



schoolmoney

Reports User Guide



communitybrands



Introduction

This user guide takes you through the various reports that are available on **SchoolMoney**. Each report is explained step by step, so that you can decide which reports you will need to use within your school and how to get the most out of them.

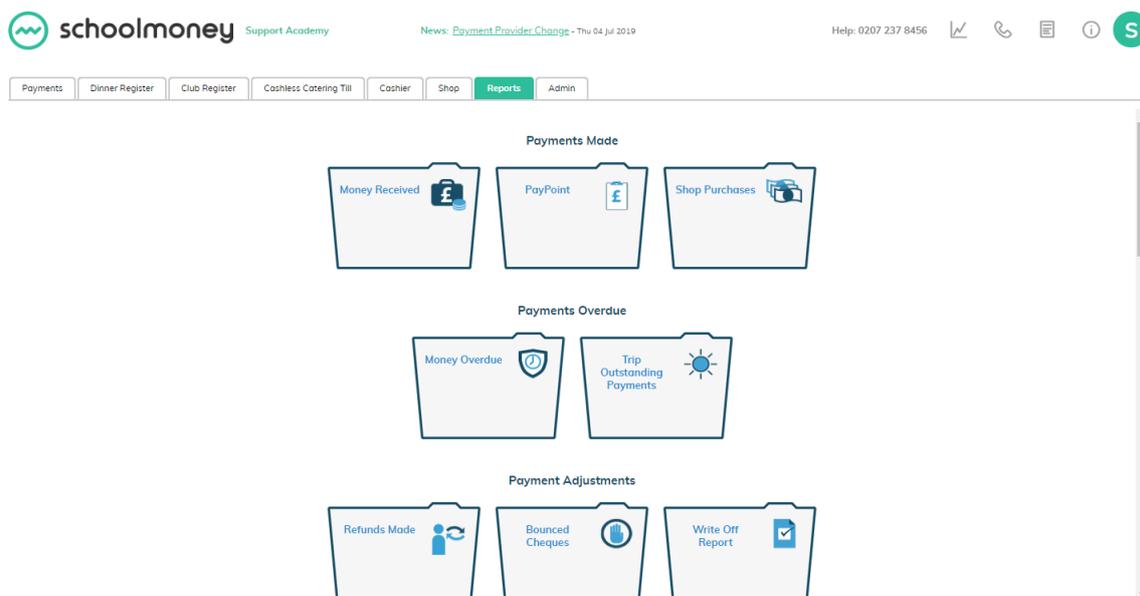
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1. Introduction to Reports

When you click on the reports tab it will take you to a page with a number of folders that are available.



These folders are organised into a number of headings for ease of use:

- Payments Made
- Payments Overdue
- Payment Adjustments
- Dinner & Catering
- Club & Extended Services
- Analysis
- Receipts & History
- App

Click on any folder to open a report.

2. Payments Made

2.1 Money Received

The Money Received report shows you everything that has been paid by the parents to the school during the last seven days. This report is a real-time update of what the parents have paid, whether that be by cash/cheque in school or online via debit/credit card.

Money Received Breakdown

Dinner	£0.00	Shop Items	£15.98	Extended	£0.00	Trips	£12.00	Uniform	£0.00
Residential	£0.00	Swimming	£0.00	Music	£0.00	Donations	£0.00	School Fees	£20.00
School Fund	£0.00	Milk	£0.00	Other	£0.00				

Received Payments (1 - 4 / 4)

Student	Year Group	Form	Payment Method	Amount	Parent Paid On	Paid By	Payment Details	Running Total
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Cash	£12.00	Mon 12 Aug 2019	Steve Potterton (steve.potterton@eduspot.co.uk)		£47.98
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Voucher	£10.00	Mon 12 Aug 2019	Debra Strang (lauren.strang@eduspot.co.uk)		£35.98
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Cash	£10.00	Mon 12 Aug 2019	Debra Strang (lauren.strang@eduspot.co.uk)		£25.98
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Cash	£15.98	Mon 12 Aug 2019	Debra Strang (lauren.strang@eduspot.co.uk)		£15.98

Filter | Show transaction breakdown | Paid on = Last 7 Days, Generated on Monday the 12th of August 2019 at 12:57 | Print | Export | Back

You will see listed information such as:

- Child’s name
- Payment method
- Amount
- Parent paid on

In this report you will be able to see:

- A breakdown of all money that has been received by payment type
- The total amount received during the chosen date range
- A filters button that allows you to change the report to reflect any information you may need to generate
- Print and export buttons

If you would like to see a breakdown of where the money is allocated, select the amount in blue.

The screenshot shows the SchoolMoney 'Reports' section. A 'Transaction Breakdown' popup window is open, displaying a table of transactions. The background shows a 'Received Payments' table with columns for Student, Year Group, Form, and Payment Type. The popup table has columns for Student, Payment Type, Description, Amount, and Method.

Student	Payment Type	Description	Amount	Method
Mitchell Richard (Pride Rock)	School Trip	Trip to the Lake	£12.00	Cheque
Mitchell Richard (Pride Rock)	Residential	residential trip	£50.00	Cheque
Mitchell Richard (Pride Rock)	Residential	residential trip	£25.00	Cheque
Mitchell Richard (Pride Rock)	Residential	residential trip	£25.00	Cheque
Mitchell Richard (Pride Rock)	Residential	residential trip	£25.00	Cheque
Mitchell Richard (Pride Rock)	Club / Extended Services	Lunch Time Club	£25.00	Cheque
Mitchell Richard (Pride Rock)	School Trip	Alton towers trip with coach payment	£9.45	Cheque
Mitchell Richard (Pride Rock)	Club / Extended Services	Lunch Time Club	£40.00	Cheque

A popup box will appear showing you exactly where the money has been attached. Once you are finished, select Close and the box will disappear.

The screenshot shows the 'Select report filters' popup window. It contains several sections for filtering data: 'Item Details' (Description, Payment Type, Reference), 'Pay Details' (Payment Method, Account, Parent Paid On, Due Date), 'Students' (Name, Year, Form, Group), and 'Amount Details' (More than, less than).

Click on the filters button and it will open up a new box in the centre of the screen. This allows you to filter for things such as:

- Payment method (debit card, credit card, cash, cheque)
- Parent paid on (the date range of the report)
- Name (the child's name)

Eg. If you want to see how much money was paid for the whole of January:

- Click on filters
- Select Parent Paid On
- Choose the option of Date Range
- Input the date range for January
- Select OK
- The report will now have been generated.

If you would like your report to be more detailed, you can click the Show transaction breakdown in the bottom left-hand corner of your screen.

The screenshot shows the SchoolMoney interface with the 'Reports' menu selected. The 'Money Received Breakdown' table is as follows:

Dinner	£0.00	Shop Items	£15.98	Extended	£65.00	Trips	£33.45	Uniform	£0.00
Residential	£125.00	Swimming	£0.00	Music	£0.00	Donations	£0.00	School Fees	£20.00
School Fund	£0.00	Milk	£0.00	Other	£0.00				

The 'Received Payments (1 - 15 / 15)' table is as follows:

Student	Year Group	Form	Type	Description	Reference	Instalment	Payment Method	Amount	Parent Paid On	Paid By
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Club / Extended Services	Lunch Time Club	W/C 05 Aug 2019	1	Cheque	£25.00	Mon 12 Aug 2019	Primary Contact
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Club / Extended Services	Lunch Time Club	W/C 06 May 2019	1	Cheque	£40.00	Mon 12 Aug 2019	Primary Contact
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	School Trip	Alton towers trip with coach payment	Alton towers trip with coach payment	1	Cheque	£9.45	Mon 12 Aug 2019	Primary Contact
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Residential	residential trip	Year 2 residential trip	4 of 5	Cheque	£25.00	Mon 12 Aug 2019	Primary Contact
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Residential	residential trip	Year 2 residential trip	3 of 5	Cheque	£25.00	Mon 12 Aug 2019	Primary Contact
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Residential	residential trip	Year 2 residential trip	2 of 5	Cheque	£25.00	Mon 12 Aug 2019	Primary Contact
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Residential	residential trip	Year 2 residential trip	1 of 5	Cheque	£50.00	Mon 12 Aug 2019	Primary Contact
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	School Trip	Trip to the Lake		1	Cheque	£12.00	Mon 12 Aug 2019	Primary Contact
Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Trip	Trip to the Lake		1	Cash	£12.00	Mon 12 Aug 2019	Steve Potterton
Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Fees	Theatre Trip	Summer 2019	1 of 2	Voucher	£10.00	Mon 12 Aug 2019	Debra Strang (la
Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Fees	Eden project trip	Summer 2019	2 of 3	Cash	£10.00	Mon 12 Aug 2019	Debra Strang (la
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Shop Item	Ruler			Cash	£0.49	Mon 12 Aug 2019	Debra Strang (la
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Shop Item	Pencil Case			Cash	£2.50	Mon 12 Aug 2019	Debra Strang (la
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Shop Item	Drinks Bottle			Cash	£2.99	Mon 12 Aug 2019	Debra Strang (la
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Shop Item	Book Bag			Cash	£10.00	Mon 12 Aug 2019	Debra Strang (la

At the bottom of the screenshot, there are buttons for 'Filter', 'Show transaction breakdown', 'Print', 'Export', and 'Back'. The status bar indicates 'Paid on = Last 7 Days, Generated on Monday the 12th of August 2019 at 13:01'.

This will then show and allow you to filter for more information such as:

- Payment type
- Description
- Reference

2.2 PayPoint

The PayPoint report shows you a list of all PayPoint transactions that have been processed on the **SchoolMoney** System.

In the top left-hand corner, you can filter for specific children if you need to see a list of their transactions. In the bottom left-hand corner, you can also print or export the report.

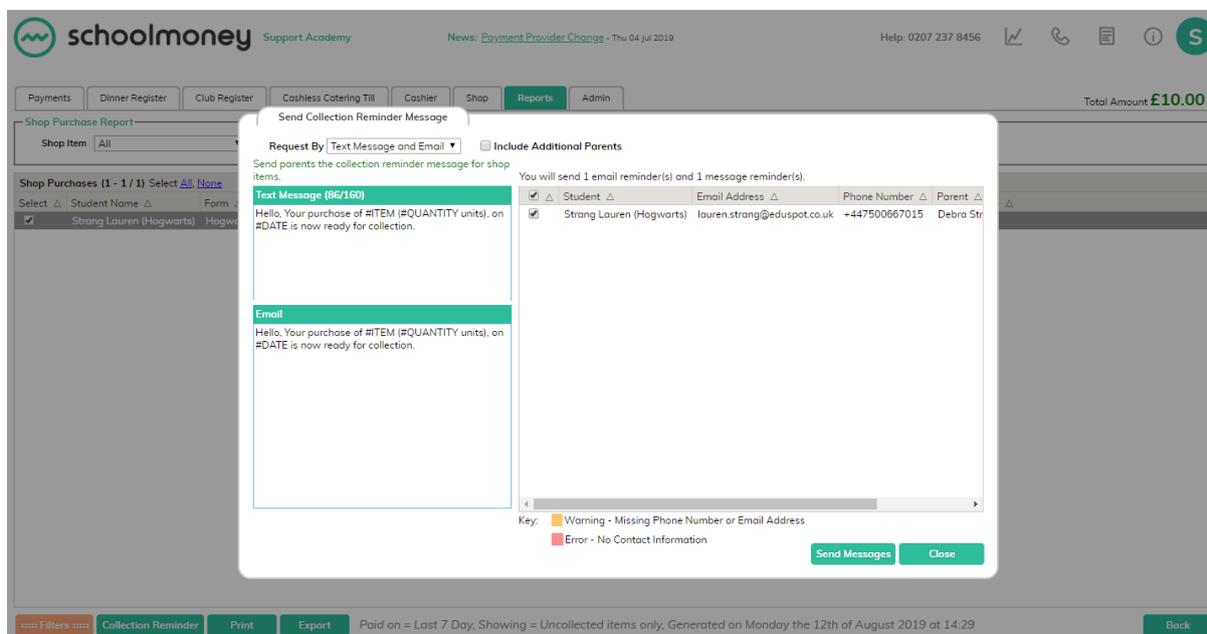
2.3 Shop Purchases Report

The Shop Purchases Report shows all of the items purchased by parents whether they have been paid for online or within the school. It will outline the details of the item, as well as if it has been collected or if it is still waiting to be picked up.

