



USER GUIDES

# ADMINISTRATOR USER GUIDE

Version 2

September 2016

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# INTRODUCTION

## Welcome to School-Day

Welcome to the School-Day Administrator User Guide. We know that running a school can be challenging, which is why we are proud to offer a tool that helps organize your administrative tasks in one central location. Administrators play an important role in the school community – it is your dedication and participation that motivates School-Day to focus on your administrative needs. We hope that you find this guide informative, and that it helps to make the most of your experience. Please contact us if you have any questions or inquiries.

## About Our Guide

At School-Day we are continuously working towards improving our system to better suit your needs. As we develop new features, we update our User Guides. At the bottom of the cover page of this User Guide you will notice a version number. You will always find an updated version of this User Guide available online on our Support Site at [www.school-day.com/support](http://www.school-day.com/support).

We value any feedback about our guides and our product, so please take a moment to send us your comments at [support@school-day.com](mailto:support@school-day.com) or call us anytime at 1.855.253.1731. Your feedback will help make School-Day your solution.

The School-Day Team

## GETTING STARTED

### Access Your School-Day Account

To access your School-Day account, navigate to [www.school-day.com](http://www.school-day.com) and click **Log In/Register**. Sign in using your unique username or email address and password. If you need a username, please contact Support.

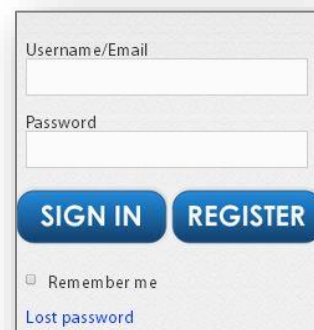
As the Administrator, you have access to all School-wide information as well as individual Class/Group information. The School level is the default level. To add, view, edit and delete information at the Class/Group level, select the appropriate **Class/Group** from the drop down list in the side menu and then perform an action.

### Retrieving a Lost Password

To retrieve a lost password, click **Sign In** from the School-Day homepage and select **Lost Password**.

Enter your email address, click **Request**, and an email will be sent to you. This email contains a unique link to a password reset page.

Create your new password and click **Reset Password**. You will then be prompted to sign in to your account using this new password.



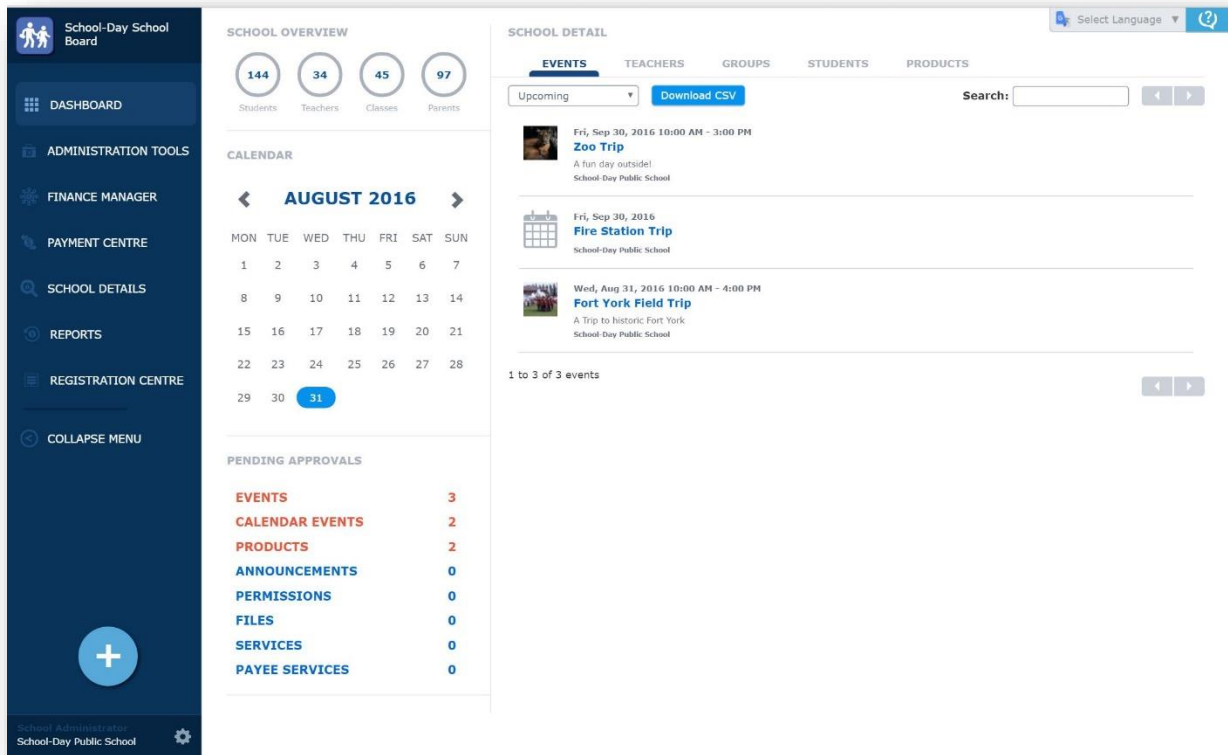
The image shows a login/register form with the following elements:

- A text input field labeled "Username/Email".
- A text input field labeled "Password".
- Two blue buttons: "SIGN IN" and "REGISTER".
- A checkbox labeled "Remember me".
- A link labeled "Lost password" below the checkbox.

# DASHBOARD

Your School-Day Dashboard gives you an overview of the activities, items, and data active in your school.

Blue text and icons in School-Day are actionable items – try clicking on them to filter data, show summary information, or show more detailed information.



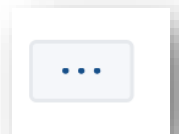
To return to your Dashboard at any time, click on the **Dashboard** link, found on every School-Day page.



Adding Items: To add an item in School-Day, look for the **Add** Symbol found in your side bar. You will select an item to add, and then pick the group to post it in to start.



Actions, Editing, Reports and Additional Options: To see additional functions for some items, click on the **More** symbol. Typically, you will see Edit, Delete or Report functions here.



## PROFILES

Profiles will let you set personal and school-wide information. Look for the settings icon down near your school or username to begin.

### Personal Profile

Your Personal Profile lets you change your password or language settings. Click **Edit Profile**, change any information then click **Update**.

### School Profile

From the School Profile, you can edit certain settings, such as Approvals, Time Zone, and Payment Types Accepted. You can also set general information about your school, or upload a photo.

### Language Settings

You can set the language in which School-Day displays some information, choosing from English or French. All school generated emails and notices to parents will be sent in the language chosen.

### Payment Types Setting

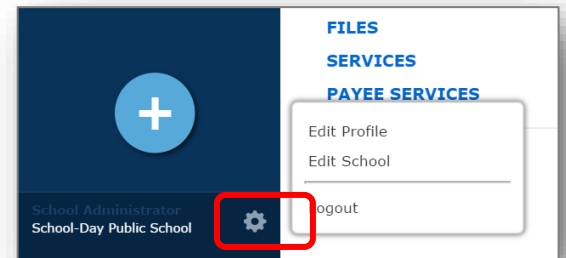
The Payment Type option sets how you will allow parents to purchase items at your school. You can choose between Online and Cash, Online Only, and Cash Only. Online and Cash is recommended for most schools, especially if you're just starting to use School-Day.

### Cash Button Text

The Cash Button Text option will change how your Parents see the 'cash' payment button. It is defaulted to Cash/Cheque, but you can change it to reflect language preference or usage preference (for example, changing the button to say Cash Only if you no longer accept cheque payments).

### Approvals

Your school can be set to Approvals, which means that every posting (Events, Products, Announcements, Permission Forms, Programs Files and Services) will need to be approved before being shared publicly. At the time of creation, the user receives a message indicating that the posting has been sent to the Administrator for approval, and the Administrator receives an email indicating that they have Approvals pending.





### View, Edit or Approve Pending Approvals

View Pending Approvals from your Dashboard. If you have items to approve they will show in red. Click on the headings to review the postings. Click **Approve** to share the items.

PENDING APPROVALS	
EVENTS	0
CALENDAR EVENTS	2
PRODUCTS	1
ANNOUNCEMENTS	0
PERMISSIONS	0
FILES	0
SERVICES	0
PAYEE SERVICES	0

## SCHOOL DETAILS

Under School Details you will find the information that makes School-Day individualized to your school – the pre-loaded Groups, Teachers and Students, plus any Parents that link to your school.

### Groups

Please note that for most schools, Classes/Groups are created or deleted automatically as School-Day receives data from your Student Information System, and you don't need to manage them manually.

To manually add a Class or Group, select **Add Class/Group** from the **Add Item** icon located in the side menu on your Dashboard. Type in the Name and Description for the Class/Group you would like to add, select the Teacher/Supervisor of that Class/Group from the drop down menu and click **Create**.

Note: You must add Teachers to School-Day before you can add Classes/Groups. Classes/Group created in your Student Information System should appear in School-Day automatically.

### Viewing Group Information

Click on the Groups tab on your Dashboard to view. Click on any Group name to review information or retrieve Student Lists.

### Edit or Delete a Group

To edit or delete a Class/Group Details, click on a Class/Group and select **Edit Group** located in the side menu. Edit fields as required and click **Save**.

You can easily reassign a Classroom/Group to a different Teacher by using the *Teacher* drop down menu. Use the controls under the Select Additional Teachers menu to add one or more additional Teachers to the Class/Group.

The Participants controls let you add multiple Students to your Groups quickly. Using the Participants controls you can add existing Students and Groups to any other Group. Search by grade or individual student, highlight the names, and click **Add Selected**.

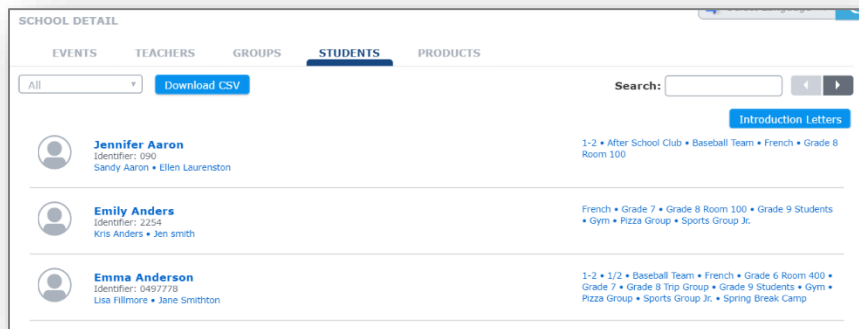


The screenshot shows a classroom profile page titled "CLASSROOM: GRADE 8 ROOM 100". It features a profile picture of a man, a "School" section for "School-Day Public School" with a "School Board" link, and a "Supervisor" field for "Henry Paulson" with a "Website" link to "www.eighthgraders.com". On the right, there are statistics: "Announcements | 36", "Event | 40", "Products | 21", and "Student List | 29". Below the profile information is an "About" section with the text: "Mr. Paulson's Grade 8 Class, Room 100. Our class is a great example of what can be accomplished when students work together and show true caring. The Grade 8 Class is entirely responsible for running the School-Day Public School Breakfast Program. Because of Grade 8's dedication and work, the students at School-Day PS start every school day right! Let's go!"

## Students

To view a list of Students, select the **Students Tab** located at the top of your **Dashboard**. You can view, search and generate a report about Students. Click on a Student's name to see more information, including linked parents/guardians or to edit.

Students can be added through the **Add** button on your Dashboard.

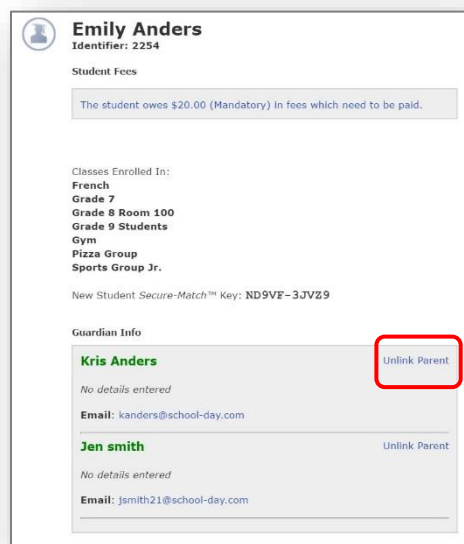


## Manage Parent/Guardian Access

You will occasionally need to manage Parent/Guardian access to Student information. If custodial access changes or a Student reaches the age of majority, you may wish to remove a Parent/Guardian from a Student's School-Day profile. To remove a Parent/Guardian account, select the **Students** tab and click on the Student's name. Click **Unlink Parent** to remove the Parent/Guardian account. Removing a Parent account cannot be undone.

## Student Homeroom

The first class a Student is loaded with (either automatically or manually) will be set as the Student's Homeroom. The Homeroom designation is used to anchor a Student to one class for School-wide payment and attendance records. If you need to adjust a Student's Homeroom, click the Student name and select **Edit Student** located in the side menu. Choose the Homeroom by double clicking one of the choices under the **Classes** field. The designation under **Homeroom** will change. Click **Update** to save the change.



## Teachers

Please note that for most schools, Teachers are created automatically as School-Day receives data from your Student Information System. If your Teacher information is in your Student Information System, please wait a day or so and the Teacher record will be created for you. Also note that because of this, Teacher accounts rarely need to be created manually.

To manually add a Teacher, select **Add Teacher** from the **Add** button located in the side menu on your Dashboard.

Fill in the name, ID and email address of the Teacher, create and confirm a password, and click **Create**.

To view a Teacher, click on the Teachers tab on your Dashboard. Clicking on a Teacher's name will show you more details, and let you edit information.

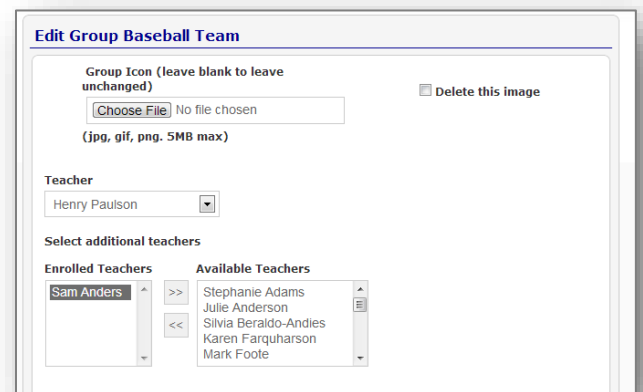
## Edit Class/Group Assignments

You can change Teacher Classroom assignments easily by clicking the Classrooms you wish to reassign and using the >> and << arrows to reposition them under **Taught Classes** or **Available Classes**.

