ACCOUNT ADMINISTRATOR HOW-TO MANUAL

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ACCOUNT ADMINISTRATOR MANUAL

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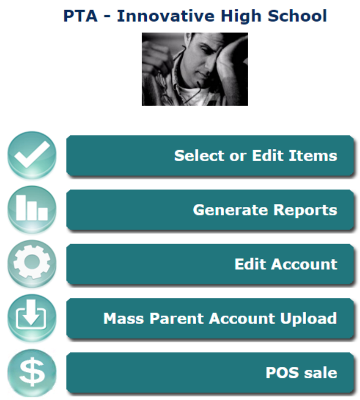
ACCOUNT ADMINISTRATOR MANUAL

There are four main Account Administrator functions when logged in to the Main Page. This Manual will provide graphic and detailed explanations of how to utilize each function and the options and features within each one.



FUNCTION: SELECT OR EDIT ITEMS

Pay4SchoolStuff gives you the flexibility to customize items for your organization in the **Account Administrator Select or Edit Items Function**. Create a **Payment Category Menu** and cost and no-cost items for each category in two easy steps:

1. Edit an existing Category or create a new Category (Spirit Wear, Bingo Night etc.)
2. Click "Enter/Edit" to create items within each Category.

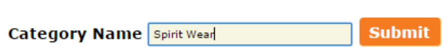
NOTE – A Payment Category Menu will not be visible to parents to see unless time-controlled items are created within that category.

PAYMENT CATEGORY

Create a New Payment Category

Click on "Add New Category"

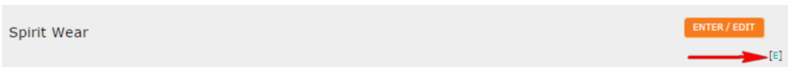
Enter Category Name, click "Submit"



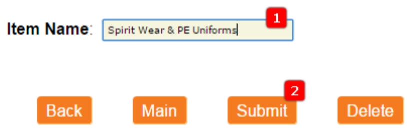
Edit an Existing Payment Category

Scroll to desired Payment Category to change

Click on the [E] in the right hand margin under "Enter / Edit"



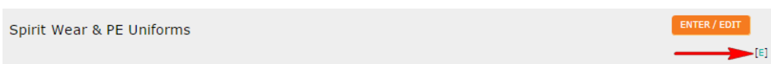
1. Update the Item Name for the Category
2. Click "Submit"



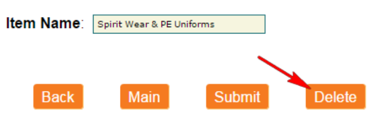
Delete an Existing Payment Category

To remove a Payment Category from your list, scroll to the Payment Category to delete

Click on the [E] in the right hand margin under "Enter / Edit"

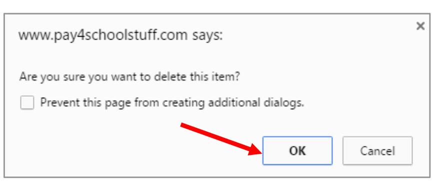


Click "Delete"



When pop-up message appears, check box to "Prevent this this page from creating additional dialogs." Then Click "OK".

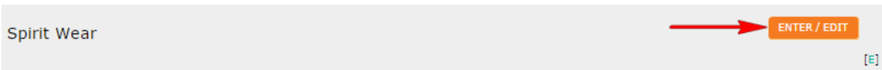
The Payment Category will be removed.



ADD ITEM

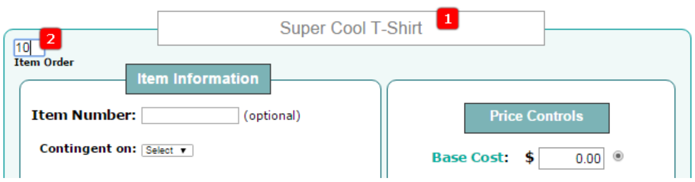
Scroll to the Payment Category where you want to add items

Click Enter / Edit



If items already exist in the category you will need to click on **Add new item**

1. **Item Name** – Enter desired item name. This will appear to payers and in reports.
2. **Item Number** – Enter item order. Default is alphabetical listing. Using item order allows you to determine the order.

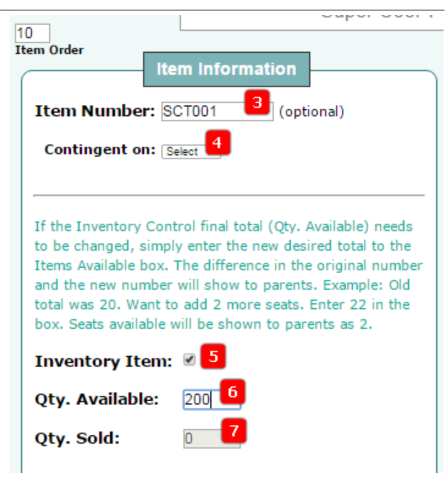


TIP – List item order in increments of 10 (10, 20, 30, etc.). If you need to change the 5th item to be 2nd, you change it from 50 to 15 and it now appears 2nd in the list.

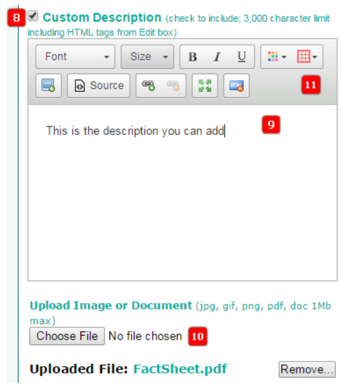
Deleted: etc

Item Information

3. **Item Number** – Enter your unique number for this item. This will allow you to more easily generate reports using your numbering system.
4. **Contingent Upon** – This can be utilized to have an item appear only after a first item is completed. For example, if a permission slip is required before buying a prom ticket, must have membership in order to vote on the budget.
5. **Inventory Item** – Check this box if you want to limit the number of items sold, e.g. seats in a class for a Chess Club. The system will send an e-mail to the address used to enter items when 5 spaces remain, and an e-mail when 0 is reached. At 0, the item will read "Sold Out" and no more spaces will be sold. Read instructions carefully to edit the Inventory Control after it has been originally set and items have been sold.
6. **Quantity Available** – Number of items available
7. **Quantity Sold** – Set to zero when item is created. If items have been sold, it will display the number sold.



