



ACCOUNT ADMINISTRATOR
HOW-TO MANUAL

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ACCOUNT ADMINISTRATOR MANUAL



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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.

PTA - Innovative High School



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.

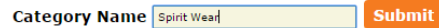
PAYMENT CATEGORY

Create a New Payment Category

Click on "Add New Category"



Enter Category Name, click "Submit"



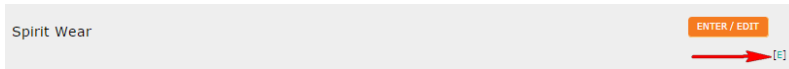
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Edit an Existing Payment Category

Scroll to desired Payment Category to change

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



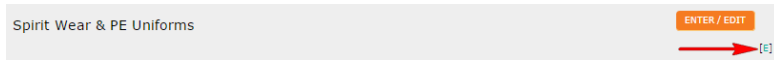
1. Update the Item Name for the Category **Item Name:** ¹
2. Click "Submit"



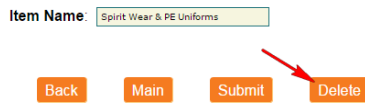
Delete an Existing Payment Category

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"

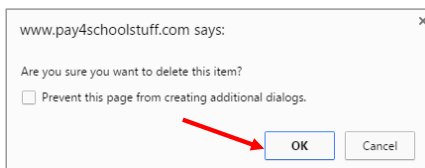


Click "Delete"



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

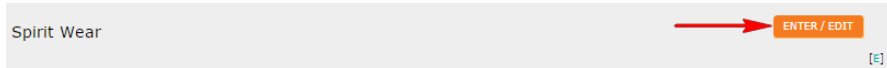
The Payment Category will be removed.



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.

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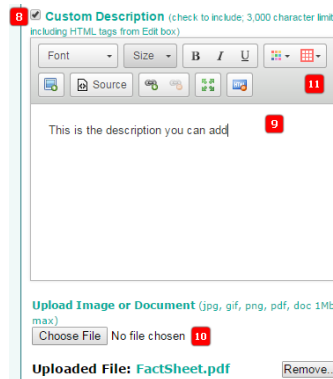
8. **Custom Description** – If you want to add any type of text, image, etc. click this box. There is a limit of 3,000 characters.

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

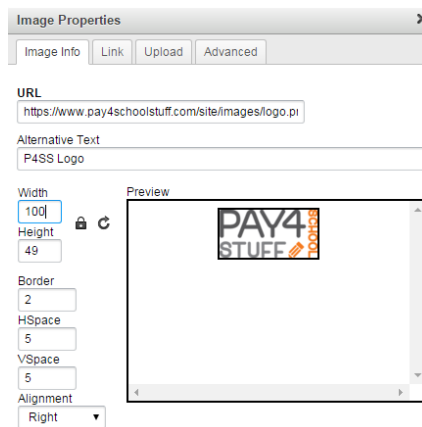


Image

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.

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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 - |

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| 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

Price Controls

Base Cost: \$ 10.00

Retail Cost: \$ 10.00

Parent Pays: 0%

Margin: Your Net: \$ 9.48

Recurring Billing

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

Recurring Billing

Enable

Billing Type: Month

Freq., every 1 month(s)

- **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.

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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

Date Controls

Off
 Always On
 Set Dates

Active From:

Active To:

Event Date:

POS Sale Options

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

POS Sale Options

Available for sale at POS

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.

| Color | Size | Gender | Season |
|--|---|---------------------------------------|-------------------------------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> Red | <input checked="" type="checkbox"/> YS | <input checked="" type="checkbox"/> M | <input type="checkbox"/> Winter |
| <input type="checkbox"/> Green | <input checked="" type="checkbox"/> YM | <input type="checkbox"/> F | <input type="checkbox"/> Spring |
| <input checked="" type="checkbox"/> Blue | <input checked="" type="checkbox"/> YL | <input type="checkbox"/> C | <input type="checkbox"/> Summer |
| <input checked="" type="checkbox"/> Yellow | <input checked="" type="checkbox"/> YXL | | <input type="checkbox"/> Autumn |
| <input type="checkbox"/> Orange | <input checked="" type="checkbox"/> XS | | |
| <input type="checkbox"/> Pink | <input checked="" type="checkbox"/> S | | |
| <input type="checkbox"/> White | <input checked="" type="checkbox"/> M | | |
| <input type="checkbox"/> Black | <input checked="" type="checkbox"/> L | | |
| <input type="checkbox"/> Grey | <input checked="" type="checkbox"/> XL | | |
| <input type="checkbox"/> School | <input checked="" type="checkbox"/> XXL | | |
| <input type="checkbox"/> Club | | | |
| <input type="checkbox"/> Other | | | |

