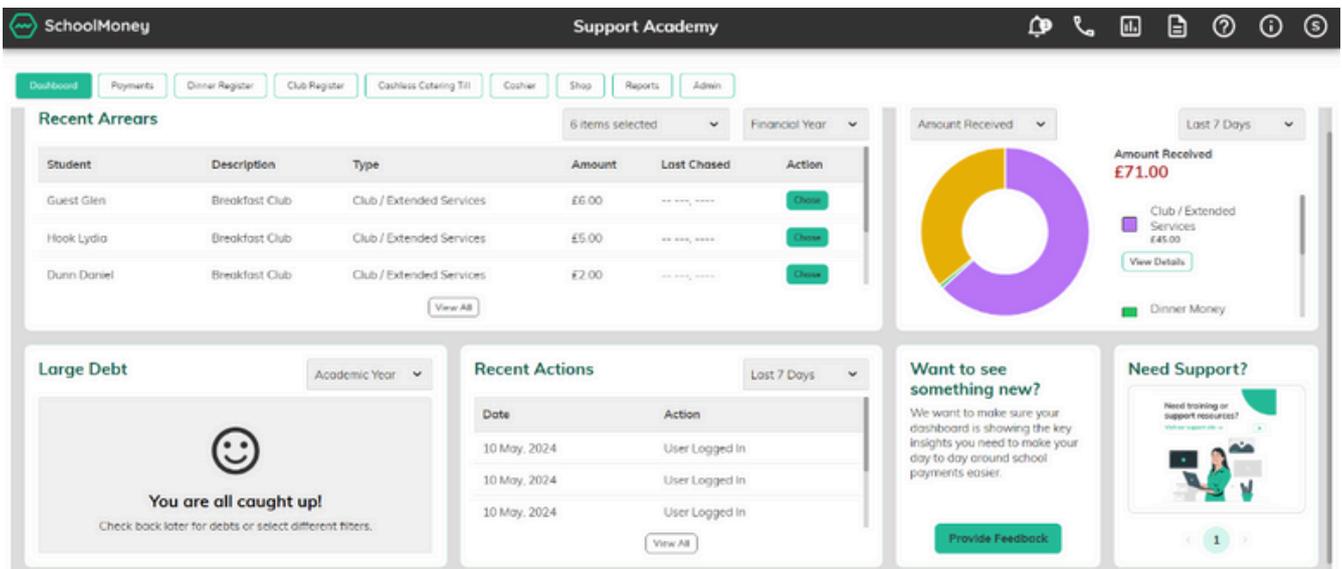


SchoolMoney Dashboard

The **SchoolMoney Dashboard** has been specially developed to give you a quick overview of your school's income, arrears, and other crucial information at a glance. This means that you no longer need to go looking for reports to get access to the information you access most frequently. You also have the facility to chase arrears directly from the dashboard, saving you time when contacting parents!

The Dashboard will be the first screen you are presented with when you first log into SchoolMoney, and you will always be able to access it quickly by clicking on the 'Dashboard' tab at the top of your screen. Once you have accessed the Dashboard, you will notice that it is broken down into various widgets as shown below:



Recent Arrears

Student	Description	Type	Amount	Last Chased	Action
Guest Glen	Breakfast Club	Club / Extended Services	£6.00	--- ---	Chase
Hook Lydia	Breakfast Club	Club / Extended Services	£5.00	--- ---	Chase
Dunn Daniel	Breakfast Club	Club / Extended Services	£2.00	--- ---	Chase

Amount Received

Amount Received: **£71.00**

- Club / Extended Services: £45.00
- Dinner Money

Large Debt

You are all caught up!

Check back later for debts or select different filters.

Recent Actions

Date	Action
10 May, 2024	User Logged In
10 May, 2024	User Logged In
10 May, 2024	User Logged In

Want to see something new?

We want to make sure your dashboard is showing the key insights you need to make your day to day around school payments easier.