8. **Custom Description** – If you want to add any type of text, image, etc. click this box. There is a limit of 3,000 characters.
9. **Rich Text Editor**
    a. Enter text. You have the ability to change the font, size, color, bold, italic and underline.
    b. Create Hyperlinks
    c. Upload an Image
        i. Adding images for spirit wear or other items is helpful for payer so they can scroll page looking for item.
        ii. If user clicks on the image it will NOT make it bigger



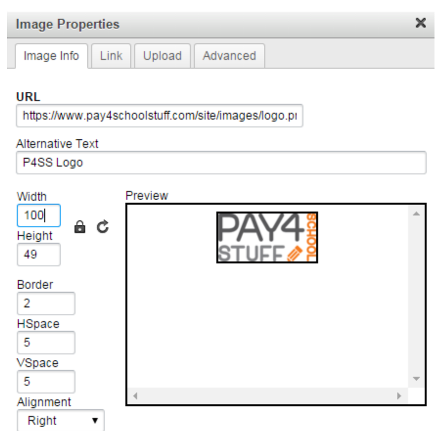
10. **File** – Add file if you want to display a flyer that cannot easily be conveyed in the text area. It will display as View or File to the user. Use only jpg, gif, png, pdf or doc file format.
11. **Toolbar** – See below

Image

Images can be reference by URL (your website) or uploaded from your device.

Image Info Tab

- **URL** – Location of image. You can right click on an image, the copy image address. Keep in mind images are often copyrighted and that you need permission to use or make reference for usage.
- **Alternative Text** – If image cannot be displayed, text is displayed
- **Width/Height** – Width/Height you want the image to display. Reset the size.
- **Border** – Enter a number for the weight of the border. Border will be black. 0 for no border.
- **HSpace** – Enter a number for pixel gap. Whitespace left and right.
- **VSpace** – Enter a number for pixel gap. Whitespace top and bottom.
- **Alignment** – Right or Left of text



TIP – Generally the image should be locked ( ), so it is not disproportionate.

TIP – Don't make the image too large, so that the user needs to scroll more to see all information on page. Generally, Width = 100-150 is sufficient.

Link Tab

- **URL** – Location for the image to link to
- **Target**
  - New Window – Opens linked item in new window or tab - Recommended
  - Topmost Window – Opens linked item in full body of the window
  - Same Window – Opens linked item in existing window – Not Recommended
  - Parent Window – Opens linked item in parent frame

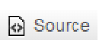
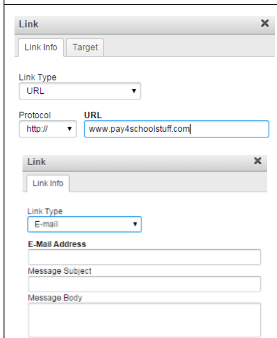
Upload Tab

- Choose File where image is located
- Click to upload the picture

Advanced Tab

For users with HTML knowledge, one can edit the HTML code.

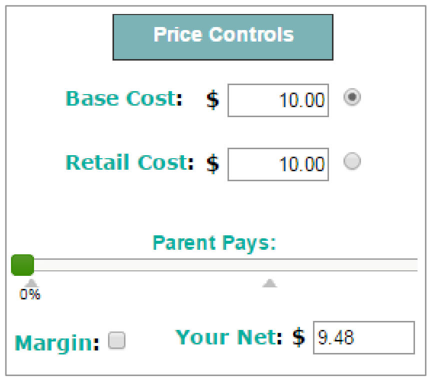
Tool Bar

Icon	Description
	Font type Font size
	Bold, Italic, Underline
	Font color
	Highlight font, e.g. description
	Image
	HTML source code – Not recommended unless you have HTML experience
	Create hyperlink – Highlight text you want to be linked, then click this icon
	Link Type: URL, Anchor Text (links to somewhere else within text – infrequent use), or Email URL – Paste URL to link Email – Enter email address, Subject and Body Text, if relevant. It is helpful to pre-populate the subject, so that the person receiving the email will get a consistent subject rather than leaving it to the parent to complete. For Example: Subject: P4SS Spirit Wear Question Body: Name - Phone -

Icon	Description
	Reason for Inquire -
	Maximize / Minimize area
	Remove formatting

Price Control

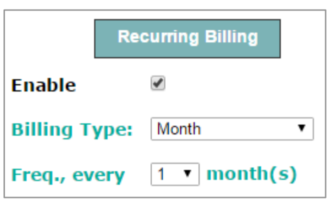
Processing fees are 2.99% + $0.26/item, automatically calculated by the system. Click outside the Price Control box to record price entered.



- **Base Cost** – Cost plus processing fees. Using the Parent Pays slider will change the Retail Cost and Your Net.
- **Retail Cost** - Deducts the processing fees from the retail total to calculate the net. Slider bar inactive.
- **Parent Pays Slider** – Allows you to adjust how much of the fee is passed to parents, 0 to 100%.
- **Margin** - Adds an additional 0.75% to the processing fee
- **Your Net** – Amount that your organization will receive per transaction

Recurring Billing

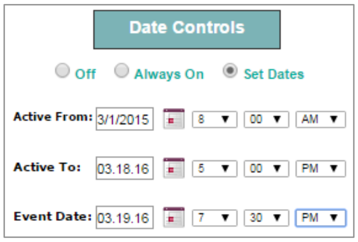
If you have an item and you would like to allow the user to break the cost into equal payments.



- **Enable** – Check box to allow option
- **Billing Type** – Monthly or Weekly
- **Frequency** – 1 to 12 months or 1 – 4 weeks. Allows the payer to choose how many payments based on frequency.

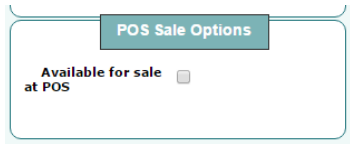
Date Controls

- **Display** – Off, Always On or Set Dates
- **Active From** – Allows you to pick a date/time when the item will automatically activate, i.e. turn on, for purchase (will display on the website before activation)
- **Active To** – Allows you to pick a date/time when item will automatically deactivate, i.e., turn off, for purchase (will display on the website after deactivation)
- **Event Date** – Displays the date/time of the event



POS Sale Options

Checking this box will allow you to go to the POS Sale Section to have item display.

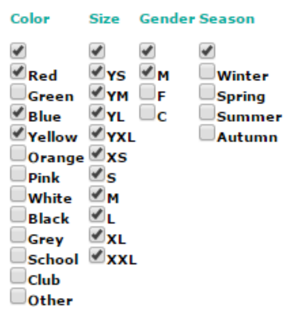


Information Required From Parent

These fields are **required** if the box is checked. It will default to a drop-down or empty field for input.

