



schoolmoney

Shop User Guide



communitybrands



Introduction

The shop can be a very useful part of the **SchoolMoney** system. You can sell items such as school uniforms, book bags, or even concert tickets to the parents online, allowing them to pay using their debit/credit cards.

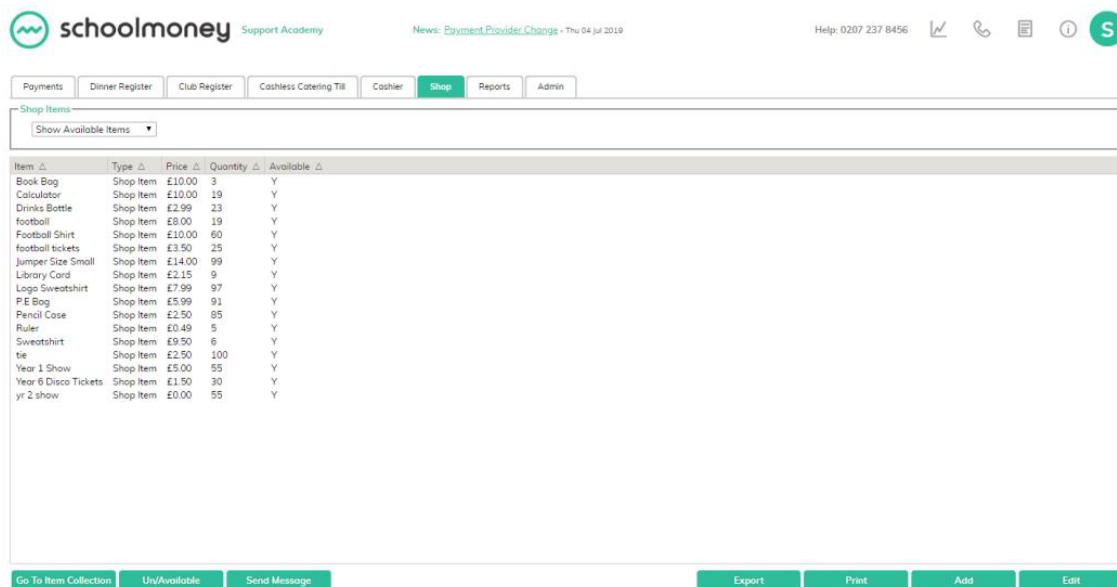
This user guide will take you step-by-step through how to set up shop items, how parents purchase them, as well as how the school can keep track of the items purchased.

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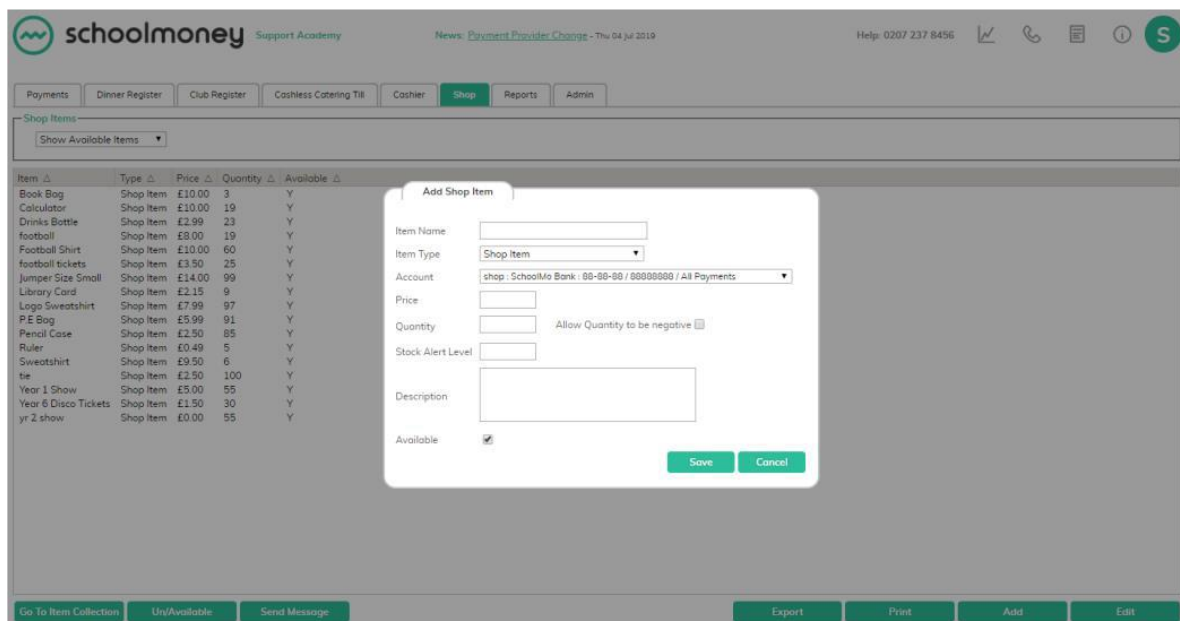
1. Setting up Shop Items