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.

| Choices (10) | Period | List | Form |
|---------------------------------|---------------------------------|---------------------------------|---------------------------------|
| <input type="checkbox"/> (show) | <input type="checkbox"/> (show) | <input type="checkbox"/> (show) | <input type="checkbox"/> (show) |
| 1 | 2 | 3 | 4 |

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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.

Description
Attendees

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.

| Pos | Include | Item Name | Field Type | Options | Required | |
|-----|-------------------------------------|---------------|----------------------|---|-------------------------------------|---|
| 10 | <input checked="" type="checkbox"/> | Matching Gift | Choices (10 options) | <input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> Save <input type="checkbox"/> Cancel |

- 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.

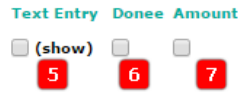
| Pos | Include | Item Name | Field Type | Options | Required | |
|-----|-------------------------------------|---------------|----------------------|---------|-------------------------------------|---|
| 10 | <input checked="" type="checkbox"/> | Matching Gift | Choices (10 options) | show | <input checked="" type="checkbox"/> | <input type="checkbox"/> Edit <input type="checkbox"/> Delete |
| 20 | <input checked="" type="checkbox"/> | Company | Character (255 max) | | <input checked="" type="checkbox"/> | <input type="checkbox"/> Edit <input type="checkbox"/> Delete |

Add

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- 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.

The screenshot shows a form titled "Information Required From Parent" with the following fields: Color, Size, Gender, Season, Sport, Choices (10), Period, List, Form, Text Entry, Donee, and Amount. Each field has a small square icon to its left, and the "Choices (10)", "Period", "List", "Form", and "Text Entry" fields have "(edit)" text next to them. Below the form are five buttons: "Preview", "Save item", "Duplicate item", "Copy URL", and "Delete item".

- **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.

The screenshot shows a preview window for an item titled "Super Cool T-shirt". It includes the event date "Saturday Mar 19th, 2016 - 07:30PM" and a description: "This is the description you can add to help the user with the product being sold or instructions they need to complete any form information below." Below the description is the PAY4 STUFF logo. The "Billing frequency" is set to "every week". There are four columns: "Subscribe" (checked), "Number of Payments" (empty), "Quantity" (1), and "Retail Cost" (\$10.00). A "View payment schedule" link is present. At the bottom, there is a "View Image or File" link and a red warning: "Please make sure to click Save Item button if you are OK with preview."

- **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.

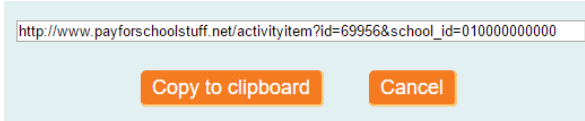
This screenshot is identical to the one above, but with a red arrow pointing to the "Duplicate item" button.

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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.



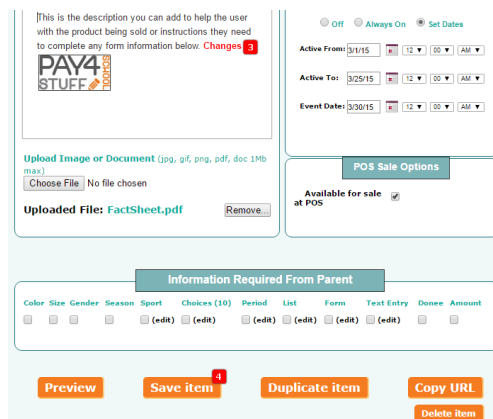
Cancel when you have copied the link.