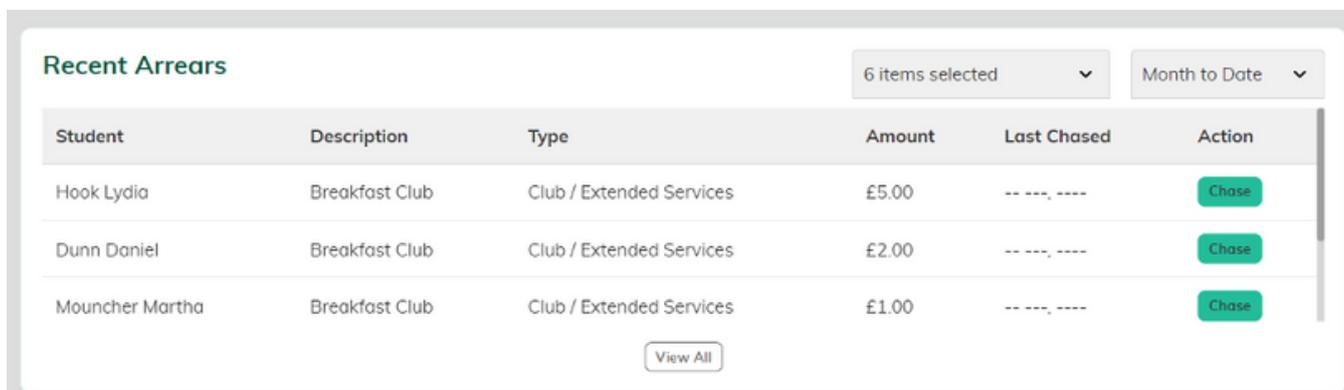
[Provide Feedback](#)

Need Support?

Need training or support resources?

Recent Arrears Widget

The Recent Arrears widget allows you to see the overdue payments from a defined time period.



The screenshot shows the 'Recent Arrears' widget. At the top left is the title 'Recent Arrears'. To the right are two dropdown menus: '6 items selected' and 'Month to Date'. Below these is a table with the following data:

Student	Description	Type	Amount	Last Chased	Action
Hook Lydia	Breakfast Club	Club / Extended Services	£5.00	---, ---	Chase
Dunn Daniel	Breakfast Club	Club / Extended Services	£2.00	---, ---	Chase
Moucher Martha	Breakfast Club	Club / Extended Services	£1.00	---, ---	Chase

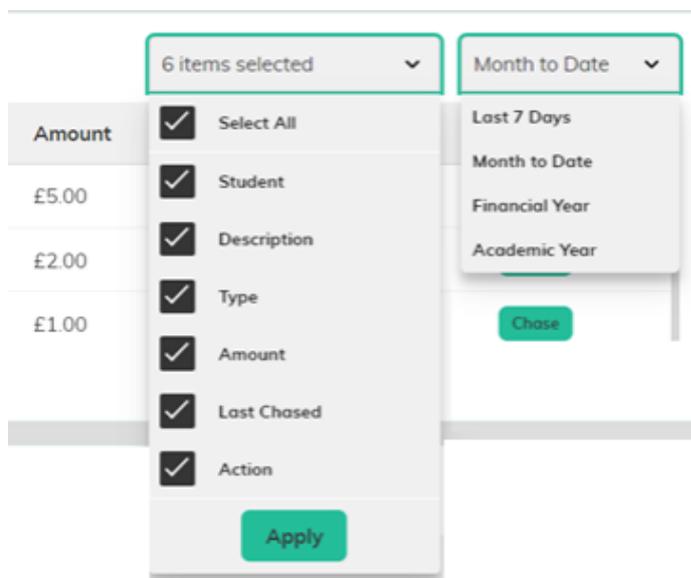
Below the table is a 'View All' button.

When looking at this widget, you can use a drop-down menu to select the desired time period to see debts ranging from the last week, month, financial year (April to April) or academic year (September to September).

