



**schoolmoney**

# Multi-Contact Guide



**communitybrands**



## Introduction

With the introduction of **SchoolMoney**'s Multi-Contact Support we have made it simple to create and manage multiple parental contacts on a per-student basis.

We do not currently support additional contact imports, as we recommend that additional contacts are only added when absolutely necessary at the request of the parent. This is most helpful for those families where parents do not live together.

Remember that any online contacts (those who can log in and make online payments) – whether primary or additional - will contribute towards your contact/student allowance.

Please note that credit payments are allocated to the student, rather than the parent, meaning that both parents will have access to the same credit pot. This gives each parent the ability to decide how to allocate credit to payments.

If you have Multi-Contact Support activated on your **SchoolMoney** account, you will notice some subtle differences as described below.

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# 1. Managing Additional Parents within the Student Profile

You will notice a 'View Parents' button in the bottom left corner of the Student Profile. Aside from this button, the Student Profile remains unchanged; the parent details displayed are those of the priority 1 parent, imported via your Management Information System.

The screenshot shows the SchoolMoney interface with the 'Admin' tab selected. The 'Student Details' section includes:

- Forename: \* Heather
- Surname: \* Allen
- Gender: \* Female
- Year: \* Year 4
- Form: \* G
- ADNO: 00235689
- Admission Status: On Roll
- Medical Information: (empty field)

The 'Parent Details' section includes:

- Parent Title: Mrs
- Parent Forename: \* Julie
- Parent Surname: \* McGrath
- Mobile: +447552304640
- Email: juliemcgrath@example.com
- Offline Contact:

The 'School Dinners' section includes:

- School Dinner Days: Mon, Tue, Wed, Thu, Fri (with checkboxes)
- Cashless Pin: 8482
- Free School Meals:
- Entitlement Starts: 05 Sep 2016 (Start)
- Entitlement Ends: 26 Jul 2019 (End)
- Dietary Information: (empty field)

Buttons at the bottom include 'View Parents', 'Reset Password', 'Save', and 'Cancel'. A 'Print Paypoint Slip' button is also visible next to a barcode.

When you click on the 'View Parents' button, you will be presented with a list of all additional contacts attached to the student. Please note that this will not include the priority 1 parent, as their details are viewable exclusively within the student's main profile screen; this list only shows additional parents.

The screenshot shows the 'Parents' modal window overlaid on the student profile. The modal contains a table with the following data:

Do Not Contact	Student	Email Address	Phone Number	Title	First Name	Last Name
N	Allen Heather (G)	david.allen@example.com	+44763951148	Mr	David	Allen

Buttons at the bottom of the modal include 'Un/Delete', 'Show deleted', 'Add', 'Edit', and 'Close'. The background shows the 'View Parents' button and other profile details.

Click 'Add' to create a new additional contact for the student. Once saved, the contact will appear in the list.

If the parent is set as an 'Offline Contact,' they will not be able to log in online or make online payments; however, they will still be able to have payments marked for them manually by the school.

ADNO: 00235689  
Admission Status: On Roll

Parents

Do Not Contact △ Student △ Email Address △ Phone Number △ Title △ First Name △ Last Name △

**Add Parent**

Student \* Allen Heather (G) ▼  
Email Address: \* david.allen@example.com  
Phone Number: \* 0763951148  
Title: Mr ▼  
First Name: \* David  
Last Name: \* Allen  
Offline Contact:

Save Cancel

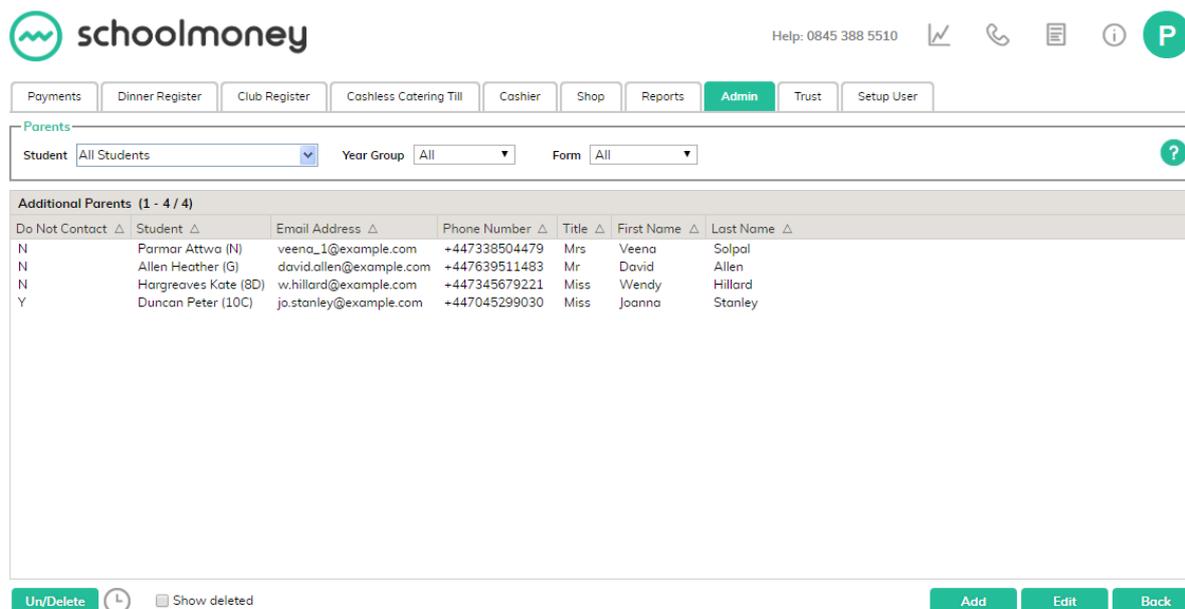
Un/Delete  Show deleted Add Edit Close Save Cancel