In this section, box MUST be checked to display to end user.

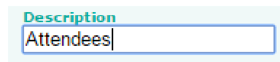
- For **Color, Size, Gender** and **Season**, select the presets as desired.



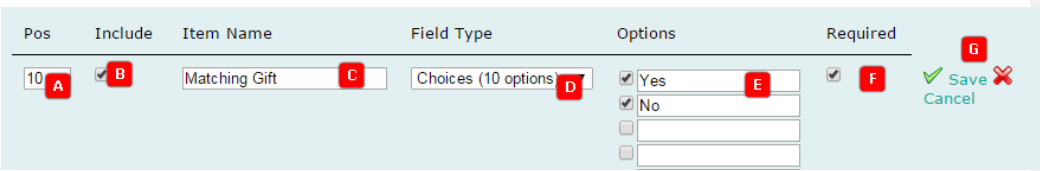
TIP – For Sport, Choices, Period, List, Form, Text Entry, click the box AND then click SHOW for configuration.

1. **Choices** – Customize this field in the Description box for the text you would like to appear, e.g. "PE Teacher." Enter the choices AND click the box for each entry the end user will choose from. This will appear as a drop-down to user with a maximum of 10 choices.
2. **Period** – Show to select the numbers for payer to choose from when a number response is required, for instance, the periods/blocks at your school, or the number of hours one can volunteer to choose from.

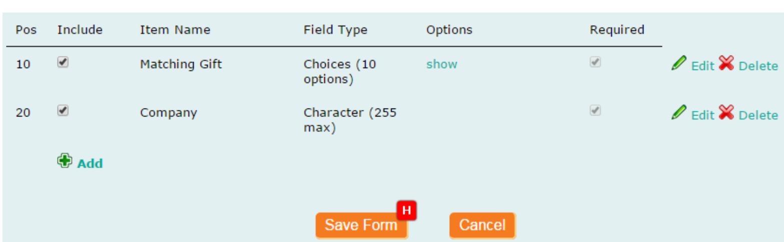
3. **List** – Customize this field in the List box for the text you would like to appear, e.g. "Attendees". This feature allows the end user to type in a list of up to 10 entries as, for example, family members attending a Family Night Dinner.



4. **Form** – Allows indefinite number of customized fields of information--with different types of entry fields--to be designed on a form and required for completion by the payer.

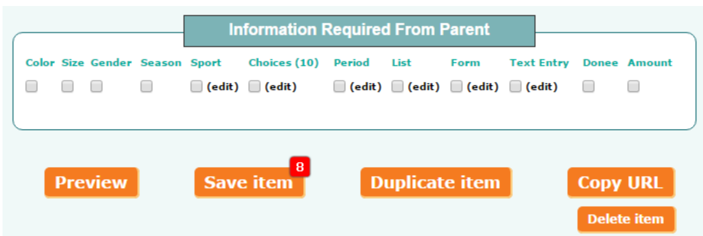


A. **Position** – The order on the form that this item will appear.
B. **Include** – Displays this item to payer. You may create an item on a form, but be undecided about including/displaying the item to the end user, thus unchecking "Include"
C. **Item Name** – Free text field for the form item (no character limit)
D. **Field Type** – Select a format for this form item:
   - Character – 255 character limit. Character counter will display for payer as they type in entry
   - Choices – A drop-down of 10 items, same in "Information Required from Parent"
   - Date – Provides date format, mmddyyyy, to payer
   - Numeric – Allows up to 50 numbers for payer
   - Phone – Requires phone format entry, xxx-xxx-xxxx
E. **Options** – Will display when Choices Field Type is selected, to enter options payer will choose from
F. **Required** – Check box if you require this form item to be completed by payer
G. **Save / Cancel item question** – **YOU MUST SAVE EACH ITEM** (line) on the form or you will lose it
H. **Save Form** – Click "Save Form" at the bottom of the screen. You **MUST save the entire form** with all of the form items.



5. **Text Entry** – Allows a free text field for user to type in text. Customize this field in the Description box for the text you would like to appear, e.g. "PE Teacher."
6. **Donee** – Displays text field for payer to enter text of target name for donation

7. **Amount** – Allows payer to type in amount to be charged, overriding Price Control. Price will remain at $0.00. This is ideal for open donation items.
8. **Save item** – Be sure to click "Save Item" for ANY change made to new or existing form.



TIP – Click on *Show* to get additional information not displayed. Click *Hide* to have box disappear.

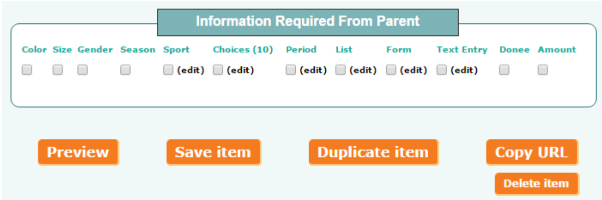
TIP – Recommended to save always and often. If the item is no cost, you will get a message confirming $0.00. Click OK.

TIP – Login as a user to preview the information to confirm set-up. Complete information to ensure it behaves as expected.

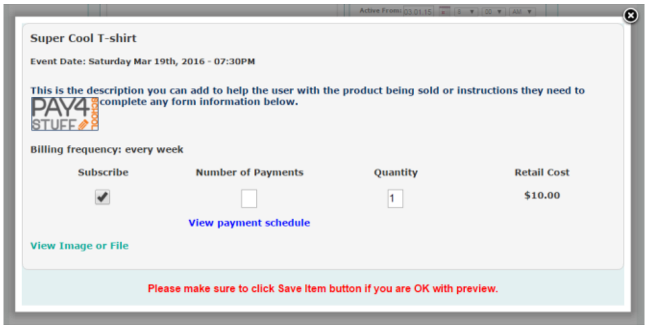
TIP – Open another browser window in private or incognito so you can see your changes real-time as you cannot have two sessions open with the same browser.

ITEM PREVIEW AND DUPLICATION OPTIONS

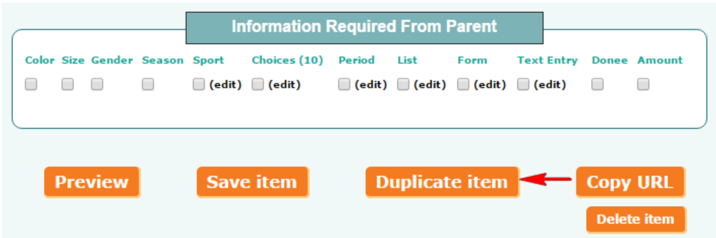
For the Administrator's convenience, there is the ability to preview the item as well as duplicate an item that may be similar to an existing one.