**Note:** Editing Classes from the Teacher Details page installs the Teacher as a Primary Teacher. The Primary Teacher will bump out an existing Class Teacher. To assign additional or multiple Teachers, please refer to the section 'Add Additional/Secondary Teachers' in the 'Teachers' section of this User Guide.

## Add Additional/Secondary Teachers

To add an additional or multiple Teachers to a single class, select the Class/Group from the Class/Group tab on the administrator dashboard, and click **Edit Group**. You can add additional Teachers easily by clicking the additional Teacher you wish to add to the Class/Group and using the >> arrows to reposition them under Enrolled Teachers. To remove a secondary Teacher, use the << arrows to move them from the Enrolled Teachers section and into the Available Teachers section. Scroll down and click **Save** to save your changes. Now two or more teachers will have access to the Class/Group.



The screenshot shows the 'Edit Group Baseball Team' interface. At the top, there is a 'Group Icon' section with a 'Choose File' button and a 'Delete this image' checkbox. Below this is a 'Teacher' dropdown menu currently set to 'Henry Paulson'. The 'Select additional teachers' section is divided into two columns: 'Enrolled Teachers' and 'Available Teachers'. The 'Enrolled Teachers' column contains 'Sam Anders'. The 'Available Teachers' column contains 'Stephanie Adams', 'Julie Anderson', 'Silvia Beraldo-Andies', 'Karen Farquharson', and 'Mark Foote'. Between the two columns are '>>' and '<<' arrows for moving teachers between the lists.

## Members

To view a list of all Members registered in your School (which includes Parents and Public Users), select **Manage Members** from the **School Details** menu. From this screen you will see a list of all accounts registered at your school, as well as associated students. If you need to remove an unauthorized user from seeing your school's Public items, click **Remove From School**. This will unlink the user from your school, but will not delete the user's account.

## INTRODUCTION LETTERS AND SECURE-MATCH KEYS

Introduction Letters serve as an introduction to School-Day and provide the Secure-Match™ key, which can be used to link Student information to Parent accounts. Please note that Introduction Letters are unique to each Student.

### Introduction Letters

To print Introduction Letters to be circulated to Parents one Class/Group at a time, select a Class from the *Group* tab, and then navigate to the ***Class/Group Homepage*** by clicking the Class/Group name.

Select ***Student List*** and click ***Generate***

***Introduction Letters***. To

print for individual Students, use the Introduction Letter checkbox next to a Student name. Click ***Select All*** to select every Student. You can filter the Student List by All, Linked to Account or Unlinked. It's a quick way to see which parents have registered their students, and to print Introduction Letters for those who haven't.

From Adobe Reader you can Print, Save or Email the ***Introduction Letters*** for distribution to Parents.

Note: To print Introduction Letters for the entire School, click on the Students tab located on your Dashboard and click ***Introduction Letters***. Follow the same steps as above to create and print.

### Secure-Match Keys

To view Secure-Match™ keys for individual Students, first click the ***Students*** tab. Navigate to the Student, and click their name.

The Student may already have a Secure-Match™ key listed, or you may need to generate another for them. Viewing Secure-Match™ keys allows you to give out keys verbally, if you can verify the Parent in question is a legal guardian. If you're going to send Secure-Match™ keys home, you should use the Introduction Letter.

School-Day Public School  
26 Soho Street  
Toronto, ON  
M5T 1Z7

Dear Parent/Guardian of Marie-Jose Larocque,

I would like to inform you that Marie-Jose Larocque has been chosen to take part in an exciting new project. You will now have the option of using School-Day, an online communications and secure payment processing solution.

Do not panic! It is simple to use and will make your life easier. You will be able to view school news and upcoming events, sign permission forms and make purchases online anytime, anywhere from a single point of entry. Plus you can rest assured that School-Day is secure. Only those invited to join may do so - it is not open to the general public.

All data is kept private and confidential and can be accessed with proper user credentials only.

**How to get started using School-Day**

1) Please go to [www.school-day.com](http://www.school-day.com) and click on the Register button.  
2) Register for School-Day by entering your name and email address and providing the following information:

School: School-Day Public School Secret Code: TD50Z-414GE

Please do not share this secret code with anyone else. It was specifically created for the parent/guardian of Marie-Jose Larocque. You can find additional information, such as benefits, FAQs and user tips, on the School-Day site.

If you have any questions or concerns, please contact [info@school-day.com](mailto:info@school-day.com).

Thank you for your cooperation during this project.

Sincerely,  
School-Day Public School Admin  
School-Day Public School

**school-day**  
Your School Community Online

GENERATE ANOTHER SECURE-MATCH KEY

## ADMINISTRATION TOOLS

Under Administration Tools you will find the day-to-day controls for managing activities at a school.

### Announcements

Announcements are communication items you can send to registered Parents. If you choose to send a Notification with your Announcement, registered Parents who have opted in to communications will receive an email that contains your message – handy for important and time sensitive items.

### Add Announcement

To add an Announcement, select **Announcement** from the Add button. Select to create an Announcement for the entire School, or for a particular Class/Group. Fill in all required fields and click **Publish**. If you would like to send out an email notification about your Announcement to users, select **Publish and Notify**.

Note: You cannot send out an attachment with your Announcement. If you have an attachment, you should upload it the School Files section and include the link in your Announcement.

### View Announcement

To view a list of Announcements, select **Announcements** located in the side menu. From this page you can view, edit or add Announcements.

### Announcement Details

View a list of all Announcements under Administration Tools by clicking Announcements. You can use the drop-down list to filter by your school's Announcements, or Announcements shared with you by your school board.

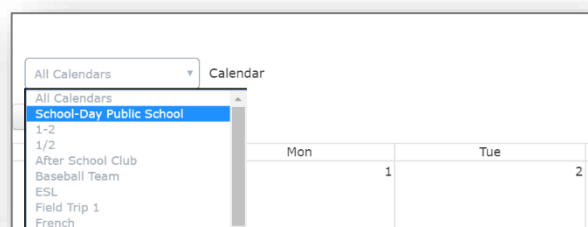
Click on **Announcement** to see the details or to edit. If you edit your Announcement, only select **Publish and Notify** if the content of your message has altered significantly, as this will re-send an email about your Announcement to all users. Many users find multiple copies of Announcement emails bothersome.

To delete an Announcement, click **Delete Announcement** from the Edit Announcement screen.

### Calendar

The Calendar in School-Day is automatically populated based on Events that have been logged into the system, and gives you another way to view activities at your school. You cannot add Calendar information manually.

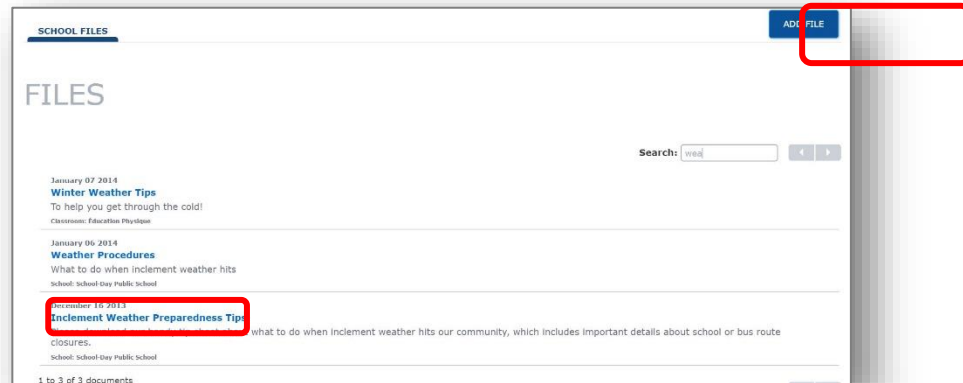
Click **Calendar** from the Administration Tools list. From this screen, you can filter Events by clicking the **Day**, **Week** and **Month**. To view past or upcoming Events, use the < and > arrows. You can also filter calendars to a specific **Class** or **Group** by using the dropdown list next to the Calendar name.



## School Files

School Files allow you to upload documents to share with Parents. Because School-Day will not email attachments with any of your postings, if you have extra documentation to send to Parents, you can post it here.

To view your Files, select **School Files** from Administration Tools. From this page you can view, edit or add School Files.



## Add Files

To add a File, click the **Plus** menu, and **File**. Select to create a File for the entire School, or for a particular Class/Group. Fill in all required fields.

You must set who can view your posting by checking off Teachers and/or Parents under **File Access**. When you are finished, click **Save File**.

*Note: Files are limited to Word Files, Image Files and PDFs and have a maximum of 5MB per File.*

## Download, Edit and Delete Files

To download a File, select the File icon and click on **Download Files**.

To edit a File, select a File and select **Edit from the More** menu, edit the fields as necessary and click **Save File**.

To delete a File, select **Delete File** from the Edit File screen.



## Events

Events in School-Day are designed to manage field trips and outings for your school or class. For example, off campus sporting events, museum trips, overnight trips, or on campus activities. Events allow you to track attendance, permission forms or payments – some or all of these.

To add an Event, click the **Add** symbol from the Dashboard and click **Event**.

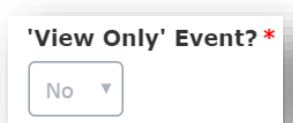
Click your School name to add an Event for the entire school, or pick an individual class from the list to post just to them.

Fields marked with a red asterisk are mandatory, others are optional.

## View Only Events

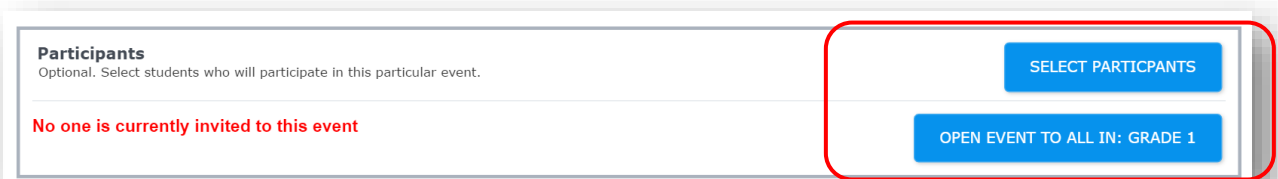
View Only Events do not track or require any actions like payments, attendance or permission forms. They don't show up on the parent's Dashboard and will only display in the school calendar. They are designed for simple items like holiday reminders or team practices.

If you have created an Event, and do not see it in your Event Listing, please first check your School Calendar, as you may have created a View Only Event.



## Participants

The Participants widget lets you invite more than one Class to your Event, a mix of Classes and Students, or the entire school. It will show you who is invited by default (no one), and let you adjust that by clicking the blue buttons. You need to save your Event, before you can invite Participants.



On the Select Participants screen, you can use the drop-down lists or Search bar to find a Class/Group or individual Students. Click **Add Selected** when you are done. Back on your Event screen, you can see how many Students are now Participants in your event. To review, remove or add Participants, click **Select Participants** again.



## Actual Cost/Display Price

When entering the cost of an Event there are two payment fields: Actual Cost and Display Price. This is designed as a cost recovery tool for your merchant account and debit and credit card fees. Your Cost Calculator rate is set according to your School Board policy, and cannot be changed. Your Cost Calculator rate may or may not be set.

The **Actual Cost** is the cost that the School must receive for the Event. When entering the amount in the Actual Cost field, the **Display Price** is automatically populated by the Cost Calculator percentage and rounds up to the nearest \$0.05.

<b>Actual Cost *</b>
<input type="text"/>

The Display Price the amount the Parent pays for the Event, and is the only price they will see.

Note: Sales Taxes need to be included your Actual Cost.

<b>Display Price *</b>
<input type="text"/>

There are two ways to use the calculator:

### Actual Cost

If the Actual Cost that the School must receive in payment is \$10.00, you would enter \$10.00 in the **Actual Cost** field; the **Display Price** will be automatically calculated and rounded to the nearest \$0.05, to \$10.25 (with the cost calculator set to 2.5%).

<b>Actual Cost</b>	<b>Display Price</b>
<input type="text" value="10.00"/>	<input type="text" value="10.25"/>
<small>Minimum Cost must be a number greater than zero.</small>	

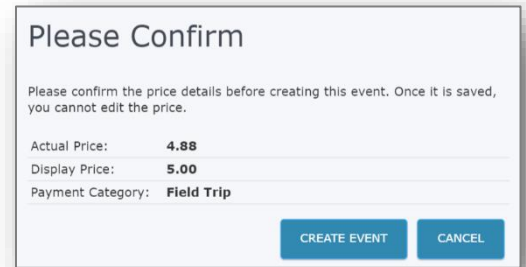
### Display Price

If the Actual Cost that the School must receive in payment is \$10.00, but based on entering that into the calculator, you know that the Display Price will be \$10.25, you can round the amount in the Display Price up or down. Change the **Display Price** to \$10.00, which will change the **Actual Cost** Amount to \$9.76. The amount the School will collect now is \$9.76.

<b>Actual Cost</b>	<b>Display Price</b>
<input type="text" value="9.76"/>	<input type="text" value="10.00"/>
<small>Minimum Cost must be a number greater than zero.</small>	

### Editing Price Details

Once you have clicked **Submit** to save your Event, you **cannot** edit or change the Cost or Payment Category fields. If you need to change the Cost of your Event, you must delete it and create it again.



Please Confirm

Please confirm the price details before creating this event. Once it is saved, you cannot edit the price.

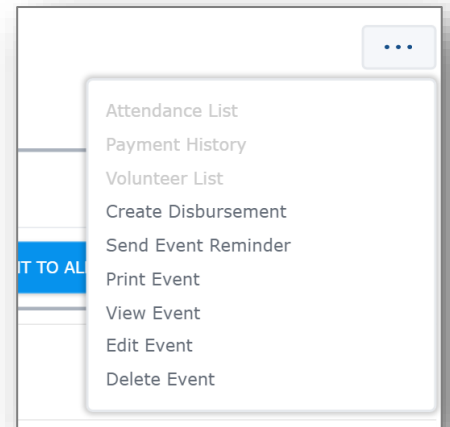
Actual Price:	<b>4.88</b>
Display Price:	<b>5.00</b>
Payment Category:	<b>Field Trip</b>

### Event Details

A list of Events is shown on your Dashboard. To review the details of a specific Event, click on the **Event's** name and the **More** button.