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"

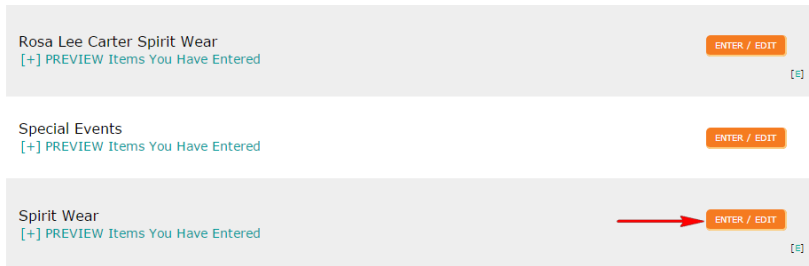


3. Scroll to the Item you want to edit and make changes
4. Be sure to **Save** each item or updates will be lost.

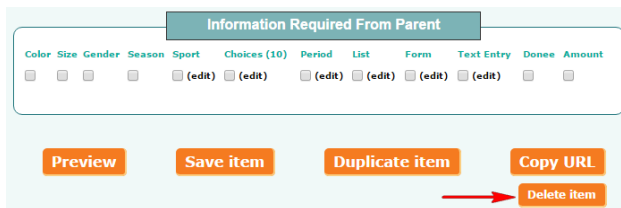


DELETE ITEM

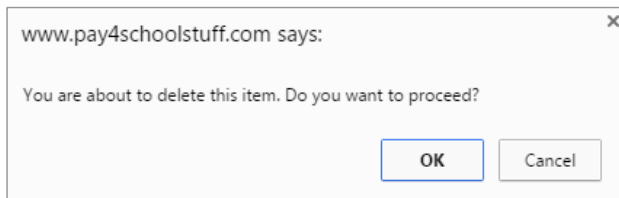
1. Scroll to the Payment Category on your Main Payment Menu where you want to **Delete Item** that payer can view under "Preview Items to Purchase" (or under "Preview Items You Have Entered" for Administrator view).
2. Click on "Enter / Edit"



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.

Batch update

1. Select category items
 - Greens Fees **1**
 - IHS Tournament Golf Shirt
2. Set the new items properties

Item Information

Include in Batch Update
Checking the Inventory Control box will re-set the new item's Inventory Control for Quantity Available and Quantity Sold to 0. (The Quantity Available total can be edited after the new item is created.) By not checking this box, the Inventory Control for the newly created item will be unchanged and continue to show the totals for Quantity Available and Quantity Sold in the older (existing) item.

Inventory Item:

Qty. Available:

Qty. Sold:

Note: non inventory items will not be updated with new inventory values.

Include in Batch Update
Custom Description (check to include 3,000 character capacity with the new item)

Font: Size:

Batch update feature

Include in Batch Update

Price Controls

Base Cost: \$

Retail Cost: \$

Parent Pays:

Margin: Your Net: \$

Include in Batch Update

Date Controls

On Always On Set Dates

Active From:

Active To:

Event Date:

Update **3**

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.

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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

The screenshot shows the 'Report Generation' interface for Cheryl Adams PTA at Innovative High School. The page includes a header with the PAY4STUFF logo and navigation links. The main content area is titled 'Report Generation' and contains a form with various options for generating reports. The 'Report Type' section has radio buttons for different report categories. The 'Parent Contact Report' option is selected. The form includes date pickers for 'From Date' and 'To Date', and dropdown menus for 'Parents', 'Students', 'Student ID', 'Grade', 'Item', 'Positions', 'Item No.', and 'Item Name'. A 'Generate Report' button is located at the bottom of the form.

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.

Report Generation

Show items from date

Save

Make sure to specify a date **INSIDE** the pop-up calendar before clicking "Save"

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.

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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: [Bass, Jay] **3**

Students: [Bass, Jordan] **3**

Student ID: []

Grade: [All]

Items:

- FBI Gift Wrapping Fundraiser
- New Volunteer Opportunities for 2010-2011
- No Cook Test
- Parent Volunteer Form**
- Spouse Information

Positions: [PTA/PTO Pkcs]

Item No:

- 001
- PAY
- 801
- test

Select One:

Parents:

- All Accounts
- Accounts with No Transactions
- Accounts with Transactions
- Adults with No Students
- Bass, Jay

Item No.: []

Item Name: [Agoura HS Open Donation--Tax ID 35-98751]