- **Preview** – See the item that you are working on as the payer will see it. **Save** the item after you preview or make changes to it when you are satisfied with the design.

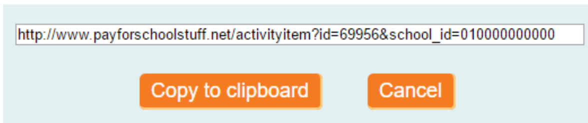


- **Duplicate item** – If you would like to update a **single** item from one year to the next, or are creating different variations of the same item, e.g., spirit wear, classes, etc. then design or update one item as desired, save it, and then click "Duplicate item" to copy this item exactly. Then make changes to the duplicated item and click "Save item." This prevents having to create an identical item from scratch each time.



COPY URL

Copy URL allows the ability to link directly to the item. Copy to clipboard so you can use the URL in an email or website.

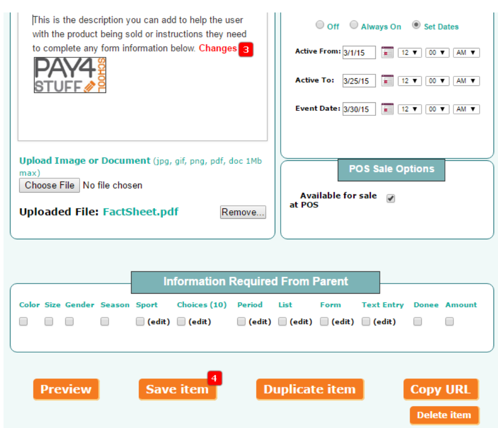


Cancel when you have copied the link.

EDIT ITEM

1. Scroll to the Payment Category on your Main Payment Menu where you want to add or **Edit Item** that payer can view under "Preview Items to Purchase" (or under "Preview Items You Have Entered" for Administrator view).
2. Click on "Enter / Edit"

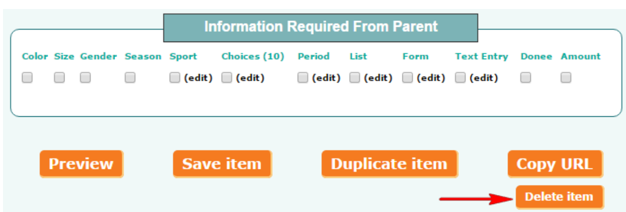
3. Scroll to the Item you want to edit and make changes
4. Be sure to **Save** each item or updates will be lost.



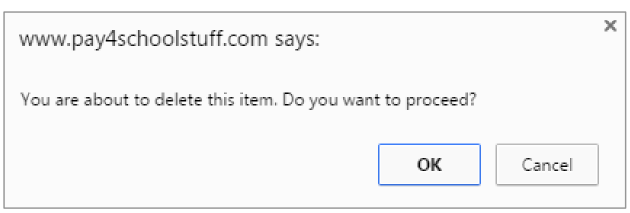
DELETE ITEM

1. Scroll to the Payment Category on your Main Payment Menu where you want to **Delete Item** that payer can view under "Preview Items to Purchase" (or under "Preview Items You Have Entered" for Administrator view).
2. Click on "Enter / Edit"

3. Scroll to the Item you want to remove
4. Click on "Delete item"



5. You will be prompted for confirmation to Delete the item. Click "OK".



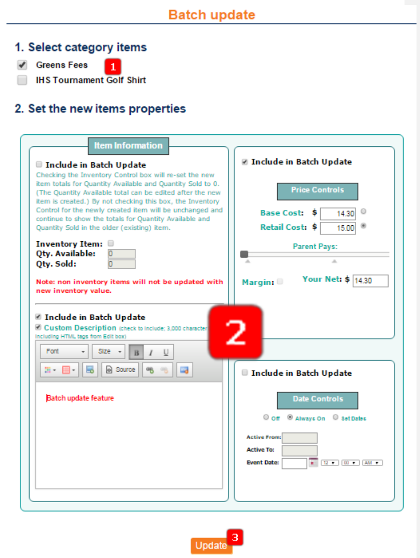
BATCH UPDATE

The **Batch Update** allows you to make updates to a larger number ("batch') of existing items within a Payment Category by using existing data and duplicating this group of items with a choice of item options. This feature is helpful when more than one item (accomplished by using the "Duplicate Item" feature) requires duplication/updating. Fields that can be included in the newly created items include:

- Item information: Inventory Control and Custom Description
- Price Controls
- Date Controls

You may select all or any of the above items to include in the Batch Update

1. Select the items you wish to update by clicking the boxes next to the items listed at the top of the page.
2. Click the boxes to "Include in Batch Update" for those features (Item information, Price Controls, Date Controls) that you want to be included in **all** of the updated items
3. Click "Update" button to duplicate the batch of items.
4. New items will appear at the top of your list of items. You can then edit and save any piece of information needed in the newly updated items.



NOTE – Remember to number Item Order for new, updated items so they list in desired order.

TIP – When updating an item requiring the Inventory Control to be reset, include the Inventory Control in the Batch Update and set the Quantity Available for the entire batch. Individual items can have their inventory control quantity available edited in the updated items.

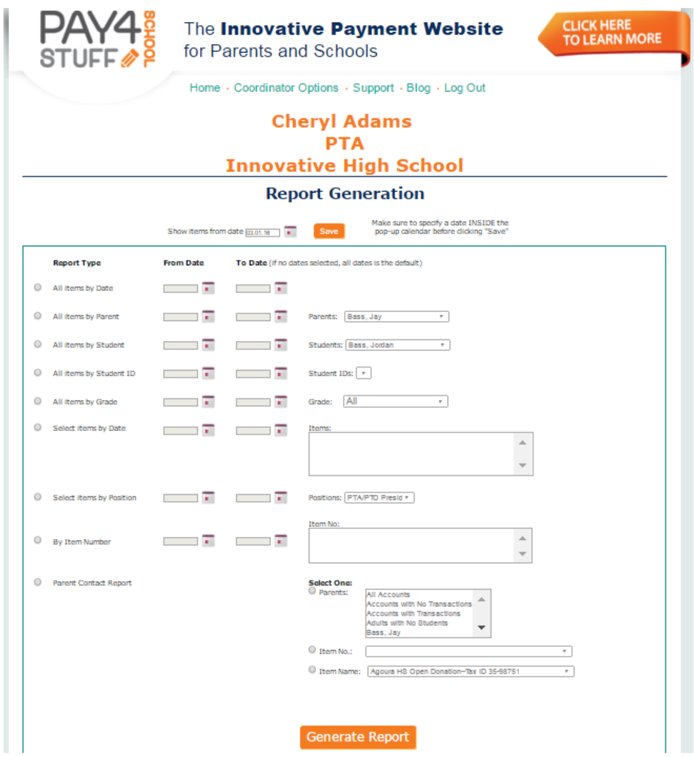
FUNCTION: GENERATE REPORTS

REPORTING / RECONCILIATION

Pay4SchoolStuff.com has flexible and robust reporting capabilities for parents, parent organization leaders and school and administrative staff.

