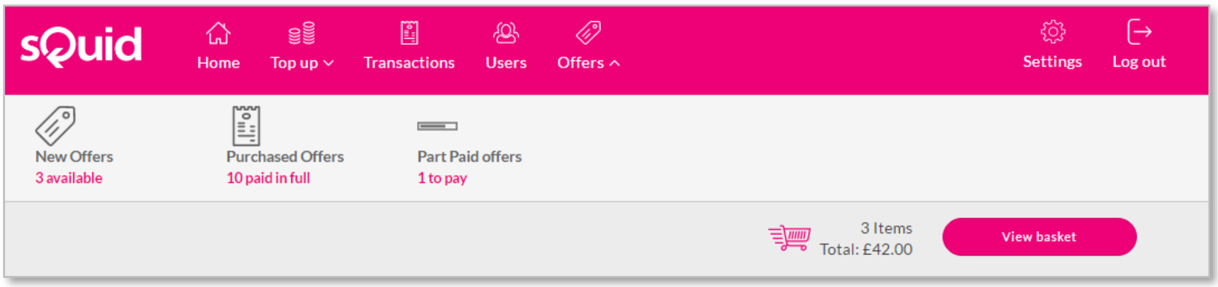



- The user will then be taken to the 'Checkout' screen
- If the user wants to pay for the offer with funds available from their Trips and Offers purse then they would click **Pay for this offer with the purse funds I have available,** and proceed to the next page
- If the user has no funds in their Trips 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 | |

| OFFERS – OFFER CATEGORIES | TRAINING RECEIVED |
|---|---|
| **OFFER CATEGORIES** – How to create new Categories | |
| **OFFER CATEGORIES** – How to edit existing Categories | |
| **OFFER CATEGORIES** – How to delete Categories | |

| OFFERS – LEDGER CODES | TRAINING RECEIVED |
|---|---|
| **LEDGER CODES** – How to create a new Ledger Code | |
| **LEDGER CODES** – How to edit an existing Ledger Code | |
| **LEDGER CODES** – How to delete a Ledger Code | |

| OFFERS – SETTLEMENT ACCOUNTS | TRAINING RECEIVED |
|---|---|
| **SETTLEMENT ACCOUNTS** – View Bank Account Details | |

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

| OFFERS – CREATE NEW OFFER continued… | TRAINING RECEIVED |
|---|---|
| **OFFER OVERVIEW** – How to make amendments if required | |
| **PUBLISH OFFER** – If you click NO then the offer will be saved in your draft offers | |
| **PUBLISH OFFER** – If you click YES then your offer will be completed and published | |

| OFFERS – VIEW ALL OFFERS | TRAINING RECEIVED |
|---|---|
| **OFFERS** – How to filter between Offer Categories | |
| **OFFERS** – How to filter between Start and End Dates | |
| **OFFERS** – Using the "Tabs" to filter between live, draft, upcoming, paused and expired offers | |
| **OFFERS** – Editing Offers | |
| **OFFERS** – Creating a New Offer while in Offers section | |

| OFFER MANAGEMENT – ARCHIVED OFFERS | TRAINING RECEIVED |
|---|---|
| **ARCHIVED OFFERS** – How to filter between Offer Categories | |
| **ARCHIVED OFFERS** – How to filter between Start and End Dates | |
| **ARCHIVED OFFERS** – Editing an Archived Offer to make it live | |

| ON SITE PURCHASE | TRAINING RECEIVED |
|---|---|
| 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 | |

| SALES – INCOMPLETE ON SITE SALES | TRAINING RECEIVED |
|---|---|
| Looking for users with part paid offers | |
| Paying for additional instalments of a part paid offer | |

| SALES - SALES | TRAINING RECEIVED |
|---|---|
| **SALES** – How to filter between different Offer Categories | |
| **SALES** - How to filter between Start and End Dates | |
| **SALES** - Using the "Tabs" to filter between live, paused and expired offers | |
| **SALES** - How to search for an offer by offer name | |
| **SALES** - How to export data as csv file | |

| **SALES - TRANSACTIONS** | **TRAINING RECEIVED** |
| --- | --- |
| **TRANSACTIONS** – How to filter between different Offer Categories | |
| **TRANSACTIONS** - How to filter between Start and End Dates | |
| **TRANSACTIONS** - How to search for an offer by offer name | |
| **TRANSACTIONS** - 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:**

sQuid SchoolPay