Select	Student Name	Form	Year Group	Item Name	Amount	Payment Method	Quantity	Purchased On	Collected On	Collection Note	Last Contact Date
<input type="checkbox"/>	Strang Lauren (Hogwarts)	Hogwarts	Year 3	Book Bag	£10.00	Cash	1	Mon 12 Aug 2019	Mon 12 Aug 2019	Dad collected	
<input type="checkbox"/>	Strang Lauren (Hogwarts)	Hogwarts	Year 3	Drinks Bottle	£2.99	Cash	1	Mon 12 Aug 2019	Mon 12 Aug 2019	Dad collected	
<input type="checkbox"/>	Strang Lauren (Hogwarts)	Hogwarts	Year 3	Pencil Case	£2.50	Cash	1	Mon 12 Aug 2019	Mon 12 Aug 2019	/	
<input type="checkbox"/>	Strang Lauren (Hogwarts)	Hogwarts	Year 3	Ruler	£0.49	Cash	1	Mon 12 Aug 2019	Mon 12 Aug 2019	Dad collected	

From the report, you can filter for specific items using the drop-down box in the top left-hand corner. You can also filter on specific date ranges and children.

At the top of the report, there is a tick box that enables you to see uncollected items only. You can then use the button in the bottom left-hand corner to send collection reminders.



You will only be able to do this for items that haven't been collected.

When you select the button, it will pop up with a box in which you can choose your method of communication and add any extra details. When you are ready, select Send Messages.

3. Payment Overdue

3.1 Money Overdue

The Money Overdue report will detail any children who may have arrears on **SchoolMoney**. They will show up in the report once a payment has passed its due date and the parent has not cleared the outstanding balance.

The report outlines:

- The total overdue
- When it should have been paid
- The child’s name
- The child’s year group
- The payment type
- The description
- The reference
- When they were last contacted

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Payments Dinner Register Club Register Cashless Catering Till Cashier Shop **Reports** Admin Total Overdue **£3718.00**

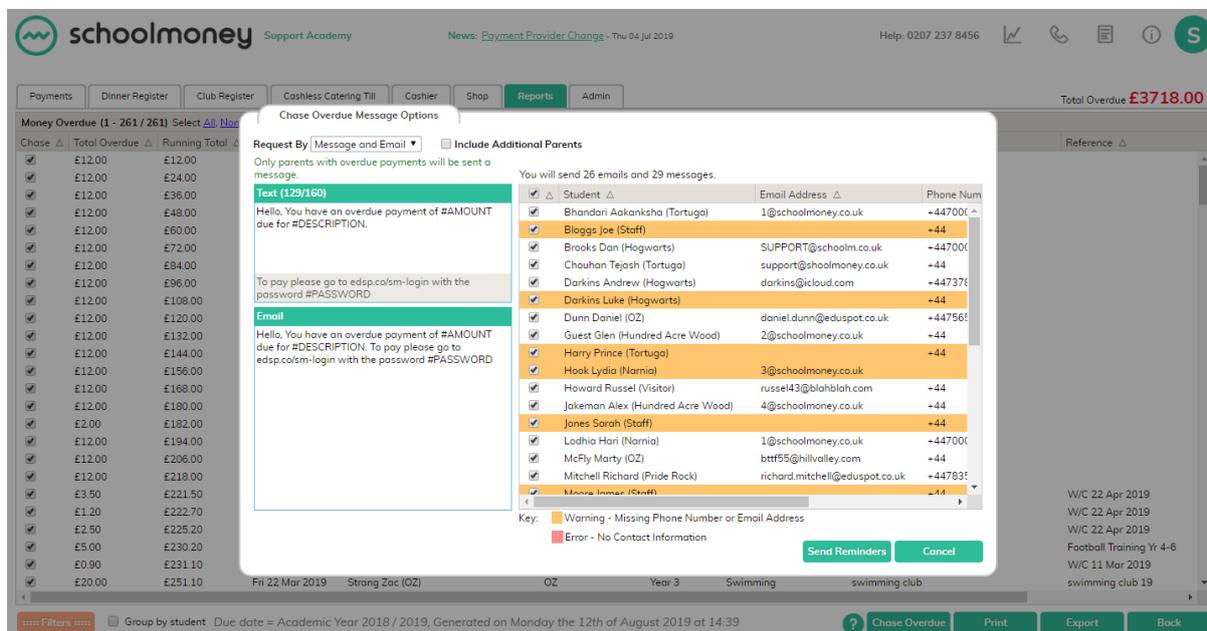
Money Overdue (1 - 261 / 261) Select All None

Chose	Total Overdue	Running Total	Due Date	Student Name	Form	Year Group	Payment Type	Description	Reference
<input checked="" type="checkbox"/>	£12.00	£12.00	Wed 23 Jan 2019	Naik Anna (Pride Rock)	Pride Rock	Year 6	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£24.00	Wed 23 Jan 2019	Taylor Jessica (Narnia)	Narnia	Year 2	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£36.00	Wed 23 Jan 2019	Banister Billy (Pride Rock)	Pride Rock	Year 6	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£48.00	Wed 23 Jan 2019	Strang Zac (OZ)	OZ	Year 3	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£60.00	Wed 23 Jan 2019	Patterton Steve (Hogwarts)	Hogwarts	Year 4	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£72.00	Wed 23 Jan 2019	Chouhan Tejash (Tortuga)	Tortuga	Year 4	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£84.00	Wed 23 Jan 2019	Patel Raj (OZ)	OZ	Year 3	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£96.00	Wed 23 Jan 2019	Patel Sachin (Hogwarts)	Hogwarts	Year 2	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£108.00	Wed 23 Jan 2019	Bhandari Aakanksha (Tortuga)	Tortuga	Year 6	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£120.00	Wed 23 Jan 2019	Simpson Bart (Narnia)	Narnia	Year 3	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£132.00	Wed 23 Jan 2019	McFly Marty (OZ)	OZ	Year 4	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£144.00	Wed 23 Jan 2019	Moore James (Staff)	Staff	Staff	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£156.00	Wed 23 Jan 2019	Walker Jess (Hogwarts)	Hogwarts	Year 2	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£168.00	Wed 23 Jan 2019	Darkins Andrew (Hogwarts)	Hogwarts	Year 2	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£180.00	Wed 23 Jan 2019	Darkins Luke (Hogwarts)	Hogwarts	Year 6	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£2.00	£182.00	Wed 23 Jan 2019	Wowzers James (Hogwarts)	Hogwarts	Year 6	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£194.00	Wed 23 Jan 2019	Bloggs Joe (Staff)	Staff	Staff	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£206.00	Wed 23 Jan 2019	Brooks Dan (Hogwarts)	Hogwarts	Year 3	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£12.00	£218.00	Wed 23 Jan 2019	Strang Noah (Pride Rock)	Pride Rock	Year 2	School Trip	Trip to the Lake	
<input checked="" type="checkbox"/>	£3.50	£221.50	Mon 04 Mar 2019	Bloggs Joe (Staff)	Staff	Staff	Dinner Money	School Lunches	W/C 22 Apr 2019
<input checked="" type="checkbox"/>	£1.20	£222.70	Mon 04 Mar 2019	Brooks Dan (Hogwarts)	Hogwarts	Year 3	Dinner Money	School Lunches	W/C 22 Apr 2019
<input checked="" type="checkbox"/>	£2.50	£225.20	Mon 04 Mar 2019	Brooks Dan (Hogwarts)	Hogwarts	Year 3	Club / Extended Services	Alterschool Club	W/C 22 Apr 2019
<input checked="" type="checkbox"/>	£5.00	£230.20	Mon 11 Mar 2019	Guest Glen (Hundred Acre Wood)	Hundred Acre Wood	Year 6	Other	Football Training	Football Training Yr 4-6
<input checked="" type="checkbox"/>	£0.90	£231.10	Sat 16 Mar 2019	Howard Russel (Visitor)	Visitor	Visitor	Dinner Money	School Lunches	W/C 11 Mar 2019
<input checked="" type="checkbox"/>	£20.00	£251.10	Fri 22 Mar 2019	Strang Zac (OZ)	OZ	Year 3	Swimming	swimming club	swimming club 19

Filters: Group by student Due date = Academic Year 2018 / 2019, Generated on Monday the 12th of August 2019 at 14:39

The Chase Overdue button allows you to send texts/emails to parents to notify them of the amount they owe the school.

- Click on the Chase Overdue button so that the message window appears



- Choose whether to send the message by text, email, or both

Please Note: you can change the wording of the message if you wish but the #AMOUNT, #DESCRIPTION, and #PASSWORD will all be automatically filled out for you.

- Click Send Reminders and the messages will be sent out to the parents.

3.2 Trip Outstanding Payments

This report is a very brief overview of all the money that is still outstanding for any trip payments. In the top left-hand corner click on the drop-down menu and select the trip you would like more information about. The details will appear below and include:

- A list of children’s names
- Their year and form groups
- How much they have paid to date
- How much they still owe
- If the parent has given their consent or not

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Payments Dinner Register Club Register Cashless Catering Till Cashier Shop **Rep. rts** Admin

Trip Outstanding Payments Summary

Trip: IOW Group: All Show All Students Amount Per Student: £100.00 Total Paid: £0.00
 Year: All Form: All Total Written Off: £0.00 Total Outstanding: £1600.00

Student	Year Group	Form	Gender	Medical Information	Paid To Date	Amount Outstanding
Bhandari Aakanksha (Tortuga)	Year 6	Tortuga	Female		£0.00	£100.00
Chouhan Tejash (Tortuga)	Year 4	Tortuga	Male		£0.00	£100.00
Darkins Luke (Hogwarts)	Year 6	Hogwarts	Male		£0.00	£100.00
Dunn Daniel (OZ)	Year 4	OZ	Male		£0.00	£100.00
Guest Glen (Hundred Acre Wood)	Year 6	Hundred Acre Wood	Male		£0.00	£100.00
Harry Prince (Tortuga)	Year 6	Tortuga	Male		£0.00	£100.00
Holmes Leigh (Pride Rock)	Year 6	Pride Rock	Male		£0.00	£100.00
Hook Lydia (Namia)	Year 4	Namia	Female		£0.00	£100.00
McFly Marty (OZ)	Year 4	OZ	Male		£0.00	£100.00
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Male	Asthma, Hayfever	£0.00	£100.00
Morris jenny (OZ)	Year 6	OZ	Female		£0.00	£100.00
Morris Paul (Hogwarts)	Year 4	Hogwarts	Male		£0.00	£100.00
Naik Anna (Pride Rock)	Year 6	Pride Rock	Female		£0.00	£100.00
Potterton Steve (Hogwarts)	Year 4	Hogwarts	Male		£0.00	£100.00
Virdi Nina (Tortuga)	Year 4	Tortuga	Female		£0.00	£100.00
Wowzers James (Hogwarts)	Year 6	Hogwarts	Male	Asthma	£0.00	£100.00

Print Export Trip = IOW, Shown Students = Outstanding Payments, Generated on Monday the 12th of August 2019 at 14:49 Back

In the top right-hand corner of the screen you will be able to see:

- The amount per student
- The total amount paid
- The total that has been written off for the trip
- The total outstanding amount

4. Payment Adjustments

4.1 Refunds Made

If you process any refunds on the **SchoolMoney** system, whether by cash, cheque, or straight onto the parent’s card, then this will appear in the 'Refunds Made' report.