If you need to print paper copies for any parents, click **Print Event** to print event details, and click the blue **Permission Form** name link to print a permission form.

If you would like to send a reminder about your Event, click Send Event Reminder. A reminder will be emailed to all users who have not signed a Permission Form or submitted a payment.



- Attendance List
- Payment History
- Volunteer List
- Create Disbursement
- Send Event Reminder
- Print Event
- View Event
- Edit Event
- Delete Event

### Edit or Delete Events

Click **Edit Event** to make changes to your Event, clicking Submit when you are done.

Note: If your Event has a Cost, once you have clicked **Submit** to save your Event, you can no longer edit the Cost fields. If you need to change the Cost of your Event, you must delete it and create it again.

To delete an Event, click the Event name, select **Delete Event** located in the side menu. Click **Delete** to confirm. This action cannot be undone.

Note: If you delete an Event that has already been purchased by a parent, you will have to issue refunds.

### Event Attendance

When you post an Event on School-Day, the Permission Forms and payments will be logged automatically when they are completed online. You can then review the entries, or manually enter the receipt of paper forms and cash/cheques. Click **Attendance List** from the **More** button.

You can print a report, review the payments received, or log paper forms and cash/cheque payments.

## ATTENDANCE LIST FOR FORT YORK FIELD TRIP

[PRINT](#) [EXPORT TO CSV](#) [ACCEPT CASH OR CHEQUE](#)

**Permission Forms**  
General Permission

**Pricing**

Display Price	\$45.00
Actual Cost	\$43.90

**Payments Received**

Online	\$45.00
Cash	\$45.00
Cheques	\$0.00

Total Received \$90.00  
Total Refunded \$0.00

**Net Income \$90.00**

Amount Subsidized \$0.00

Grand Total \$90.00

Show 25 attendees

All Classes

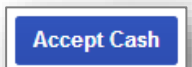
Search:

STUDENT	PMT TYPE	DATE	SUBSIDY	RCVD	RFND	FORMS	ATTENDING
Aaron, Jennifer	ONLINE	08/16/16		\$45.00		General Permission	Yes
Anders, Emily	CASH	08/16/16		\$45.00		General Permission	Yes
Anderson, Emma							

To log the acceptance of permission forms, click the action icon located on a Student's information line.



To accept a cash or cheque payment, click the **Accept Cash** button at the top right of the Attendance List.



A new tab will open. This new tab is the Accept Cash page (as found in the Payment Centre) with the relevant Event pre-selected.

You can log the payments for multiple Students at the same time. Click the relevant Student's name to log a cash or cheque payment.

If you are subsidizing this Student's Event, input the amount of cash you have received into the *Subtotal* field. The *Total* field will automatically update.

Scroll to the bottom of the page when you have made all of your selections. Double check your Grand Total, and click **Accept Cash** to log the cash entries.

Once you verify the cash acceptance, you will be brought to a completed order page. You may **View**, **Save** or **Print** any individual order details.

### Accept Cash Completed

**Jennifer Aaron** Order #127727

Description	Type	Qty	Price	Subtotal	Subsidy
Zoo Trip		1	5.00	5.00	0.00
			<b>Total</b>	<b>5.00</b>	<b>0.00</b>

**Transaction Details**  
Customer Name: Jennifer Aaron  
Date: 2013-08-14 at 01:04:08 PM  
Id: 127727  
Auth Code: 20130814160408ID.1500  
Accepted By: School-Day Public School Administrator  
Payment Method: CASH  
Comments:  
[View and Print the Order Details](#)

### Volunteers List

To view a list of Parents who have volunteered for an Event, select **Volunteers List** from the **More** menu. You will be taken to the Volunteer List for your Event. The list is populated with the first Volunteer responses at the top, to make it easier to accept Volunteers on a first come, first serve basis.

Click **Approve** to accept Volunteers or **Deny** if you do not need any more Volunteers. Volunteers will be notified by email and on their School-Day account if they have been either approved or denied.

### Permission Forms

Permission forms will typically come pre-loaded into your school from documents sent to us from your school board. Please check with your board representative if you need a new form added.

Click **Events** from the Administration Tools, and there is a Permission Forms link at the top of the page. Here you can review or add forms.

### Add Permission Form

To create a new Permission Form template click **Add Permission**.

Create a Title for your Permission Form, and input the Template Text.

The template variables allow customization for each Permission Form and must be included in your template text.

Set Variables are:

- |                |               |
|----------------|---------------|
| %SCHOOL_NAME%  | %PARENT_NAME% |
| %GROUP_NAME%   | %EVENT_NAME%  |
| %TEACHER_NAME% | %EVENT_DATE%  |
| %STUDENT_NAME% |               |

For example, if you want your Permission Form to read: I John Smith grant permission for my child Jimmy Smith to attend School Fun Fair on May 9 2011 supervised by Mrs. Dunwoody from Grade 7 at School-Day Public School.

You would enter the following variables in place of the information: I %PARENT\_NAME% grant permission for my child %STUDENT\_NAME% to attend %EVENT\_NAME% on %EVENT\_DATE% supervised by %TEACHER\_NAME% from %GROUP\_NAME% at %SCHOOL\_NAME%

## Event Forms

Adding Forms for your Event allows you to gather more information from Parents, or offer them more choices related to your Event. Text boxes gather information (such as information, comments, or food allergies), while Option boxes help you gather choices (ham or turkey) and Checkbox Lists can help you gather multiple choice responses.

*Please Note: If you are going to use an Event Form to gather sensitive information about Parents/ Students, it is your responsibility to adhere to your school board's policy about the use and care of that information.*

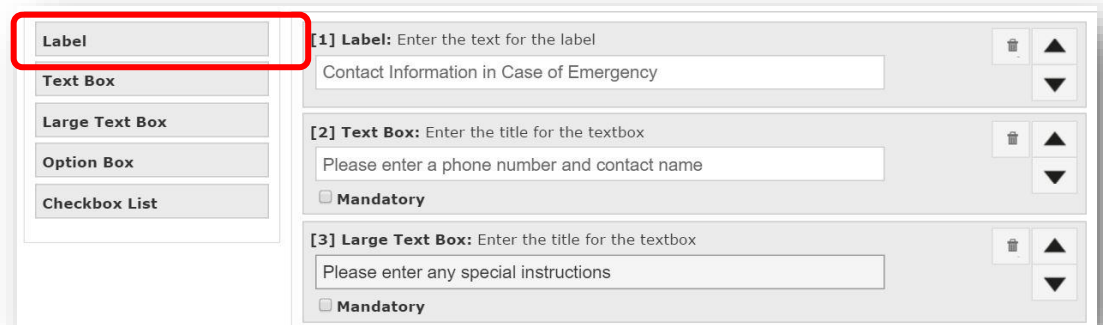
*Event Forms cannot be added to a free Event at this time. Your Event **must** have a cost in order to utilize Event Forms.*

You can add any combinations to create a custom Form for your Event. To begin, click **Add Event Form** on your **Add Event page**.

Click on a heading to add it.

Label allows you to create a label or heading for your Form. For example, if you were about to ask a series of feedback questions, you might want to label that section Feedback.

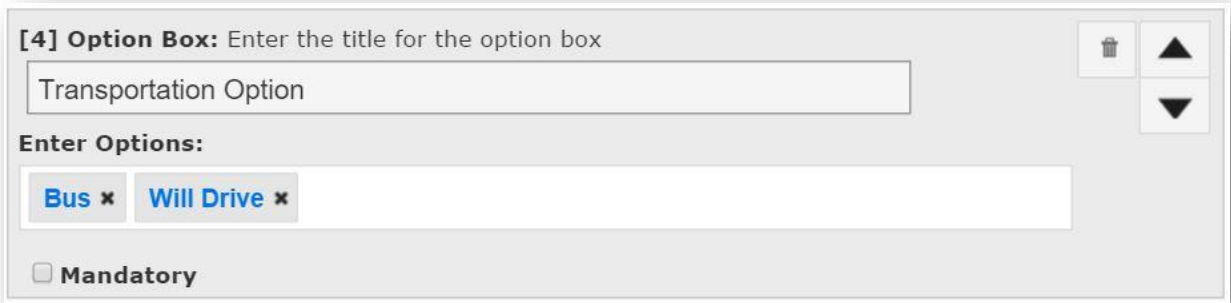
There are two Text Box options. Text Box is designed to get shorter answers from users. Large Text Box is designed to gather longer answers. Both boxes have a character limit of 500, but Large Text Box is formatted to encourage more text from the user.



The screenshot shows the Event Form builder interface. On the left, there is a list of form elements: Label, Text Box, Large Text Box, Option Box, and Checkbox List. The 'Label' element is highlighted with a red box. On the right, there is a preview of the form with three sections:

- [1] Label: Enter the text for the label. The text 'Contact Information in Case of Emergency' is entered in the text box.
- [2] Text Box: Enter the title for the textbox. The text 'Please enter a phone number and contact name' is entered in the text box. There is a 'Mandatory' checkbox.
- [3] Large Text Box: Enter the title for the textbox. The text 'Please enter any special instructions' is entered in the text box. There is a 'Mandatory' checkbox.

The Option box lets users pick only one of the listed items, just like Product Options. Enter a name for the Option Box, and then enter the Options by typing and hitting enter.



[4] **Option Box:** Enter the title for the option box

Transportation Option

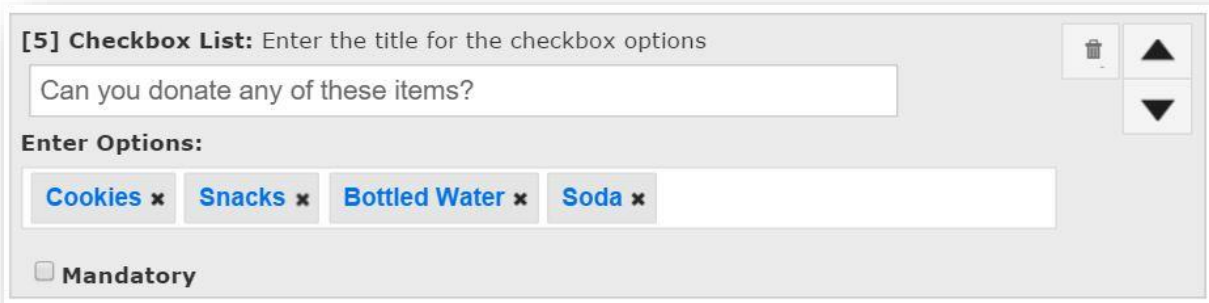
**Enter Options:**

Bus x Will Drive x

**Mandatory**

The screenshot shows a form configuration window for an 'Option Box'. At the top, there is a title field containing 'Transportation Option'. Below the title is a section labeled 'Enter Options:' with a text input field containing 'Bus x' and 'Will Drive x'. At the bottom, there is a checkbox labeled 'Mandatory' which is currently unchecked. On the right side of the window, there are three icons: a trash can, an up arrow, and a down arrow.

The Checkbox List lets users pick any or all of your options. Title the list, then enter the options by hitting enter.



[5] **Checkbox List:** Enter the title for the checkbox options

Can you donate any of these items?

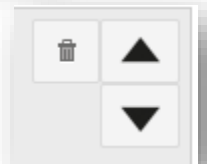
**Enter Options:**

Cookies x Snacks x Bottled Water x Soda x

**Mandatory**

The screenshot shows a form configuration window for a 'Checkbox List'. At the top, there is a title field containing 'Can you donate any of these items?'. Below the title is a section labeled 'Enter Options:' with a text input field containing 'Cookies x', 'Snacks x', 'Bottled Water x', and 'Soda x'. At the bottom, there is a checkbox labeled 'Mandatory' which is currently unchecked. On the right side of the window, there are three icons: a trash can, an up arrow, and a down arrow.

After you add Form information, you can delete or reorder the list. Click the garbage icon to trash a form item. Use the up and down arrows to change the order of your listed form items.

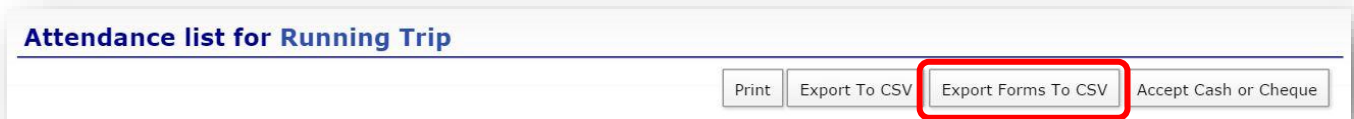


**Mandatory**

Every Form item can be marked Mandatory. Mark an item Mandatory if you must have the user enter information in that section.

Once you have saved your Event, you will see a summary of your Event Form.

After Event Forms have been completed, you can review the information the Parents have entered only by downloading the Event Forms CSV report, which you can access by clicking on your Event's **Attendance List**. From the *Attendance List*, click **Export Forms to CSV**.



When you export your Form information you can open an Excel file which will show you all the information the parent entered.

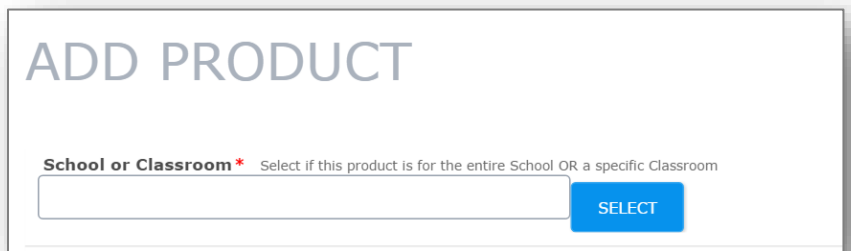
## Products

Products in School-Day are designed to help your school create their own storefront to sell items online. Anything you sell at your school can be put online – pizza, snacks, fundraising items, customized clothing or ticket sales. With Products, you set the cost per one unit, and the Parents can purchase one or more – just like regular online shopping carts.

To add a Product, click the **Add** symbol from the Dashboard and click **Product**.

Click your School name to add a Product for the entire school, or pick an individual class from the list to post just to them.

Fields marked with a red asterisk are mandatory, others are optional.

A screenshot of a form titled "ADD PRODUCT". Below the title is a dropdown menu with the label "School or Classroom\*" and a subtext "Select if this product is for the entire School OR a specific Classroom". To the right of the dropdown is a blue button labeled "SELECT".

