Administration for SchoolMoney

Guide to take you through the Admin tab

Introduction

This guide will take you through the Admin tab.

The Admin tab in **SchoolMoney** is where you can control the minor details of the system such as children's details, creating groups and even the information that the parents will see when they log on**.**
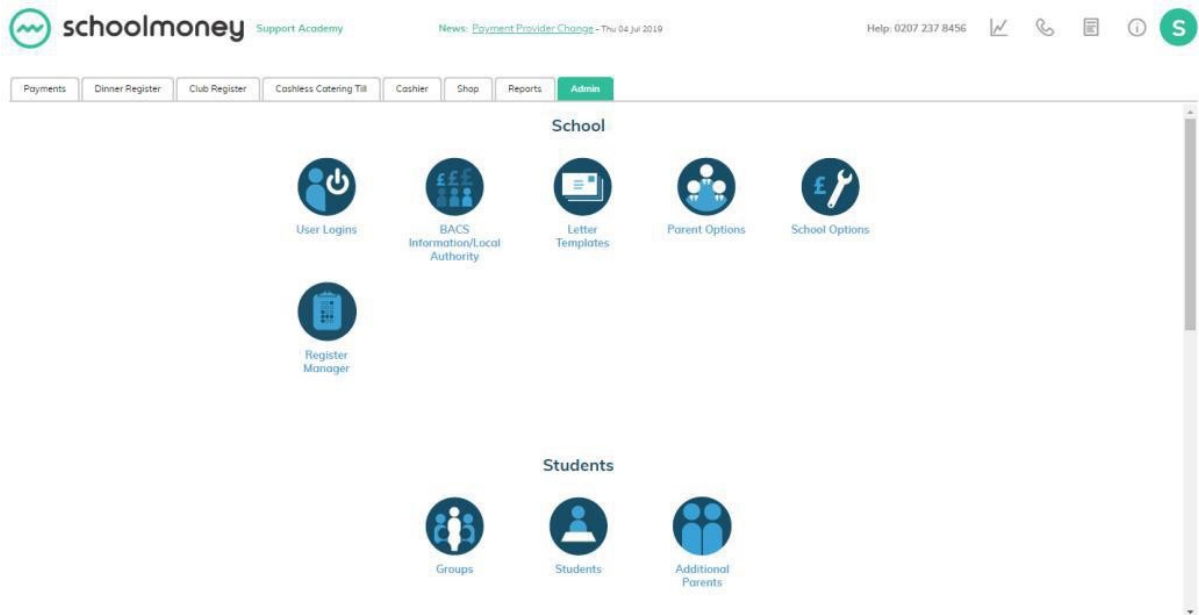
Please Note: If you use SIMS as your management information system, any changes that need to be made to the children's details must be updated on SIMS. **SchoolMoney** will then automatically update when your link runs.

Contents

1. Introduction to Admin

When you click on the Admin tab, it will take you to a page with a number of icons that are available for you to choose from.

These icons are organised into headings for ease of use:

- School
- Students
- Staff
- Dinners
- Imports

Click on any icon to open up the section you want.

2. School

2.1 User Logins

If you require another username and password for a member of staff, please contact us and we will set it up for you. You should not set up new users through this section of the system.

If you need to, you can restrict access to specific users by double-clicking onto the relevant login and then ticking or unticking as necessary.

2.2 BACS Information/Local Authority

On this page, you will be able to see your bank accounts and BACS references, as well as which payment types they have been allocated to.

If you need to add or change bank account details or BACS references, please contact the support team on **02072378456** or at **www.eduspot.uk/support**

2.3 Letter Templates

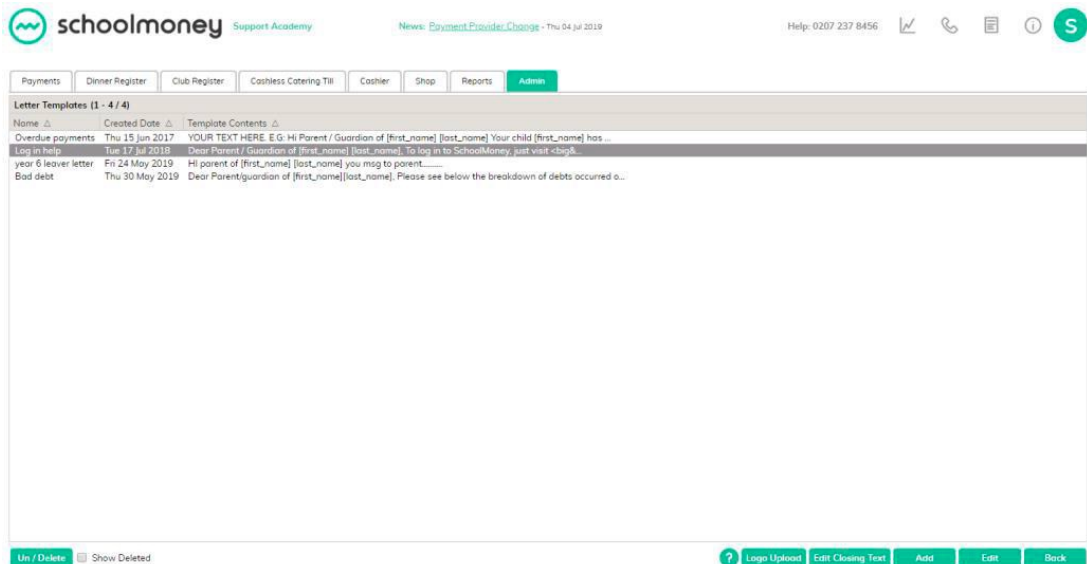The Letter Templates Icon enables you to write up letters to be used in your Letter Generator report (**Please see the Reports Guide for further information**).

To create a letter template:

- Select the Add button in the bottom right-hand corner
- A box will pop up in the middle of the screen. This will have a blank box for typing out the letter on the left and a list of power tags on the right.
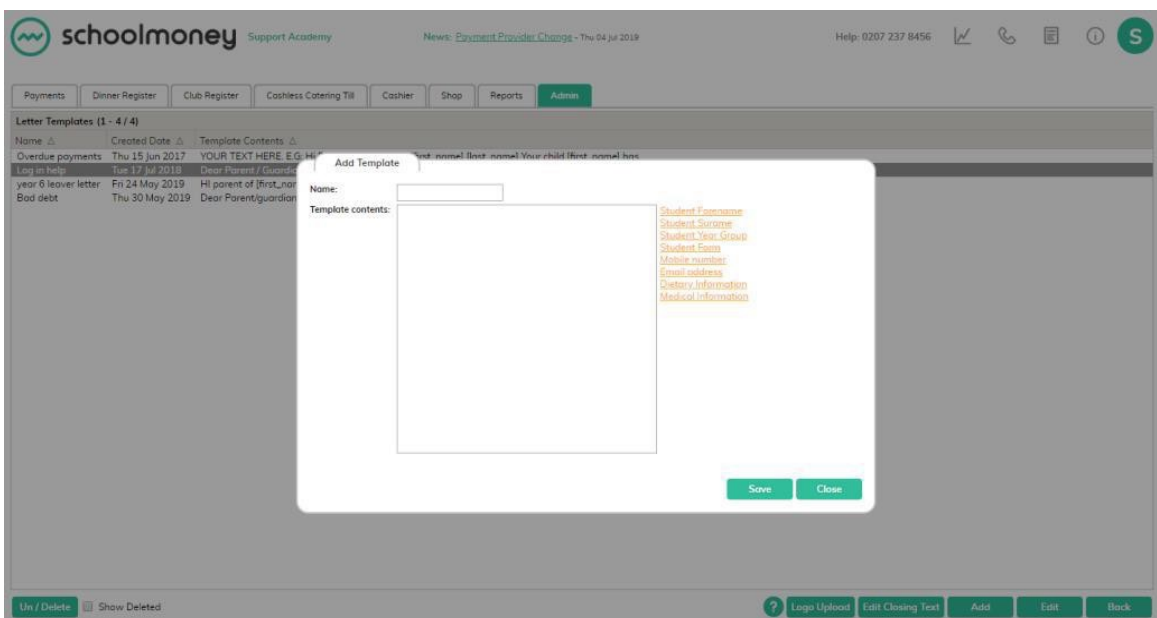
- Write out your letter in the box using the power tags where you feel it is necessary. These tags, when printed, will be automatically replaced with the relevant information to each child.
- Once you have written up the letter, save it in the bottom right-hand corner. This will then appear listed. You can set up as many letters as you require.

In the bottom right-hand corner, you can select the Logo Upload button and add your school logo to be included in your letters.