1 **2** **4**

Generate Report ←

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Report Output

[+] Expand Report Criteria

Select all records or choose individual records; then click the "Save to Excel" or "E-mail" buttons at the bottom of the page

| <input type="checkbox"/> | Pos | Item | Item No. | Pay Date | Grade | Student's ID | Student's FN | Student's LN | Info | Qty | Retail | Sch. Net | Teacher |
|-------------------------------------|-----|---------|----------|---------------------|-------|--------------|--------------|--------------|------|-----|--------|----------|---------|
| <input checked="" type="checkbox"/> | PTA | T-shirt | s01 | 12/19/2011 10:28 PM | 11 | | Cathy | Stevens | Show | 1 | \$0.00 | \$0.00 | |
| <input checked="" type="checkbox"/> | PTA | T-shirt | s01 | 12/19/2011 10:29 PM | 11 | | Cathy | Stevens | Show | 1 | \$0.00 | \$0.00 | |
| <input checked="" type="checkbox"/> | PTA | T-shirt | s01 | 12/19/2011 10:31 PM | 11 | | Cathy | Stevens | Hide | 1 | \$0.00 | \$0.00 | |

Total A

Parents' Name: Janet Stevens

Parents' Email: info@pay4schoolstuffonline.com

Parents' Phone: 877-397-2937

Color: Blue

Quantity: 1

Size: XL

Text Entry: Bass3

Additional parent contact information is available in the Parent Contact Report (above) or in any Excel file report generated

Save to Excel File Print Email Setup/update automa

Visit our Business Partners

Online School and Parent Organization Payments • © 2009-2016 Pay

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

ACCOUNT ADMINISTRATOR MANUAL



EMAIL

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

Select all records or choose individual records; then click the "Save to Excel" or "E-mail" buttons at the bottom of the page

| <input type="checkbox"/> | Pos | Item | Item No. | Pay Date | Grade | Student's ID | Student's FN | Student's LN | Info | Qty | Retail | Sch. Net | Teacher |
|-------------------------------------|-----|---------|----------|---------------------|-------|--------------|--------------|--------------|------|----------|-------------|---------------|---------|
| <input checked="" type="checkbox"/> | PTA | T-shirt | s01 | 12/19/2011 10:28 PM | 11 | | Cathy | Stevens | Show | 1 | \$0.00 | \$0.00 | |
| <input type="checkbox"/> | PTA | T-shirt | s01 | 12/19/2011 10:29 PM | 11 | | Cathy | Stevens | Show | 1 | \$0.00 | \$0.00 | |
| <input checked="" type="checkbox"/> | PTA | T-shirt | s01 | 12/19/2011 10:31 PM | 11 | | Cathy | Stevens | Show | 1 | \$0.00 | \$0.00 | |
| Total Amount: | | | | | | | | | | 3 | 0.00 | \$0.00 | |

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.

From: Cheryl@adams.com

To: info@pay4schoolstuffonline.com

Subject: Reminder T-shirts Coming Home

Body:
Hi,
This is a reminder that the t-shirts that were purchased will be sent home with your student on Friday February 12.
Any questions, please do not hesitate to contact us.
Innovative High School PTO

The e-mail you create will only be sent to each individual address, not all of them. If you require a "BCC" include this address on your TO field using comma as a separator.

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."

Select period: [Monthly]

Email Address: []

Email Address: []

Email Address: []

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.

Edit Account Information

| | | |
|------------------------|---|--|
| Organization Name | <input type="text" value="PTA"/> | |
| First Name | <input type="text" value="Cheryl"/> | |
| Last Name | <input type="text" value="Adams"/> | |
| E-Mail Address | <input type="text" value="Cheryl@adams.com"/> | This will be your User ID for logging in |
| Confirm E-Mail Address | <input type="text" value="Cheryl@adams.com"/> | |
| Position | <input type="text" value="PTA"/> | |
| Telephone | <input type="text"/> - <input type="text"/> - <input type="text"/> | |
| Fax | <input type="text" value="301"/> - <input type="text" value="301"/> - <input type="text" value="3013"/> | |