You can also use a drop-down menu to select the level of detail you see in the list view. By default, you will see the following:

- Student Name
- Payment Description
- Payment Type
- Amount Due
- Date Last Chased (if previously chased)
- Action button (to allow you to chase the arrears)

If there is some information you do not wish to see in the list view, you can untick those options:



To expand the list view and see more arrears, click on the 'View All' button. You will then see all arrears from your selected time range.

The image shows a table titled 'Recent Arrears'. The table has columns for Student, Description, Type, Amount, and Last Chased. There are 10 rows of data. A '5 items selected' dropdown and an 'Academic Year' dropdown are visible at the top right. A 'Back' button and a 'Chase' button are visible at the bottom right.

<input checked="" type="checkbox"/>	Student	Description	Type	Amount	Last Chased
<input checked="" type="checkbox"/>	Darkins Luke	Breakfast Club	Club / Extended Services	£5.00	-- -- -- -- --
<input checked="" type="checkbox"/>	Barr Chrissy	Breakfast Club	Club / Extended Services	£5.00	-- -- -- -- --
<input checked="" type="checkbox"/>	Guest Glen	Breakfast Club	Club / Extended Services	£6.00	-- -- -- -- --
<input checked="" type="checkbox"/>	Hook Lydia	Breakfast Club	Club / Extended Services	£3.00	-- -- -- -- --
<input checked="" type="checkbox"/>	Dunn Daniel	Breakfast Club	Club / Extended Services	£2.00	-- -- -- -- --
<input checked="" type="checkbox"/>	Morris Paul	School Dinners	Dinner Money	£11.50	-- -- -- -- --
<input checked="" type="checkbox"/>	Darkins Luke	Breakfast Club	Club / Extended Services	£5.00	-- -- -- -- --
<input checked="" type="checkbox"/>	Barr Chrissy	Breakfast Club	Club / Extended Services	£5.00	-- -- -- -- --
<input checked="" type="checkbox"/>	Mitchell Richard	trip payment message test	School Trip	£10.22	18 Apr, 2024
<input checked="" type="checkbox"/>	Mitchell Paul	trip payment message test	School Trip	£10.22	22 Apr, 2024

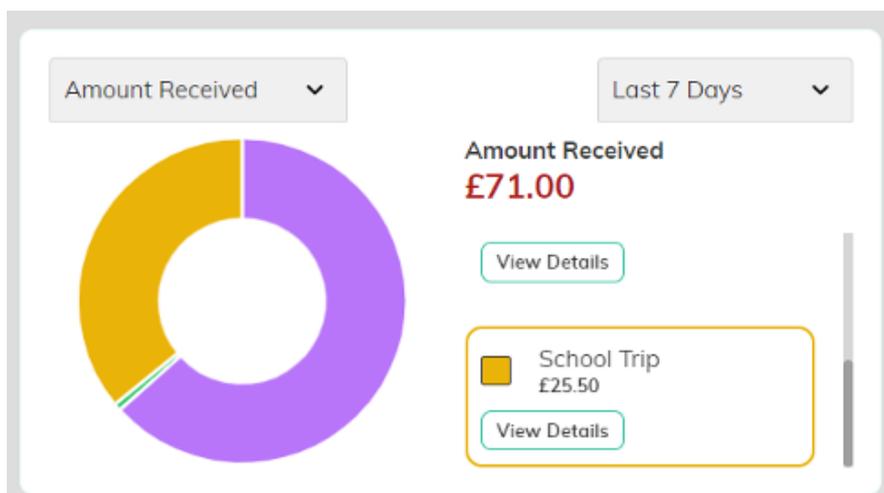
Here you can tick individual arrears, or select them all by ticking the top box. To chase the arrears, click on the green 'Chase' button and tick all / selected students, then press 'Chase' again. When you are finished, click on the 'Back' button.