You can also select the Edit Closing Text button to add a few sentences of closing text that will always appear at the end of your letters.
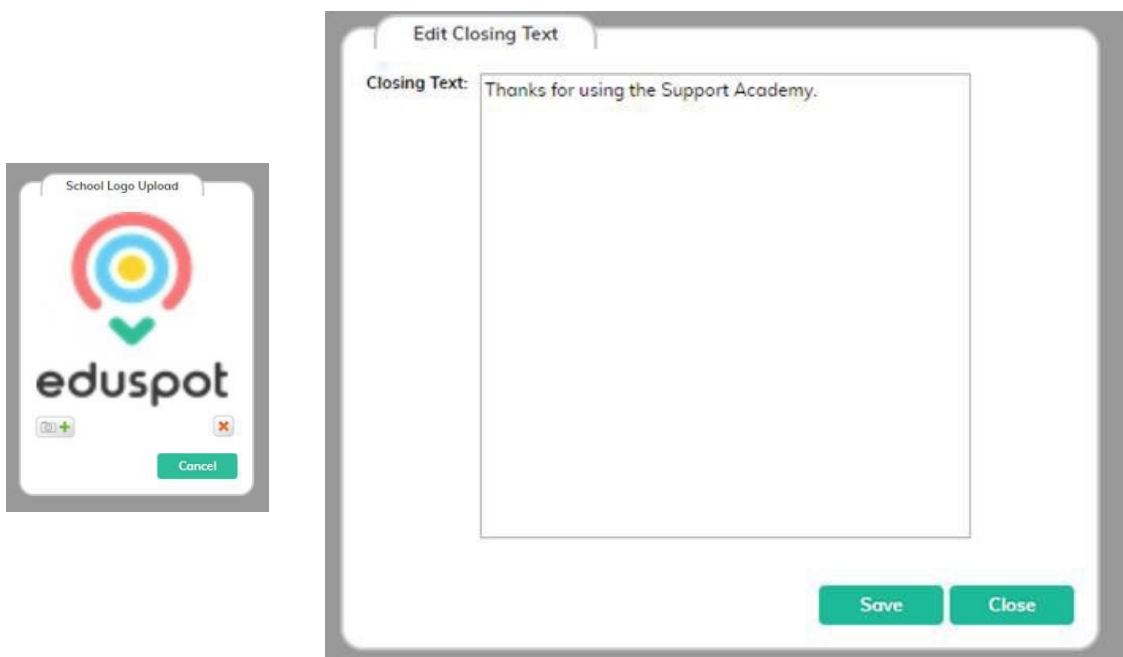
2.4 Parent Options

Parent Options enables you to customise various aspects of the Parents Login page allowing the parents to see their child's account in the way you want it set up.

Order Payments on Parents Screen: This enables you to choose whether the parents will see the most overdue payment first or last on the screen.

Minimum Online Payment Amount: If you choose a minimum amount, eg. £5, then the parent will have to pay this much or more to process their online payment.

Select PayPoint Barcodes: This allows you to choose which barcodes are printed for the parents, eg. Just dinners and trips. A tick in the box means it is selected and available to print for the parents.

Default Dinner Top Up: This is the amount that the parent will see in the Dinner/Club Top Up. We suggest that you set this to represent the weekly cost of dinners. Please remember that this is only a guide; parents will be able to change the amount in the available box.

Dinner History: This allows you to add in any extra important information you might want to give to the parents.

Select PayPoint Barcodes

Select barcodes to show on printed PayPoint slips

- ☑ Dinner Money
- ☑ Club/Extended Services
- ☑ School Trip
- ☑ Milk
- ☐ Swimming
- ☑ Shop
- ☐ Music
- ☐ Residential
- ☐ Other
- ☐ School Fund
- ☐ Donations
- ☐ School Fees

Save   Cancel

2.5 School Options

School Options enables you to customise various aspects of your account, allowing you to use **SchoolMoney** in a flexible way that works for you.

Contact Information

This is where you can input your school's information; you will need to add your telephone number, main school email address, and mobile 'from' name (which will appear on the texts and emails to parents). You are also able to add your school logo which will go out on emails. The LA and DfE code will already have been filled out for you and you are unable to change this.

Cashless Catering Till Options

Include Archived Dinners: If this is ticked, you will see all dinner weeks listed in your cashless catering. If this is unticked, you will only see the weeks that are unarchived listed.

Order Students by Last Name: This will amend the order that the children are listed in the cashless catering between last name and first name.

Show Prices: If this is ticked, you will be able to see the price of each dinner item.

Show Dinner Balance: This will show the pupils' dinner balance on the cashless screen when they are selecting their meals. If you want to see the dinner balances, Show Prices must be ticked. You will be able to see at a glance if they are in credit, debt, or balanced.

Show FSM Status: This will indicate by colour if a child is FSM or UIFSM.

Display cost for FSM/UIFSM: If this is ticked, it will display a cost for FSM and UIFSM pupils, but will not charge them.

Charge FSM/UIFSM when daily spend exceeds: This will allow you to choose a cost limit for your FSM pupils. If they exceed this cost when selecting Dinner items, they will be charged extra.

Student Dinner Cap+Staff Dinner Cap: This enables you to choose a limit to the amount the students/staff members can spend per day.

Student Item Limit and Staff Item Limit: This will restrict the number of cashless items a person can choose per register.

Dinner and Club Payment Options

From here, you can choose if you want to set your dinner and club references automatically when you set up your payments.

You can also set your default due date to clubs and dinners, which will mean the money in that payment will be overdue after that day each week.

Service Fee

If you are on our Pay as You Go payment package, this allows you to choose whether the service costs are covered by you as a school or the parents.

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PayPoint Barcodes

As mentioned in Parent Options, you can select which PayPoint barcodes you would like to print out or the parents.

Dinner Options

If you do not use Cashless Catering but want the option to choose between Meat meals and Vegetarian meals, you can tick this box. **To see more information on Meat and Veg, take a look at the Dinner Money guide**.

2.6 Manage Dinner Register Groups

The Manage Dinner Register Groups section will allow you to set up and amend your Dinner Register Groups.

This can be useful if you have different groups of users who pay different prices for their meals. (e.g: Staff may pay a higher price for meals meaning a separate staff dinner register will be required).

If you would like to set up a new register, or change/remove an existing register, please refer to our separate guide **Managing Dinner Register Groups**.

2.7 Manage Club Register Groups

The Manage Club Register Groups section will allow you to add and amend your own Club Register Groups on **SchoolMoney** - without needing to contact the **SchoolMoney** support team. This can be useful if you are launching new clubs in the School and require a new registers setting up for them.

If you would like to set up a new club register, or change/remove an existing register, please refer to our separate guide **Managing Club Register Groups.**

2.8 Register Manager

The Register Manager is a feature that will assist you in adding new pupils into your dinner registers when you need them adding to multiple weeks. It also makes sure that all pupil data, such as year groups and form groups, can be updated when needed.

To start, click on the first drop-down menu in the top left-hand corner and select the register you want to amend. Then, choose the academic year you want to cover using the second drop-down menu.
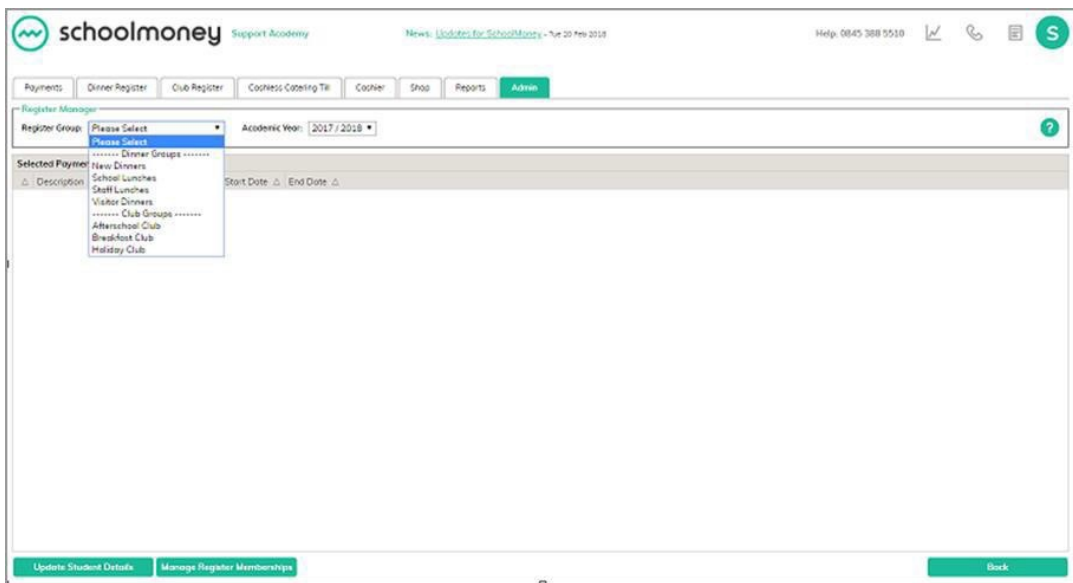
Once you have chosen the registers to amend, you will see that the weeks will appear listed on the screen. Untick any weeks you do not want to amend.