Account Administrators can easily **Generate Reports** based on:

- All items purchased by date range
- All items purchased by date range by
  - Parent
  - Student or Student ID
  - Grade
  - Item(s)
  - Position
  - Item Number(s)
- Parent contact reports



CREATING A REPORT / REPORT OUTPUT

Creating a Report

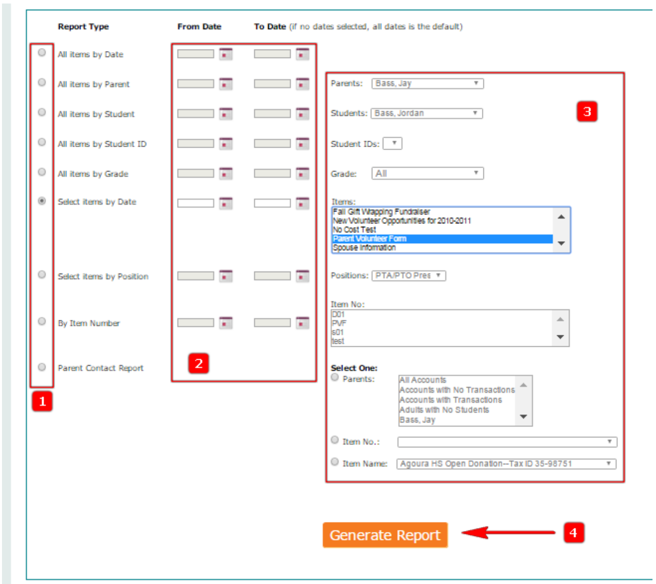
If you have used Pay4SchoolStuff.com for multiple years, your item list may have gotten long and this will display only those items in the current school year or shorter time period. Filter the items, students, parents, etc. displayed from a specific date.

Select

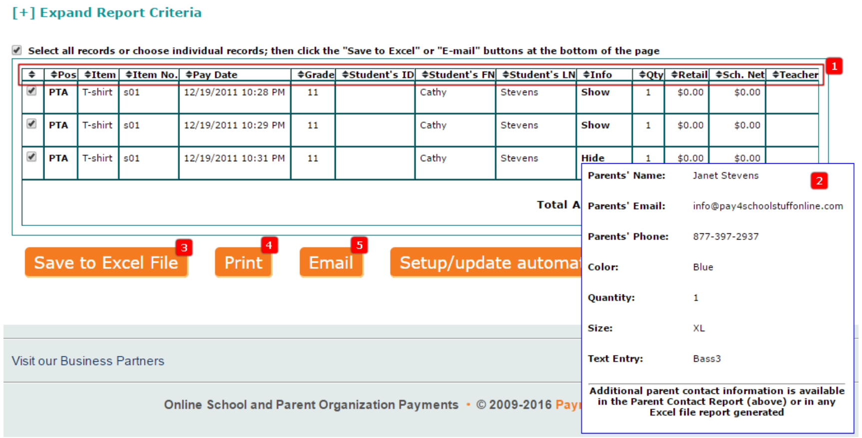
1. Report type
2. Date range – initially not important but as you use P4SS this will be important as your data build from one school year to the next
3. Select from drop-down list.
   a. To select more than one item, hold down Shift Key and click on other items
   b. OR hold down CTRL Key if items are alphabetical within list

NOTE – Not all report types allow multiple selections

4. Click on Generate Report at bottom of page. Your desired report will appear on-screen within seconds.


Report Type
From Date
To Date (if no dates selected, all dates is the default)
All items by Date
All items by Parent
All items by Student
All items by Student ID
All items by Grade
Select items by Date
Select items by Position
By Item Number
Parent Contact Report
Parents:
Students:
Student IDs:
Grade:
Items:
Positions:
Item No:
Select One:
Item Name:
Generate Report
1
2
3
4

Report Output



All reports include:

- Item name and number
- Payment date
- Student name, ID and grade
- Quantity
- Costs and Net Revenue
- Parent contact info
- Additional fields collected from "Information Required From Parent", i.e. color, size, choices, period, list, form data, text entry

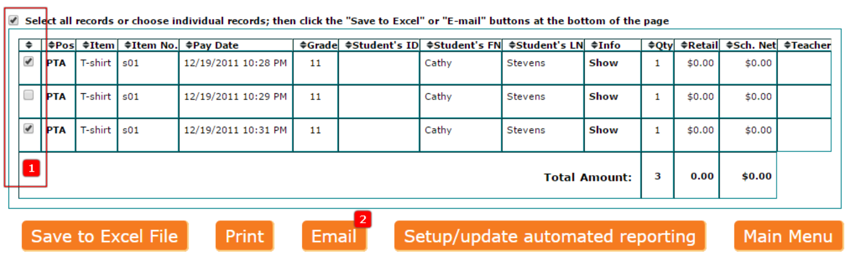
Each of these columns can be **sorted** by clicking on the header (Ascending or Descending for alphabetical or numeric data)

2. Click on *Show* to get additional information not displayed. Click *Hide* to have box disappear.
3. Save all data to Excel for further data manipulation and sharing with colleagues.
4. Print report
5. Select all rows or individual rows to email parents directly.