Log into your **SchoolMoney** account and click on the Shop tab.



1.1 Adding an Item

Click on the 'Add' button in the bottom right-hand corner of the screen. A box will pop up with the various fields that need to be filled out to add the item.



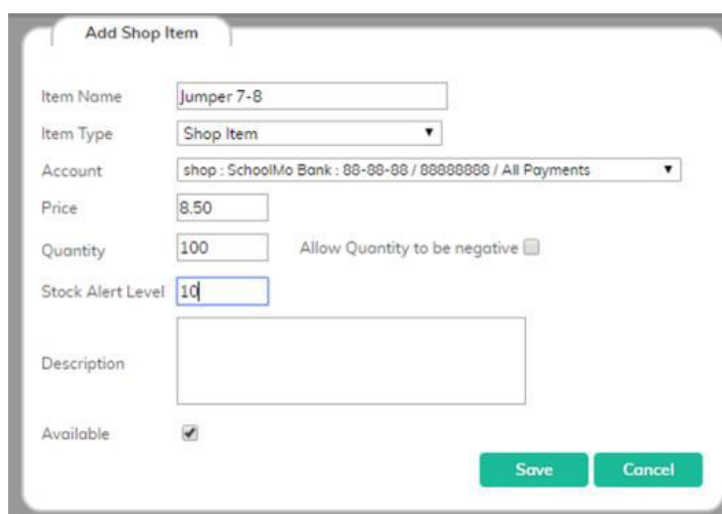
Enter the details of the item in the fields available -

Item Name: this is the item that you are selling, such as a jumper or a book bag.

Account: if you have more than one bank account available (your uniform goes into one account, but concert tickets go into another), you can set it in this field.

Price: how much the item is going to cost.

Quantity: the number of this item that you currently have in stock. This automatically reduces as parents go online and pay for items.



Select 'Save' and the item will be added to the list; it will then be available for parents to pay for online. You can add as many items as you wish.

1.2 Making an Item Unavailable

- Select the item so that it highlights in grey
- Click on the 'Available/Unavailable' button in the bottom right-hand corner
- Press OK on the confirmation box that has appeared
- Your item has now been removed from the main page.

You can always get your removed item back by selecting the 'Show Available Items' drop-down box in the top left-hand corner of your screen. Choose 'Show Unavailable Items.' This will bring up a list of all deleted items that are highlighted in orange.

Select the item you want to bring back and click on 'Available/Unavailable' and it will bring your item back for the parents to see and pay for.

The screenshot displays the SchoolMoney Shop Items page. The header includes the SchoolMoney logo, 'Support Academy', a news notification 'News: Payment Provider Change - Thu 04 Jul 2019', and a help number '0207 237 8456'. The navigation menu has 'Shop' selected. Below the menu is a search bar with the text 'Show Unavailable Items'. The main content area is a table with the following data:

Item	Type	Price	Quantity	Available
Fountain Pen	Shop Item	£0.94	0	N
Hula Hoop	Shop Item	£3.00	5	N
Jumper 7-8	Shop Item	£8.50	100	N
Sports Top	Shop Item	£1.90	1	N

At the bottom of the page, there are buttons for 'Go To Item Collection', 'Un/Available', 'Send Message', 'Export', 'Print', 'Add', and 'Edit'.

1.3 Editing an Item

- Click on the item you wish to amend so that it highlights in grey
- Click on the 'Edit' button in the bottom right-hand corner of the screen
- Amend any information, such as price or quantity
- Press 'Save'
- The item has now been amended on the system and this will be reflected on the parents' side.