*Note: Products MUST have a cost. At this point, School-Day cannot be used to share free items. When you run out of stock for your Product, you should delete the Product or set the expiry date to prevent additional orders and payments.*

## Product Details

Products are listed on your Dashboard or under the Administration Tools. To view details about a Product and it's purchase history, edit or delete a product, click on the **Product's** name.

## Event Products

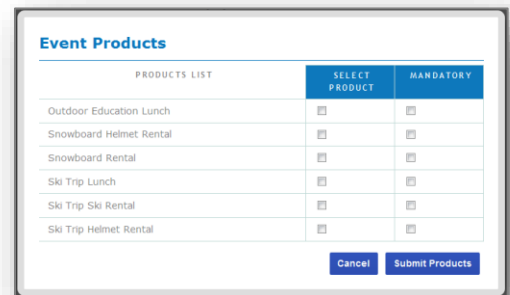
Event Products allow you to tie specific Products to Events. Event Products can only be used when attached to an Event and are visible to parents only from the Event page.

You must add your Event Product before you begin to create your Event. To add an Event Product, navigate to the **Add Product** screen. Select **Yes** from the Product for Event drop-down list, complete the required fields and click **Submit**.

Please note that Event Products cannot be customized, nor can the parent adjust the quantity. So, if you have a Product linked to an Event that has options, forms, or parents might want more than one of, you should create a regular Product.

To attach an Event Product to an Event, navigate to the Add Event screen. Complete the required fields, and click **Add Event Products**.

You can then select any existing **Event Products** to add. If your Event Product is a mandatory purchase for your event, select **Mandatory**. This will automatically add the Event Product to parent's shopping carts when they check out. If an Event Product is not mandatory, parents will select whether or not to purchase the product.

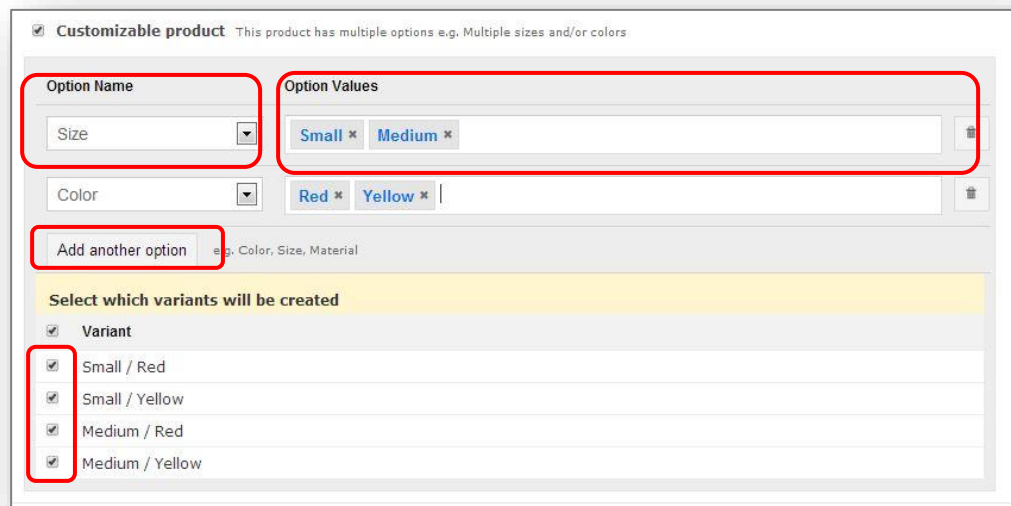


PRODUCTS LIST	SELECT PRODUCT	MANDATORY
Outdoor Education Lunch	<input type="checkbox"/>	<input type="checkbox"/>
Snowboard Helmet Rental	<input type="checkbox"/>	<input type="checkbox"/>
Snowboard Rental	<input type="checkbox"/>	<input type="checkbox"/>
Ski Trip Lunch	<input type="checkbox"/>	<input type="checkbox"/>
Ski Trip Ski Rental	<input type="checkbox"/>	<input type="checkbox"/>
Ski Trip Helmet Rental	<input type="checkbox"/>	<input type="checkbox"/>

Cancel Submit Products

## Customizable Products

The Customization Product option allows you to set up a Product that has variable options associated with it, such as flavour, colour or size.



Customizable product This product has multiple options e.g. Multiple sizes and/or colors

Option Name: Size

Option Values: Small \* Medium \*

Color: Red \* Yellow \*

Add another option e.g. Color, Size, Material

Select which variants will be created

Variant

- Small / Red
- Small / Yellow
- Medium / Red
- Medium / Yellow

Pick from pre-loaded options under Option Name, or click **Enter a New Option** to make your own category. Use the pre-loaded Option Values, or type your own in the field and select **Enter** to create.



To create multiple Options, click **Add Another Option**. All possible variant combinations will be displayed under the Variant field. If one set of options is not available, (for example Small/Red) simply click to unselect it. You should only use 2-3 options per item, otherwise your Variant list will become far too difficult for parents to navigate.

Please note that Customizable Options can only be used to sell Products at the same price point. For example, people could pick between white milk or chocolate if both were \$1.00. You can't use this feature to pick between a short sleeve shirt at \$5.00 and a long sleeve shirt at \$10.00.

## Product Forms

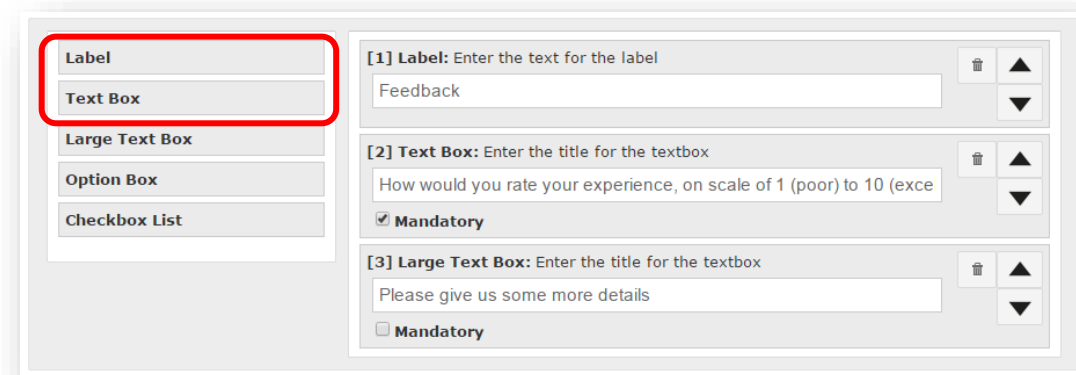
Adding Forms for your Product allows you to gather more information from Parents, or offer them more choice in Products. Text boxes gather information (such as comments, suggestions or food allergies), while Option boxes help you gather choices (ham or turkey) and Checkbox Lists can help you gather multiple choices (like sandwich toppings).

Please note that if you are going to use a Product Form to gather sensitive information about Parents/Students, it is your responsibility to adhere to your school board's policy about the use and care of that information.

You can add any combinations to create a custom Form for your Product. To begin, click **Add Product Form** on your Add Product page. Click on a heading to add it.

**Label** allows you to create a label or heading for your Form. For example, if you were about to ask a series of feedback questions, you might want to label that section Feedback.

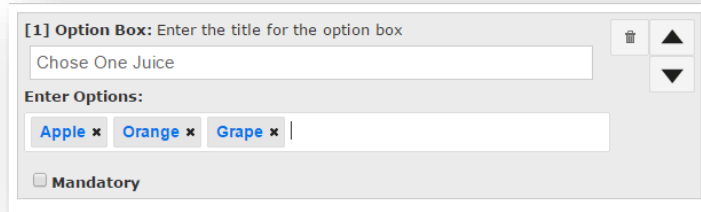
There are two **Text Box** options. **Text Box** is designed to get shorter answers from users. **Large Text Box** is designed to gather longer answers. Both boxes have a character limit of 500, but Large Text Box is formatted to encourage more text from the user.



The screenshot displays the Product Form builder interface. On the left, a vertical list of form elements is shown: **Label**, **Text Box**, **Large Text Box**, **Option Box**, and **Checkbox List**. The **Label** and **Text Box** options are highlighted with a red rectangular border. On the right, a preview of the form shows three sections:

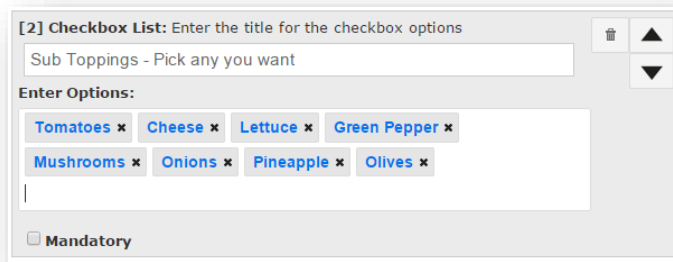
- [1] Label:** Enter the text for the label. The text "Feedback" is entered in the input field. There are delete, up, and down arrow icons to the right.
- [2] Text Box:** Enter the title for the textbox. The text "How would you rate your experience, on scale of 1 (poor) to 10 (exce" is entered. A **Mandatory** checkbox is checked. There are delete, up, and down arrow icons to the right.
- [3] Large Text Box:** Enter the title for the textbox. The text "Please give us some more details" is entered. A **Mandatory** checkbox is unchecked. There are delete, up, and down arrow icons to the right.

The **Option Box** lets users pick only one of the listed items, just like Product Options. Enter a name for the Option Box, and then enter the **Options** by typing and selecting **Enter**.



The screenshot shows a configuration window for an 'Option Box'. At the top, it says '[1] Option Box: Enter the title for the option box'. Below this is a text input field containing 'Chose One Juice'. To the right of the input field are three icons: a trash can, an up arrow, and a down arrow. Below the input field is the label 'Enter Options:' followed by a list of options: 'Apple x', 'Orange x', and 'Grape x'. At the bottom of the window is a checkbox labeled 'Mandatory' which is currently unchecked.

The **Checkbox List** lets users pick any or all of your options, which can be useful for items that have lots of choice. Title the list, then enter the **Options** by typing and selecting **Enter**.

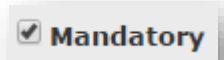


The screenshot shows a configuration window for a 'Checkbox List'. At the top, it says '[2] Checkbox List: Enter the title for the checkbox options'. Below this is a text input field containing 'Sub Toppings - Pick any you want'. To the right of the input field are three icons: a trash can, an up arrow, and a down arrow. Below the input field is the label 'Enter Options:' followed by a list of options: 'Tomatoes x', 'Cheese x', 'Lettuce x', 'Green Pepper x', 'Mushrooms x', 'Onions x', 'Pineapple x', and 'Olives x'. At the bottom of the window is a checkbox labeled 'Mandatory' which is currently unchecked.

After you add Form information, you can delete or reorder the list. Click the **Garbage Can Icon** to trash a form item. Use the up and down arrows to change the order of your listed form items.



Every Form item can be marked Mandatory. Mark an item Mandatory if you must have the user enter information in that section.



Once you have saved your Product, you will see a summary of your Product Form.

Now, parents have an easy way to complete the purchase of a Product. They can enter text, pick from a drop-down and click on any or all options.

After your Product has been purchased, you can review the information the Parents have entered only on the Purchase Report.

Click on your Product's name, then the **More** button, then Purchase Report. On the Report page, you must select **Export Forms to CSV**. Product Forms information can only be found here due to the complex and large nature of the information. It will show on no other reports.

A blue rectangular button with rounded corners and a white border, containing the text "EXPORT FORMS TO CSV" in white, uppercase letters. The button is positioned to the right of the first paragraph.

EXPORT FORMS TO CSV

When you export your Form information you can open an Excel file which will show you all the information the parent entered.

## FEES

Student Fees allow you to assign a specific fee to a Student or groups of Students. Fees can be applied independently of Class/Groups, or associated with a Class/Group. Parents can then pay the assigned fee partially, or in full. The Student will now hold a balance which they can pay down over time. Fees are designed for any type of school fees you might need to collect, such as library fees, team/club/group fees, lost textbooks, or large ticket items like multi-day trips, where Parents might wish to pay for an item over time.

### Add a Fee

To add a Student Fee click the **Add** button and select **Add Fee**.

Fill in all required fields by typing in information or selecting from the menus. Mandatory fields are marked with a red asterisk.

If your school does not have the Cost Calculator set, your Actual Cost and Display Price will both be the same. If the Cost Calculator is set, please see the Actual Cost/Display Price explanation in the Products section of the Administrator User Guide.

Click **Save** to create your Student Fee. Once you make the Fee, you will need to Assign or Associate the Fee in order for it to be linked to Student accounts, and payable by Parents.

### Edit a Student Fee

To edit a Student Fee, click the name of your Fee to get to the Fee's page (or click Fees from the Administration Tools list to access Fees). On the Student Fee page, click **Edit Student Fee**.

### Delete a Student Fee

To delete a Student Fee, click the name of the Fee to get to the Fee's page, and click **Edit Student Fee**. Delete Fee is an option near the bottom. You can only delete a Fee if no partial payments have been submitted by Parents. If partial payments have been submitted for your Fee, you must first refund those purchases. Deleting a Fee will remove all Fee Assignments to Students and Associations with Classes/Groups, but you will still retain a record of all payments made towards the fee in your Payment History.

## Associate a Student Fee

Student Fees can be associated with Classes/Groups. This allows a fee to be assigned to an entire Class/Group, an entire school, or specific grade groupings quickly, and means that any students enrolled in the Classes/Groups will automatically receive this Fee. It will be automatically removed from their account if they leave the Class/Group (unless a payment has already been made) and will be automatically assigned to a Student's account if they join the Class/Group. You can Associate one Fee, or multiple Fees at the same time.

To associate multiple Fees with Classes/Groups at the same time, first select the **Checkbox** beside multiple Fees, and then click **Associate Fee With**. Or just select one **Fee**.

FEE NAME	NECESSITY	# GROUPS	# STUDENTS	COST	PRICE	PAID	REFUND	REMAINING
frais pour le classe d'art	Mandatory	2	113	\$15.00	\$15.38	\$46.14	\$0.00	\$1,691.80
PE Locker Rental	Mandatory	0	0	\$14.63	\$15.00	\$0.00	\$0.00	\$0.00
Gym Fees	Mandatory	43	131	\$14.63	\$15.00	\$160.00	\$0.00	\$1,805.00
Art Fees	Mandatory	46	132	\$14.63	\$15.00	\$60.00	\$7.50	\$1,920.00

To select a Class/Group, click on the **Name**, which will highlight in blue, or click **Select All**.