NOTE – Only those items selected will be exported to Excel, printed or emailed

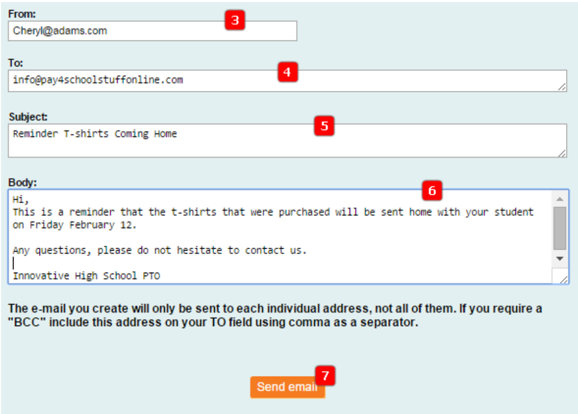
EMAIL

1. Click "Select" to include all entries in report, or uncheck those addresses not to be included in email
2. Click "Email"



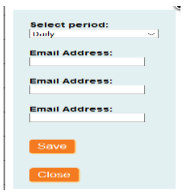
3. "From" address can be changed but will default to the email address associated with your Administrator account (User ID address)
4. "To" address will automatically populate with all addresses from the entries selected in the report results.
5. Enter "Subject" line
6. Enter "Body" text. This is a straight text and not a rich text editor.
7. Click "Send Email"

NOTE – The "TO" will populate with all addresses but will behave as a BCC.



SETUP/UPDATE AUTOMATIC REPORTING

If you would like to receive the report automatically for distribution, click on "Setup/update automatic reporting". You have the option to receive the report daily, weekly or monthly to the administrative email account. You may set up to three e-mail addresses to receive auto reports. Then click "Save". To cancel a report that has been set up, run the report and then highlight "None" in the drop down and click "Save."



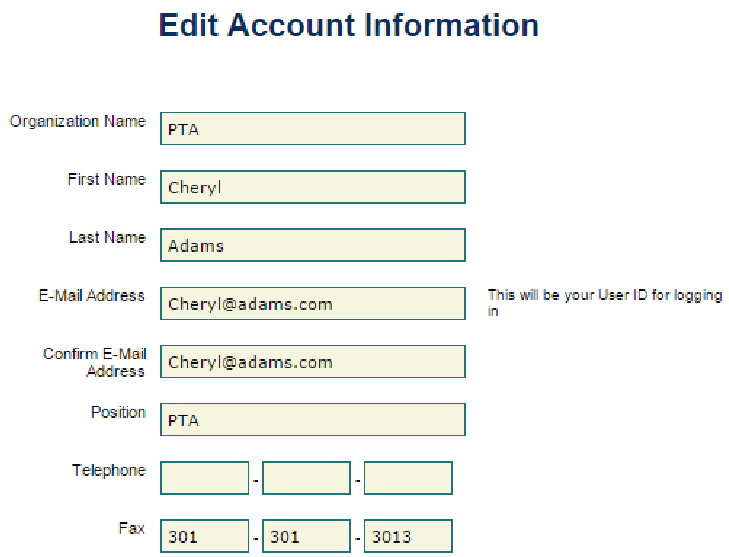
FUNCTION: EDIT ACCOUNT

As an Administrator, you can update your contact information at any time. It is highly recommended that you use a generic User ID that you can pass from one Administrator to the next and that you maintain a current phone number should P4SS need to reach you directly.

GENERAL INFORMATION

Click on the field to update the information. The email address is the User ID used for logging into Pay4SchoolStuff Administrator Account.

Click "Submit" at the bottom of the page.



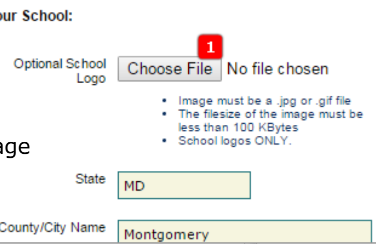
YOUR SCHOOL LOGO

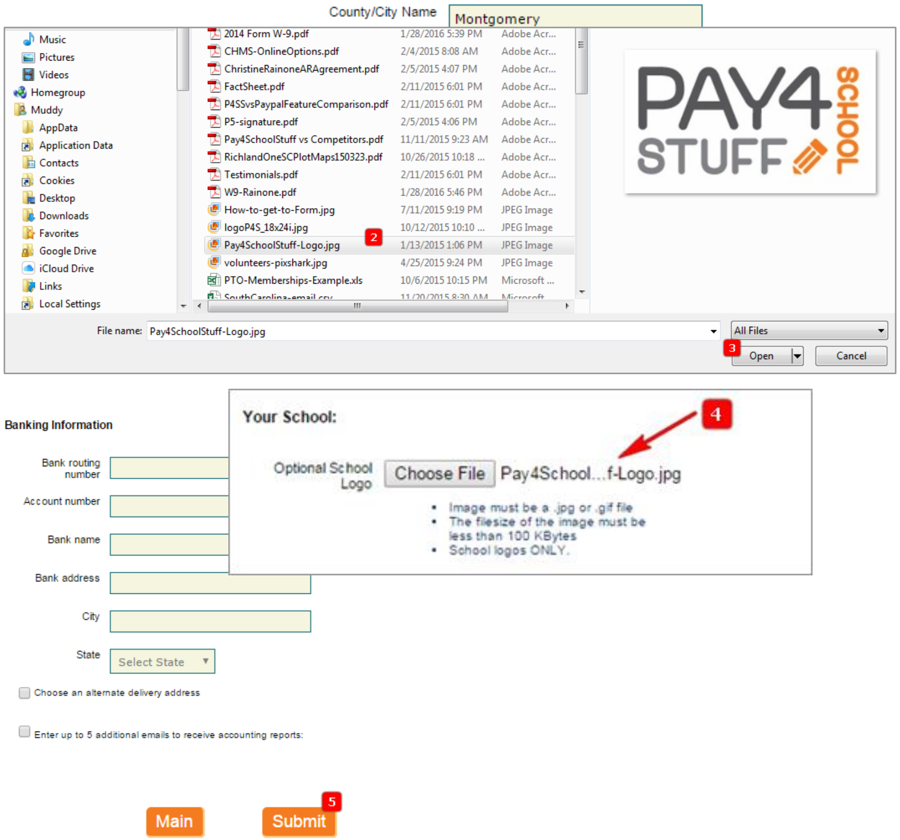
Add Logo

Follow these steps to have your school logo to appear on your page to your payers.

NOTE – Image must be jpg or gif and less than 100 kb in size. School logo only.

1. Click “Choose File”
2. Browse to the selected jpg or gif file
3. Click “Open” on your computer
4. The selected file name will appear
5. Click “Submit” at the bottom of the page
6. The logo will appear on the page





End user will now see the logo

NOTE – Selected logo will appear on Payment Menu for all groups having accounts with your School.