2. Contact Parents

Once you have created your shop items, you may want to contact your parents to let them know that it is available.

- Click on the shop item you want to contact your parents about so that it highlights in grey
- Click on Send Message in the bottom left-hand corner
- A message box will pop up, amend the details as needed (such as how to send the message, what the message says and who to send the message to)
- Select Send Messages

The screenshot shows the SchoolMoney interface with a modal dialog titled "Inform Shop Item Availability". The dialog has a "Request By" dropdown set to "Text Message" and an "Include Additional Parents" checkbox. Below this, there are two message templates: "Text Message (70/160)" and "Email", both containing the text "Hello, a new shop item Book Bag(£10.00) is now available for purchase." To the right, a table lists students with checkboxes for selection. The table has columns for Student, Phone Number, Parent, and App Not. A key at the bottom indicates that yellow highlights mean "Warning - Missing Phone Number or Email Address" and red highlights mean "Error - No Contact Information".

Student	Phone Number	Parent	App Not
Hook Lydia (Narnia)		Primary Contact	N
Patel Raj (OZ)		Primary Contact	N
Patel Sachin (Hogwarts)		Primary Contact	N
Raven Gareth (Hogwarts)		Primary Contact	N
Taylor Jessica (Narnia)		Primary Contact	N
Bloggs Joe (Staff)	+44	Primary Contact	N
Chouhan Tejash (Tortuga)	+44	Primary Contact	N
Darkins Luke (Hogwarts)	+44	Primary Contact	N
Guest Glen (Hundred Acre Wood)	+44	Primary Contact	N
Harry Prince (Tortuga)	+44	Primary Contact	N
Howard Russel (Visitor)	+44	Primary Contact	N
Jakeman Alex (Hundred Acre Wood)	+44	Primary Contact	N
Jones Sarah (Staff)	+44	Primary Contact	N
McFly Marty (OZ)	+44	Primary Contact	N
Moore James (Staff)	+44	Primary Contact	N
Naik Anna (Fride Rock)	+44	Aarti Naik	N
Sharma Bob (Narnia)	+44	Primary Contact	N

3. Item Collection

When a parent pays for an item online, this item will automatically appear in 'Item Collection.' This screen displays all the items that have been paid for but are still uncollected.

- Click on the Shop tab
- In the bottom right-hand corner of the screen select 'Go to Item Collection'

The screenshot shows the SchoolMoney interface. At the top, there's a navigation bar with the SchoolMoney logo, 'Support Academy', a news notification 'News: Payment Provider Change - Thu 04 Jul 2019', and a help number 'Help: 0207 237 8456'. Below this is a secondary navigation menu with tabs for 'Payments', 'Dinner Register', 'Club Register', 'Cashless Catering Till', 'Cashier', 'Shop' (highlighted), 'Reports', and 'Admin'. The main content area is titled 'Shop Items' and has a dropdown menu for 'Show Available Items'. Below this is a table with the following data:

Item	Type	Price	Quantity	Available
Book Bag	Shop Item	£10.00	3	Y
Calculator	Shop Item	£10.00	19	Y
Drinks Bottle	Shop Item	£2.99	23	Y
football	Shop Item	£8.00	19	Y
Football Shirt	Shop Item	£10.00	60	Y
football tickets	Shop Item	£3.50	25	Y
Jumper Size Small	Shop Item	£14.00	99	Y
Library Card	Shop Item	£2.15	9	Y
Logo Sweatshirt	Shop Item	£7.99	97	Y
P.E Bag	Shop Item	£5.99	91	Y
Pencil Case	Shop Item	£2.50	85	Y
Ruler	Shop Item	£0.49	5	Y
Sweatshirt	Shop Item	£9.50	6	Y
tie	Shop Item	£2.50	100	Y
Year 1 Show	Shop Item	£5.00	55	Y
Year 6 Disco Tickets	Shop Item	£1.50	30	Y
yr 2 show	Shop Item	£0.00	55	Y

At the bottom of the screen, there are several buttons: 'Go To Item Collection', 'Un/Available', 'Send Message', 'Export', 'Print', 'Add', and 'Edit'.