Once you have sent the chase messages, those arrears will automatically drop off the Recent Arrears list until the following day so you can chase them again if the parents still have not paid.

Chart Widget

The Chart widget provides you with a quick visual overview of your school's finances, and how those are made up. You can use the drop-down menu to view the chart based on:

- Amount Received
- Amount Overdue
- Amount Refunded
- Amount Forecast (This includes pending payments which have not yet reached their due dates).

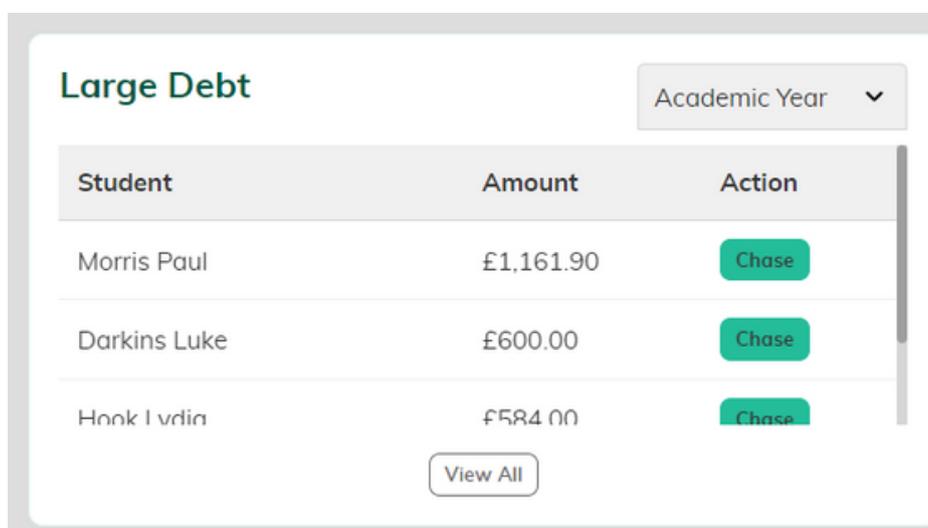


You can use the time period drop-down menu to view the chart based on payments for the week, month, academic year or financial year.

Hovering over a segment will scroll the key to highlight the corresponding payment category. If you wish to drill down on this, you can then click on the 'View Details' button which will take you to a report with a breakdown of that data.

Large Debt Widget

The Large Debt widget provides you with quick access to a list of any pupils who have overdue arrears exceeding £100.00. You can use the drop-down menu to pick up arrears from the last week, month, academic year, or financial year.



Student	Amount	Action
Morris Paul	£1,161.90	Chase
Darkins Luke	£600.00	Chase
Hook Ivdia	£584.00	Chase

[View All](#)

Press the 'View All' button to expand the list and view all those arrears from the time period you have selected.

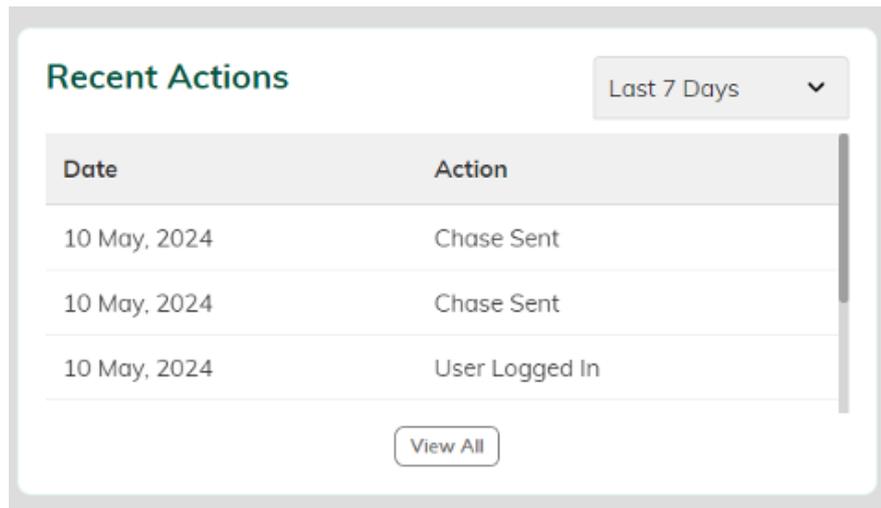
Large Debts			
		3 items selected	Academic Year
<input type="checkbox"/>	Student	Amount	Last Chased
<input checked="" type="checkbox"/>	Morris Paul	£1,161.90	-- -- -- --
<input type="checkbox"/>	Hook Lydia	£584.00	-- -- -- --