You can select more than one Class/Group to Associate the Fee with, just click **Multiple** to highlight them. Once you have made your selections, click **Associate**.

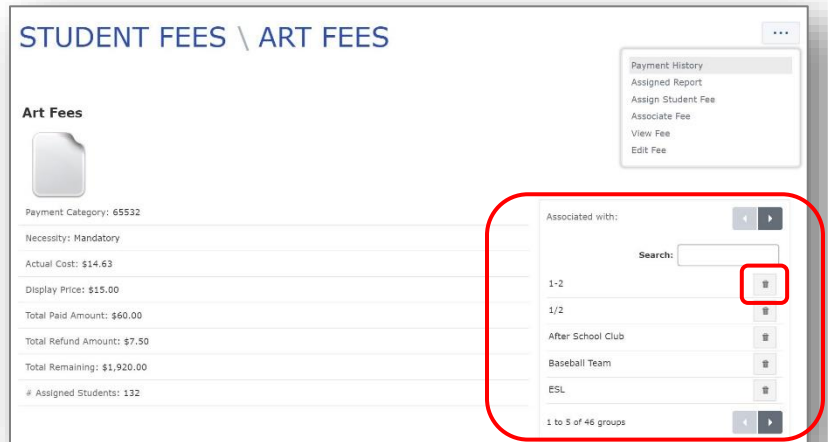
Once you Associate a Fee with a Class/Group, you will see a list of linked Classes/Groups on the Fee's page. If a Student is in more than one Class/Group that has been associated with this Fee, their account will only be charged with one instance of the Fee. If you need to assign an identical Fee more than once, you must use Assign Fee to add the second occurrence manually.

NAME	DESCRIPTION
1-2	ESL 1
1/2	
After School Club	
Baseball Team	SDPS's Baseball Team!
ESL	
Field Trip 1	for grade 1
French	
Grade 1	Oral Presentations
Grade 2	
Grade 3	

Please take care when associating multiple Fees to multiple Classes/Groups to ensure you're associating them correctly.

To unassociate a Fee with a class, use the garbage can icon to clear. The Fee will be cleared from class, and from every Student's account (unless a payment has been made).

If a duplicate Fee was assigned to a Student, that Fee must be cleared using the Student Fee Assigned Report.

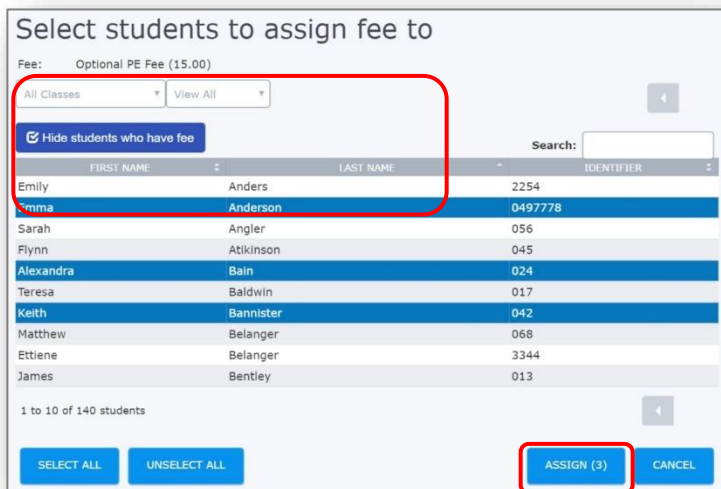


### Assign a Student Fee

Assigning a Fee is good for items which don't relate to entire classes (which you use Associate a Fee for). To assign to individual Students, click **Assign Student Fee** to.

On the Select Students screen, you can use the drop-down lists or Search bar to find a Class/Group or individual Students.

You can use the Hide Students option to hide students that already have this Fee Assigned or Associated to them, so that you don't accidentally apply the Student Fee twice.



To select a **Student**, click on their name, which will highlight in blue, or click **Select All** to select an entire Class/Group. You can select multiple **Students** by clicking on their name.

Once you have made your selections, click **Assign**.

## Review Student Fee Information

To review general information about your Student Fee, click on the **Fee's** title from the list in the Student Fees area. You will see a list of Associated Classes/Groups, as well as some summary information about Assigned Students and outstanding totals.

To review the payment records for your Student Fee, click **Assigned Report**. This will show only the Students who have had that fee assigned to them.

This report can be filtered by the date paid using the From and To calendars, using the Search bar to find a particular Student, or filtering by a particular class. As well, you can hide Paid Orders, in order to quickly discern any outstanding payments. The report can also be exported to CSV. This report will show you information about your Student Fee, such as:

Org. Price – the original assigned Fee price

Paid - the amount the Student has paid so far

FIRST NAME	LAST NAME	STUDENT ID	HOMEROOM	ORG PRICE	PAID	REMAINING	REFUND	ORDER IDS
Jennifer	Aaron	090	1-2	\$15.00	\$15.00	\$0.00	\$0.00	279313
Christine	DiGuardio	333	Grade 7	\$15.00	\$15.00	\$0.00	\$0.00	357312

Remaining – the amount of the original assigned Fee price left to pay

## Student Account

Once a Student Fee is applied to a Student, you can track that information on a per Student basis.

PURCHASE REPORT   STUDENT ACCOUNT   EDIT   DELETE

**Rachel Laurenston**  
Identifier: 24735

**Student Fees**

The student owes \$15.00 (Mandatory) in fees which need to be paid.

Classes Enrolled In:  
Baseball Team  
Grade 8 Room 100  
Student Council

GENERATE ANOTHER SECURE-MATCH KEY

Guardian Info

**Ellen Laurenston**   Unlink Parent

No details entered

Email: el Laurenston@email.com

Using the Students tab, navigate to a Student and click on their name. On their information page, you will see the total fees needing to be paid.

Click on the ***Fee Information*** and you will be brought to the Student Account page. Here you can review any assigned fees, generate reports, apply a subsidy, print a receipt, and assign further fees.

By clicking ***Export Receipt***, you can generate an Excel file that contains a printable receipt of Fees for that student. Or, save paper, ink, and associated costs and time by clicking ***Email Receipt*** to electronically send the invoice with a custom message option.

**Student Account**

Rachel Laurenston

Show 25 entries

Fee Name	Payment Category	Necessity	Original Price	Remaining to Pay	Created	Order IDs
Art Supplies	Field Trips	Optional	\$15.00	\$15.00	August 25 2015 at 09:13:22 AM	
Gym Clothes					March 13 2015 at 11:50:32	
Gym Clothes						
Library Fees						
Locker and Locks						
Lost Workbook Fee						
Student Activities and Student Leadership						
Student Locks						

1 to 8 of 8 Products

**School-Day Public School**  
 26 Soho Street  
 Toronto, Ontario M5T 1Z7  
 416-599-5500

To the parents/guardians of: Rachel Laurenston

Presented below is a list of your student's outstanding school fees.

Fee	Original Price	Remaining To Pay
Library Fees	\$5.00	\$0.00
Locker and Locks	\$5.00	\$5.00
Gym Clothes	\$25.00	\$25.00
<b>Totals</b>	<b>0</b>	<b>0</b>

There are two ways to pay the fees:

- Online payment through the school's online payment system at [www.school-day.com](http://www.school-day.com)
- Cash or cheque payment at the school's office.

We encourage you to use the online option.

Sincerely,  
 School-Day Public School

Fee Name	Payment Category	Original Price	Remaining To Pay	Created	Last Update
Locker and Locks	Maintenance Fees	\$15.00	\$15.00	2015-01-30 8:58	2015-01-30 8:58
test	Fundraising	\$5.00	\$5.00	2015-02-17 12:21	2015-02-17 12:21
Textbook Recovery Fee	Operating Fund, ect	\$9.00	\$9.00	2015-03-13 12:50	2015-03-13 12:50

By clicking ***Export to CSV***, you can generate an Excel file of the Student Account, for download and use in other programs.



## Apply Subsidies

To apply a subsidy, navigate to the Student Account page using the Students tab, navigating to a Student and clicking on their **Name**. On their information page, you will see the total fees needing to be paid.

Click on the **Fee Information** and you will be brought to the Student Account page.

To subsidize a Fee, click on the **Payment Amount** under

### Add Subsidy

Add a subsidy to this student's fee.

**Remaining Amount: \$15.00**

- Summer Discount **\$15.00**
- International Discount **25%**
- District Discount **30%**
- Full Subsidy **100%**
- Other:  
  \$  %

Fee Name	Payment Category	Necessity	Original Price	Remaining to Pay	Created	Order IDs
Art Supplies	Field Trips	Optional	\$15.00	\$15.00	August 25 2015 at 09:13:22 AM	
Gym Clothes	Operation Fund. ect	Mandatory	\$25.00	\$20.00	March 13 2015 at 11:50:32 AM	218080
		andatory	\$25.00	\$25.00	May 01 2015 at 01:02:17 PM	
		andatory	\$5.00	\$0.00	March 13 2015 at 10:14:33 AM	218079
		andatory	\$5.00	\$0.00	March 13 2015 at 11:47:58 AM	218080 218135
		andatory	\$8.00	\$8.00	May 01 2015 at 01:08:41 PM	
		andatory	\$21.00	\$21.00	August 25 2015 at 01:14:05 PM	
		andatory	\$10.25	\$10.25	August 28 2015 at 06:10:45 PM	

the Remaining to Pay column.

Pick from pre-set subsidy amounts or percentages, or enter your own subsidy by dollar amount or percentage, and click **Add Subsidy**.

Once you add the subsidy, the Remaining to Pay amount for the Fee will update to reflect either a dollar change, or a percent change, and the subsidy will generate an Order Number.

This Order Number now allows the subsidy to be tracked throughout your school's payment history as a dollar amount.

## Accept Cash Payments for Fees

Administrators can accept a cash or cheque payment for Fees. Use the **Accept Cash** link to navigate to one Student, or more than one Student (please see the Accept Cash section of your Administrator User Guide for further information on this). Click **Add Fee** to begin.

The system will then generate a list of Fees to accept payment for.

Only Fees that have been previously Assigned to a Student or Associated with a Student's Class/Group will appear for you to select. Click on the Fee(s) to highlight, and click **Add Accepted**.

Description	Type	Qty	Price	Subtotal
No items have been selected				

Use the Subtotal field if you are only receiving a partial Fee payment, chose the Payment Type and click **Accept Payment**.

Description	Type	Qty	Price	Subtotal
Art Fees	Fee	1	15.00	15.00
<b>Total</b>				<b>15.00</b>

Payment Type: Cash

\* Price shown is the minimum amount that can be paid for that item.

**Grand Total: 15.00**

## Student Fees Reports

Payments for Student Fees will always appear in your Payment History, but there are other filtered reports you can access which will show you your information grouped in meaningful ways.

To access the Student Fees Reports, click **Fees** from your Administration Tools list.

All Assigned Report

Click **All Assigned Report** to see a list of all of your school's Assigned/Associated Fees. Preselect some Fees beforehand to view particular Fees. This will give you a report that details all Fee information, including Students linked, amounts paid, and outstanding balances.

## Student Totals Report

Click **Student Totals Report** to view the Student Totals Report, which will show you all Students who have a Fee amount applied to them, broken down into Mandatory or Optional, and it gives Student totals while showing any payments and remaining balances.

Use the search functions to narrow down your results, and export to CSV for an Excel file of your filtered selections.



	LAST NAME	STUDENT ID	HOMEROOM	NECESSITY	ORG PRICE	PAID	REMAINING	REFUND
	Aaron	090	1-2	Mandatory	\$120.76	\$110.76	\$10.00	\$7.50
Jennifer	Aaron	090	1-2	Optional	\$15.00	\$15.00	\$0.00	\$0.00

## Other Reports

You may have additional reports related to Student Fees under your Custom Reports section under the Payment Centre.

## SERVICES

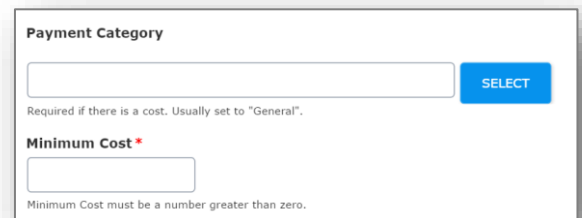
Creating a Service allows you to create a pay item that doesn't have a set, mandatory price. Services can be used to manage multiple payment amounts that vary between individuals, such as fundraising contributions from Parents, or the varying cost of lost textbooks. They have a minimum cost set, then a Parent can pay the minimum cost or more.

To add a Service, click **Service** from your Add button.

Complete the required fields, and select a **Minimum Cost**.

The Minimum Cost is the lowest price point of your Service.

For example, if art class fees range from \$10.00 to \$25.00, you would enter \$10.00. A parent may enter any dollar amount over the Minimum Cost. When you have entered all the fields, select **Save**.



Payment Category

Required if there is a cost. Usually set to "General".

**Minimum Cost \***

Minimum Cost must be a number greater than zero.

*Note: You must inform Parents what their Service cost will be, and instruct them to select the appropriate amount when they are arranging payment. Parents only see the Minimum Cost for Services.*

## Service Details

Click on **Service** name to see associated details such as Payment History and Edit Options.

*Note: Once you have clicked **Submit** to save your Service, you **cannot** edit or change the Cost or Payment Category fields. If you need to change the Minimum Cost you must delete it and create it again. Other fields can be edited.*

EDIT    DELETE    PAYMENT HISTORY

### Woodworking Fee

**Description:**  
Please pay the amount indicated by the woodworking teacher

**Minimum Cost:** \$0.50

**Payment Category:** Special Days Fall

**Visibility:** Private

As a school admin you cannot pay for services at this time.

## PARENT CONFERENCE

The Parent Conference module allows Administrators to create interview schedules for Teachers at the school, which Parents can use to book their own appointments.

### Add Conference

To create a new Conference, select **Parent Conference** from the Administration Tools menu. Then click **Add Conference Event**.

A Title is mandatory for your Conference. Please give it a clear Title so it's easy for Parents to navigate, especially if you have more than one Conference scheduled. We recommend you title your Conferences with dates and specifics, for example Subject Teachers Conference, or All School Schedule October 22, 2016.

Until you are satisfied with your Conference, you should keep the **Status** to **Inactive**. You can set this to Active later to share with Parents.