In this screen you will be able to see:

- The student's name
- The student's form group
- The item they purchased
- The date they purchased the item
- How much the item cost

To find specific students, you can use the filter button in the top left-hand corner of the screen. Type in the student's name and it will bring up any items that still need to be collected. This is useful if you have a high number of items being purchased or if a parent has purchased more than one item over several days.

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

Item Collection

Student: Show Uncollected Items Purchased On Academic Year: 2018 / 2019

Item collection (1 - 4 / 4) Select All None

Student	Form	Year Group	Item	Purchased On	Price	Note
<input type="checkbox"/> Strang Lauren (Hogwarts)	Hogwarts	Year 3	Book Bag	Mon 12 Aug 2019	£10.00	
<input type="checkbox"/> Strang Lauren (Hogwarts)	Hogwarts	Year 3	Drinks Bottle	Mon 12 Aug 2019	£2.99	
<input type="checkbox"/> Strang Lauren (Hogwarts)	Hogwarts	Year 3	Pencil Case	Mon 12 Aug 2019	£2.50	
<input type="checkbox"/> Strang Lauren (Hogwarts)	Hogwarts	Year 3	Ruler	Mon 12 Aug 2019	£0.49	

Mark Items as Un/Collected Export Print Back

When a parent/student comes to pick up the item, select the checkbox next to the item you are sending home. Click on 'Mark Item as Collected' in the bottom right-hand corner of the screen. A box will appear asking you to enter a 'Collection Note.' This can be the name of the person who picked up the item or the date it was collected.

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

Item Collection

Student: Show Uncollected Items Purchased On Academic Year: 2018 / 2019

Item collection (1 - 4 / 4) Select All None

Student	Form	Year Group	Item	Purchased On	Price	Note
<input checked="" type="checkbox"/> Strang Lauren (Hogwarts)	Hogwarts	Year 3	Book Bag	Mon 12 Aug 2019	£10.00	
<input type="checkbox"/> Strang Lauren (Hogwarts)	Hogwarts	Year 3	Drinks Bottle	Mon 12 Aug 2019	£2.99	
<input type="checkbox"/> Strang Lauren (Hogwarts)	Hogwarts	Year 3	Pencil Case	Mon 12 Aug 2019	£2.50	
<input type="checkbox"/> Strang Lauren (Hogwarts)	Hogwarts	Year 3	Ruler	Mon 12 Aug 2019	£0.49	

Mark as collected

Collection Note:

Save Cancel

Mark Items as Un/Collected Export Print Back

After entering any collection notes, click 'Save.' The items have now been removed from the uncollected page.

4. Purchasing Shop Items in School

Once your items have been set up in the Shop tab, parents will be able to pay directly through the school using cash, cheque, or card.

- Select the Cashier tab
- Find the child that would like to purchase the shop item, using the filter in the top left-hand corner

The screenshot shows the 'Cashier' interface in SchoolMoney. The top navigation bar includes 'Payments', 'Dinner Register', 'Club Register', 'Cashless Catering Till', 'Cashier', 'Shop', 'Reports', and 'Admin'. The 'Cashier' tab is active. Below the navigation, there are filters for 'Strong Lauren (Hoagwarts)', 'Show Unpaid/Uncollected Items', and 'Siblings'. The main area is split into two panels. The left panel shows a table of transactions with columns for Description, Type, Reference, Due Date, and Outstanding. The right panel, titled 'Manage payments', shows a table with columns for Amount, Due Date, Status, Action, Due, and Bookings. At the bottom right, there is a 'Buy Shop Item' button.