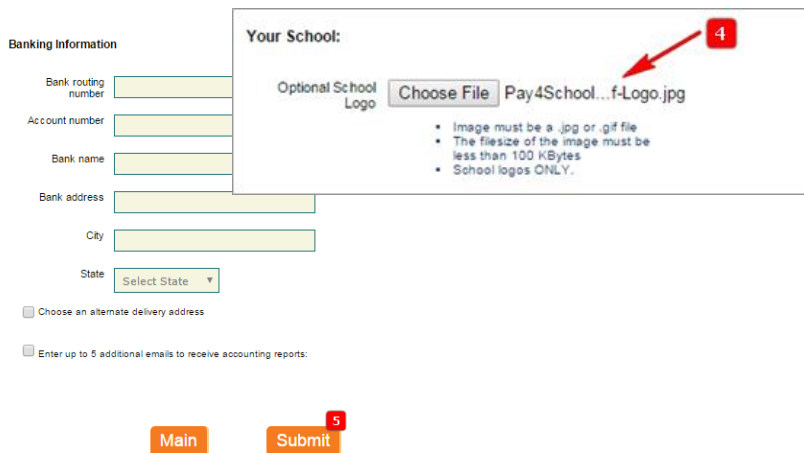
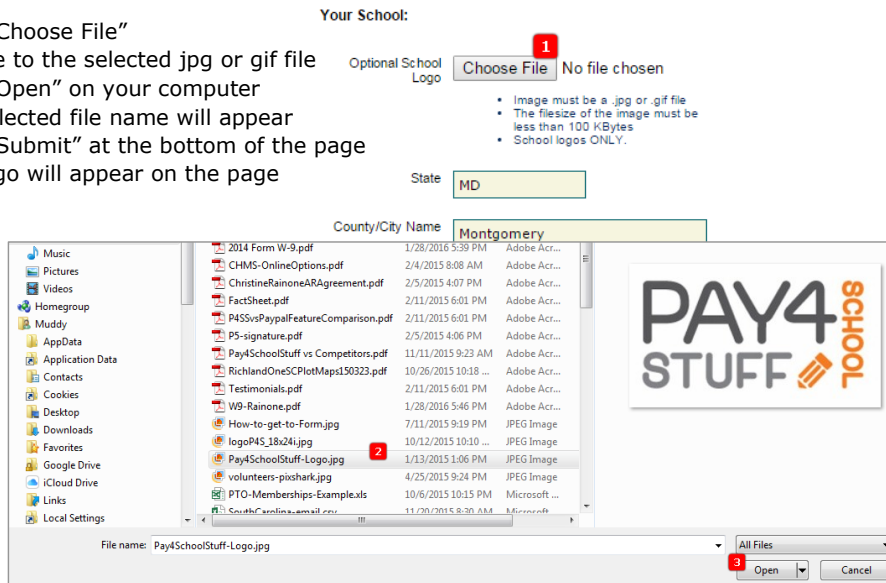
YOUR SCHOOL LOGO

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



ACCOUNT ADMINISTRATOR MANUAL



End user will now see the logo

PTA - Innovative High School



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.

Your School:

Optional School
Logo



Delete

Choose File | No file chosen

- Image must be a .jpg or .gif file
- The filesize of the image must be less than 100 KBytes
- School logos ONLY.

MAILING ADDRESS

Update the mailing address as needed and click "Submit"

Your Mailing Address:

Address

City

State

ZIP

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.

Student ID Req'd **1** Indicate if you require parent to enter student ID.

Teacher Req'd **Teachers** **2** Indicate if you require to add teachers.

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

Teachers List

| Grade | First Name | Last Name | Actions |
|------------|------------|-----------|--------------------------------------|
| 5 1 | | | + Add Grade 2 |

Save
Cancel

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

| Grade | First Name | Last Name | Actions |
|------------|----------------|----------------|---|
| 5 3 | Sally 4 | Smith 5 | Delete grade + Add 6 + Add Grade |