Student Name	Year Group	Form	Description	Reference	Type	Instalment	Payment Method	Amount Refunded	Details	Refund Date
Taylor Sue (Hogwarts)	Year 3	Hogwarts	Calculator		Shop Item		Cash	£10.00	not working	Fri 05 Jul 2019
Taylor Sue (Hogwarts)	Year 3	Hogwarts	Credit Refund		Dinner Money		Cash	£0.20		Fri 17 May 2019
Strong Lauren (Hogwarts)	Year 3	Hogwarts	Credit Refund		Dinner Money		Cheque	£20.00	Moved to packed lunch	Mon 13 May 2019
Taylor Sue (Hogwarts)	Year 3	Hogwarts	Credit Refund		School Fees		Cash	£5.00		Wed 08 May 2019
Taylor Sue (Hogwarts)	Year 3	Hogwarts	harry potter studio tours	spring 2019	School Fees	1	Cash	£10.00		Tue 07 May 2019
Dunn Daniel (OZ)	Year 4	OZ	Trip to the Lake		School Trip	1	Cash	£10.00		Wed 17 Apr 2019
Ludlow Henri (Rearail)	Year 2	Nanso	Robinson	RW 18/19	School Trip	1	Cash	£330.00	overpayment	Thu 04 Apr 2019
Howard Russel (Visitor)	Visitor		Football Trip	December 19 All Yrs	School Trip	1	Cash	£50.00		Fri 15 Mar 2019
Brooks Dan (Hogwarts)	Year 3	Hogwarts	Credit Refund		Club / Extended Services		Cash	£6.00	not attended	Fri 08 Mar 2019
Brooks Dan (Hogwarts)	Year 3	Hogwarts	Afterschool Club	W/C 18 Mar 2019	Club / Extended Services	1	Cash	£6.00	not attended	Thu 14 Mar 2019
Walker Jess (Hogwarts)	Year 2	Hogwarts	Credit Refund		Club / Extended Services		Cash	£10.00		Fri 08 Mar 2019
Walker Jess (Hogwarts)	Year 2	Hogwarts	Credit Refund		Dinner Money		Cash	£10.00		Fri 08 Mar 2019
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Credit Refund		Club / Extended Services		Cash	£10.00		Thu 07 Mar 2019
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Credit Refund		Club / Extended Services		Cash	£10.00		Thu 07 Mar 2019
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Credit Refund		Club / Extended Services		Cash	£10.00		Thu 07 Mar 2019
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Credit Refund		Dinner Money		Cash	£7.30		Thu 07 Mar 2019
Brooks Dan (Hogwarts)	Year 3	Hogwarts	Credit Refund		Dinner Money		Cash	£15.00		Thu 07 Mar 2019
Bhandari Aakanksha (Tortuga)	Year 6	Tortuga	Credit Refund		Dinner Money		Cash	£10.00		Thu 07 Mar 2019
Bhandari Aakanksha (Tortuga)	Year 6	Tortuga	Credit Refund		Dinner Money		Cash	£10.00		Thu 07 Mar 2019
Morris Paul (Hogwarts)	Year 4	Hogwarts	Credit Refund		Club / Extended Services		Cash	£11.75		Wed 06 Mar 2019
Morris Paul (Hogwarts)	Year 4	Hogwarts	Credit Refund		Dinner Money		Cash	£100.00	overpayment	Wed 06 Mar 2019
Nolk Anna (Pride Rock)	Year 6	Pride Rock	Barcelona Trip	6th March Yr 6	School Trip	1	Cash	£60.00	wrong trip paid for	Wed 06 Mar 2019
Wowzers James (Hogwarts)	Year 6	Hogwarts	Credit Refund		School Trip		Cash	£60.00	Barcelona trip	Wed 06 Mar 2019
Wowzers James (Hogwarts)	Year 6	Hogwarts	Credit Refund		Dinner Money		Cash	£3.40	school lunches	Wed 06 Mar 2019
Wowzers James (Hogwarts)	Year 6	Hogwarts	Credit Refund		Dinner Money		Cash	£6.60	school lunches	Wed 06 Mar 2019
Wowzers James (Hogwarts)	Year 6	Hogwarts	Credit Refund		Club / Extended Services		Cash	£10.00	afterschool club	Wed 06 Mar 2019
Wowzers James (Hogwarts)	Year 6	Hogwarts	School Lunches	W/C 04 Feb 2019	Dinner Money	1	Debit Card	£0.05	Merge student transaction test	Mon 28 Jan 2019

This report gives you details of any payment that has been refunded back to the parents, the date of the refund, how much was refunded, and the details as to why the refund was made.

4.2 Bounced Cheques

If a parent has paid by cheque but the bank has told you that this has bounced back, then you can mark that onto the **SchoolMoney** system.

The bounced cheque report will show you a list of all cheques that have previously bounced, including any details you have marked; the school can then keep track of any transactions on the system that might not have gone through correctly.

In the top right-hand corner of the screen, there is a total ‘Bounced Amount’ during the date range chosen and you can filter, print and export this information as with the rest of the reports.

The screenshot shows the 'Bounced Cheques' report in SchoolMoney. The report title is 'Bounced Cheques (1 - 4 / 4)'. The total bounced amount is £30.00. The table lists four entries for Moore James (Staff) with various descriptions like 'School Trip' and 'Other', all with an amount of £3.00 and a date of Wed 24 Apr 2019. The report includes navigation buttons for Filters, Print, Export, and Back.

Student	Year Group	Form	Type	Description	Reference	Instalment	Amount	Parent Paid On	Paid By	Received In School Bank On	Running Total	Details
Moore James (Staff)	Staff	Staff	School Trip	Trip to the Lake		1	£12.00	Wed 24 Apr 2019	Primary Contact	Wed 24 Apr 2019	£12.00	
Moore James (Staff)	Staff	Staff	Other	voluntary		1	£3.00	Wed 24 Apr 2019	Primary Contact	Wed 24 Apr 2019	£15.00	
Moore James (Staff)	Staff	Staff	School Trip	Trip to the Lake		1	£12.00	Wed 24 Apr 2019	Primary Contact	Wed 24 Apr 2019	£27.00	
Moore James (Staff)	Staff	Staff	Other	voluntary		1	£3.00	Wed 24 Apr 2019	Primary Contact	Wed 24 Apr 2019	£30.00	

4.3 Write off Report

This report details any write offs that have been completed on **SchoolMoney**. You will be able to see the specific payment, the write off date and any extra details you may have added yourself.

The screenshot shows the 'Write Off' report in SchoolMoney. The report title is 'Write Off Breakdown'. The total written off amount is £40.45. The table lists various categories like Dinner, Trips, Extended, Other, School Fund, Residential, Swimming, Uniform, School Fees, Donations, Music, and Milk. Below this is a detailed table for 'Write Off (1 - 8 / 8)' with columns for Student, Year Group, Form, Type, Description, Reference, Instalment, Amount, Written Off On, Running Total, and Reason. The report includes navigation buttons for Filters, Print, Export, and Back.

Student	Year Group	Form	Type	Description	Reference	Instalment	Amount	Written Off On	Running Total	Reason
Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Fees	Eden project trip	Summer 2019	3 of 3	£10.00	Mon 12 Aug 2019	£10.00	
Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Trip	Alton towers trip with coach payment	Alton towers trip - with coach payment	1	£9.45	Mon 12 Aug 2019	£19.45	
Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Trip	Alton towers trip - own travel arrangements	Alton towers trip - own travel arrangement	1	£5.00	Mon 12 Aug 2019	£24.45	
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Swimming	swimming club	swimming club 19	1 of 5	£4.00	Mon 12 Aug 2019	£28.45	
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Swimming	swimming club	swimming club 19	2 of 5	£4.00	Mon 12 Aug 2019	£32.45	
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Swimming	swimming club	swimming club 19	3 of 5	£4.00	Mon 12 Aug 2019	£36.45	
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Swimming	swimming club	swimming club 19	4 of 5	£4.00	Mon 12 Aug 2019	£40.45	
Strang Lauren (Hogwarts)	Year 3	Hogwarts	Swimming	swimming club	swimming club 19	4 of 5	£0.00	Mon 12 Aug 2019	£40.45	

E.g. If you have a pupil premium child and the school is covering the cost of a trip, you can write off this amount. It will then show as balanced on the child’s account so that the parent doesn’t pay but you have a record on the system of how the trip was covered.

5. Dinner and Catering

5.1 Dinner Arrears

Dinner Arrears will show you the amalgamated arrears that a child has accumulated on the Dinner Register.

Dinner Arrears Report

Dinner Week:

Dinner Arrears (1 - 35 / 35) Select All None

Chose	Total Arrears	Student	Year Group	Form	Description
<input checked="" type="checkbox"/>	£10.10	Bloggs Joe (Staff)	Staff	Staff	School Lunches
<input checked="" type="checkbox"/>	£6.90	Brooks Dan (Hogwarts)	Year 3	Hogwarts	School Lunches
<input checked="" type="checkbox"/>	£8.10	Howard Russel (Visitor)	Visitor	Visitor	School Lunches
<input checked="" type="checkbox"/>	£7.00	Potterton Steve (Hogwarts)	Year 4	Hogwarts	School Lunches
<input checked="" type="checkbox"/>	£7.20	Bhandari Aakanksha (Tortuga)	Year 6	Tortuga	School Lunches
<input checked="" type="checkbox"/>	£5.00	Chouhan Tejash (Tortuga)	Year 4	Tortuga	School Lunches
<input checked="" type="checkbox"/>	£12.70	Darkins Luke (Hogwarts)	Year 6	Hogwarts	School Lunches
<input checked="" type="checkbox"/>	£16.60	Dunn Daniel (OZ)	Year 4	OZ	School Lunches
<input checked="" type="checkbox"/>	£7.60	Strang Zac (OZ)	Year 3	OZ	School Lunches
<input checked="" type="checkbox"/>	£0.60	Guest Glen (Hundred Acre Wood)	Year 6	Hundred Acre Wood	School Lunches
<input checked="" type="checkbox"/>	£4.70	Morris Jenny (OZ)	Year 6	OZ	School Lunches
<input checked="" type="checkbox"/>	£5.00	Morris Paul (Hogwarts)	Year 4	Hogwarts	School Lunches
<input checked="" type="checkbox"/>	£4.70	Patel Raj (OZ)	Year 3	OZ	School Lunches
<input checked="" type="checkbox"/>	£2.10	Banister Billy (Pride Rock)	Year 6	Pride Rock	GF Lunches
<input checked="" type="checkbox"/>	£0.40	Brooks Dan (Hogwarts)	Year 3	Hogwarts	GF Lunches
<input checked="" type="checkbox"/>	£4.20	Chouhan Tejash (Tortuga)	Year 4	Tortuga	GF Lunches
<input checked="" type="checkbox"/>	£0.60	Darkins Andrew (Hogwarts)	Year 2	Hogwarts	GF Lunches
<input checked="" type="checkbox"/>	£0.40	Darkins Luke (Hogwarts)	Year 6	Hogwarts	GF Lunches
<input checked="" type="checkbox"/>	£4.20	Dunn Daniel (OZ)	Year 4	OZ	GF Lunches
<input checked="" type="checkbox"/>	£4.20	Guest Glen (Hundred Acre Wood)	Year 6	Hundred Acre Wood	GF Lunches
<input checked="" type="checkbox"/>	£4.20	Harry Prince (Tortuga)	Year 6	Tortuga	GF Lunches
<input checked="" type="checkbox"/>	£2.70	Hook Lydia (Narnia)	Year 4	Narnia	GF Lunches

Due date = Academic Year 2018 / 2019, Generated on Monday the 12th of August 2019 at 15:01

This report runs in a very similar way to the Money Overdue report. The Money Overdue shows you the separate amounts owed for all payment types whereas the Dinner Arrears report will show an overall total of what a child owes.