There are two buttons in the bottom left-hand corner for you to choose from.
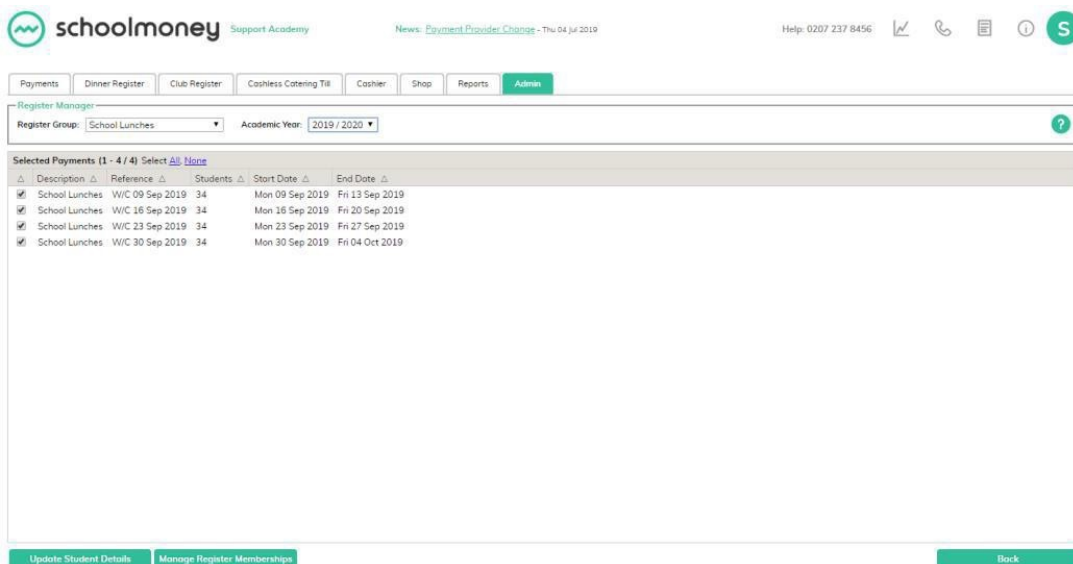
Update Student Details

This button will update any pupils' information in the payments/registers chosen if they have moved year/form groups.

Click on the button and a box will pop up. This will bring up a box of the pupils whose data has changed since they were added to the register. Untick anyone you do not want to update and when you are ready press Save. This will have then updated the pupils' information.

schoolmoney

Manage Register Memberships

This button will enable you to add/remove multiple pupils into/from multiple registers without having to go into each individual week.

Click on the Manage Register Memberships button and it will pop up with another screen. On the left, you will see a list of all your pupils. You can use the filters at the top of the box to find specific students or groups of students. Select Add next to the children that you want to add/remove from the registers selected.
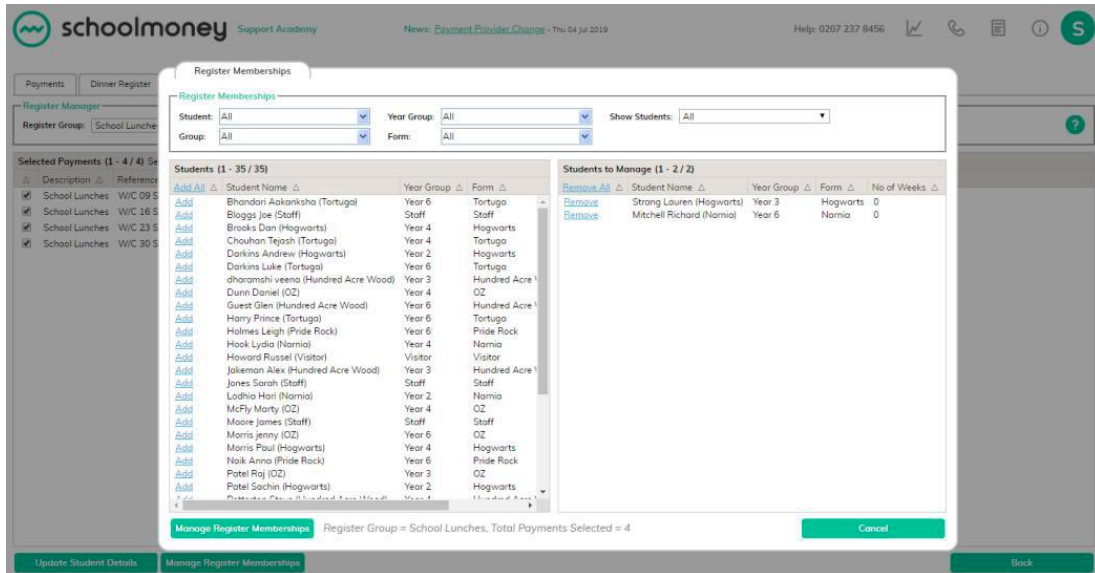
Click on Manage Register Memberships in the bottom left-hand corner.
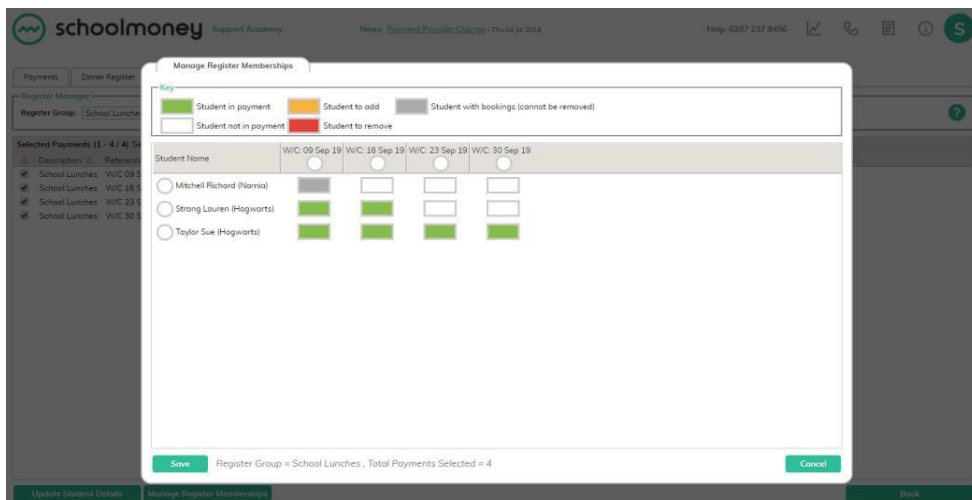
Another box will pop up on the screen with the children's names listed along the left-hand side and the weeks you have selected along the top. Adjacent to each child's name are tick boxes for each week.

- If the boxes are blank, it means the child is not added into any weeks
- If the boxes are green, it means the child is added into the weeks but no meals have been taken
- If the boxes are grey, it means the child is added into the weeks and meals have been taken

To add or remove any pupils, click on the boxes and turn them in the correct colour.

- If the boxes are orange, the child will be added to the weeks
- If the boxes are red, the child will be removed from the weeks
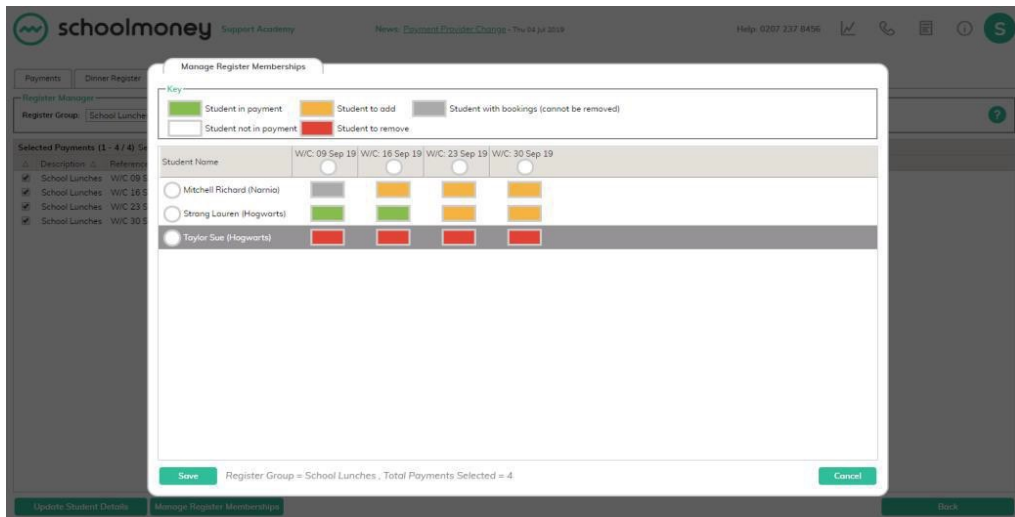
You can use the circular radio button next to the child's name to select all of the weeks for that student and you can use the radio button below the dates to select all children for that date. When you are ready, press Save in the bottom left-hand corner.