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

ACCOUNT ADMINISTRATOR MANUAL



- 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.**

| | | | | |
|--------|----------------------|----------------------|--------------------------|--------------|
| 5 Hide | | | <input type="checkbox"/> | Delete grade |
| 5 | Sally | Smith | <input type="checkbox"/> | Delete |
| 5 | Joe | Smith | <input type="checkbox"/> | Delete |
| 5 | John | Doe | <input type="checkbox"/> | Delete |
| 5 | Jane | Doe | <input type="checkbox"/> | Delete |
| | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | Add |
| 4 Hide | | | <input type="checkbox"/> | Delete grade |
| 4 | T | Miller | <input type="checkbox"/> | Delete |
| 4 | Mickey | Young | <input type="checkbox"/> | Delete |
| 4 | Daisy | Cook | <input type="checkbox"/> | Delete |
| 4 | Cindy | York | <input type="checkbox"/> | Delete |
| | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | Add |
| | | | <input type="checkbox"/> | Add Grade |

Grades ▾

Save ¹² Cancel

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).

| | | | | |
|--------|----------------------|----------------------|--------------------------|---------------------|
| 5 Hide | | | <input type="checkbox"/> | Delete grade |
| 5 | Jane | Doe | <input type="checkbox"/> | Delete |
| 5 | John | Doe | <input type="checkbox"/> | Delete ¹ |
| 5 | Joe | Smith | <input type="checkbox"/> | Delete |
| 5 | Sally | Smith | <input type="checkbox"/> | Delete |
| | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | Add |
| | | | <input type="checkbox"/> | Add Grade |

Grades ▾

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

| | | | | |
|--------|---|---|--------------------------|------------------|
| 5 Hide | | | <input type="checkbox"/> | Delete grade |
| 5 | Jane | Doe | <input type="checkbox"/> | Delete |
| 5 | Joe | Smith | <input type="checkbox"/> | Delete |
| 5 | Sally | Smith | <input type="checkbox"/> | Delete |
| | <input type="text" value="Johnathan"/> ² | <input type="text" value="Joe"/> ³ | <input type="checkbox"/> | Add ⁴ |

ACCOUNT ADMINISTRATOR MANUAL



5. Click Save

| | Last Name | First Name | Actions |
|--------|-----------|------------|--------------|
| 5 Hide | Jane | Doe | Delete grade |
| 5 | Joe | Smith | Delete |
| 5 | Sally | Smith | Delete |
| 5 | Johnathan | Joe | Delete |

Grades ▾

Save ⁵ Cancel

Add Add Grade

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

| Last Name | Actions |
|-----------|--------------|
| Cook | Delete grade |
| Miller | Delete |
| | Delete |

Teachers List

6

BANKING INFORMATION / FINANCIAL INFORMATION / POS ITEMIZATION

1. Banking information cannot be updated from this screen. Please complete the [form](http://support@pay4schoolstuff.com) 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

Banking Information

Bank routing number **1**

Account number

Bank name

Bank address

City

State

Changes to your banking information can only be made in writing by completing the Request to Change Banking Information form [here](#). Complete this form and email to: support@pay4schoolstuff.com or fax to 877-397-2937. Pay4SchoolStuff will inform you when your information has been updated.

Financial Information

Voided check image No file chosen **2**

- Image must be a .jpg or .png or .pdf file
- The filesize of the file can be up to 30 MB

W-9 form PDF No file chosen **3**

- Download W-9 form
- W-9 form must be a .jpg or .png or .pdf file
- The filesize of the file can be up to 30 MB

4 Choose an alternate delivery address

Enter Your Mailing Address

Address **5**

City

State

6 Enter up to 5 additional emails to receive accounting reports:

Email #1 **7**

Email #2

Email #3

Email #4

Email #5

8 Enable POS itemized mode. Expedited POS mode is used by default.

9

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.



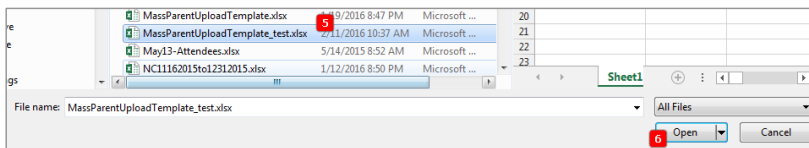
#3 Upload completed Mass Parent into Pay4SchoolStuff system by clicking here: [Upload](#)

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

POS Sale: Itemized Mode A

| Items | Quantity | Retail Cost |
|---------------------|----------|-------------|
| R&B | 0 | \$ 0.00 |
| R&B | 0 | \$ 0.00 |
| Test picture upload | 0 | \$ 1.00 |

- 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