Instead of sending out multiple texts asking for various weeks, the school will be able to send one text per child indicating the lump sum of what they owe.

5.2 Catering Report

The Catering Report is only used if you have the Cashless Catering module on the **SchoolMoney** system. This report gives you a breakdown of what the children in the school have eaten between any two dates of your choosing.

schoolmoney Support Academy News: Moving away from SIMS? Please contact us regarding an MIS Migration - Mon 16 May 2022 Help: 0207 237 8456

Payments Dinner Register Club Register Cashless Catering Till Cashier Shop Reports Admin Trust Setup User

Catering Report

Group: All Year: All Form: All Student: All

Dinner Group: All Dinners From: 23 Feb 2022 Dinners To: 28 Feb 2022

Meal Selection	Paid For	Free Meals	Universal Infant Free Meals	Packed Lunch	Packed Lunch (FSM)	Packed Lunch (UIFSM)	Total Meals	Total Cost
Chicken Wrap	0	1	1	0	0	0	2	£0.00
Creamy Bacon Pasta	1	1	0	0	0	0	2	£3.00
Creamy Veg Pasta	0	1	0	0	0	0	1	£0.00
Meat Pizza and Chips	0	1	0	0	0	0	1	£0.00
Selection of Pizza	0	1	1	0	0	0	2	£0.00
Veg Pizza and chips	0	0	1	0	0	0	1	£0.00
TOTAL:	1	5	3	0	0	0	9	£3.00

Export Print Show breakdown by student Dinners from Wednesday the 23rd of February 2022 to Monday the 28th of February 2022 Back

You can change the date range of the report using the 'Dinners From' and 'Dinners To' filters on the top left-hand side of the screen. You can also filter for group, year, and form.

The system will automatically create a report showing:

- How many of each individual meal option have been taken
- How many of those meal options are free, paid, or universal infant free
- The total cost

schoolmoney Support Academy News: Moving away from SIMS? Please contact us regarding an MIS Migration - Mon 16 May 2022 Help: 0207 237 8456

Payments Dinner Register Club Register Cashless Catering Till Cashier Shop Reports Admin Trust Setup User

Catering Report

Group: All Year: All Form: All Student: All

Dinner Group: All Dinners From: 23 Feb 2022 Dinners To: 28 Feb 2022

Student	Year Group	Form	Dinner Date	Item Description	Paid For	Items Bought	Total Cost
Dharamshi Siya (Hogwarts)	Year 4	Hogwarts	Wed 23 Feb 2022	Chicken Wrap	Universal Infant Free Meal	1	£0.00
Dharamshi Siya (Hogwarts)	Year 4	Hogwarts	Thu 24 Feb 2022	Selection of Pizza	Universal Infant Free Meal	1	£0.00
Dharamshi Siya (Hogwarts)	Year 4	Hogwarts	Fri 25 Feb 2022	Veg Pizza and chips	Universal Infant Free Meal	1	£0.00
Dharamshi Veena (Pride Rock)	Year 3	Pride Rock	Wed 23 Feb 2022	Chicken Wrap	Free Meal	1	£0.00
Dharamshi Veena (Pride Rock)	Year 3	Pride Rock	Thu 24 Feb 2022	Selection of Pizza	Free Meal	1	£0.00
Dharamshi Veena (Pride Rock)	Year 3	Pride Rock	Fri 25 Feb 2022	Meat Pizza and Chips	Free Meal	1	£0.00
Dharamshi Veena (Pride Rock)	Year 3	Pride Rock	Mon 28 Feb 2022	Creamy Bacon Pasta	Free Meal	1	£0.00
Mitchell Richard (Button Moon)	Year 4	Button Moon	Mon 28 Feb 2022	Creamy Veg Pasta	Free Meal	1	£0.00
Taylor Sue (Pride Rock)	Year 3	Pride Rock	Mon 28 Feb 2022	Creamy Bacon Pasta	Paid for	1	£3.00
TOTAL:						9	£3.00

Export Print Show breakdown by student Show dietary requirements Paid for: All Dinners from Wednesday the 23rd of February 2022 to Monday the 28th of February 2022 Back

In the bottom left-hand corner, there is a tick box next to 'Show Breakdown By Student.' If you select this, it will show a breakdown of all of the different meals each student has taken during this period of time. This can be useful if you ever need to know which student is having what meal.

You have the option to show dietary requirements by ticking the box in the bottom left-hand corner if the kitchen needs to know anything about specific students (such as nut allergies). When ticked, this will appear as an extra column.

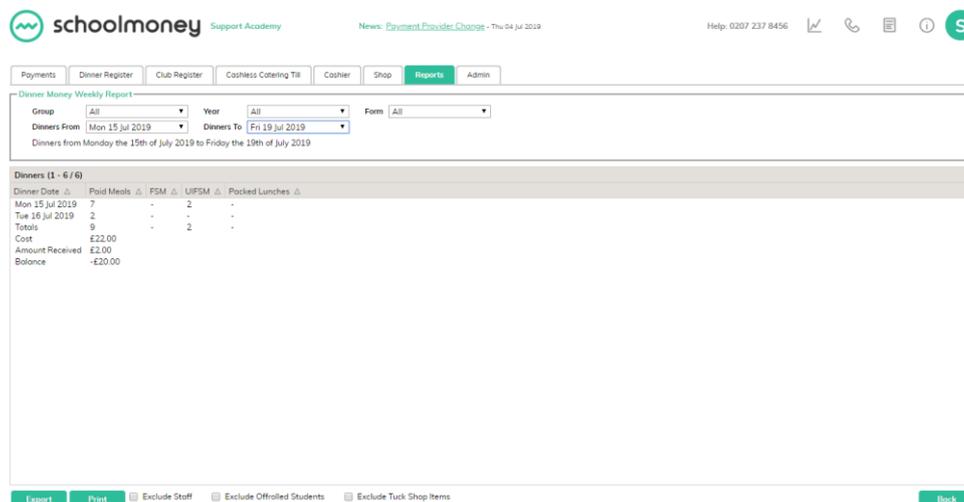
5.3 Dinner Money Weekly Report and Dinner Money Council Banking Report

These reports both show:

- The number of meals for that date range
- If they are paid, free or universal infant free
- The total cost

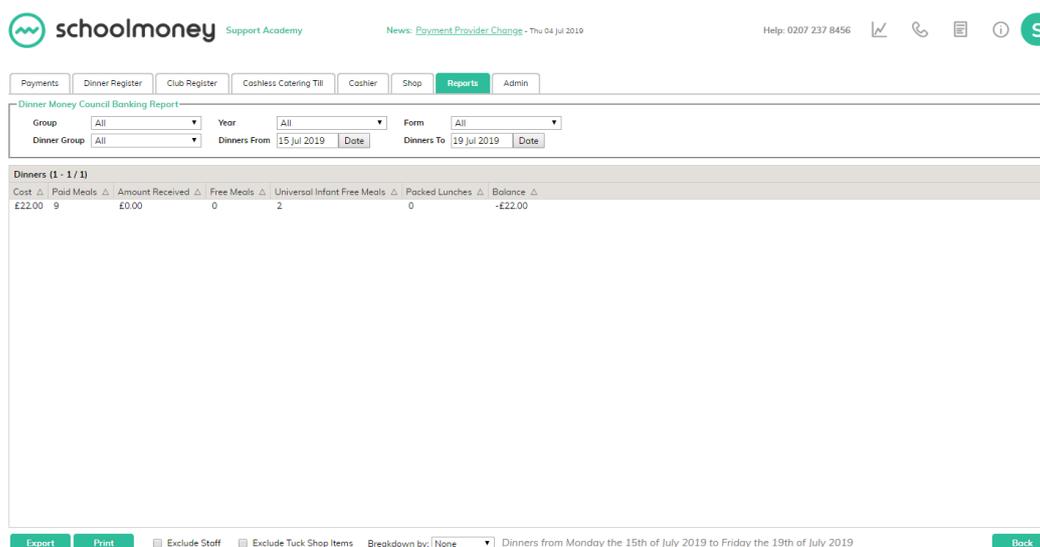
With the Dinner Money Weekly report, the ‘Amount Received’ represents all of the money that has been assigned to that week. E.g. If a parent has paid in advance for dinners that are taken in June, then the money will appear against this report in June.

This report will only allow you to filter from a Monday to Friday date range.



With the Dinner Money Council Banking report, the ‘Amount Received’ is all of the money that has come in during that week regardless of what week it is meant for. E.g. If you paid in June it would appear against June, even if it is meant for July or to pay off past arrears.

The report automatically defaults to the last seven days, however, it allows you to change specific dates rather than weeks. If you select either of the ‘Date’ buttons it will pop up with a calendar, meaning that you can search for the number of dinners taken for one day or for one month.



Both of these reports have the standard print and export functions in the bottom right-hand corner and a filter button along the top of the page. This allows you to filter for specific year groups or classes, depending on the information that you need.

The reports also allow you to exclude staff. If you have any staff on the system that take meals, but you do not want to include them in the report, you can tick 'Exclude Staff' in the bottom left-hand corner of the report.

5.4 Free School Meals Report

The Free School Meal report will give you a list of all of the children that are marked as pupil premium on [SchoolMoney](#).

You will be able to see:

- The child's name
- Year group
- Form group
- Entitlement dates

You can filter at the top for students, year groups, and form groups.