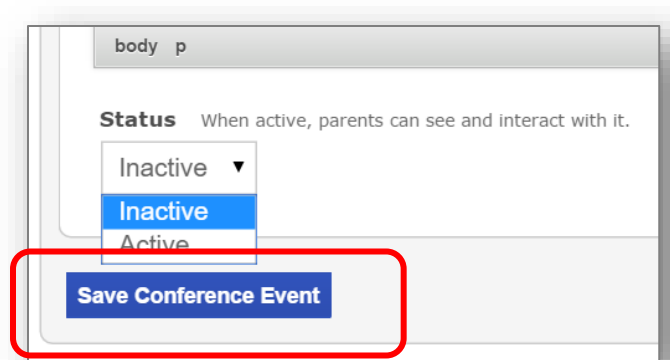
When you are done, click **Save Conference Event**.

### Classes Included in Conferences

By default, every Class/Group that is active in your School-Day Class/Group list will appear in your Conference, linked to the teacher. So if a Teacher appears in School-Day, any or all of their assigned Students will be able to book an appointment with them.

For example, if Mr. Andrews teaches Kindergarten and the Running Club that includes students in other grades, those Students/Parents in the Running Club will be able to book an appointment with Mr. Andrews, unless the Running Club is excluded from Conferences.

If you have extra groups, clubs, teams or Student groupings that shouldn't be included in Conferences, please take the time to exclude them before activating your Conference.

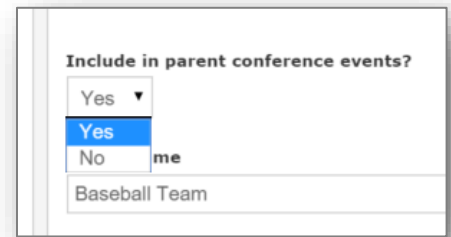


## Excluding a Class/Group

To exclude a Class/Group from appearing in the Conferences as described above, find the Class/Group from the Groups button on your Dashboard, and then click **Edit**. Select **No** under Include in Parent Conference Events and then **Save**.

Now, if a Student is in the Running Club and Grade 4, instead of being able to book with their Grade 4 teacher and Mr. Andrew's Kindergarten class, they will only see their Grade 4 class appointments.

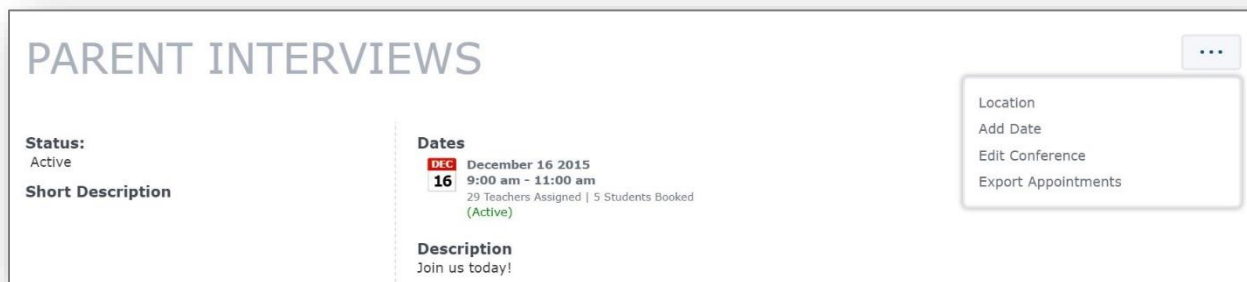
It is very important that you exclude inapplicable Classes/Groups before you activate your Conference. If you do not, you will run the risk that some parents will be confused about the multiple appointments available to them, and will book an appointment that they don't need.



The screenshot shows a dropdown menu titled "Include in parent conference events?". The menu is open, showing three options: "Yes", "No", and "me". The "No" option is currently selected and highlighted in blue. Below the menu, the text "Baseball Team" is visible, indicating the current selection.

## Conference Details

Click on any **Conference** in the Conference Events area to view or set the Conference Details, such as Date, Status and Teachers invited.



The screenshot shows the "PARENT INTERVIEWS" conference details page. The page is divided into several sections:

- Status:** Active
- Short Description:** (Empty field)
- Dates:** December 16 2015, 9:00 am - 11:00 am. Below the date, it says "29 Teachers Assigned | 5 Students Booked (Active)".
- Description:** Join us today!
- More menu:** Location, Add Date, Edit Conference, Export Appointments.

## Set Conference Details

To set a Date for your Conference, click **Add Date** from the **More** menu and use the drop down options to select. You can also set your lengths for your appointments using the **Appointment Time Interval** dropdown. Click **Add Date** to save.

Click **Add Date** again if you would like to add any more date and time options to this Conference. This lets you open a Conference for different dates, or even break up the same conference over one day, if for example only some teachers can have appointments in the morning.

You should also open up different Date/Time blocks if you have some Teachers who will be offering a different Appointment Time Intervals than others.



The screenshot shows the "Dates" section of the conference details page. It displays two date/time blocks:

- NOV 15 November 15 2015**: 3:30 pm - 8:00 pm, 0 Teachers / 0 Parents, Inactive.
- NOV 15 November 15 2015**: 9:00 am - 10:30 am, 0 Teachers / 0 Parents, Inactive.

## Room/Location Defaults

Conferences will automatically pick Teacher's room locations based on their alphabetically listed first class.

The Room Default will list the Teacher's default class, from their list of available Classes/Groups. Click on the **Location** button on the Conference Details page to change which Class/Group the conference will be offered to from the drop down, or to rename the location by entering text into the Custom field.

Since Parents clearly see the Room Names when they book, you should ensure this information is clear and up to date. You can also use this field to communicate other specifics with parents, such as Co-Interviews with Mrs. Anders or French Students Only, which may not be reflected in the Teacher's schedule.

Click **Save** when you're done.

Once you have set Dates and Times for your Conference, you need to add Teachers to these specific date and time groupings.

Click on the time range to select and then click **Select Teachers** from the **More** menu.

Click a Teacher to select (it will highlight in blue and you can select more than one at a time) and then choose **Add Selected**. Then the system will create your Conference.



## Edit a Teacher/Class Location

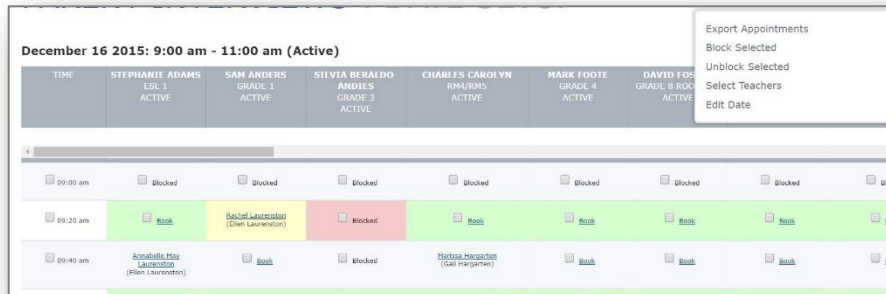
Once you have created your Conference, if you see any issues with the Teachers you've added, click the **Teacher's** name to adjust. On the next screen, you can edit the location, change the status, or remove the Teacher from the schedule by clicking **Delete**.

Click **Update** to save your changes.

Please note that if you delete a Teacher who has appointments booked in that Conference, you will lose those bookings permanently.

## Export Appointments

To export a list of appointments, click on a time range from your list of Conferences, then click **Export Appointments**. This will download an Excel file which you can edit, email, save or print.



The screenshot shows a scheduling interface for December 16, 2015, from 9:00 am to 11:00 am. The interface is organized into a grid with columns for teachers and rows for time slots. The teachers listed are Stephanie Adams (ESL 1), Sam Anders (Grade 1), Silvia Beraldo Andies (Grade 3), Charles Carolyn RM/RMS, Mark Foote (Grade 4), and David Fox (Grade 8 ROC). The time slots shown are 09:00 am, 09:20 am, and 09:40 am. The 09:20 am slot is highlighted in green and contains a 'Book' button. A dropdown menu is open over the grid, listing options: Export Appointments, Block Selected, Unblock Selected, Select Teachers, and Edit Date.

When viewing your newly populated Conference, you can edit and block appointment spots. To block a time slot, select the checkmark beside it and click **Block Selected**.

This can be done for an entire Teacher's Schedule if they won't be there, or across one time for everyone, for a lunch break.

To book a time slot for a Student yourself, click the **Book** option.

When you're booking on behalf of a Student/Parent, the system will give you a list of available Students unique to each Teacher.

Click on a **Student's** name to see available Parents to book for. If the parent has not made a School-Day account, you can still book the Student, but the Parent name will remain Unspecified.

## Delete Conference

If you need to delete a Conference, find it in the list of the Conference Events area. Click **Edit Conference** and then **Delete Event**.



### Activate Conference Details

Once you are satisfied with your Conference Details, you need to share each date range with Parents by setting the Conference to Active. Each date range must be activated.

Dates	
NOV 15	November 15 2015 3:30 pm - 8:00 pm Inactive
NOV 15	November 15 2015 9:00 am - 10:30 am Active

To do this, click on your **Conference Date** range and then click **Edit Conference**, select an **Active Status** and click **Update**.

Then, you must also activate your Conference in general, not just the specific times. Click **Edit Conference** from the Conference Details page, change the status to Active and **Update**.

Now Parents can view and book your Conference.

## FINANCE MANAGER

The Finance Manager link manages all of the administrative financial components of School-Day. This is where you can manage Bank Deposits, GL Accounts, Payees, and Reconciliation for your school.

### Bank Deposits

Bank Deposits can be tied into cash and cheque orders you have logged at your school, allowing you to batch and close payments, and helping you to reconcile funds. Bank Deposits also lets you create a deposit slip for sending to a bank. Both of these aspects of the Bank Deposit feature can be used together or separately.

To begin, click **Bank Deposits** from the Finance Manager.

Click on the **Settings** tab to review your Deposit settings or edit.



You will see previous deposits. Click on the **Deposit's** line to open details.



To create a new Bank Deposit, click **More** button and **Create Deposit**. Enter a description, or use today's date as a default and click **Create**.

You can now add the cash and cheque orders that have been logged at your school into a Deposit. Click **Add Orders** to start creating your batch. If you don't wish to assign orders to a deposit, skip this section.

### Select Orders

View All ▾

From  ... To  ... Search:  ◀ ▶

DATE		TRN #	ORDER	INITIAL AMT	DEPOSIT AMT	REFUND AMT	PMT TYPE
2013-04-23 14:05:38	Dance-A-Thon	118882	118882	\$9.80	\$9.80	\$0.00	CASH
2013-04-24 15:34:29	Yearbook	118972	118972	\$40.00	\$40.00	\$0.00	CASH
2013-05-03 15:46:50	Spirit Wear	120211	120211	\$1.00	\$1.00	\$0.00	CASH
2013-05-15 11:42:51	Spring Carnival	121848	121848	\$5.00	\$5.00	\$0.00	CASH
2013-05-22 11:21:13	Glee Club Concert	122335	122335	\$5.00	\$5.00	\$0.00	CASH
2013-05-27 10:59:53	Museum Field Trip	123629	123629	\$6.00	\$6.00	\$0.00	CASH
2013-05-29 15:09:30	Yearbook	123930	123930	\$40.00	\$40.00	\$0.00	CASH
2013-06-12 12:46:30	Summer Track and Field Trip	126799	126799	\$5.00	\$5.00	\$0.00	CASH
2013-06-19 14:11:16	Summer Track and Field Trip	126906	126906	\$5.00	\$5.00	\$0.00	CASH
2013-06-26 17:20:29	End of School Barbecue	127634	127634	\$5.00	\$5.00	\$0.00	CASH

1 to 10 of 996 orders

◀ ▶

SELECT ALL UNSELECT ALL **ADD SELECTED (3)** CANCEL

Use the options to filter by date, or search for an individual transaction number. Click an **Order** to highlight, and then click **Add Selected** to add these order(s) to your deposit batch.

The deposit total will be shown.

Next, enter the denominations of the cash you will be depositing, using the drop-down options. Adjust the **Type** using the pre-populated options, Adjust the **Quantity** field to reflect your deposit, and the total will be automatically calculated under the **Value** column.

Total Bill(s):	5.00
Total Loose Coin(s):	1.00
Amount In Cheques:	5.00
Amount In Cash	6.00
Total Deposit:	11.00

Use the **Totals** section to verify your deposit amounts.

The Deposit Total Selected is: \$10.00

When you are finished, if you would like to review your entries or add more orders to this deposit later, click **Save Deposit**.

If you would like to close this Deposit, and create a batch of your cash and cheque orders, click **Close Deposit**. Once you click **Close**, you will not be able to add any more cash/cheque orders to this deposit. Closing your deposit indicates that you have sent the associated orders to the bank for deposit.

Once you have closed a deposit, cash orders are labelled with the associated deposit information.

### G/L Accounts

G/L Accounts or payment account codes should be pre-loaded into your school. These codes need to be centrally loaded and managed, but changes can be submitted from the school level.

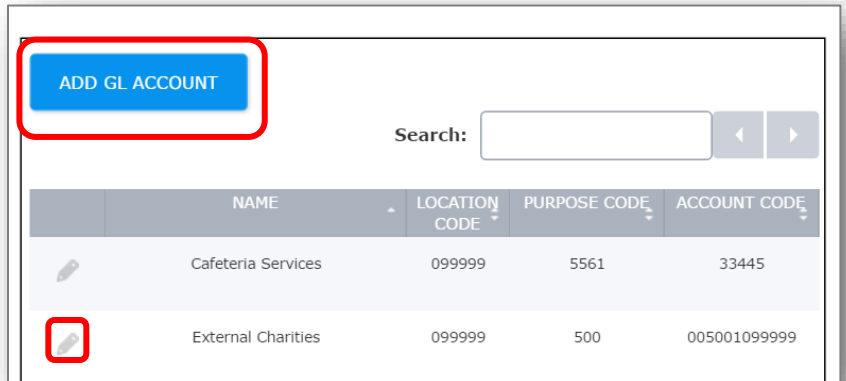
Click **G/L Accounts** from the Finance Manager.

To View G/L Accounts, click the **Folder** icon. These accounts may be arranged under different categories. To edit a G/L Account click the **Edit** icon to the left of the G/L Account line item.

Note: All additions and edits will be sent for approval to the Finance Administrator.

Edit the fields and click **Save**. A notification will appear indicating that the G/L Account you have edited has been sent for approval.