2.9 Universal Infant Free School Meals

The Universal Infant Free School section allows you to specify which (if any) year groups qualify for Universal Free meals within the school.
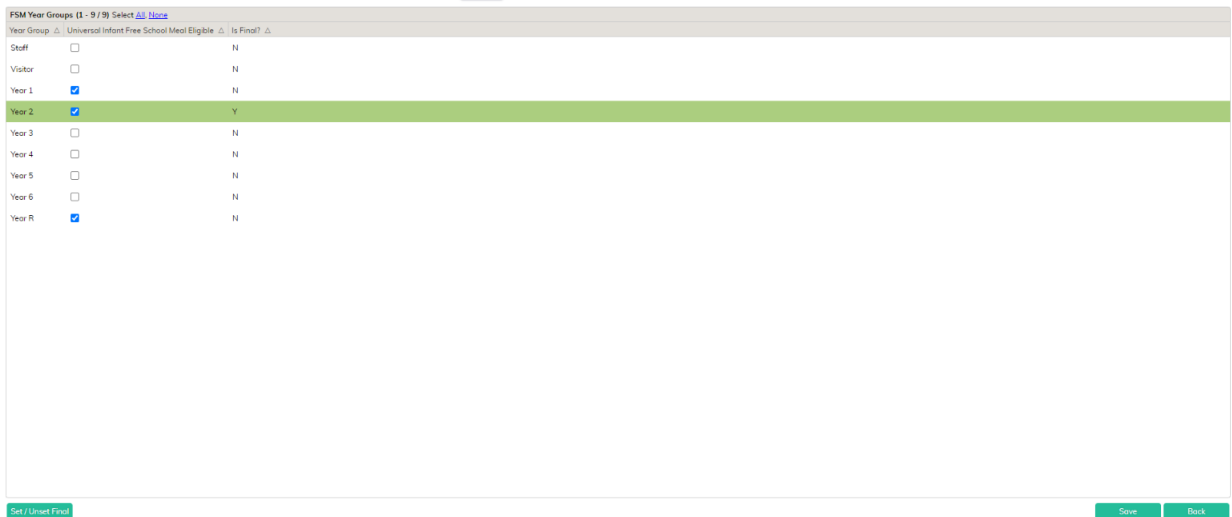
This should be pre-set for you as part of your onboarding process, but if for any reason you need to change the year groups that are eligible for Universal Meals, please tick or untick the boxes as necessary and press Save.

The last year group before they start having to pay (unless otherwise entitled for Free Meals) should be set as final. Usually this is Year 2.
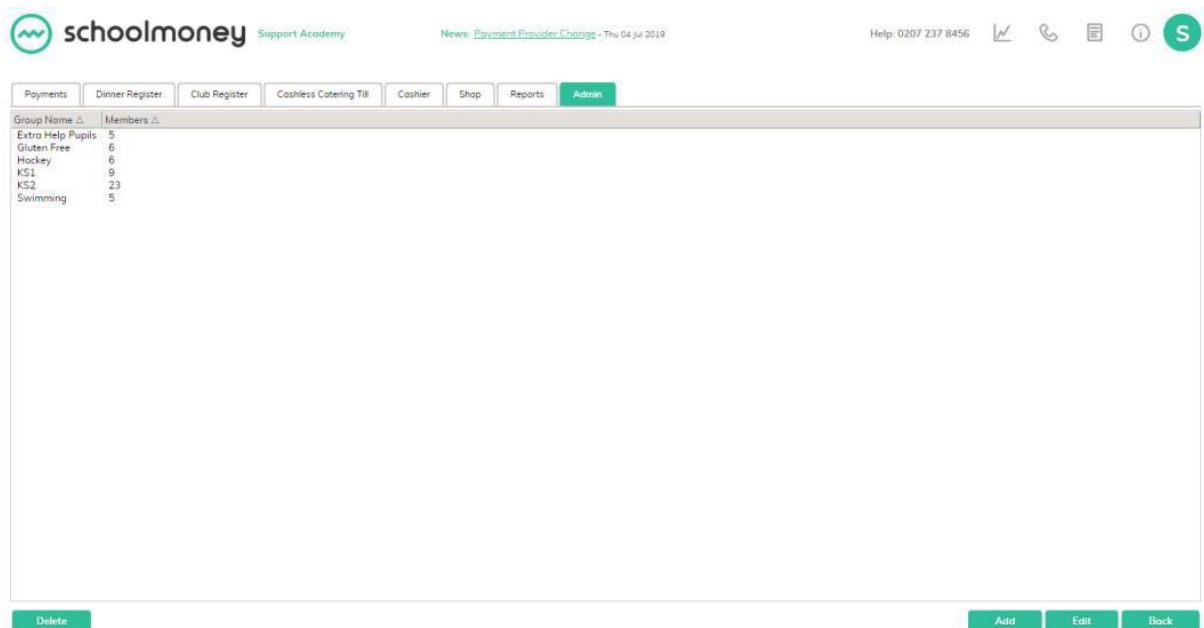Click on the year group and press the Set/Unset as final button.

3. Students

3.1 Groups

In **SchoolMoney**, you can create groups so that adding children into payments becomes quicker and easier.

Eg. A breakfast club has fifteen regular students in different year groups. You can create a breakfast club group; you don't have to go through and find each student one at a time when creating the payment.

To create a group, select the Groups icon on the main Admin page.

At the bottom, there are four buttons:
- Add
- Edit
- Back
- Delete

Adding a Group

To create a new group, click on the Add button in the bottom right-hand corner. This will bring up a window with your students listed on the left-hand side of the page.

- Write a description/name for your group in the top left-hand corner
- Click the All Students drop-down menu to filter for year/class groups
- To add a student, click the Add link next to their name. They will move across to the other side of the page

- To remove a student, click on the Remove link next to the child's name and they will move back over to the left-hand side of the page
- Press Save Group when you are ready
- The group will now be available to use in your payments

Editing a Group

- Select the group you would like to edit from your list on the main page
- Click Edit in the bottom right-hand corner

- Your list of students will show on the left and your current group members on the right
- Add and remove the students as necessary
- Save the group when you are finished

Deleting a Group

- Select the group you wish to delete on the Groups main page
- Click the Delete button in the bottom left-hand corner of your screen
- A confirmation box will appear; click OK

3.2 Students

General Information

In the Students section of the Admin tab, you will find all of your on-roll student records, which include their personal information, such as contact details, year/form groups, FSM entitlements, etc.

If a parent ever wants to check what contact details are recorded against their child, this is the section where you need to look.

If you use SIMS or the Wonde link, we suggest that you change any information regarding students directly in your management system and then run the link so it updates **SchoolMoney**. If you have any problems with this process, please get in touch with us.

Select the Students icon to be sent to the main Student page. A list of your current on-roll students will appear.

You can filter for specific students using the drop-down menus available at the top of the screen or by searching by name in the Student Name field.

If you ever need to use the information listed on the main page, you can export the information using the button in the bottom left-hand corner.

In the bottom right-hand corner of the screen, you can Add and Edit students, and in the bottom left-hand drop-down menu you can Delete any students.

Please Note: You cannot delete students that have any payment history on the system. You must Off-Roll these students to keep your audit trail clear.

Adding a Student

To add a student, click on the Add button in the bottom right-hand corner. A new screen will open where you can input the child's details.

The screens is broken down into three sections.

In Student Details, enter the following information:

- The child's forename forename and surname

- The chil's gender

- The year and form group that the child is in
- The child's admission number
- Any medical details relevant to the child

In Parent Details, add the contact details of the primary parent:

- The parent's title and name
- The mobile number that the parent wants to be contacted on
- The email address that the parent wants to be contacted on
- Offline Contact – if this is ticked, the parent will never be contacted by **SchoolMoney**

School Dinners allows you to select certain settings for the child's meals:

- If school dinner days are ticked, it means the child will have hot meals. If it's unticked, they will be marked as sandwiches
- If the child is eligible for FSM, tick the box in this section and enter the FSM entitlement dates
- Enter any dietary information related to the child.

You must fill out all fields that are starred. Once all relevant fields are completed, press Save in the bottom right-hand corner. The child will be available to be added into payments

Please Note: Your students are not added into payments automatically. This needs to be done manually.