Free School Meals Report

Student: All | Year: All | Form: All

Student	Year Group	Form	Free School Meals Start Date	Free School Meals End Date
Bhandari Aakanksha (Tortuga)	Year 6	Tortuga	Sun 10 Mar 2019	Fri 19 Mar 2019
Darlene Luke (Hogwarts)	Year 6	Hogwarts	Wed 17 Apr 2020	Fri 17 Apr 2020
Guest Glen (Hundred Acre Wood)	Year 6	Hundred Acre Wood	Thu 31 Aug 2017	Fri 31 Aug 2018
Holmes Leigh (Pride Rock)	Year 6	Pride Rock	Thu 24 Aug 2017	Thu 24 Aug 2017
Nalk Anna (Pride Rock)	Year 6	Pride Rock	Fri 09 Mar 2018	Fri 30 Mar 2018
Patel Raj (OZ)	Year 3	OZ	Mon 20 May 2019	Mon 20 May 2019
Strang Zac (OZ)	Year 3	OZ	Mon 06 May 2019	Mon 20 May 2019
Taylor Jessica (Namia)	Year 2	Namia	Sun 28 Aug 2016	Wed 28 Feb 2018

Buttons: Export, Print, Back

5.5 Medical and Dietary Details

This report gives a brief list of all medical and dietary details that have been marked onto **SchoolMoney** in the Admin/Students section.

You can filter at the top for students (including those who have already been off-rolled), year groups, and form groups.

Medical and Dietary Information Report

Student Name: | Group: All | Form: All

Include Off Rolloled Students: | Year Group: All

Student	Year Group	Form	Dietary Information	Medical Information
Bhandari Aakanksha (Tortuga)	Year 6	Tortuga	No pork	
Lochia Hari (Namia)	Year 2	Namia	Veggie	
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Will not eat pork	Asthma, Hayfever
Nalk Anna (Pride Rock)	Year 6	Pride Rock	Peanut allergy	
Potterton Steve (Hogwarts)	Year 4	Hogwarts	Allergic to peanuts	
Strang Lauren (Hogwarts)	Year 3	Hogwarts		Asthma
Strang Zac (OZ)	Year 3	OZ		Asthma
Taylor Jessica (Namia)	Year 2	Namia	Cheese intolerance	
Woozvers James (Hogwarts)	Year 6	Hogwarts		Asthma

Buttons: Export, Print, Back

5.6 Dinner Weekly Summary

The Dinner Weekly Summary report gives a simplified breakdown of the number of meals taken on a daily basis and the costs that these have accumulated by form/year group.

The report splits the meals into daily paid and free meals. It allows you to filter to specific dinner groups as well as switch between the different weeks you have set up.

Dinner Weekly Summary

Dinner Group: All | Dinner Week: Wk: Mon 15 Jul 2019 School L | Show Archived Weeks | Display By: Form

Form	Mon Paid	Mon Free	Tue Paid	Tue Free	Wed Paid	Wed Free	Thu Paid	Thu Free	Fri Paid	Fri Free	Total Paid	Total Free	Weekly Cost	Amount Paid	Amount Written Off
Hogwarts	1	2	0	0	0	0	0	0	0	0	1	2	£2.60	£0.20	£0.00
OZ	5	0	0	0	0	0	0	0	0	0	5	0	£11.00	£1.80	£0.00
Pride Rock	1	0	0	0	0	0	0	0	0	0	1	0	£4.40	£0.00	£0.00
Staff	0	0	1	0	0	0	0	0	0	0	1	0	£2.20	£0.00	£0.00
Tortuga	0	0	1	0	0	0	0	0	0	0	1	0	£2.20	£0.00	£0.00
Totals	7	2	2	0	9	2	£22.40	£2.00	£0.00						

5.7 Dinner Balance

The dinner balance report will clearly state the dinner balances for each child.

You can filter at the top for students, year groups, and form groups. You can also show balances more than or balances less than by typing in an amount and excluding FSM/UIFSM/Pack lunch students. You can also send messages from the report in the bottom left corner. If you send a message to parents with a negative balance, they will receive the arrears message, and if the balance is £0 or positive they will receive an encouraging top-up message.

Dinner Balance Report

Student: All | Year: All | Form: All

Show: Balance More Than | Go | Exclude FSM/UIFSM/Packed Lunch

Student	Form	Year Group	Balance	Balance Updated
Bains David	Staff	Staff	-£13.70	20 Jun 2022 12:16 PM
Banister Billy	Pride Rock	Year 6	£0.00	20 Jun 2022 12:16 PM
Barr Chrissy	Hundred Acre Wood	Year 1	£6.10	20 Jun 2022 12:16 PM
Barr Christopher	Staff	Staff	£0.00	20 Jun 2022 12:16 PM
Bloggs Joe	Button Moon	Year 6	£43.60	20 Jun 2022 12:16 PM
Bloggs Josephine	Visitor	Visitor	-£2.40	20 Jun 2022 12:16 PM
Daniels Shane	Middle Earth	Year 6	-£6.40	20 Jun 2022 12:16 PM
Darkins Andrew	Middle Earth	Year 1	-£1.20	20 Jun 2022 12:16 PM
Darkins Luke	OZ	Year 3	-£10.20	20 Jun 2022 12:16 PM
Dharamshi Siya	Hogwarts	Year 4	-£3.20	20 Jun 2022 12:16 PM
Dharamshi Veena	Pride Rock	Year 3	£0.00	20 Jun 2022 12:16 PM
Dunn Daniel	OZ	Year 4	£0.00	20 Jun 2022 12:16 PM
Guest Glen	Hundred Acre Wood	Year 1	-£3.30	20 Jun 2022 12:16 PM
Harry Prince	Pride Rock	Year 3	-£10.20	20 Jun 2022 12:16 PM

6. Clubs/Extended Services

6.1 Club Arrears

Club Arrears will show you the amalgamated arrears that a child has accumulated on the club register.

The screenshot shows the SchoolMoney interface for a 'Club Arrears Report'. At the top, there's a navigation bar with 'Reports' highlighted. Below it, a 'Club Arrears Report' dropdown menu is visible. The main area contains a table with the following data:

Chase	Total Arrears	Student	Year Group	Form	Description
<input checked="" type="checkbox"/>	£2.50	Brooks Dan (Hogwarts)	Year 3	Hogwarts	After-school Club
<input checked="" type="checkbox"/>	£6.00	Banister Billy (Pride Rock)	Year 6	Pride Rock	After-school Club
<input checked="" type="checkbox"/>	£10.00	Bhandari Aakanksha (Tortuga)	Year 6	Tortuga	After-school Club
<input checked="" type="checkbox"/>	£12.00	Guest Glen (Hundred Acre Wood)	Year 6	Hundred Acre Wood	After-school Club
<input checked="" type="checkbox"/>	£2.00	Harry Prince (Tortuga)	Year 6	Tortuga	After-school Club
<input checked="" type="checkbox"/>	£14.00	Holmes Leigh (Pride Rock)	Year 6	Pride Rock	After-school Club
<input checked="" type="checkbox"/>	£15.00	Banister Billy (Pride Rock)	Year 6	Pride Rock	Breakfast Club
<input checked="" type="checkbox"/>	£19.00	Bhandari Aakanksha (Tortuga)	Year 6	Tortuga	Breakfast Club
<input checked="" type="checkbox"/>	£9.00	Brooks Dan (Hogwarts)	Year 3	Hogwarts	Breakfast Club
<input checked="" type="checkbox"/>	£13.00	Dorinda Luke (Hogwarts)	Year 6	Hogwarts	Breakfast Club
<input checked="" type="checkbox"/>	£6.00	Dunn Daniel (OZ)	Year 4	OZ	Breakfast Club
<input checked="" type="checkbox"/>	£6.00	Guest Glen (Hundred Acre Wood)	Year 6	Hundred Acre Wood	Breakfast Club
<input checked="" type="checkbox"/>	£6.00	Harry Prince (Tortuga)	Year 6	Tortuga	Breakfast Club
<input checked="" type="checkbox"/>	£8.00	Jones Sarah (Staff)	Staff	Staff	Morning Club
<input checked="" type="checkbox"/>	£10.00	Simpson Bart (Namia)	Year 3	Namia	After-school Club
<input checked="" type="checkbox"/>	£4.00	Jones Sarah (Staff)	Staff	Staff	After-school Club
<input checked="" type="checkbox"/>	£4.00	Taylor Jessica (Namia)	Year 2	Namia	After-school Club

At the bottom of the screenshot, there are buttons for 'Filters', 'Chase Overdue', 'Export', 'Print', and 'Back'. A footer note states: 'Due date = Academic Year 2018 / 2019. Generated on Monday the 12th of August 2019 at 16:06'.

This report runs in a very similar way to the Money Overdue report. The Money Overdue shows you the separate amounts owed for all payment types, whereas the Club Arrears report will show an overall total of what a child owes. Instead of sending out multiple texts asking for various weeks, the school will be able to send one text per child indicating the lump sum of what they owe.

If you need to see a breakdown of these arrears by Club, you can use the filter in the top left-hand corner to switch between each one you have set up.

6.2 Club Weekly Report

The Club Weekly report shows all sessions taken for the weeks chosen in the drop-down box available. These are broken down into daily figures and indicate how many children took each session available on that day.

As with other reports you can filter by year/form/group and specific club types if needed. Tick the weeks you want to see the information for in the drop-down box on the left-hand side of the page. You can include more than one type of club at a time if you wish.

Club Money Weekly Report

Year Group: All | Form: All | Group: All

Clubs: Wk: Mon 05 Aug 2019 Lunch Time Club | Day: All

Club Date	Session 1	Session 2	Session 3	Session 4	Session 5	Session 6	Session 7	Session 8	Session 9	Session 10	Total Sessions Per Day
Mon 05 Aug 2019	1	-	-	-	-	-	-	-	-	-	1
Tue 06 Aug 2019	1	-	1	-	-	-	-	-	-	-	2
Fri 09 Aug 2019	-	2	-	-	-	-	-	-	-	-	2
Totals	2	2	1	-	-	-	-	-	-	-	5
Cost	£70.00										
Amount Received	£70.00										
Balance	£0.00										

Export | Print | Show breakdown by student | Generated On Monday the 12th of August 2019, Clubs = Wk: Mon 05 Aug 2019 Lunch Time Club | Back

6.3 Club Weekly Summary

The Club Weekly Summary report gives a simplified breakdown of the number of sessions taken on a daily basis and the costs that these have accumulated by form/year group.

Club Weekly Summary

Club Group: All | Club Week: Wk: Mon 05 Aug 2019 Lunch | Show Archived Weeks: | Display By: Form

Form	Monday	Tuesday	Wednesday	Thursday	Friday	Total	Weekly Cost	Amount Paid	Amount Written Off
Pride Rock	1	1	0	0	1	3	£35.00	£35.00	£0.00
Tortuga	0	1	0	0	1	2	£35.00	£35.00	£0.00
Totals	1	2	0	0	2	5	£70.00	£70.00	£0.00

Print | Export | Back

The report allows you to filter to a specific Club you have set as well as switch between different weeks.

7. Analysis

7.1 Static Banking Report and Banking Reconciliation Report

We suggest that you use Static Banking Reconciliation to reconcile your money. The Banking Reconciliation will show any credit movements that have been made on the system, whereas Static Banking Reconciliation will show the exact amount of money that was paid to the school on that date.

The Static Banking Reconciliation report helps you to reconcile with the lump sum that appears on your bank statement under the heading 'Smart Payments.'