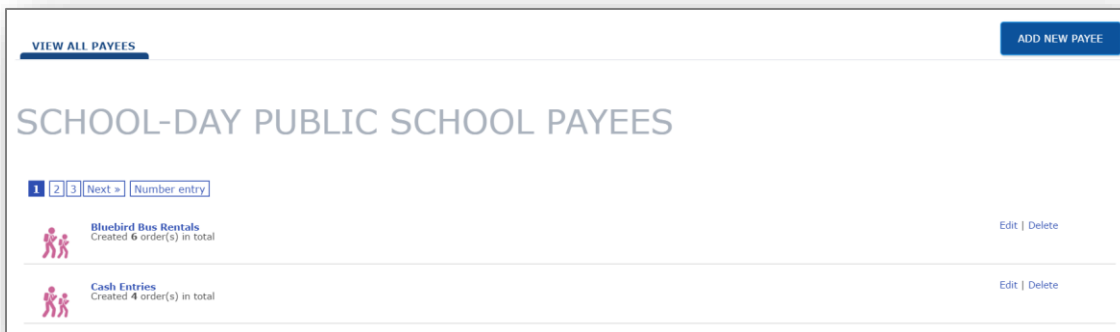
To add a G/L account, click **Add G/L Account**. Enter the Description, Purpose and Account Code, and click **Save**.



## Payee Management

Payees are used to log payments to your school from outside agents – such as income from facility rentals or lunch programs.

To manage your school's Payees, click **Payee Management** from the Finance Manager menu.



To add a Payee, click the **Add New Payee** link at left side page. Complete the required fields. Please note that you must include an email address to add a Payee. You may use a fake email address if you wish, but ensure you use a     @    .com format.

To Edit or Delete a Payee, click on the **Payee** name.

To review the past transactions of a Payee, click on the **Payee** name. To review a specific order, click on the **Order Number**.

## Reconciliations

School-Day can also create Reconciliation reports to help you settle your school funds. We have provided technical usage instructions only. If your school will be using this feature, you will receive guidance from your school board about items such as time frames and information to be included, so please contact your school board representative with usage questions.

To begin, click **Reconciliation** from the Finance Manager. Previous reconciliations will be listed. To view the details of a past reconciliation, click the **Start Date**.

START DATE	END DATE	START BALANCE	END BALANCE	CLOSED DATE	CREATED
2014-11-01	2014-11-29		\$10.00	2014-11-28	2014-11-28
2015-01-01	2015-01-29		-\$5.00	2015-01-20	2015-01-20
2015-02-02	2015-02-19		\$48.99	2015-02-12	2015-02-12

To create a new Reconciliation, click the **More** button. Select the date range for your Reconciliation period by clicking the date box and using the pop-up calendar. Click **Create**. You can now leave this posting at any time, and it will save automatically.

Once you have started to enter information to your Reconciliation, the System will create two projected reports. You can view these at any time to check your inputted information. Click on the **More** button on your Reconciliation to download.

The Projected Income Report will show all daily deposits by card type, and includes cash and cheque deposits where used. Use this report to verify the income on your bank statement with the information in School-Day.

January 31 2015

- Projected Income Report
- Projected Reconciliation GL Report
- Delete Reconciliation

SELECT BATCHES

Search:

DEPOSIT	FLAG

While Batch dates in School-Day and deposit dates on the bank statement may vary because of holidays, weekends, or late night Batches, amounts will always be the same, allowing the user to match and confirm all entries.

Next, review the Open Batches. This Batch information is pulled into School-Day directly from your Payment Provider, and shows Batches which have been closed by your Payment Provider, but not reconciled by the school.

Start Date: September 01 2015      End Date: October 31 2015

**Batches** SELECT BATCHES

Batch Total: \$179.00      Search:

DATE	INITIAL	REFUNDS	DEPOSIT	FLAG
2015-09-03	\$25.50	\$0.00	\$25.50	
2015-09-11	\$65.00	\$0.00	\$65.00	
2015-09-15	\$30.00	\$0.00	\$30.00	
2015-09-17	\$7.50	\$0.00	\$7.50	
2015-09-21	\$38.00	\$0.00	\$38.00	
2015-09-24	\$8.00	\$0.00	\$8.00	
2015-09-28	\$5.00	\$0.00	\$5.00	■

1 to 7 of 7 batches

To remove a Batch, click the **Remove** icon, and it will remain behind to be used for another Reconciliation. This is useful if a Batch was transacted during your time period, but wasn't deposited in the bank.

If a Batch has a red flag, it means that the Batch data has not yet been verified by your Payment Provider. Please contact School-Day via email, at [support@school-day.com](mailto:support@school-day.com), or open a support ticket at [www.school-day.com/support](http://www.school-day.com/support), giving us the Batch date, amount, school and school board. We recommend you contact us to resolve all flagged entries.

If you need to add more Batches to your Reconciliation (for example, if you removed a Batch from a previous Reconciliation), click **Select Batches**. Click a Batch to select (it will highlight in blue) and then click **Add Selected** to add this Batch.

Select Batches

View All  Search:

From  To

DATE	INITIAL AMT.	REFUND AMT.	DEPOSIT AMT.	FLAG
2011-06-02	\$0.00	\$0.00	\$0.00	■
2011-06-15	\$0.00	\$0.00	\$0.00	■
2011-06-20	\$0.00	\$0.00	\$0.00	■
2011-06-21	\$0.00	\$0.00	\$0.00	■
2011-06-24	\$0.00	\$0.00	\$0.00	■
2011-06-27	\$0.00	\$0.00	\$0.00	■
2011-07-13	\$0.00	\$0.00	\$0.00	■
2011-07-14	\$0.00	\$0.00	\$0.00	■
2011-07-15	\$0.00	\$0.00	\$0.00	■
2011-07-18	\$0.00	\$0.00	\$0.00	■

1 to 10 of 249 Batches

SELECT ALL UNSELECT ALL CANCEL

Note: a row with a ■ may require investigation. Please notify the School-Day team of the associated date and school so this can be taken care of promptly.

If you have been using School-Day to collect cash and cheque payments, as well as to log Bank Deposits, these can also be added to your Reconciliation.

Click **Select Deposits** to choose from your existing Deposits (please note that you must first log a Bank Deposit through School-Day, and you must close the Deposit, if you would like add one to your Reconciliation). Click a deposit to add, then click **Add Selected**.



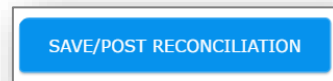
You can also log adjustments in School-Day, directly against GL/Account codes, if recommended by your school board. These adjustments can be used to reconcile disbursement payments, GL adjustments, and various fees including NSF fees. Select the **Type of Adjustment** from the drop-down list, and apply the GL Code. Include the amount, a description and input the date.

Click **Save Adjustment** when done.

<b>Totals</b>	
Total Cash:	<input type="text"/>
Batch Total:	\$179.00
Total Disbursements:	<input type="text"/>
Total Adjustments:	<input type="text"/>
<hr/>	
Grand Total:	\$179.00

Use the Totals fields to verify the amounts of your Reconciliation.

When you are done, click **Save/Post Reconciliation**. This will close off your Reconciliation for any further edits, additions or deletions. You will not be able to delete or edit this Reconciliation once posted.



Please note that you can leave your Reconciliation at any time, and come back to it later, and the System will save your progress. Simply navigate away from the Reconciliation screen. Only Save/Post your Reconciliation when you are ready to close off these transactions.

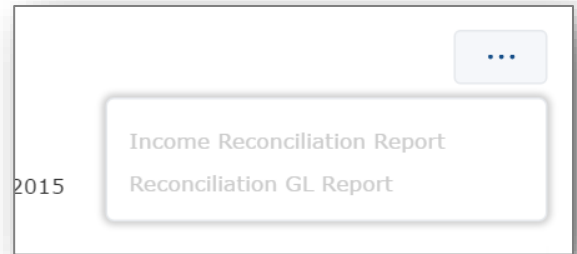
Once you have posted your Reconciliation, you will have 2 reports to view (these reports were previously the Projected Income Report and the Projected GL Report).

The Income Reconciliation Report will show all daily Deposits by card type, and includes cash and cheque Deposits where used.

While Batch dates in School-Day and Deposit dates on the bank statement may vary because of holidays, weekends, or late night Batches, amounts will always be the same, allowing the user to match and confirm all entries.

The Reconciliation GL Report displays your reconciled information as GL Summaries.

Once you have posted your Reconciliation, you'll see the associated entries in your Payment History have updated.



Income Reconciliation Report for School-Day Public School			
Date Ending	September 30 2014		
<b>Income</b>			
Date	Deposit Type	Amount	Detail
2014-09-02	Batch	\$35.00	Visa
2014-09-16	Batch	\$100.25	Mastercard
2014-09-03	Cash Deposit	\$155.05	Deposit #: 13   September 3, 2014
<b>Income Totals:</b>		<b>\$290.30</b>	
<b>Total Reconciled Income:</b>			
<b>September 30 2014</b>		<b>\$290.30</b>	

Reconciliation GL Report for School-Day Public School			
Date Ending	September 30 2014		
<b>Online</b>			
Payment Category Name	Total		
Field Trips	\$15.25		
Student Activities	\$20.00		
Milk Sale Jr.	\$100.00		
<b>Online Total:</b>	<b>\$135.25</b>		
<b>Cash / Cheques</b>			
Payment Category Name	Total		
Student Activities	\$1.05		
School Council	\$100.00		
Milk Sale Jr.	\$54.00		
<b>Cash / Cheque Total:</b>	<b>\$155.05</b>		
<b>Totals:</b>			
Payment Category Name	Total		
Field Trips	\$15.25		
Student Activities	\$21.05		
Milk Sale Jr.	\$154.00		
School Council	\$100.00		
<b>Grand Total:</b>	<b>\$290.30</b>		



Clicking on the **Batch Order** will bring you to the summary of your Reconciliation, allowing you to find all associated details.

Show 10 entries
 Class Filter: All Classes

From:  ... To:  ...
 Search:

DATE	TRANSACTION	ORDER	BATCH	STUDENT	CONSUMER	TYPE	ITEM NAME	QTY	AMOUNT	PAYMENT	ACTION
2015-05-21 12:01:04	123	254265	C:86	Aaron, Jennifer	Aaron, Jennifer	Product	2014 Yearbook	1	\$27.00	Cheque	Refund
2013-12-12 17:11:37	345	147817	C:86	Atkinson, Flynn	Frick, Madeline	Event	Holiday Dance	1	\$10.25	Cheque	Refund

## BANK DEPOSIT DETAILS

**Description:** April 8, 2015  
**Deposit Number:** 42      **Date Created:** April 08 2015 at 12:02:01 PM  
**Commercial Bank:** SDBC      **Date Closed:** Open  
**Account:** 2473      **Branch:** 1223334  
**Night Deposit Wallet:** 235

Cheques	Totals
DETAIL	AMOUNT
# 345a	\$10.25
# 123a	\$27.00
<b>Total: \$37.25</b>	

**Associated Orders Total: \$37.25**

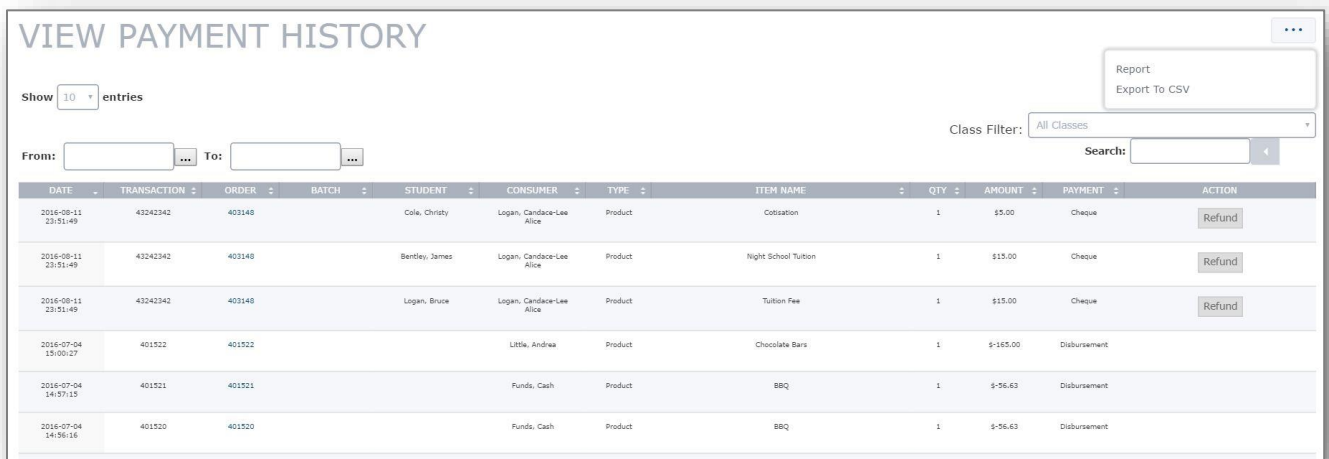
## Payment Centre

The Payment Centre manages all of the financial components of School-Day. This is where you can manage the cash and online payments for your school.

### Payment History

School Administrators have the ability to view all transactions in their school through the *Payment History* link. Click **Payment History** from the Payment Centre link.

The Payment History page will provide you with a list of all items that have been purchased. The amounts reflect the actual amount paid by the parent.



The screenshot shows the 'VIEW PAYMENT HISTORY' interface. At the top, there is a title 'VIEW PAYMENT HISTORY' and a menu icon. Below the title, there are controls for 'Show 10 entries', 'From' and 'To' date pickers, a 'Class Filter' dropdown set to 'All Classes', and a 'Search' input field. On the right side, there are buttons for 'Report' and 'Export To CSV'. The main content is a table with the following columns: DATE, TRANSACTION, ORDER, BATCH, STUDENT, CONSUMER, TYPE, ITEM NAME, QTY, AMOUNT, PAYMENT, and ACTION. The table contains six rows of transaction data.