Sending a Password Reminder/Resetting Password

If a parent has misplaced their password to log into **SchoolMoney**, you can send them a password reminder or a reset password link from the Students section.
To send a reminder of their original password, you will need to resend the welcome message. Please note that this will only work if they have not already changed their password.
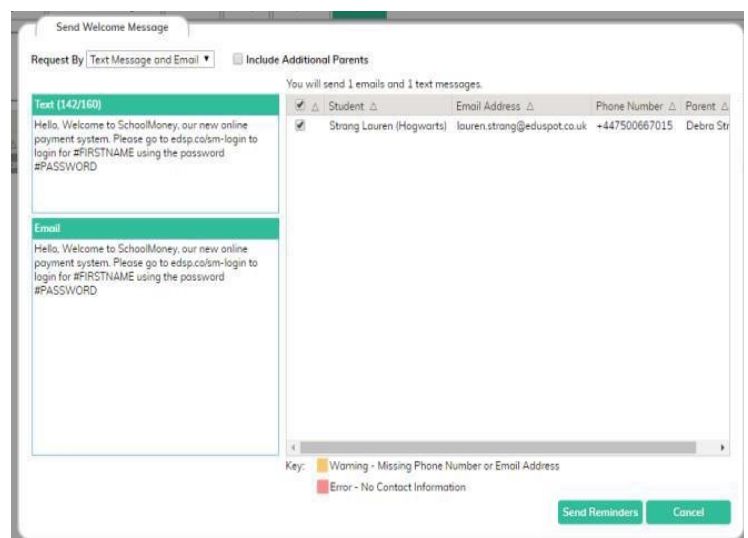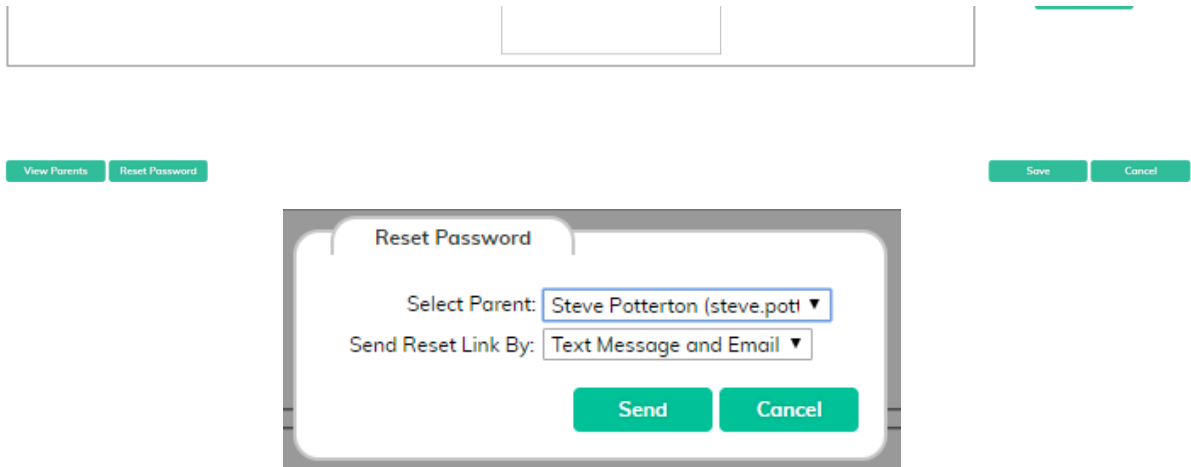
- Find the student/students in the list
- Tick the box next to their name on the left-hand side
- At the bottom, click on the drop-down menu and select Send Welcome Message
- A box will pop up allowing you to send the reminder messages to as many students you would like
- You can amend the message as you see fit in this section
- Select Send Reminders to send it to the parent(s)

If you want to send the parent a reset password link, you can do this through the child's record:

- Find and double-click on the relevant child to open up their record
- Click on the Send Password Reminder button in the bottom left-hand corner

| View Parents | Reset Password |

Reset Password

Select Parent: Steve Potterton (steve.pott ▼

Send Reset Link By: Text Message and Email ▼

Send   **Cancel**

- A box will pop up allowing you to choose to send the password via text, email, or both
- Press OK
- A confirmation box will appear. Press OK to complete the action and return to the Students page

The parent will now have been issued with their password and will be able to log onto the system.
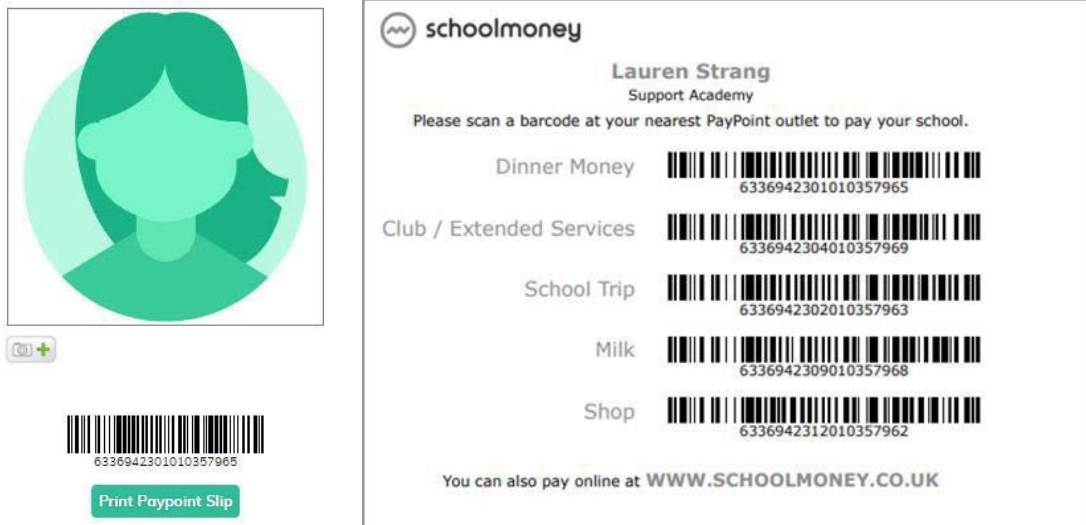
PayPoint

Please Note: If you do not have access to PayPoint, you will need to contact **SchoolMoney**. The PayPoint facility is an extra cost on the system.

If a parent doesn't have access to the internet or wants an alternative way of paying for trips and dinners, we offer the facility to use PayPoint. This allows the parent to go into any shop that has PayPoint and pay for their child using a credit/debit card or cash. Parents can find a shop close to them by using the store locator website and inputting their postcode www.paypoint.co.uk/paypointlocator

Once a payment has been set up, parents will be able to make payments via PayPoint. The money will then be allocated to the payment that is the most overdue, or if there are no overdue payments it will pay off the oldest date listed.

Parents will have their own unique barcode that can be scanned for each child when making payments. You can print this off from the child's record in **SchoolMoney**.

If you would like to print out multiple barcodes without going in and out of children's record, you can do this from the main Students page.
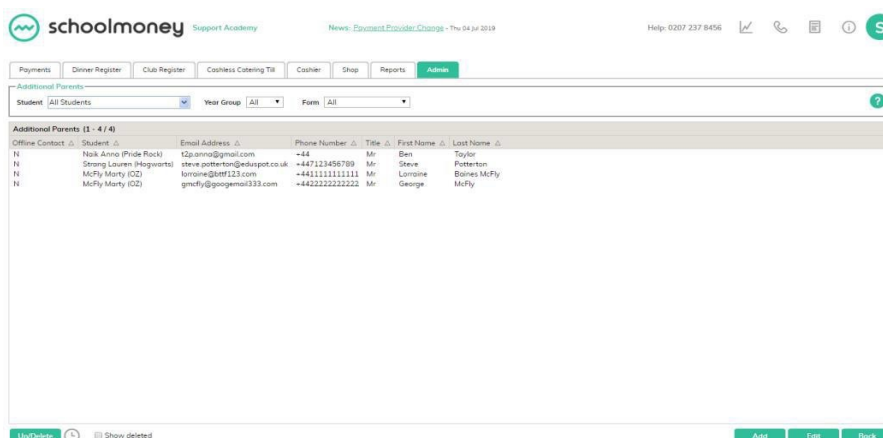
- Tick the boxes next to the children's names on the left-hand side and click Select All to choose whose barcodes you are printing
- From the drop-down menu in the bottom left-hand corner, click on Print PayPoint Slips

Your slips will then print out to whichever printer is connected to your computer.

3.3 Additional Parents

If you have any instances where you need the option to add a second Parent/Guardian to a child's account, you can do this through Additional Parents.

Once an additional parent is added you will be able to send out messages to them and prompt them to login to their child's account with their own login details.

To add an additional parent:

- Select the Add button in the bottom right-hand corner and a box will pop up

- Locate the child you want to set the parent/guardian up for. If you need any additional parents for siblings, you will need to set up a separate record for each child
- Fill out the details of the second parent. Offline Contact will mean that you will not be able to send messages out to this parent

- Save in the bottom right-hand corner

Once the additional parent has been saved, you will then be able to see them listed. In this page, you can delete additional parents and edit them, using the buttons along the bottom of the screen.

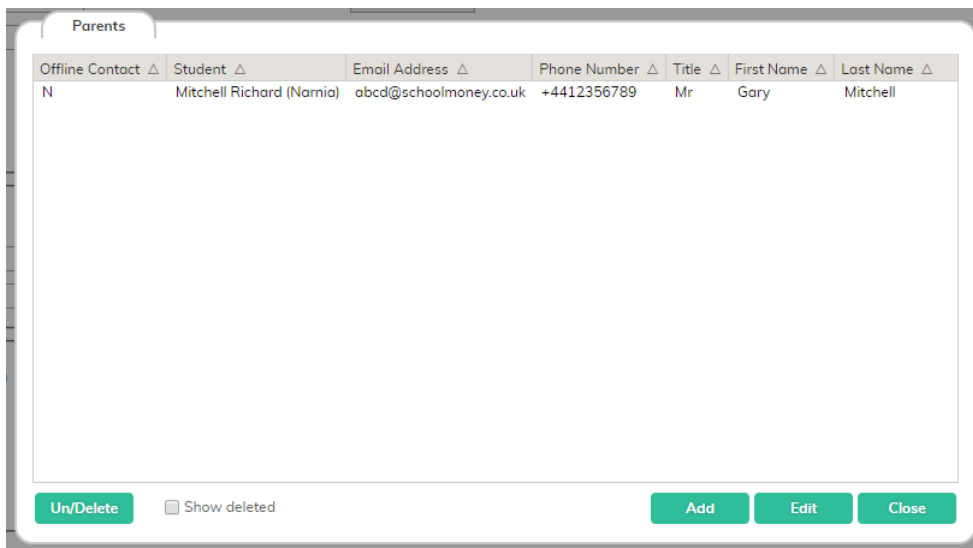You can also view and edit additional parents in the Students section:

- Click on Students
- Find the child
- In the bottom left-hand corner, click on View Parents

| View Parents | Reset Password | | Save | Cancel |

- A box will pop up and list any additional parents for the child. As with the Additional Parents section, you can add, edit, and delete

Parents						
Offline Contact △	Student △	Email Address △	Phone Number △	Title △	First Name △	Last Name △
N	Mitchell Richard (Narnia)	abcd@schoolmoney.co.uk	+4412356789	Mr	Gary	Mitchell

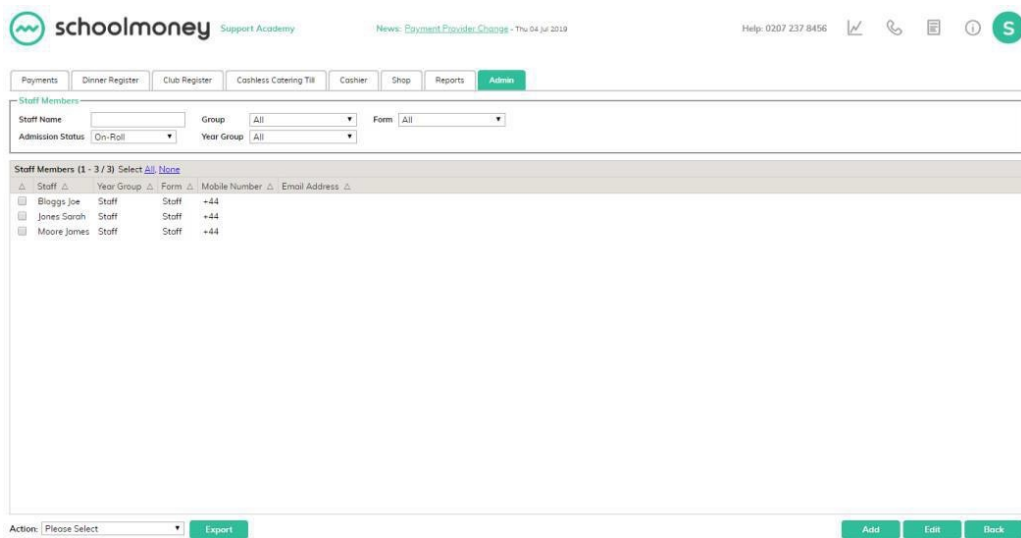| Un/Delete | ☐ Show deleted | | Add | Edit | Close |

When you are sending out messages to parents, you can tick the Include Additional Parents box and you will be able to choose which parents you want to send the messages out to.

☐ Include Additional Parents

4. Staff

The Staff icon sends you to a screen that is similar to the Students page, except it only shows people who have been marked as Staff.

When you add a staff member using the Add button in the bottom right-hand corner, they will automatically be marked as staff on the system, not students.

As with the Students section, you can print out PayPoint slips and send password reminders to your staff members using the drop-down menu in the bottom left-hand corner of your screen.
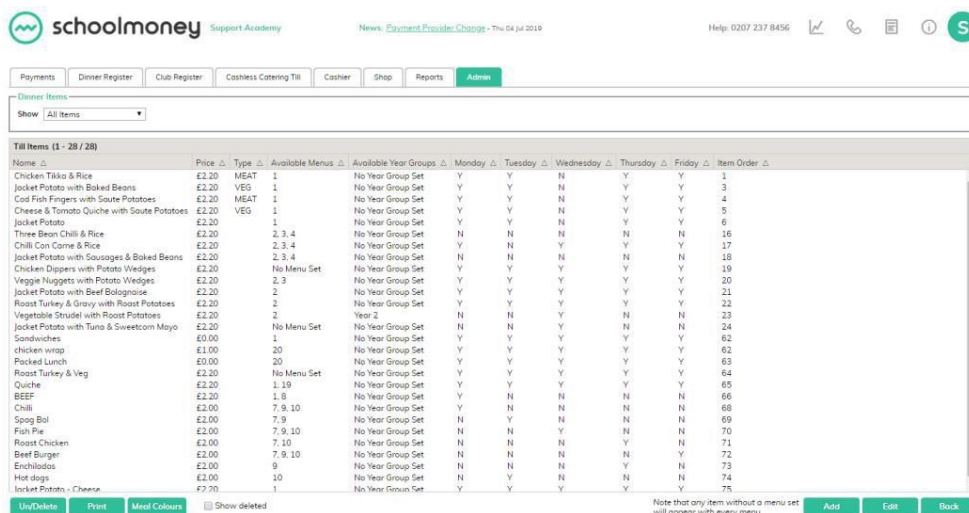
5. Dinners

5.1 Dinner Items

Please ignore this section if you do not use the Cashless Catering Till.

The Cashless Catering Till add on allows you to set up dinner items for the Cashless Catering Till.

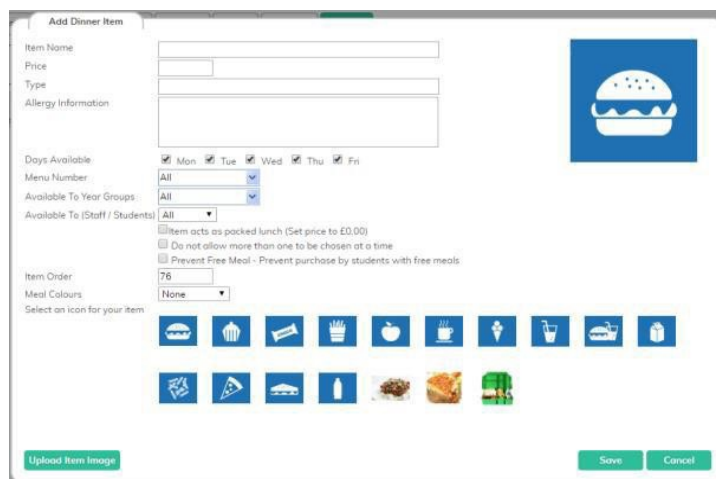### Adding a Catering Item

To add a catering item, select the Add button in the bottom right-hand corner of the screen. A box will pop up in the centre of the screen.

Fill out the information in the boxes so that once saved, the children/parents will be able to make their choice.

Item name: the meal option or an option number/colour

Price: how much the meal is going to cost (especially useful if your items have different costs)

Allergy information: if there are any known allergens in this meal (eg. Shellfish), write the information in this box

Days available: here you can set which days the item is available on

Menu number: here you can set which menu number this item is available on. Eg. If you have a three week rotating menu, menu 1 will be week 1 etc.

Available to (year groups): this allows you to choose which year groups will see each item, which is useful when you have restricted items for nursery or key stage

Available to (staff/students): this allows you to choose whether the option can be seen by everyone, just the students or just the staff

Tick box one: this allows you to mark the item as a packed lunch so you can track who is bringing in lunch from home

Tick box two: this prevents a child from choosing more than one of the same option

Tick box three: you can prevent free school meals from choosing an item if this box is ticked

Item order: you can put a number in this box so that instead of appearing alphabetically, the dinner items appear in an order of your choosing on the till

Meal colours: here you can allocate any meal colours/descriptions you may have set up in the Meal Colours button at the bottom of the Dinner Items page

Choose item image: you can upload your own photos of meals or choose one from our selection

Press the Save button in the bottom right-hand corner to save the item and add it to your meal list.

Editing an Item

You may need to edit an item once you have set it up because the price has changed or it is available on a different day.

- Click on the item in the Catering section of Admin
- Select the Edit button in the bottom right-hand corner of your page or double-click on the item

This will bring up the previous pop up and allow you to edit any information you need.

Deleting an Item

You may need to delete an item you have previously set up because it is no longer available or you offer different items seasonally.

• Click on the item you want to delete
• Select the Delete/Undelete button in the bottom left-hand corner of your page

To undelete an item:
• In the top left-hand corner of the screen, click Include Deleted
• Click on the item you want to undelete
• Select the Delete/Undelete button in the bottom left-hand corner of your page

Meal Colours

Clicking on the Meal Colours button will bring up a new box that will list 10 colours with description boxes next to them. Add descriptions next to the colours you wish to use and press Save.

5.2 Manage Dinner Payments

The Manage Dinner Payments option means you can amend your weekly and daily register amount if these change.