The screenshot shows the SchoolMoney web interface. At the top, there's a navigation bar with 'schoolmoney Support Academy' and a news item 'Payment Provider Change - Thu 04 Jul 2019'. Below that, a menu bar includes 'Payments', 'Dinner Register', 'Club Register', 'Catering Catering TR', 'Casher', 'Shop', 'Reports', and 'Admin'. The 'Reports' tab is active, and the 'Static Banking Reconciliation Report' is displayed. The report has filters for 'Bank Account' (All), 'Reference' (All), 'Received In Bank' (Fri 09 Feb 2019), and 'Payment Type' (All). Below the filters, a table titled 'Banked Payments (1 - 2 / 2)' shows the following data:

Received in Bank	Student	Year Group	Form	Parent Paid On	Amount	Type	Description
Fr 09 Feb 2019	Wowzers James (Hogwarts)	Year 6	Hogwarts	Mon 28 Jan 2019	£0.05	Dinner Money	School Lunches
Fr 09 Feb 2019	Wowzers James (Hogwarts)	Year 6	Hogwarts	Mon 28 Jan 2019	-£0.05	Dinner Money	School Lunches

At the bottom of the report, there are buttons for 'Print', 'Export', and 'Back'. A footer note states: 'Payments made between Monday the 28th of January 2019 and Sunday the 3rd of February 2019. Generated on Tuesday the 13th of August 2019 at 10:01'.

At **SchoolMoney**, our weeks work from Monday to Sunday. Anything that is paid by the parents during that time will be deposited into your bank account the following Friday in one lump sum.

Once you know how much that lump sum is, you will need to come into the Static Banking Reconciliation report to see this breakdown. E.g. If you receive £100 into your bank you will be able to see that £20 was for a school trip, £10 was from a student for dinners, £5 was from another student for dinners, and so on.

You can use the filter along the top of the screen for:

- Bank accounts (if you have more than one on the system)
- Reference
- Payment type
- Date

- Student

You also have the option to print this report or export it to excel. Many schools will print the report off and attach it to their bank statement.

7.2 Forecast

This report is used for monitoring how much cash flow is likely to come into the school at any given time based on the due date of the payment.

Student	Year Group	Form	Type	Description	Reference	Instalment	Total due	Due Date	Running Total
Sharanishi veena (Staff)	Staff	Staff	Club / Extended Services	Afterschool Club	W/C 02 Sep 2019	1	£4.00	Thu 05 Sep 2019	£4.00
Bhanjan Aakanksha (Tortugo)	Year 6	Tortugo	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£94.00
Chowhan Tejas (Tortugo)	Year 4	Tortugo	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£184.00
Dankins Luke (Hogwarts)	Year 6	Hogwarts	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£274.00
Dunn Daniel (OZ)	Year 4	OZ	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£364.00
Guest Gies (Hundred Acre Wood)	Year 6	Hundred Acre Wood	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£454.00
Harry Prince (Tortugo)	Year 6	Tortugo	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£544.00
Haines Leigh (Pride Rock)	Year 6	Pride Rock	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£634.00
Hook Lydia (Nommo)	Year 4	Nommo	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£724.00
Milly Mary (OZ)	Year 4	OZ	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£814.00
Michael Richard (Pride Rock)	Year 6	Pride Rock	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£904.00
Morris jenny (OZ)	Year 6	OZ	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£994.00
Morris Paul (Hogwarts)	Year 4	Hogwarts	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£1084.00
Noak Anna (Pride Rock)	Year 6	Pride Rock	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£1174.00
Pitterton Steve (Hogwarts)	Year 4	Hogwarts	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£1264.00
Ural Nina (Tortugo)	Year 4	Tortugo	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£1354.00
Woozers James (Hogwarts)	Year 6	Hogwarts	School Trip	IOW	IOW	2 of 2	£90.00	Thu 12 Sep 2019	£1444.00
Dankins Andrew (Hogwarts)	Year 2	Hogwarts	Dinner Money	School Lunches	W/C 08 Sep 2019	1	£2.20	Fri 13 Sep 2019	£1446.20
Brooks Dan (Hogwarts)	Year 3	Hogwarts	Dinner Money	School Lunches	W/C 09 Sep 2019	1	£2.20	Fri 13 Sep 2019	£1448.40
Dankins Andrew (Hogwarts)	Year 2	Hogwarts	Residential	residential trip	Year 2 residential trip	5 of 5	£25.00	Tue 31 Mar 2020	£1473.40
Patel Sachin (Hogwarts)	Year 2	Hogwarts	Residential	residential trip	Year 2 residential trip	5 of 5	£25.00	Tue 31 Mar 2020	£1498.40
Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Residential	residential trip	Year 2 residential trip	5 of 5	£25.00	Tue 31 Mar 2020	£1523.40
Sharanishi veena (Staff)	Staff	Staff	Residential	residential trip	Year 2 residential trip	5 of 5	£25.00	Tue 31 Mar 2020	£1548.40

If you want to see a different date range or how much you are expecting in for a specific trip, then you can use the filter in the bottom left-hand corner.

7.3 Shop Stock report

This report gives you a brief overview of the stock levels that you have in your shop.

Item	Quantity	Stock Alert Level	Price	Available
Book Bag	1	5	£10.00	Y
Calculator	18	5	£20.00	Y
Drinks Bottle	23	27	£2.99	Y
Football	18	0	£9.00	Y
Football Shirt	60	1	£10.00	Y
Football Socks	35	0	£3.50	Y
Jumper Size Small	99	5	£14.00	Y
Library Card	9	5	£2.15	Y
Lego Sweetshirt	97	10	£7.99	Y
P.E. Bag	91	1	£5.99	Y
Penroll Case	84	1	£2.50	Y
Ruler	4	2	£0.49	Y
Sweetshirt	6	3	£9.50	Y
Year 1 Show	100	10	£2.50	Y
Year 5 Class Tickets	55	0	£1.00	Y
y2 show	55	0	£3.00	Y

It shows:

- Item name
- Quantity (which automatically reduces as the parents purchase items)
- Stock alert level (when your quantity reaches this number the system will email you to let you know you need more stock)
- Price

7.4 Missing Details Report

The Missing Details Report will show you a list of children who are missing their mobile numbers, email addresses or both.

Student	Year Group	Form	Mobile	Email
Bliggs Joe (Staff)	Staff	Staff	+44	
Dickson Luke (Hogwarts)	Year 6	Hogwarts	+44	
Harry Prince (Tortuga)	Year 6	Tortuga	+44	
Jones Sarah (Staff)	Staff	Staff	+44	
Moore James (Staff)	Staff	Staff	+44	
Patel Raj (OZ)	Year 3	OZ		3@schoolmoney.co.uk
Rees Sarah (Hogwarts)	Year 3	Hogwarts		8@schoolmoney.co.uk
Simpson Bart (Hornia)	Year 3	Hornia	+44	
Strong Jack (Horned Acre Wood)	Year 2	Horned Acre Wood	+44	
Strong Noah (Pride Rock)	Year 2	Pride Rock	+44	
Taylor Jessica (Hornia)	Year 2	Hornia		jessica@schoolmoney.co.uk
Walker Jess (Hogwarts)	Year 3	Hogwarts	+44	

7.5 Credit Report

The credit report will show you a breakdown of any credit that a child may have on the system, be that for dinners, clubs or any other payment type.

The report will show:

- Child's name
- Year/form group
- What specific payment types they have credit for

In the bottom left-hand corner, you can tick the box 'Include off roll students.' This will then show you a list of all students, including past pupils, who have credit on the system. This is quite useful for leavers you may need to refund money to.

schoolmoney Support Academy News: Payment Provider Change - Thu 04 Jul 2019 Help: 0207 237 8456

Payments Dinner Register Club Register Cashless Catering Till Cashier Shop **Reports** Admin

Credit Report

Student: All Year: All Form: All Type: All

From: 15 Aug 2018 To: 13 Aug 2019

Student Credit (1 - 24 / 24)

Student	Year Group	Form	Club / Extended Services	School Trip	Dinner Money	Swimming
Blaggs Joe (Staff)	Staff	Staff	£14.00	-	-	-
Chouhien Tegash (Tortuga)	Year 4	Tortuga	£3.00	-	-	-
Darkins Andrew (Hogwarts)	Year 2	Hogwarts	£3.00	£100.00	-	-
Holmes Leigh (Pride Rock)	Year 6	Pride Rock	-	-	£2.80	-
Hock Lybio (Nomia)	Year 4	Nomia	£15.00	-	-	-
Howard Russell (Visitor)	Visitor	Visitor	£10.00	-	-	-
Jones Sarah (Staff)	Staff	Staff	-	£5.00	-	-
Lodha Hari (Nomia)	Year 2	Nomia	£10.00	-	£9.80	-
McFly Marty (OZ)	Year 4	OZ	-	£50.00	-	-
Moore James (Staff)	Staff	Staff	£8.00	-	-	-
Morris Paul (Hogwarts)	Year 4	Hogwarts	-	-	£65.00	-
Nak Anna (Pride Rock)	Year 6	Pride Rock	-	-	£0.20	-
Patel Sachin (Hogwarts)	Year 2	Hogwarts	£6.00	-	£9.80	-
Potterton Steve (Hogwarts)	Year 4	Hogwarts	£10.00	-	-	-
Raven Gareth (Hogwarts)	Year 2	Hogwarts	£2.00	-	£9.60	-
Simpson Bart (Nomia)	Year 3	Nomia	-	-	-	£4.00
Strong Jake (Hundred Acre Wood)	Year 2	Hundred Acre Wood	£10.00	-	£60.00	-
Strong Lauren (Hogwarts)	Year 3	Hogwarts	-	-	£2.40	-
Strong Noah (Pride Rock)	Year 2	Pride Rock	£26.50	-	£2.20	-
Strong Zac (OZ)	Year 3	OZ	£10.00	-	-	-
Taylor Jessica (Nomia)	Year 2	Nomia	-	£20.00	-	-
Taylor Sue (Hogwarts)	Year 3	Hogwarts	-	-	£5.00	-
Vivli Nina (Tortuga)	Year 4	Tortuga	£2.00	-	£4.00	-
Walker Jess (Hogwarts)	Year 2	Hogwarts	£10.00	-	£9.80	-

Print Export Include off-roll students Back

7.6 Static Banking Summary

The Static Banking Summary shows online payments that you have received into your bank account broken down by week. Now instead of looking through each week in the Static Banking Reconciliation, you have all of this information in one report.

schoolmoney Support Academy News: Payment Provider Change - Thu 04 Jul 2019 Help: 0207 237 8456

Payments Dinner Register Club Register Cashless Catering Till Cashier Shop **Reports** Admin

Static Banking Summary Report

Bank Account: All Start Date: 07 Jul 2019 End Date: 13 Aug 2019

Reference: All Payment Type: All

Total Received **£0.00**

Static Banking Summary (0 - 0 / 0)

Received in Bank Amount Running Total

Export Print Breakdown by Account Breakdown By Reference Payments made between Sun 07 Jul 2019 and Tue 13 Aug 2019 Back

You can filter the report for specific bank accounts and date ranges, as well as using the tick boxes at the bottom of the page to show breakdowns; this will include your bank account and references in the information.

8. Receipts and History

8.1 Receipts

Any receipts that are sent out from the **SchoolMoney** System (whether they pay online or in school) will appear in the Receipts report so that you always have access to them, in case a parent should ever ask or you need proof of payment.