Here you can tick individual arrears, or select them all by ticking the top box. To chase the arrears, click on the green 'Chase' button and tick all / selected students, then press 'Chase' again. When you are finished, click on the 'Back' button.

Once you have sent the chase messages, those arrears will automatically drop off the Large Arrears list until the following day so you can chase them again if the parents still have not paid.

Recent Actions Widget

The Recent Actions widget provides you with an audit trail of certain actions taken in SchoolMoney. As with the other widgets, you can use the drop-down menu to pick up activity from the last week, month, financial or academic year.



The screenshot shows a widget titled "Recent Actions" with a dropdown menu set to "Last 7 Days". Below the title is a table with two columns: "Date" and "Action". The table contains three rows of data. At the bottom of the table is a "View All" button.

Date	Action
10 May, 2024	Chase Sent
10 May, 2024	Chase Sent
10 May, 2024	User Logged In

View All

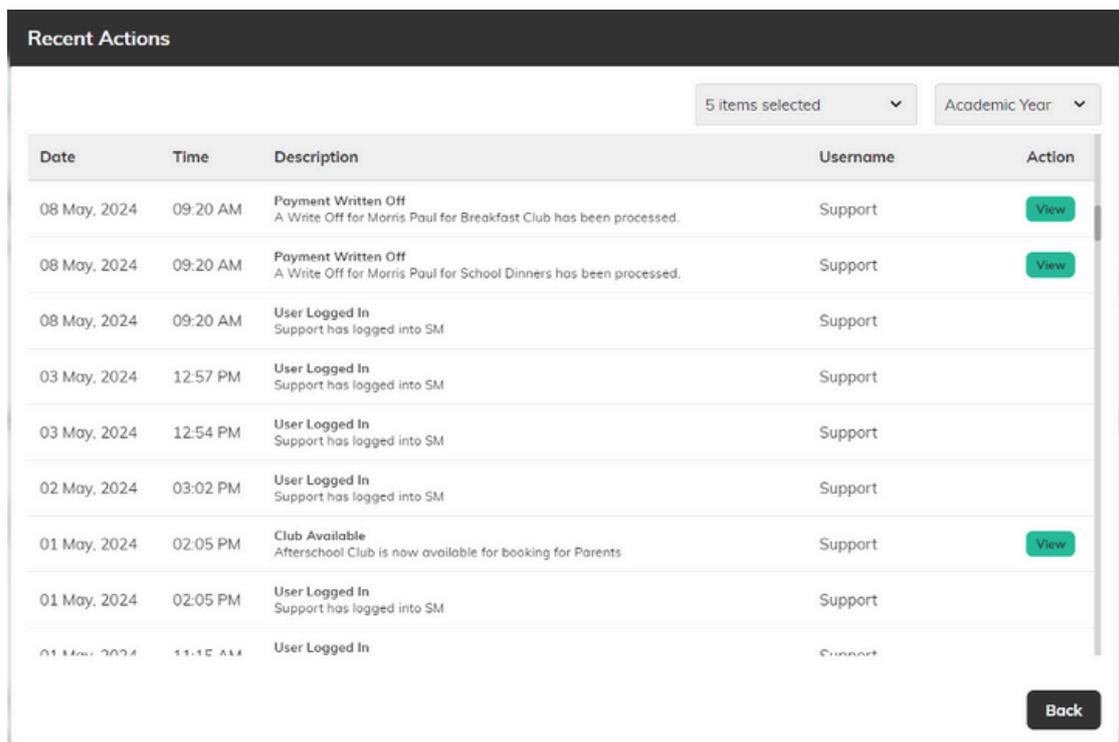
This will log information about actions that have been taken in your system including:

- School users logging into the system
- Club and Dinner payments being made available
- Payments being switched online or offline
- Payment reminders and chaser messages being sent to parents
- Payments being written off
- Refunds being processed.

You will be able to see the time, date and username for each action that was logged.

Click on the 'View All' button to expand the list. Certain actions have a 'View' button which you can click to be taken to the relevant area of the system.

When you are finished, press the 'Back' button.



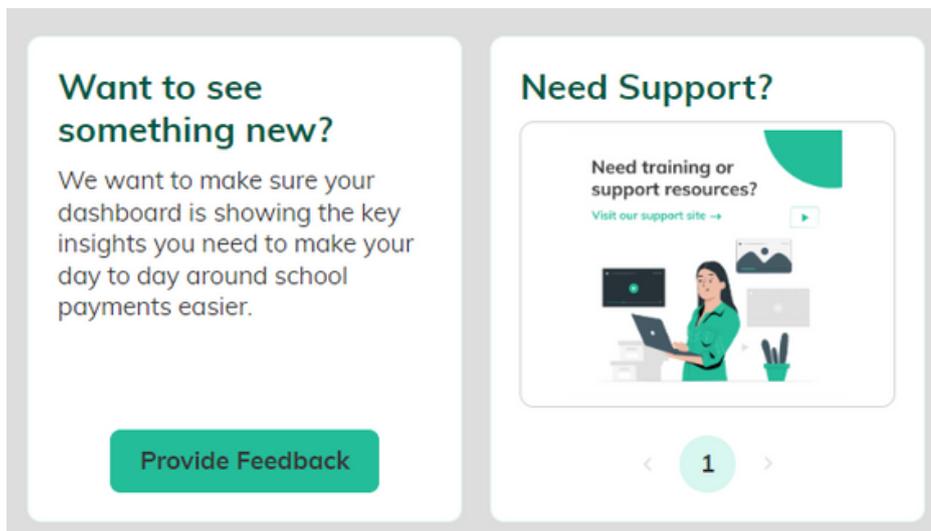
Recent Actions

5 items selected | Academic Year

Date	Time	Description	Username	Action
08 May, 2024	09:20 AM	Payment Written Off A Write Off for Morris Paul for Breakfast Club has been processed.	Support	View
08 May, 2024	09:20 AM	Payment Written Off A Write Off for Morris Paul for School Dinners has been processed.	Support	View
08 May, 2024	09:20 AM	User Logged In Support has logged into SM	Support	
03 May, 2024	12:57 PM	User Logged In Support has logged into SM	Support	
03 May, 2024	12:54 PM	User Logged In Support has logged into SM	Support	
02 May, 2024	03:02 PM	User Logged In Support has logged into SM	Support	
01 May, 2024	02:05 PM	Club Available Afterschool Club is now available for booking for Parents	Support	View
01 May, 2024	02:05 PM	User Logged In Support has logged into SM	Support	
01 May, 2024	11:15 AM	User Logged In	Support	

[Back](#)

Feedback and Support Widgets



If you have any feedback about our Dashboard, for example: other information you would like to be included, what you like or dislike about it, or how we could improve this for you, we would be very grateful if you could click on the 'Provide Feedback' button and complete the supplied form.

To access our customer support pages, click on the 'Need Support?' area, where you will find a wealth of articles and tutorial videos to help you navigate the entire SchoolMoney system.