• Select the week you would like to amend
• Click the Update Amounts button in the bottom left-hand corner

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- Change the amounts in the two fields available
- Press Save

5.3 Dinner Import

The Dinner Import icon is part of our import from SIMS Dinner Money. This is where you import the information you have extracted from SIMS Dinners to mark off the register.
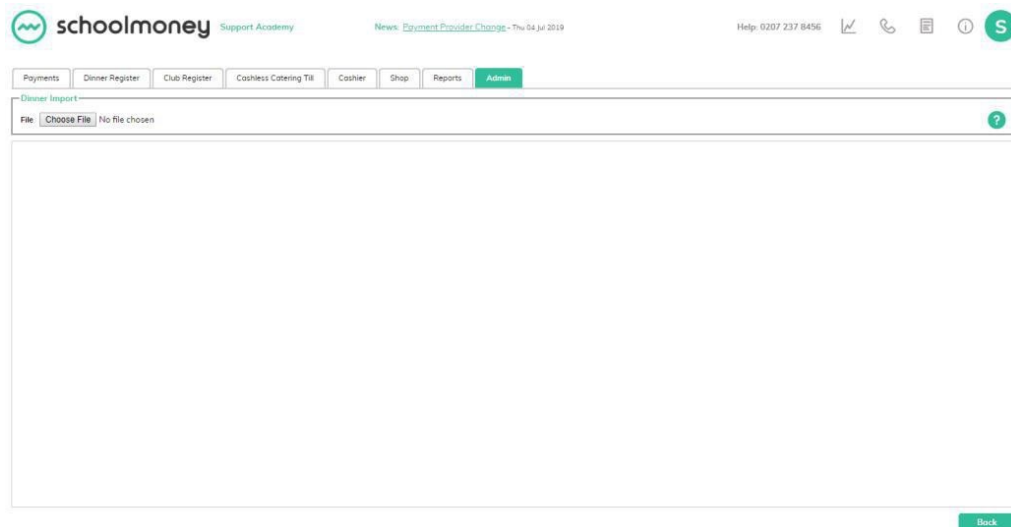
If you want any further information with regards to the import from SIMS Dinners, please see the SIMS Dinner Import guide.

5.4 Import Dinner Menu

The Import Dinner Menu section is a simple way for you to upload your dinner menus.

Please Note: You will only need to use this section if you are using our Cashless Catering Module.
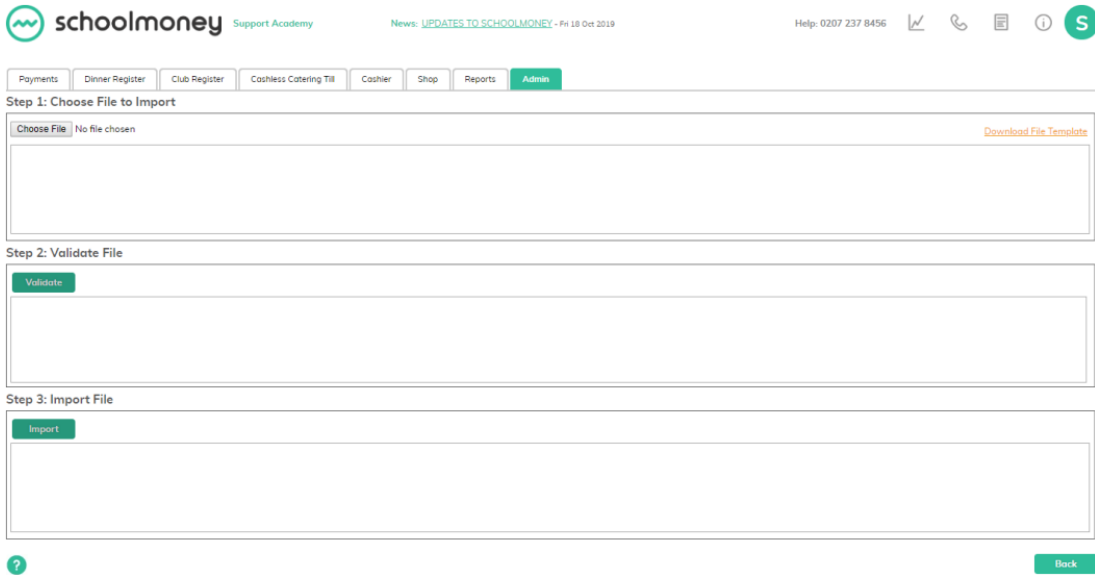
First we would advise that you download our template file. You can then use this to fill the details out as below.

Item Name: this is the name of the dinner item you are adding. This needs to be under 50 characters and cannot contain any commas

Price: the cost of the item

Type: this section is for you to add any extra information about the item – only the school can view this

Menu: in this section, add in the menu number for the item. Eg. 1=week one, 2=week two, etc. Please remember that if you already have menu items in use, you will need to select the next available blank menus. Eg. 4=week one, 5=week two, etc.

Available to: here you can specify if the meal is specific to Students or Staff

Year Groups: if a meal/cost is only available to a specific student, you can specify this here. If it is available to all year groups, type All.

Prevent FSM: if you do not want a FSM or UIFSM child to select this meal, put a Y in the column.

Days: in the Monday-Friday column, you can select which days the meals are available on. Simply put a Y in the relevant column.

Packed Lunch: if you want the item to have no charge and be marked as a packed lunch from home, put a Y in this column (you will likely only need to do this once with an item labelled Packed Lunch). Put an N against all other items.

Prevent Multiple Selections: if you put a Y in this column, it means that you can only select this item once on the till. If you put an N you can select it as many times as you wish.

Allergy Information: if you want to add any allergy information relevant to the meal (eg. Contains nuts) you can do so in this column.

Please Note: We would advise that you save the file somewhere on your computer you can find later (eg. The documents folder).

Once you have filled out the spreadsheet, you can then return to the Import Dinner Menu section to import it. First, select Choose File in the top left-hand corner and select the spreadsheet you have created. Once you have selected Open it will fill out the first section.

When you are ready, select Validate.

If the data isn't right, it will flag as an error and you will need to go back into the file to amend the data until it is correct.

If the data is correct with no errors, it will state that the file has been validated successfully.

Once the file has been validated, you can import. A box will pop up to say the import has been successful and you will be able to see the meals in the Dinner Items section.

Step 3: Import File

Import

Dinner Items Created: 10
Dinner Items Updated: 0
Duplicate Rows: 0

Dinner Items

Show Menu 1 ▼

Till Items (1 - 10 / 10) Select All, None

△	Name △	Price △	Type △	Available Menus △	Available To △	Available Year Groups △	Prevent FSM △	Monday △	Tuesday △	Wednesday △	Thursday △	Friday △	Item Order △
☐	Shepherds Pie	£2.20	1	All	All	N	Y	N	N	N	N	77
☐	Veggie Pie	£2.20	1	All	All	N	Y	N	N	N	N	78
☐	Chicken Wrap	£2.20	1	All	All	N	N	Y	N	N	N	79
☐	Falafel Wrap	£2.20	1	All	All	N	N	Y	N	N	N	80
☐	Roast Turkey	£2.20	1	All	All	N	N	N	Y	N	N	81
☐	Quorn Roast	£2.20	1	All	All	N	N	N	Y	N	N	82
☐	Selection of Pizza	£2.20	1	All	All	N	N	N	N	Y	N	83
☐	Fish and Chips	£2.20	1	All	All	N	N	N	N	N	Y	84
☐	Veggie Goujons and Chips	£2.20	1	All	All	N	N	N	N	N	Y	85
☐	Jacket Potato	£2.20	1	All	All	N	Y	Y	Y	Y	Y	86

6. Payments

6.1 Removing Payments

If you have created payments in error, you can use the Remove Payments tool to Remove them from your Payments Tab.

Please Note: You cannot remove payments which have money allocated to them. This means that if parents have already paid, the system will prevent you from removing them. In this case you would first need to credit back the amounts paid.

If money has been refunded from the payment you will not be able to remove it.

For Dinner Money and Club Extended Services payments, you will need to ensure that there are no marks in the register before you can remove the payment.

- Click the Admin tab
- Click on Remove Payments
- On the left-hand side, you will see a list of Live Payments shown in chronological order with the most recently created at the top
- Locate the Payment you wish to remove using the Description and Reference columns and click on it to highlight the line
- Click the Remove Payment button
- An alert will show to confirm the payment has been removed
- Press the F5 button on your keyboard to refresh the system. You will be redirected to the Payments tab and your payment will no longer show

Please Note: If you see an error message stating "This payment cannot be removed as it has paid instalments. Please transfer these to credit first," you will need to credit back the money.

For one-off payments such as Trips, Swimming, Milk, Other, etc

- Click into the Payments Tab
- Locate the payment you want to delete, and double-click to open it
- Find the student who has made payment (indicated by the green marking around the instalment)
- Double-click on the child's name
- For each paid instalment, click on the Action/Select Menu and choose Transfer to Credit then press Save
- Repeat as necessary until all amounts have been credited
- You will now be able to remove the payment

For Dinner Money or Club Extended Services Payments

- Click into the Dinner Register or Club Register Tab
- Set the correct Register and Date in the top left corner
- Remove any marks from the register across the entire week and click Save
- You will now be able to Remove the Payment

If you see a box entitled 'Select payment to transfer unused credit to' it means there are credit amounts originally paid to this payment which are still assigned to it behind the scenes.
If this happens, you'll need to select a similar payment to transfer them to. Choose a payment from the list and click Transfer the credit to the selected payment.
An alert will show how much credit has been transferred. Click OK and press F5 on your keyboard to refresh **SchoolMoney**.