The report will show you important details such as:

- Receipt reference
- Date of payment
- Child's name
- Payment method

The screenshot shows the 'Receipts Report' interface in SchoolMoney. At the top, there are navigation tabs: Payments, Dinner Register, Club Register, Cashless Catering Till, Cashier, Shop, Reports (selected), and Admin. Below the tabs is a search area with 'From Ref.' and 'To Ref.' fields. The main area displays a table of payments with the following columns: Date, Receipt Number, Instalment, Student Name, Year Group, Form, Payment Type, Description, Payment Reference, and Payment Method. Each row starts with a checkbox for selection. At the bottom of the table, there are buttons for 'Filter', 'Export', 'Print', and a status message: 'Paid on = Last 7 Days, Generated on Tuesday the 13th of August 2019 at 10:53'. On the right side, there are buttons for 'Print Receipt', 'Send', and 'Back'.

Date	Receipt Number	Instalment	Student Name	Year Group	Form	Payment Type	Description	Payment Reference	Payment Method
Mon 12 Aug 2019	11378020		Strang Lauren (Hogwarts)	Year 3	Hogwarts	Shop Item	Book Bag		Cash
Mon 12 Aug 2019	11377839	1 of 1	Mitchell Richard (Pride Rock)	Year 6	Pride Rock	School Trip	Trip to the Lake		Cheque
Mon 12 Aug 2019		1 of 5	Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Residential	residential trip	Year 2 residential trip	Cheque
Mon 12 Aug 2019		2 of 5	Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Residential	residential trip	Year 2 residential trip	Cheque
Mon 12 Aug 2019		3 of 5	Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Residential	residential trip	Year 2 residential trip	Cheque
Mon 12 Aug 2019		4 of 5	Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Residential	residential trip	Year 2 residential trip	Cheque
Mon 12 Aug 2019		1 of 1	Mitchell Richard (Pride Rock)	Year 6	Pride Rock	School Trip	Alton towers trip with coach payment	Alton towers trip with coach payment	Cheque
Mon 12 Aug 2019		1 of 1	Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Club / Extended Services	Lunch Time Club	W/C 06 May 2019	Cheque
Mon 12 Aug 2019		1 of 1	Mitchell Richard (Pride Rock)	Year 6	Pride Rock	Club / Extended Services	Lunch Time Club	W/C 05 Aug 2019	Cheque
Mon 12 Aug 2019	11377777	1 of 1	Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Trip	Trip to the Lake		Cash
Mon 12 Aug 2019	11377767	1 of 2	Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Fees	Theatre Trip	Summer 2019	Voucher
Mon 12 Aug 2019	11377764	2 of 3	Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Fees	Eden project trip	Summer 2019	Cash
Mon 12 Aug 2019	11377757		Strang Lauren (Hogwarts)	Year 3	Hogwarts	Shop Item	Book Bag		Cash
Mon 12 Aug 2019			Strang Lauren (Hogwarts)	Year 3	Hogwarts	Shop Item	Drinks Bottle		Cash
Mon 12 Aug 2019			Strang Lauren (Hogwarts)	Year 3	Hogwarts	Shop Item	Pencil Case		Cash
Mon 12 Aug 2019			Strang Lauren (Hogwarts)	Year 3	Hogwarts	Shop Item	Ruler		Cash
Mon 12 Aug 2019	10786704	1 of 1	Strang Lauren (Hogwarts)	Year 3	Hogwarts	Club / Extended Services	After-school Club	W/C 20 Nov 2017	Cheque
Mon 12 Aug 2019		2 of 2	Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Fees	Theatre Trip	Summer 2019	Cheque
Mon 12 Aug 2019	10786700	1 of 3	Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Fees	Eden project trip	Summer 2019	Cheque
Mon 12 Aug 2019		2 of 2	Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Fees	Theatre Trip	Summer 2019	Cheque
Mon 12 Aug 2019		1 of 2	Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Trip	Zoo Trip - 16th May	Year 3 - Summer 19	Cheque
Mon 17 Jun 2019	5454540	2 of 2	Strang Lauren (Hogwarts)	Year 3	Hogwarts	School Trip	Zoo Trip - 16th May	Year 3 - Summer 19	Cheque

There is a tick box at the start of the information. This allows you to select specific receipts and print them off using the button in the bottom right-hand corner.

You can email a copy of the receipt if the parent requests it. Once you have selected the receipt you want to send, click 'Send Receipt.' An email will be sent to the parent and a popup box will appear to confirm delivery.

8.2 Student Statements

The Student Statements report allows you to filter by student and see that specific student's history in the **SchoolMoney** system.

To view a statement:

- Click on the 'Student Statements' folder and you will be sent to a screen with a list of student's names
- Type the child's name you need in the 'Student Name' filter in the top left-hand corner of your screen. This will bring up the child
- Double click on the child and it will open up their record

Once you have selected the child's name, you will be able to see 'All Payments' relating to this child.

It will show:

- If the child has paid (the date they paid, what for and how much money it was)
- If there are any payments outstanding
- If there are any payments overdue
- If there are any partial payments

In the bottom left-hand corner, you can print off the statement, email it to the parent, or export the report to excel. In the top left-hand corner of the screen, there is a drop-down box which allows you to filter on specific sections of the statement.

Pending Payments: this will show you all of the payments on the system that are currently unpaid for the child. It does not take the due date into account. E.g. a payment that is two weeks overdue will show as unpaid, as will a payment that is not due for three weeks.

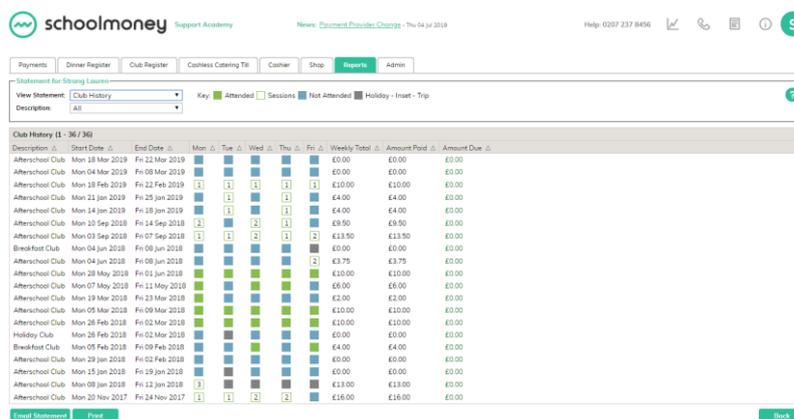
Overdue Payments: this does take into account the due date and will show you everything that the child owes that should have already been paid.

Payments Paid Late: this statement lists the payments that the parent has made for the child after the due date.

Payments Made: it gives you an overview of all the payments made for that child on the system. You will be able to see what the payment is for and the date it was paid to the school.

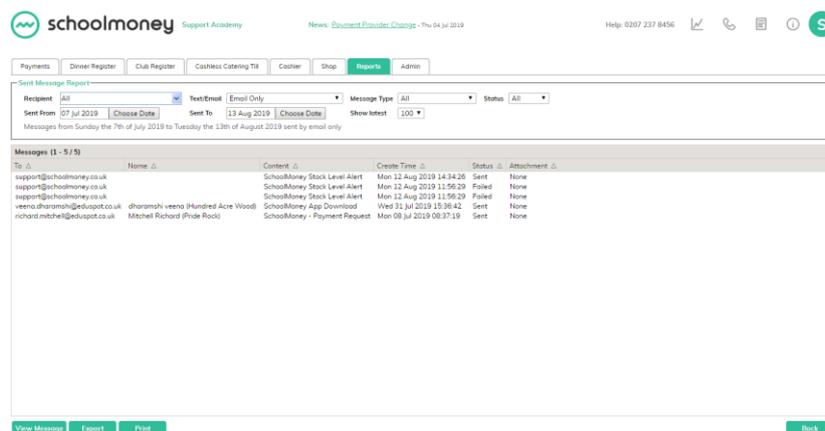
Dinner and Club History: These reports will show you the different dinners/sessions that the child has attended over the weeks that they have been in the school. It is useful if a parent ever wants to see an overview of what dinners/sessions their child has had.

Dinner Week	Start Date	End Date	Mon	Tue	Wed	Thu	Fri	Weekly Total	Amount Paid	Amount Due
School Lunches	Mon 27 May 2019	Fri 31 May 2019						£0.00	£0.00	£0.00
School Lunches	Mon 20 May 2019	Fri 24 May 2019						£2.20	£2.20	£0.00
School Lunches	Mon 13 May 2019	Fri 17 May 2019						£2.20	£2.20	£0.00
GF Lunches	Mon 13 May 2019	Fri 17 May 2019						£2.20	£2.20	£0.00
School Lunches	Mon 06 May 2019	Fri 10 May 2019						£0.00	£0.00	£0.00
School Lunches	Mon 22 Apr 2019	Fri 26 Apr 2019						£2.20	£2.20	£0.00
School Lunches	Mon 15 Apr 2019	Fri 19 Apr 2019						£0.00	£0.00	£0.00
School Lunches	Mon 08 Apr 2019	Fri 12 Apr 2019						£0.00	£0.00	£0.00
School Lunches	Mon 18 Mar 2019	Fri 22 Mar 2019						£0.00	£0.00	£0.00
School Lunches	Mon 11 Mar 2019	Fri 15 Mar 2019						£2.00	£2.00	£0.00
School Lunches	Mon 04 Mar 2019	Fri 08 Mar 2019						£0.00	£0.00	£0.00
School Lunches	Mon 04 Feb 2019	Fri 08 Feb 2019						£2.20	£2.20	£0.00
School Lunches	Mon 28 Jan 2019	Fri 01 Feb 2019						£2.20	£2.20	£0.00
School Lunches	Mon 26 Nov 2018	Fri 30 Nov 2018						£0.00	£0.00	£0.00
School Lunches	Mon 05 Nov 2018	Fri 09 Nov 2018						£0.00	£0.00	£0.00
School Lunches	Mon 22 Oct 2018	Fri 26 Oct 2018						£0.00	£0.00	£0.00
School Lunches	Mon 01 Oct 2018	Fri 05 Oct 2018						£0.00	£0.00	£0.00
School Lunches	Mon 24 Sep 2018	Fri 28 Sep 2018						£0.00	£0.00	£0.00
School Lunches	Mon 17 Sep 2018	Fri 21 Sep 2018						£0.00	£0.00	£0.00
School Lunches	Mon 02 Jul 2018	Fri 06 Jul 2018						£0.00	£0.00	£0.00



8.3 Sent Message Report

The Sent Message report shows you all of the messages that you have sent out to the parents via text and email, whether that be for a payment request, a password reminder or an arrears text.

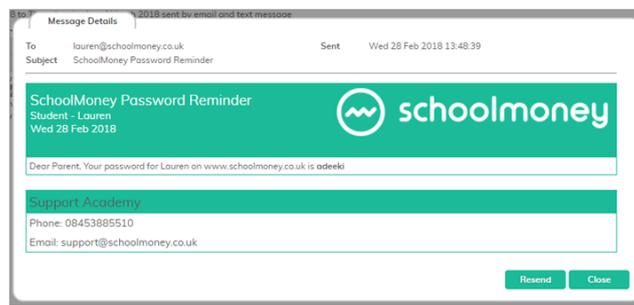


In the bottom left hand corner you will see the option to print and export the report, as well as view the message if you need to see it in more detail.