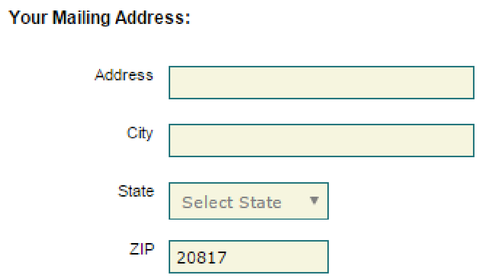
Delete / Update Logo

Click "Delete"

It will take a few moments for the image to be removed from your site.

MAILING ADDRESS

Update the mailing address as needed and click "Submit"



REQUIRED INFORMATION

Depending on your organization, you may want to capture additional information for each child. Student ID and teacher are fields that are often used universally for "delivering" information to child or identifying the correct child against student records.

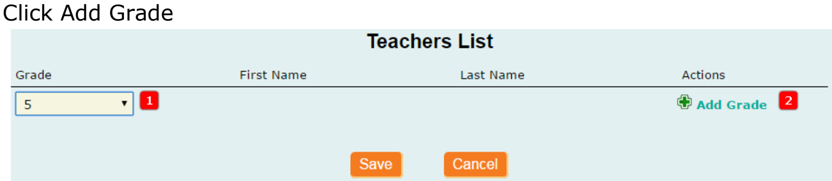
Check the required boxes as needed by your organization.

Adding Teachers

After checking the Teacher Req'd box the Teacher hyperlink will appear.

Click on the Teachers hyperlink for the dialog box to appear.

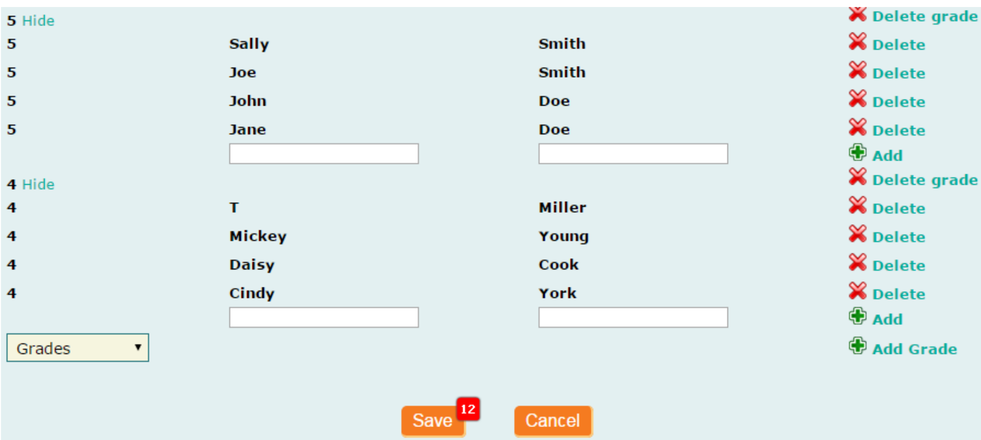
1. Select Grade, e.g. 5
2. Click Add Grade



3. Select Grade
4. Enter First Name
5. Enter Last Name
6. Click Add

7. Repeat steps 4-6 until all teachers for that grade have been added
8. Select Grade
9. Click Add Grade to add another grade

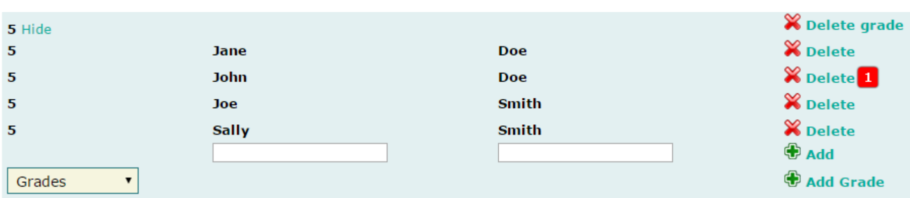
10. Repeat steps 4-6 until all teachers for that grade have been added
11. Continue steps 8-10 until all teachers have been added
12. Click Save. **Suggest you Save after completing each grade.**



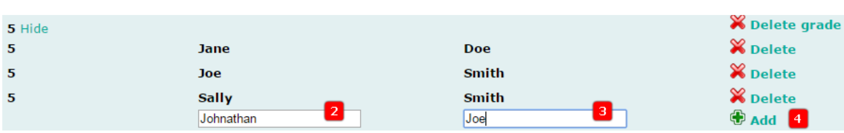
NOTE - The teachers will automatically be displayed to the user in alphabetical order.

Update Teacher

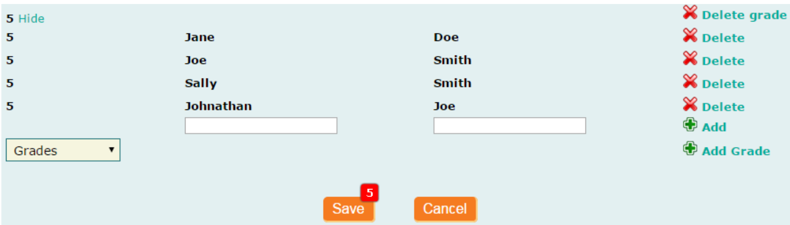
1. To update a teacher, click on the corresponding Delete for that row (John Doe).