Select payment to transfer unused credit to			
Payments (1 - 50 / 333)			
Payment Type △ Description △	No of Instalments △	Amount Total △	Reference △
Dinner Money Staff Lunches	1	£0.00	Initial Group Set-up
Dinner Money School Dinners	1	£11.00	W/C 12 Jun 2017
Dinner Money School Dinners	1	£11.00	W/C 19 Jun 2017
Dinner Money Test Lunches	1	£0.00	W/C 12 Jun 2017
Dinner Money School Dinners	1	£0.00	W/C 26 Jun 2017
Dinner Money School Dinners	1	£0.00	W/C 22 May 2017
Dinner Money School Dinners	1	£0.00	W/C 15 May 2017
Dinner Money School Dinners	1	£0.00	W/C 05 Jun 2017
Dinner Money School Dinners	1	£0.00	W/C 29 May 2017
Dinner Money Test Lunches 2	1	£0.00	Initial Group Set-up
Dinner Money School Dinners	1	£0.00	W/C 17 Apr 2017

Transfer the credit to the selected payment   Close without making the changes

Re-adding payments Removed in error

If you accidentally remove a payment which you did not mean to, you can reinstate it to show on your payments list:

- Click the Admin Tab
- Click on Remove Payments
- On the right-hand side, you will see a list of previously Removed Payments
- Locate the Payment you wish to Re-add using the Description and Reference columns and click on it to highlight the line
- Click the Re-add Payment button
- An Alert will show to confirm the payment has been Reinstated
- Press the F5 button on your keyboard to refresh the system. You will be redirected to the Payments Tab and your payment will no longer show

7. Imports

7.1 Credits and Arrears

The Credit and Arrears section enables you to import any credit and arrears that you may have when switching over to **SchoolMoney** for the first time.
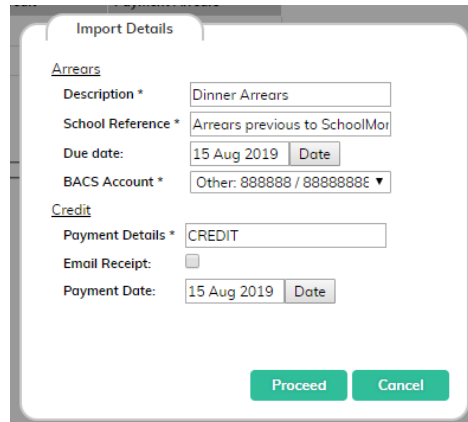
Download the Credit Arrears Sample Import File and fill it out with the following information

- Student Name
- Payment Type (Dinners/Clubs)
- ADNO (the child's admission number or UPN)
- Payment Credit
- Payment Arrears

- When you have filled this out, save it and select the Choose File in the top left-hand corner
- Once you have selected it, click Validate in the bottom right-hand corner – this will tell you if the information is correct or not
- Click Import when ready
- A box will pop up

- Fill out the fields as needed (you are welcome to leave in the information we have provided)

- Press Proceed when ready and the information will be added to the account for you. **Arrears** will show in the Payments tab under Other. **Credits** will show on the pupils' accounts (you can view this in the cashier and the credit report)

7.2 Import Logs

SchoolMoney allows you to check the recent import logs from your MIS system to ensure the data has successfully imported into the system.

To see these logs, please click into Admin and then Import Logs.
Here, you will see all the recent import attempts You can adjust the Imports From and Imports To date if you wish to look further back – however the logs are only held for approximately three months.

There is also an Import Type Drop-down box if you want to look for imports.

7.2.1 Student Import: Your main pupil data import from your MIS System

Schools Using the T2P SIMS Link or Wonde, Or who have sent us a manual CSV import file.

If your import has been successful, you will see the date and time of the import, followed by the message 'Import completed successfully' and the number of telephone numbers that were imported.

Please note: the number shown does not related to the number of pupils imported but the number of telephone numbers. This will be higher because most pupils will have more than one associated parental account. Only the highest priority parent's details are added to **SchoolMoney**.

If you see a message stating 'Files are the same hence ending gracefully,' this indicates that no new information has been picked up from your MIS since you last import. If you have recently updated some data in your MIS, please run your import again.

If you are using Wonde, please note that you will need to wait 2-4 hours before doing so as the Wonde service updates periodically throughout the day. You can double click on the line to view the data that was imported.

If you see the message stating '50% of ADNOS do not match,' there may be an issue with your import. Please contact product support. If you see no result next to the date, there may be an issue with your import. Please contact product support.

Quick Filters

| Import Type | Student Import | ∨ | Imports From | 16 Aug 2021 | Date | Imports To | 23 Dec 2022 | Date |

Import Logs (1 - 11 / 11)

Import Date △	Import Type △	Import Result △	File Type △
Dec 6 2022 10:21:34:783AM	Student Import	Dec 6 2022 10:22AM: Import completed successfully. 1372	csv
Nov 23 2022 11:30:31:037AM	Student Import	Nov 23 2022 11:31AM: Import completed successfully. 1369	csv
Nov 7 2022 12:14:02:610PM	Student Import	Nov 7 2022 12:14PM: Files are the same hence ending gracefully.	csv
Nov 7 2022 12:13:29:580PM	Student Import	Nov 7 2022 12:13PM: Import completed successfully. 1348	csv

Schools Using XoD (Xporter on Demand)

The XOD Import operates in a slightly different way as it only picks up the changes from your MIS and imports them slightly differently. This means you will see various smaller imports in the import log.

Please Note: the Import types will vary depending on the Scopes which you have authorised in the Xporter section under the Admin tab, and which are supported in your MIS.

Quick Filters

| Import Type | All | ∨ | Imports From | 16 Nov 2022 | Date | Imports To | 23 Dec 2022 | Date |

Import Logs (1 - 19 / 19)

Import Date △	Import Type △	Import Result △	File Type △
Dec 17 2022 1:23:53:400AM	Student FSM Import	Imported Student FSM Count: 1	csv
Dec 17 2022 1:23:42:773AM	Student Import	Imported Student Count: 1	csv
Dec 14 2022 5:43:28:873PM	Student FSM Import	Imported Student FSM Count: 1	csv
Dec 14 2022 5:43:27:343PM	Student Import	Imported Student Count: 1	csv
Dec 7 2022 12:05:13:837PM	Contact Deleted	Deleted Contact Count: 2	csv
Dec 7 2022 12:05:13:540PM	Student Deleted	Deleted Student Count: 1	csv
Dec 3 2022 6:12:18:450AM	Staff Import	Imported Staff Count: 1	csv
Dec 1 2022 1:20:45:913AM	Student FSM Import	Imported Student FSM Count: 3	csv
Dec 1 2022 1:19:42:037AM	Student Import	Imported Student Count: 3	csv
Nov 22 2022 9:20:17:653AM	Student FSM Import	Imported Student FSM Count: 2	csv
Nov 22 2022 9:20:14:917AM	Student Import	Imported Student Count: 2	csv
Nov 18 2022 1:33:36:310AM	Student FSM Import	Imported Student FSM Count: 1	csv

7.2.2 Dinner and Attendance Import: For imports from SIMS Dinner Money

If you import your meals from SIMS, you will also see the results these in your import logs. This will show you how many dinners were imported.

Quick Filters						
Import Type	Dinner Import ⌄	**Imports From**	16 Nov 2022	Date	**Imports To**	23 Dec 2022	Date

Import Logs (1 - 28 / 28)

Import Date △	Import Type △	Import Result △	File Type △
Dec 20 2022 9:53:49:127AM	Dinner Import	513 Dinner(s) Imported Successfully. 2 Student(s) missing from your school.	xml
Dec 19 2022 9:55:18:837AM	Dinner Import	532 Dinner(s) Imported Successfully. 2 Student(s) missing from your school.	xml
Dec 19 2022 9:50:08:210AM	Dinner Import	532 Dinner(s) Imported Successfully. 2 Student(s) missing from your school.	xml
Dec 19 2022 9:48:35:900AM	Dinner Import	532 Student(s) not in Dinner Groups for this date. 2 Student(s) missing from your school.	xml
Dec 16 2022 10:41:30:550AM	Dinner Import	534 Dinner(s) Imported Successfully. 1 Student(s) missing from your school.	xml
Dec 15 2022 9:43:12:723AM	Dinner Import	552 Dinner(s) Imported Successfully. 1 Student(s) missing from your school.	xml
Dec 14 2022 9:45:46:243AM	Dinner Import	574 Dinner(s) Imported Successfully. 1 Student(s) missing from your school.	xml
Dec 13 2022 9:44:28:360AM	Dinner Import	586 Dinner(s) Imported Successfully.	xml

If you see a message stating 'Student(s) missing from your school' the system has been unable to match one or more students based on their name and year group/form. This is sometimes caused by a difference in legal name and chosen name. If you are unable to identify the issue, please contact product support.

If you see a message stating 'Students not in dinner group' it either means that you have not yet set up your weekly dinner payment for the week you are trying to import into, or that there are pupils missing from the payment and you will need to add them using the Manage Students tool. Please see our separate **Dinners Guide** for more information on how to do this. This is located in the guides section on the top right corner of **SchoolMoney**.

8. Contact Details

We hope this user guide has helped you use the **SchoolMoney** system. If you have any questions or require further assistance, please get in touch with us and we will be more than happy to help.

Telephone number: **02072378456**

Online: **www.eduspot.co.uk/support**

We look forward to hearing any ideas or feedback you have about **SchoolMoney**, so let us know what you think!