On the top half of the screen there are options to filter the report by:

- The date range
- The recipient
- Whether it is text/email

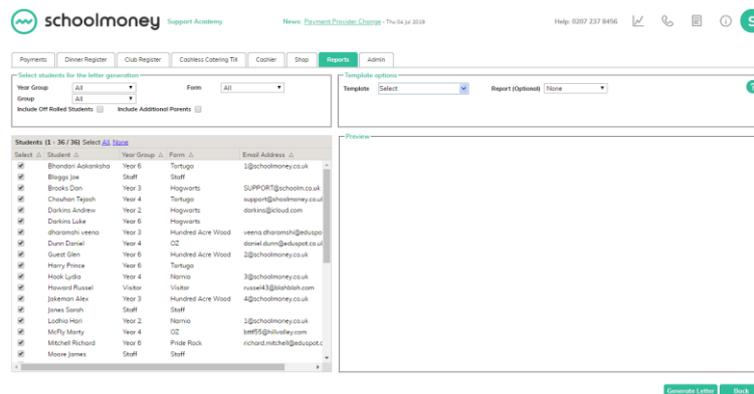
To view a message, double click on the appropriate message and it will pop up in another window. From here, you can resend the message if the parent needs another copy.



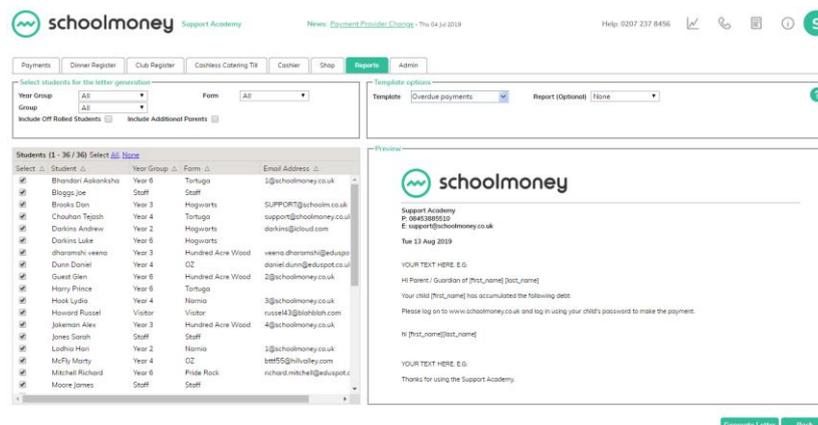
8.4 Letter Generator

The Letter Generator report enables you to print out any template letters that you have written for multiple students. To see how to create these letter templates please see the [Admin Guide](#).

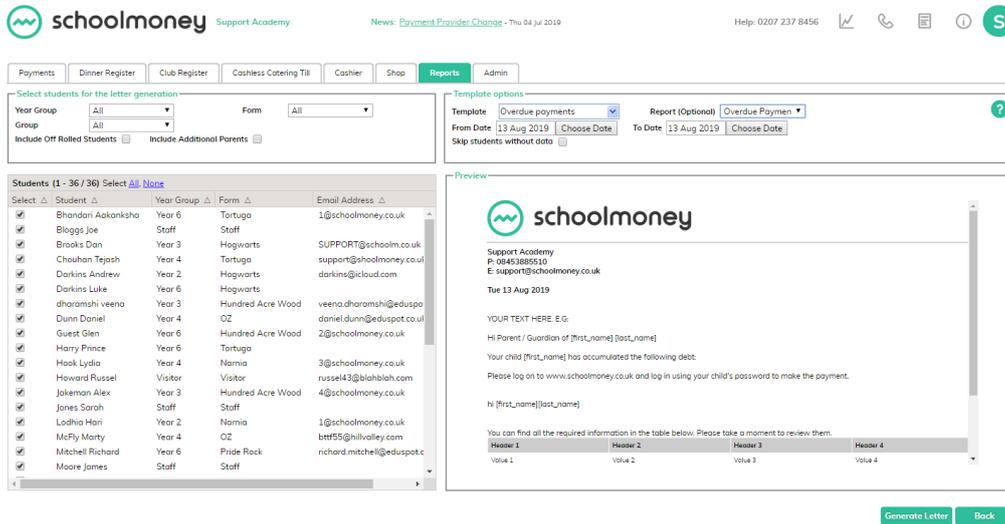
On the left-hand side you will see a list of your pupils. You can filter this list down to specific year groups and form groups as well as tick a box to include off roll pupils. Tick the children you want to send a letter out to using the boxes on the left, next to their names.



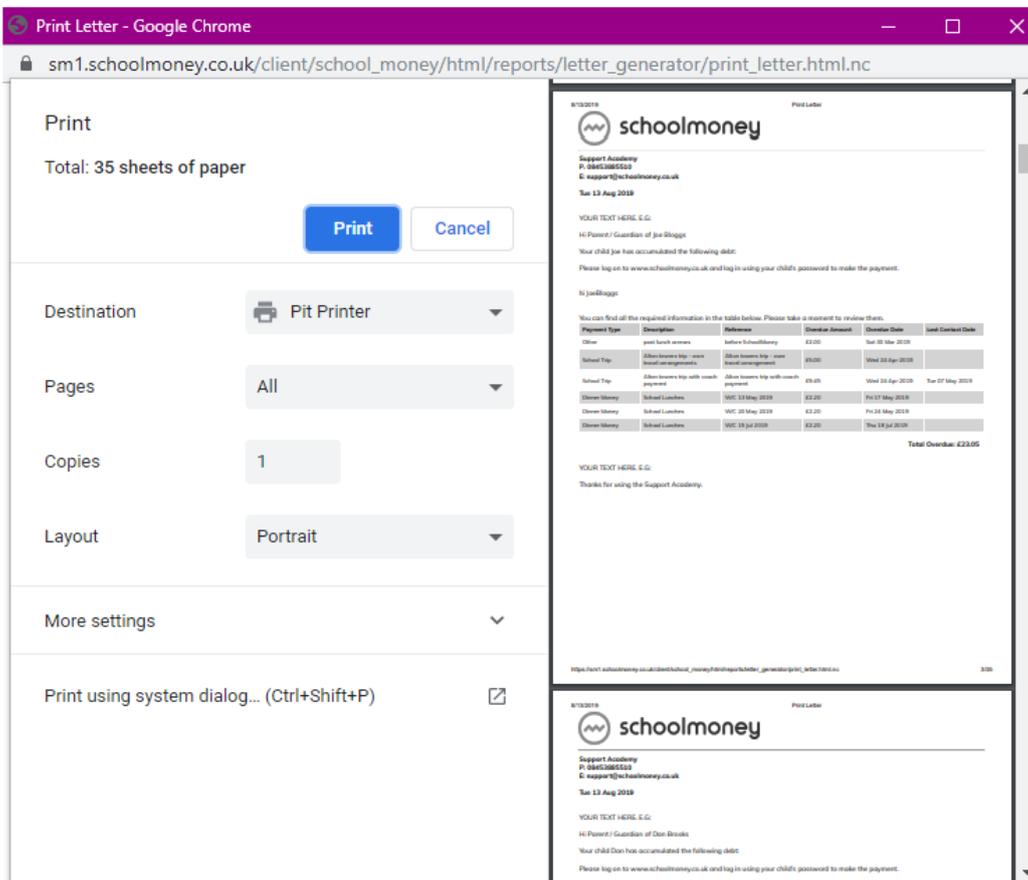
Once you have chosen the child you want to print the letter for, chose the template you want to use from the drop-down box in the top right-hand corner. The template will appear in the preview pane below.



You can also add extra information to the letter in the form of the Money Overdue report. If you select this from the drop-down box in the top right, you will then be prompted to choose a date range for the overdue amounts to cover. You can also 'skip students without data' which, when ticked, will only print pupils with overdue amounts.



Once you have selected all of the options you needed, click on 'Generate Letter' in the bottom right-hand corner. This will open your browser printing options and enable you to print the letters as needed.



9. App Users

The App Users report will show you a list of all pupils in your school and will detail whether they have signed up for the **SchoolMoney** App or not.

The screenshot displays the 'App Users' report in the SchoolMoney system. At the top, there's a navigation bar with 'Reports' highlighted. Below it, a search bar allows filtering by 'Student' (All Students), 'Year' (All), and 'Form' (All). The main table lists 41 students with columns: Select, Student Name, Form, Year Group, Contact Name, Phone Number, Email Address, and Registered with App?. The 'Registered with App?' column shows 'N' for all listed students. At the bottom right, there are two buttons: 'Send App Message' and 'Back'.

Select	Student Name	Form	Year Group	Contact Name	Phone Number	Email Address	Registered with App?
<input type="checkbox"/>	Bart Simpson	Narnia	Year 3	Primary Contact	+44		N
<input type="checkbox"/>	Jacob Strang	Hundred Acre Wood	Year 2	Primary contact	+44		N
<input type="checkbox"/>	James Moore	Staff	Staff	Primary Contact	+44		N
<input type="checkbox"/>	Jess Walker	Hogwarts	Year 2	Primary contact	+44		N
<input type="checkbox"/>	Joe Bloggs	Staff	Staff	Primary Contact	+44		N
<input type="checkbox"/>	Luke Darkins	Hogwarts	Year 6	Primary contact	+44		N
<input type="checkbox"/>	Noah Strang	Pride Rock	Year 2	Primary contact	+44		N
<input type="checkbox"/>	Prince Harry	Tortuga	Year 6	Primary contact	+44		N
<input type="checkbox"/>	Sarah Jones	Staff	Staff	Primary Contact	+44		N
<input type="checkbox"/>	Aakanksha Bhandari	Tortuga	Year 6	Primary Contact	+447000000001	1@schoolmoney.co.uk	N
<input type="checkbox"/>	Hari Lodhia	Narnia	Year 2	Primary Contact	+447000000001	1@schoolmoney.co.uk	N
<input type="checkbox"/>	Glen Guest	Hundred Acre Wood	Year 6	Primary Contact	+44	2@schoolmoney.co.uk	N
<input type="checkbox"/>	Lydia Hook	Narnia	Year 4	Primary Contact		3@schoolmoney.co.uk	N
<input type="checkbox"/>	Raj Patel	OZ	Year 3	Primary Contact		3@schoolmoney.co.uk	N
<input type="checkbox"/>	Alex Jakeman	Hundred Acre Wood	Year 3	Primary Contact	+44	4@schoolmoney.co.uk	N
<input type="checkbox"/>	Sachin Patel	Hogwarts	Year 2	Primary Contact		6@schoolmoney.co.uk	N
<input type="checkbox"/>	Gareth Raven	Hogwarts	Year 2	Primary Contact		8@schoolmoney.co.uk	N
<input type="checkbox"/>	Anna Naik	Pride Rock	Year 6	Aarti Naik	+44	aarti.naik-kotadia@eduspot.co.uk	N
<input type="checkbox"/>	Marty McFly	OZ	Year 4	Primary contact	+44	btff55@hillvalley.com	N
<input type="checkbox"/>	Daniel Dunn	OZ	Year 4	Primary contact	+44	daniel.dunn@eduspot.co.uk	Y
<input type="checkbox"/>	Andrew Darkins	Hogwarts	Year 2	Primary contact	+44	darkins@icloud.com	N
<input type="checkbox"/>	Marty McFly	OZ	Year 4	George McFly	+442222222222	gmcfly@googlemail333.com	N

In the bottom right-hand corner, you will see a 'Send App Message' button. You can tick the pupils who have not signed up to the App using the tick boxes on the left-hand side and then select the 'Send App Messages' button to contact them and advise them to sign up for the app.

10. Contact Details

We hope this user guide has helped you to use the **SchoolMoney** system. If you have any questions or require further assistance, please get in contact 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!