2. Enter First Name
3. Enter Last Name
4. Click Add



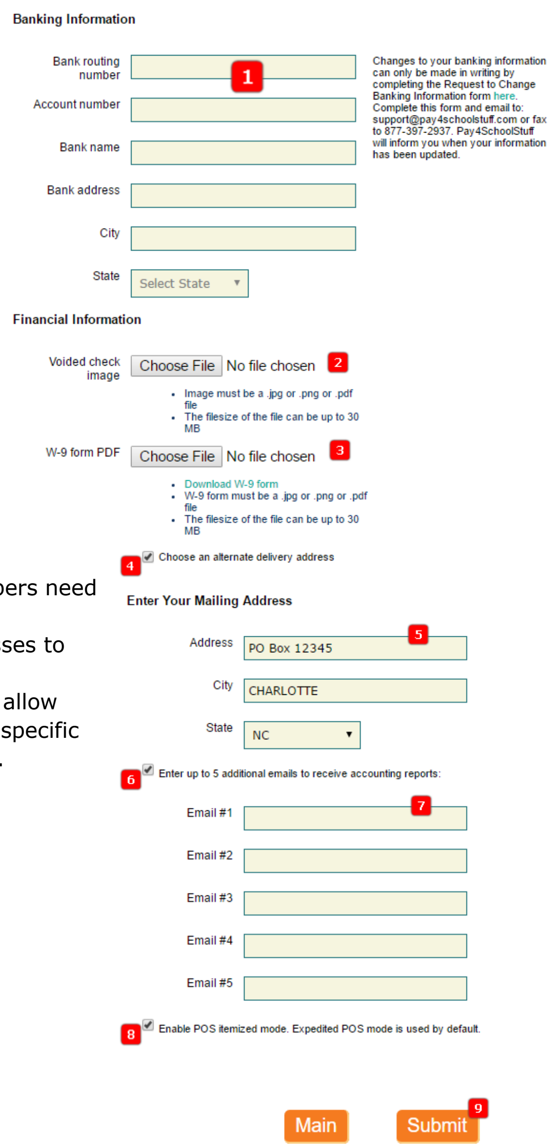
5. Click Save



6. Click on "X" to close the dialog window

BANKING INFORMATION / FINANCIAL INFORMATION / POS ITEMIZATION

1. Banking information cannot be updated from this screen. Please complete the form and submit to support@pay4schoolstuff.com or fax to 877-397-2937. Pay4SchoolStuff will inform you when your information has been updated.
2. Voided Check - Click on Choose File, browse to the file location, click Open.
3. W-9 Form - Click on "Download W-9 form", complete form, scan or take picture and save to computer. Click on Choose File, browse to the file location, click Open. "Submit".
4. Check the box should you require an alternate mailing address for the Banking Institution
5. Complete information for Banking Institution mailing address
6. Check this box if additional team members need the accounting reports
7. Enter up to five additional email addresses to receive accounting (deposit) reports
8. Enable POS itemization mode. This will allow you in POS Sale mode to associate the specific items that are sold to a parent/student.
9. Click "Submit" to save the information



FUNCTION: MASS PARENT ACCOUNT UPLOAD

Account Administrators have the ability to pre-load the system with their parents and students. This avoids the parent from having to complete the initial information and saves time. Parents will receive an automatic email after your Mass Upload with a temporary password, indicating they need to complete the registration process.

1. Click on the Mass Parent Account Upload link to view required fields in Excel file template.

Mass Parent Account Upload

#1 Click here: Mass Parent Account Upload to open the Excel file showing required fields for mass upload.

#2 Type or cut and paste your school's Parent Account data into the required fields in the Excel file opened in Step #1. Then click Choose file button below.

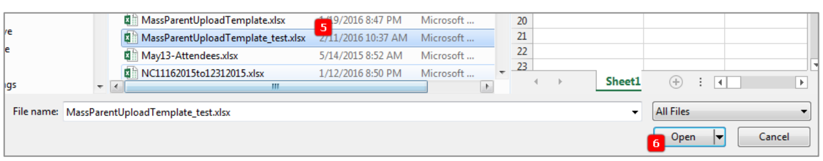
Choose File... Choose file

#3 Upload completed Mass Parent into Pay4SchoolStuff system by clicking here: Upload

2. Enter the required parent / student information in the Excel file. Required information includes:

	A	B	C	D	E	F	G	H	I	J
1	Parent Email	Parent FN	Parent LN	Street Address	City	State	ZIP	Student FN	Student LN	Student Grade
2	test@test123.com	Joe	Smitty	123 Anywhere	Timbuck Two	CA	99999	Timmy	Smitty	4

   a. Parent email
   b. Parent first name
   c. Parent last name
   d. Street address
   e. City
   f. State
   g. Zip
   h. Student first name
   i. Student last name
   j. Student grade
3. Save the Excel file. Note the location of the file.
4. "Choose File"
5. Select File
6. "Open"
7. "Upload"



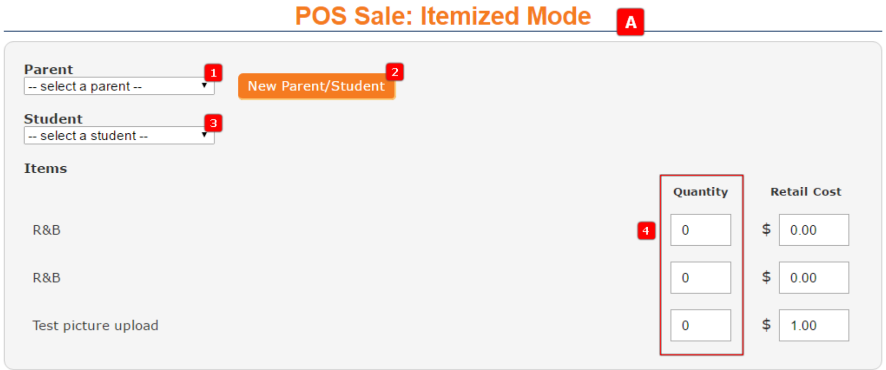
After upload, the system will automatically send an email to the parent's email with a temporary password to complete the registration process.

#4 Mass Parent Account Upload is completed with the following results:

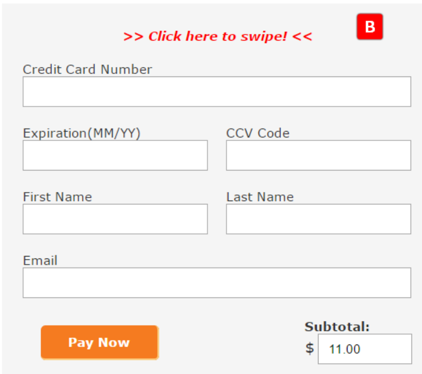
Parent Accounts Uploaded: 1

POS SALE

POS is available for a PC swipe or for manual credit card entry. Tablet and smartphone use is not currently available POS Sale



A. POS Sale: Itemized Mode – If the box is selected in Edit Account, you have the ability to itemize products on POS. This section will not appear if the box is not selected.
   1. Select Parent
   2. New Parent/Student if parent does not exist in database. Enter first and last name, click register
   3. Select Student or click on New Parent/Student if student is not listed under parent
   4. Enter quantity for items purchased



B. Credit Card Information
   1. If your USB card swipe is connected, “Click here to swipe!” to automatically load credit card information
   2. Alternatively, you can type in the information from the card
   3. Enter email address if parent would like a copy of the receipt sent to them
   4. Click Pay Now to process the transaction