schoolmoney

September Cheat Sheet

Introduction

As September is a notoriously busy time for both our office and your school, we understand it can take longer than usual to get through to our support team by phone. With this in mind, we have created this cheat sheet that will answer most of the questions you might have during this period. We advise that you read both this and our **End of Year Guide** to ensure you are fully prepared for the start of term.

Contents

schoolmoney

1. How do I send out the parents' passwords?

To send out password reminders to new or old parents:

1. Click on Admin
2. Select the Students icon
3. Select the tick boxes to the left of the children you want to send the messages to
4. In the Action/Select drop-down box, choose Send Password Message
5. A box will pop up with the option of a welcome message and a password reminder
6. Select the Send Reminders button when ready.

2. If a parent is unable to login

To login, the parents need to go to www.eduspot.co.uk, click on the Sign In button in the top right and choose the option of **SchoolMoney Parent Login**. Parents will be asked to enter their mobile number, email address, password and child's first name. If the parent is struggling, please see our comprehensive Parent Login Tips sheet – you can locate this in your User Manuals section in **SchoolMoney**.

3. Creating a new Dinner/Club Register Week

If you would like to introduce a **new** Dinner/Club, you will need to contact the Support Team. Once this has been set up, you can save weekly payments.

If you want to continue a Dinner/Club payment you have been previously using:

1. Click on the Register tab
2. Click on the date button, and select the week you want to create a payment for
3. Click the Save button in the bottom right-hand corner
4. Once saved, press F5 to return back to the Payments tab; a new payment will have been created for that week.

4. My Cashless Catering is showing all my menu items, not just the week I need.

When you have created your dinner weeks you will need to make sure that you allocate the correct menu numbers to each week:

1. Go to the Payments tab
2. Double click into the first dinner week you want to amend
3. In the top section there will be a Catering Menu drop-down box
4. Choose the correct menu relating to that week
5. Save in the bottom right-hand corner.

5. Why are my new pupils not appearing on the register?

Once you have added a new pupil onto **SchoolMoney**, you need to be aware that **they are not automatically added into any payments**.

You will need to add them manually:

1. Click on the Payments tab
2. Double click into the payment you want to add them to
3. At the bottom select Manage Students
4. In the box that pops up, select the pupils on the left you want to add by clicking on the Add link next to their name
5. Save in the bottom left.

6. How do I pull my information over from my Management Information System (MIS)?

Depending on how you have your SchoolMoney system setup, there are a few ways that you can pull across information from your MIS.

SIMS - If you use SIMS as your MIS, you will have either the v44 link or the v12 link (depending on if you are locally or centrally hosted). You will need to run this link to pull across your pupils' details.

V44 - On your desktop, there should be an icon that will look like a red box or a cog wheel. Double click on this and the link will run.

V12 - On your desktop, there should be an icon that will look like a red box or a cog wheel. Double click onto this and a box will open in the bottom right of your window. Then: Open SIMS > click on reports at the top > select 'run a report' > open the focus folder > select the student folder > double click on **A_T2P_Central_V11** > a box will pop up to say 'report has been created'

SchoolPod - If you use SchoolPod as your MIS, your link will run each morning to update SchoolMoney. If you want to run it during the school day you will need to contact your SchoolPod representative.

Other MIS (WONDE) - If you run the Wonde link between your MIS and SchoolMoney, you will need to: Log into the Teachers2Parents texting service > click on admin > select the Wonde tab > click on Import Student Details.

Other MIS (NOT WONDE) - If you do not use the Wonde link, you will need to send us a CSV file with the following information: Year Group, Admission Number, Forename, Surname, Mobile Number, Priority (must always be 1), Email Address, Form Group, Gender.

Xporter (XOD) - If you use the Xporter tool to update your pupil data, you will need to: Log into SchoolMoney > admin > Xporter. If the daily import is switched on this will import automatically daily, if the daily import has been disabled, please enable this and the import will update automatically.

7. My leavers are still showing on the system. How do I remove them?

If you have old pupils who have left still showing on **SchoolMoney**, it is likely because they have arrears on the system. Pupils will not be off-rolled if they have outstanding debt. Before you remove them, you will need to clear this debt.

Once you have cleared the debt:

1. Go to Admin
2. Select the Students icon
3. Find the child and double click into their record
4. Tick the Off Roll check box at the top of the profile
5. Save in the bottom right.

8. My children are showing their old form groups in the payments I created last term. How do I change this?

For dinner/club weeks:

1. Go to Admin
2. Select the Register Manager icon
3. In the top left, choose the group you want to amend
4. Select Update Student Details
5. In the box that comes up, check everything is correct and press Save.

For payments such as trips/music/other:

Once you have created a payment and pupils have started to pay, you cannot amend their year/form groups.

9. How do I update FSM/UIFSM pupils' entitlement dates?

To amend entitlement for government FSM:

1. Go to Admin
2. Select the Students icon
3. Find the child and double-click into their record
4. At the bottom of the screen, tick the FSM box if unchecked
5. Add in the relevant start and end date
6. Save in the bottom right.

To amend UIFSM:

UIFSM are automatically added to your YR, Y1 and Y2. If you have had a change in your year group names, this may have dropped out and we will need to amend this in the office.

10. The payments that I created last year have all disappeared even though there was still money outstanding.

The payments page is automatically filtered by current academic year.

This does not affect the rest of the system or what the parents see.

To see your old payments:

1. Go to the payments page
2. Select the Academic Year filter at the top of the screen
3. Change to last academic year or All.

11. How do I move a credit/debt to a sibling?

You cannot move debt to a sibling. The debt will stay on the original child's account until it is cleared.

To transfer a credit:

1. Go to the Cashier tab
2. Select the child
3. Click on the Parent in Credit by Link in the top right
4. Select the credit you want to transfer so the line is highlighted in grey
5. Select Transfer Credit to Sibling
6. Select the correct sibling and amend cost as needed
7. Press OK.

12. How do I switch a Payment online?

The parents will not be able to see any payments such as trips or music until you turn them online.

1. Go to the Payments tab
2. Select the payment you want to turn live once so it highlights in grey
3. In the bottom left, select the Action/Select drop-down box and choose 'set online/offline'
4. Press OK on the box that pops up to confirm the action.

13. How do I issue a refund?

To refund from a payment:

1. Go to the Cashier tab
2. Find the child
3. Select the payment you want to refund on the left
4. On the right-hand side of the screen, in the drop-down box, select the Refund option
5. Enter any relevant details
6. Click on Refund

To refund from credit:

1. Go to the Cashier tab
2. Find the child
3. Click on the Parent in Credit by Link in the top right
4. Select the credit you want to refund so the line is highlighted in grey
5. Select Refund
6. Enter any relevant details
7. Click on Refund.

14. The refund I am trying to process says there are insufficient funds in the holding account.

Insufficient funds means that there have not been enough online transactions made this week for you to refund the money back (our weeks work from Monday to Sunday).

This means that we do not have the funds to give back to the parent. You will need to wait until later in the week and see if any parents make a payment or process the refund by cash/cheque.

15. Why aren't the arrears adding up on my system?

When chasing arrears, you may find that some children are not showing as owing money in certain reports, even though the payments are still unpaid. This will be because the payment has not yet reached the due date.

When creating a payment, the default due date is always set to a Friday. This means that the amounts will not be overdue until the next day; after the due date has passed.

To change the default due date:

1. Click on the Admin Tab
2. Select the School Options icon
3. On the right, click on the Default Due Date drop-down box
4. Select Save in the bottom right.

If you have any questions about the system or need further help, please contact support@schoolmoney.co.uk