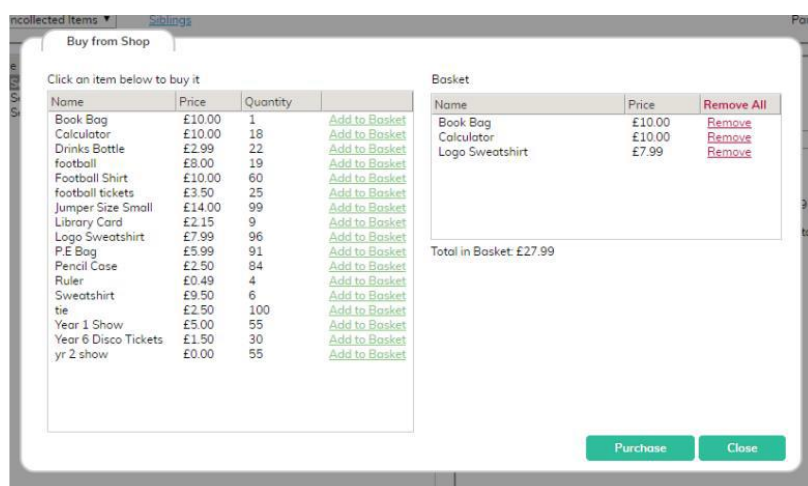
- Click on 'Buy Shop Item,' which you will be able to see in the bottom right-hand side of the screen
- A box will pop up in the centre of the screen with a list of the items you have set up

The screenshot shows the 'Buy from Shop' modal window. It features a table of items for purchase with columns for Name, Price, Quantity, and an 'Add to Basket' link. To the right is a 'Basket' section with a table for Name, Price, and a 'Remove All' link. At the bottom, there are 'Purchase' and 'Close' buttons.

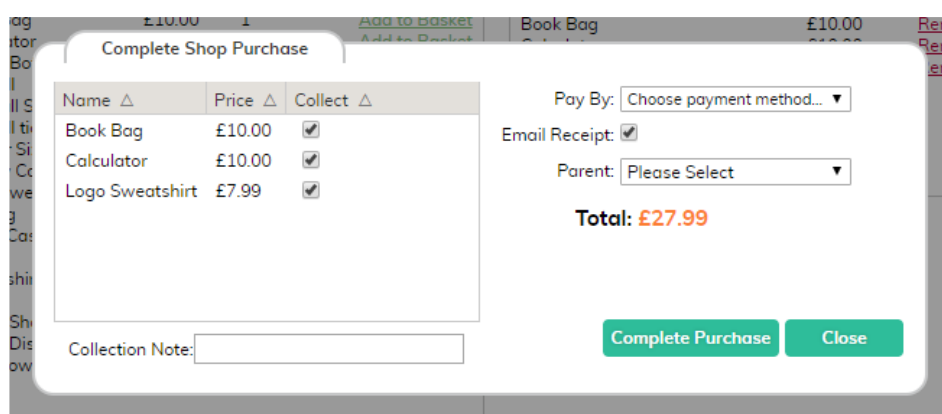
Name	Price	Quantity	
Book Bag	£10.00	2	Add to Basket
Calculator	£10.00	19	Add to Basket
Drinks Bottle	£2.99	22	Add to Basket
football	£8.00	19	Add to Basket
Football Shirt	£10.00	60	Add to Basket
football tickets	£3.50	25	Add to Basket
Jumper Size Small	£14.00	99	Add to Basket
Library Card	£2.15	9	Add to Basket
Logo Sweatshirt	£7.99	97	Add to Basket
P.E Bag	£5.99	91	Add to Basket
Pencil Case	£2.50	84	Add to Basket
Ruler	£0.49	4	Add to Basket
Sweatshirt	£9.50	6	Add to Basket
tie	£2.50	100	Add to Basket
Year 1 Show	£5.00	55	Add to Basket
Year 6 Disco Tickets	£1.50	30	Add to Basket
yr 2 show	£0.00	55	Add to Basket

Name	Price	Remove All
Total in Basket: £0.00		

- Click the link 'Add to Basket' next to any items that the parent would like to purchase
- The item will move across to the right-hand side of the screen and will be added to the total at the bottom



- Click 'Purchase' in the bottom right of the box to move to the next screen



- Mark whether the parent is collecting the item using the tick boxes next to each item on the left hand side. If they are going to come back to collect the item, simply un-tick the box under 'Collect.' This item will then appear in your uncollected items
- Enter a collection note if they are taking the item at the time of purchase
- Choose the payment method the parent is using from the drop down box on the right hand side
- If the child has more than one contact, you can select the parent who is making the purchase in the 'Parent' drop down box
- Once the information is all correct, select 'Complete Purchase'
- A confirmation box will then appear. Select 'OK,' the box will close and the purchase will be complete. A receipt will have been emailed to the parent and the student's record will have been updated

5. 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!