## 2. Managing Additional Parents within Admin

If you would prefer to view all additional contacts, head over to Admin – Parents where you will be presented with a list of **additional** contacts added to your system. From here, you can Add, Edit and Delete additional parents without having to go into the Student Profile. This list can be filtered by Student, Form, or Year Group. Please note that this list will not show priority 1 parents, only additional parents that have been manually added.

When adding a parent from this screen, you can select which student you wish to link the parent to, however, you cannot change this once the contact has been created. If you wish to unlink this contact from the student, you must delete the contact.

You can also click on the clock icon at the bottom of the page to view the audit log for all additional contacts.



The screenshot shows the SchoolMoney Admin interface. At the top, there is a navigation bar with the SchoolMoney logo, a help number (0845 388 5510), and several utility icons. Below the navigation bar is a menu with options: Payments, Dinner Register, Club Register, Cashless Catering Till, Cashier, Shop, Reports, Admin (highlighted), Trust, and Setup User. The main content area is titled 'Parents' and includes filter dropdowns for Student (All Students), Year Group (All), and Form (All). Below the filters is a table titled 'Additional Parents (1 - 4 / 4)'. The table has columns for Do Not Contact, Student, Email Address, Phone Number, Title, First Name, and Last Name. At the bottom of the page, there are buttons for 'Un/Delete' (with a clock icon), 'Show deleted', 'Add', 'Edit', and 'Back'.

Do Not Contact	Student	Email Address	Phone Number	Title	First Name	Last Name
N	Farmar Attwa (N)	veena_1@example.com	+447338504479	Mrs	Veena	Solpal
N	Allen Heather (G)	david.allen@example.com	+447639511483	Mr	David	Allen
N	Hargreaves Kate (8D)	w.hillard@example.com	+447345679221	Miss	Wendy	Hillard
Y	Duncan Peter (10C)	jo.stanley@example.com	+447045299030	Miss	Joanna	Stanley

### 3. Sending Payment Notifications to the Additional Parents

If your school has Multi Contact Support enabled, you will see a checkbox called 'Include Additional Parents' within the Text / Email frame when managing a payment.

Selecting this checkbox will show additional contacts in the list, allowing you to contact these parents individually. Each contact will appear on its own row in the list, meaning that a student's name may appear in the list multiple times.

Remember, only parents who are not marked as 'offline contact' can log in online to make payments.

Select a method to send the message by

Message Type: Request payment from parents  
 Request By: Message and Email  
 Include Additional Parents

Send parents the initial request for payment.  
 #AMOUNT is the payment TOTAL.

You will send 5 emails and 6 messages.

<input checked="" type="checkbox"/>	Student	Email Address	Phone Number	Parent
<input checked="" type="checkbox"/>	Allen Heather (G)	juliemcgrath@example.com	+447552304640	Julie McGrath
<input checked="" type="checkbox"/>	Allen Heather (G)	david.allen@example.com	+44763951148	David Allen
<input checked="" type="checkbox"/>	Duncan Peter (10C)		+44711121549	Felicity Holden
<input checked="" type="checkbox"/>	Hargreaves Kate (8D)		+447941256438	Glenn Hargreaves
<input checked="" type="checkbox"/>	Hargreaves Kate (8D)	w.hillard@example.com	+447345679221	Wendy Hillard
<input checked="" type="checkbox"/>	Parmar Attwa (N)	jit.p.85@example.com		Jiten Parmar
<input checked="" type="checkbox"/>	Parmar Attwa (N)	veena_1@example.com	+4473385044793	Veena Solpal

Key:   Warning - Missing Phone Number or Email Address  
  Error - No Contact Information

[Add Attachment](#) Send Messages Close