DATE	TRANSACTION	ORDER	BATCH	STUDENT	CONSUMER	TYPE	ITEM NAME	QTY	AMOUNT	PAYMENT	ACTION
2016-08-11 23:51:49	43242342	403148		Cole, Christy	Logan, Candace-Lee Alice	Product	Cottisation	1	\$5.00	Cheque	Refund
2016-08-11 23:51:49	43242342	403148		Bentley, James	Logan, Candace-Lee Alice	Product	Night School Tuition	1	\$15.00	Cheque	Refund
2016-08-11 23:51:49	43242342	403148		Logan, Bruce	Logan, Candace-Lee Alice	Product	Tuition Fee	1	\$15.00	Cheque	Refund
2016-07-04 15:00:27	401522	401522			Little, Andrea	Product	Chocolate Bars	1	\$-165.00	Disbursement	
2016-07-04 14:37:15	401521	401521				Funds, Cash	BBQ	1	\$-56.63	Disbursement	
2016-07-04 14:56:16	401520	401520				Funds, Cash	BBQ	1	\$-56.63	Disbursement	

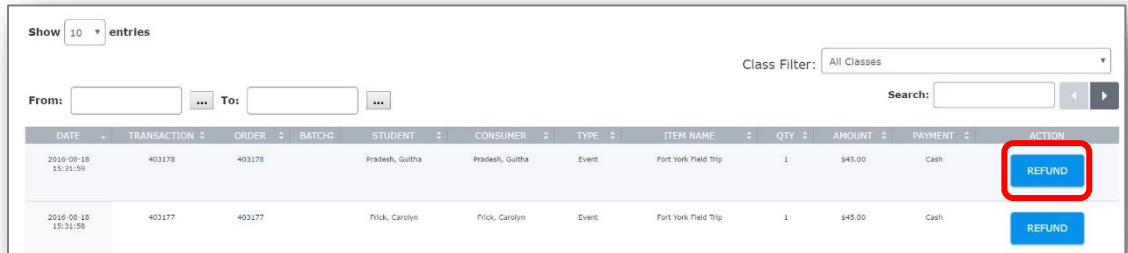
There are many ways to find a transaction item. You can search by date range or search by Transaction ID, Order ID, Student Name, Consumer Name, Item Type, Item Name and Amount in the general search field.

You can choose the amount of entries to view on the page from 10, 25, 50 and 100. Use the <and> arrows to view the next screen or the previous screen.

Enter **Search** parameters and generate a **Report** to view additional information about your payments, including Homeroom information. Please note that the Homeroom function may need to be manually edited for some Students, which can be done by visiting the Student page.

## Refunds

To process a refund, search for the item that you want to refund by entering your search criteria in the Payment History Page.



Payment History Page interface showing a table of transactions. The 'REFUND' button for the first transaction is highlighted with a red box.

DATE	TRANSACTION	ORDER	BATCH	STUDENT	CONSUMER	TYPE	ITEM NAME	QTY	AMOUNT	PAYMENT	ACTION
2016-08-18 15:31:59	403178	403178		Pradeesh, Gultha	Pradeesh, Gultha	Event	Fort York Field Trip	1	\$45.00	Cash	<b>REFUND</b>
2016-08-18 15:31:58	403177	403177		Frick, Carolyn	Frick, Carolyn	Event	Fort York Field Trip	1	\$45.00	Cash	REFUND

When you have found the transaction in question, click **Refund** to the right of the transaction. The Process Refund page will appear with the original Purchase Details which includes Transaction ID, Order Item, Quantity, Consumer Price and Maximum amount available to refund.

If it is a partial refund, enter the amount you would like to refund to the parent. If it is a full refund the amount will automatically appear in the Refund Amount field.

Once you have completed the refund fields, click **Process Refund**.



PROCESS REFUND

Order #: 403173  
Transaction #: 10164820  
Purchased By: Jenna Duffy  
jduffy@email.com  
Purchased For: Christopher Duffy  
Purchase Date: August 18 2016 at 03:03:43 PM  
Order Total: \$185.00  
Payment Method: CC

ITEM	PAID	MAX REFUND AVAIL	REFUND AMOUNT
Museum Trip	\$5.00	\$5.00	\$5.00

CANCEL PROCESS REFUND

A page will appear with the details of the refund. You will see the Original Transaction, Transaction Amount, Transaction Date and the new Transaction Number.

For online payments, once a refund has been processed, it communicates directly with your merchant account and will be reflected on your bank account. It is recommended that refunds be processed solely through School-Day to ensure that the reporting is uniform. But in the case where you would like to review your transactions through your merchant provider you may do so by signing in to your merchant account online and reviewing the Transaction History.

## Open Orders

Once a parent has submitted a cash order it will appear on your **Open Order** screen. To accept a cash or cheque order, click on the **Order Number**.

After you review the order, you can either click **Accept Cash** to complete the order and log the payment, or click **Cancel Order** to delete the order without completing. If you click **Accept Cash**, use the drop-down under Payment Type to log payment by either Cash or Cheque. If you are logging a Cheque, the Cheque Number is mandatory, for tracking purposes.

ORDER #	FIRST	LAST	CREATED	TOTAL
356299	Ellen	Laurenston	04/05/2016	\$10.00
349921	Tommy	Willington	03/17/2016	\$5.00
321097	Ellen	Laurenston	01/13/2016	\$123.00

Parents are able to cancel their pending Open Orders, so you may see some Orders disappear, or reappear with a different Order Number, if a parent has edited their purchase.

ORDER #3562992016-04-05 AT 01:19:52 PM

This order contains 1 Item(s) created by Ellen Laurenston

ORDER ITEMS:

DESCRIPTION	QTY	COST	SUBTOTAL
Spring Museum Trip Type: Fund Student: Amanda Hiv, Laurenston   1255	1	\$10.00	\$10.00

Please list your contact number  
555-566-7777

TOTAL \$10.00

Payment Type:

## Accept Payment

The Accept Payment page allows you to quickly enter cash payments for Students, Payees and Events. To begin, click **Accept Payment** from the Payment Centre.

To quickly accept multiple orders for a particular event, click **Select Event**.

Click the **Event's Title** to select. If the Event has already passed, click the **Past Events** button.

### Select Event

Search:

DATE	TITLE	GROUP
Wed Aug 31st 2016	Fort York Field Trip	School-Day Public School
Fri Sep 16th 2016	Grade 1 Trip	Grade 1
Thu Sep 22nd 2016	Animal Sanctuary	School-Day Public School
Thu Sep 29th 2016	Zoo Trip	Grade 8 Room 100
Fri Sep 30th 2016	Zoo Trip	Grade 8 Room 100
Fri Sep 30th 2016	Fire Station Trip	School-Day Public School

1 to 6 of 6 events

Use the check box to select the available Students. If you are subsidising a Student, adjust the amount in the **Subtotal** field to match what you have collected. Confirm that the amount you have indicated matches the funds you have accepted, and click **Accept Payments**. You may wish to view or print the order details after you have confirmed the cash payments.

To quickly accept single or multiple orders for Students, click **Select Students**.

**Select Students**

Search:

FIRST	LAST	HOMEROOM	IDENTIFIER
Jennifer	Aaron	1-2	090
Emily	Anders	Grade 8 Room 100	2254
Emma	Anderson	1/2	0497778
<b>Sarah</b>	<b>Angler</b>	<b>Grade 4</b>	<b>056</b>
Flynn	Atkinson	Special Education	045
Alexandra	Bain	Baseball Team	024
Teresa	Baldwin	Junior Kindergarten	017
<b>Keith</b>	<b>Bannister</b>	<b>Grade 4</b>	<b>042</b>
Matthew	Belanger	ESL	068
Ettiene	Belanger	Baseball Team	3344

1 to 10 of 144 students

**SELECT ALL** **UNSELECT ALL** **ADD SELECTED (4)** **CANCEL**

To select a Student, click their name. You can select multiple students by clicking on additional names. To unselect a student, click their name again.

Once you have made your selections, change the **View All** option to **View Selected** to review. To submit your selection, click **Add Selected**.

To add the same item to every student, click **Add Items To All**. To add unique items to each student, click **Add Items** beside the Student's name.

When you're adding items, use the **Search** field or the drop-down list to filter your available options. Multiple products can be selected by clicking on the item's name and clicking **Add Selected**.

If you are subsidising a Student, adjust the amount in the Subtotal field to match what you have collected. Confirm that the amount you have indicated matches the funds you have accepted, and click **Accept Payment**. You may wish to view or print the order details after you have confirmed the cash payments.

To record funds received from outside vendors or Payees click **Select Payee**. Payees can be used to collect cash not necessarily associated with specific Events, Products or Students.

To select a Payee, click their name. You can select multiple Payees by clicking on additional names. Click a name again to clear a selection.

Once you have made your selections, change the **View All** option to **View Selected** to review. To submit your selection, click **Add Selected**.

*Note: Payees must be added first. Please see the Payee Management section for more details.*

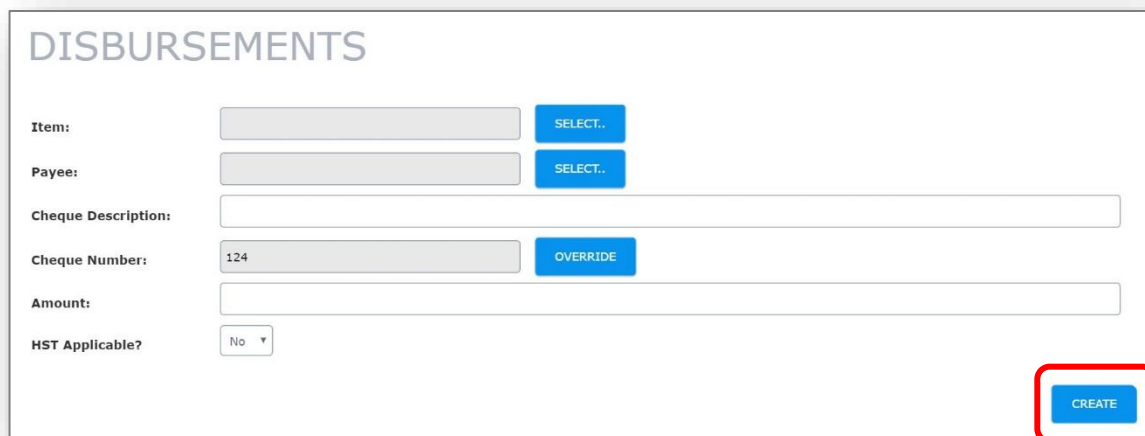
To add the same item to every Payee, click **Add Items To All**. To add unique items to each Payee, click **Add Items** beside the Payee's name.

You will need to adjust the **Subtotal** field to reflect the cash you have collected. If you have collected any payments by Cheque, please select **Cheque** as the **Payment Type**, and include the mandatory **Cheque Number**, for tracking purposes.

## Create Disbursements

The Disbursements feature lets you generate disbursement reports and issue cheques for items at your school.

Select **Create Disbursements** from the Payment Centre to begin, and complete all necessary fields.



The screenshot shows a web form titled "DISBURSEMENTS". It contains several input fields and buttons:

- Item:** A text input field followed by a blue "SELECT.." button.
- Payee:** A text input field followed by a blue "SELECT.." button.
- Cheque Description:** A wide text input field.
- Cheque Number:** A text input field containing "124" followed by a blue "OVERRIDE" button.
- Amount:** A wide text input field.
- HST Applicable?:** A dropdown menu with "No" selected.
- CREATE:** A blue button in the bottom right corner, highlighted with a red rectangular box.

*Note: If your Payee is not listed, you will have to add them. Please see the Payee Management section of this manual for more information.*

Click **Create** to log your Disbursement.

On the next page, you can review your Disbursement and print a cheque. Information from your Disbursement will automatically be printed onto your cheque. Ensure your printer is loaded with the appropriate cheque paper, and click **Print Cheque**.

Once you have created a Disbursement, it becomes an order in School-Day, viewable and reportable through the Payment Centre.

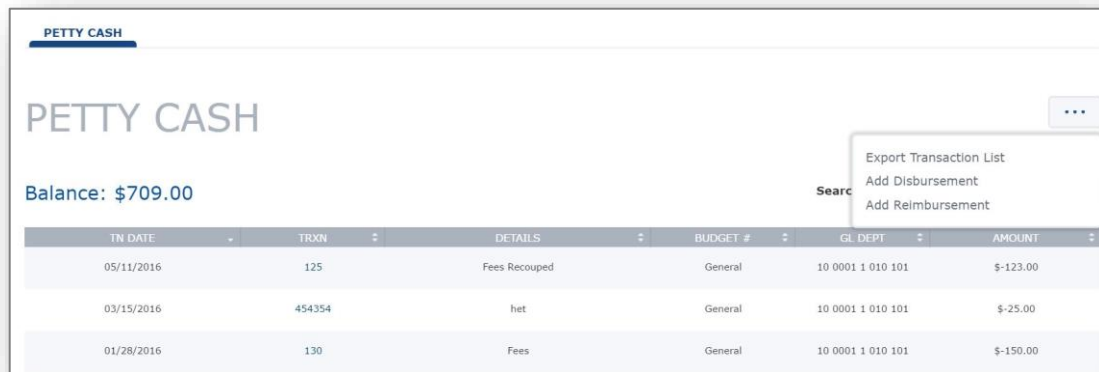
Note: *Your School District may not be using this feature at this time.*



## Petty Cash

The Petty Cash feature allows users to log Petty Cash inputs and issue cheques against Petty Cash funds in the school. The Petty Cash feature checks the balance of Petty Cash funds against the Disbursement amount and verifies all correct information has been completed. If the information is not complete or funds are insufficient, a Disbursement via Petty Cash cannot be made.

Select **Petty Cash** from the Payment Centre.



The screenshot shows the Petty Cash interface. At the top, it says "PETTY CASH" and "Balance: \$709.00". Below this is a table with columns: TN DATE, TRXN, DETAILS, BUDGET #, GL DEPT, and AMOUNT. A search dropdown menu is open, showing options: "Export Transaction List", "Add Disbursement", and "Add Reimbursement".

TN DATE	TRXN	DETAILS	BUDGET #	GL DEPT	AMOUNT
05/11/2016	125	Fees Recouped	General	10 0001 1 010 101	\$-123.00
03/15/2016	454354	het	General	10 0001 1 010 101	\$-25.00
01/28/2016	130	Fees	General	10 0001 1 010 101	\$-150.00

To add a Petty Cash Disbursement, click the **Add Disbursement** button.

System safeguards ensure that before you can create the Petty Cash Disbursement, there must be sufficient funds available.

*Please Note: GL Department and Budget Code options are preloaded from School District information.*

Once you have clicked **Create** you will be brought to the summary page for your Petty Cash Disbursement. Information from your Disbursement will automatically be printed onto your cheque. Ensure your printer is loaded with the appropriate cheque paper, and click **Print Cheque**.

To add a Petty Cash Reimbursement, click the **Add Reimbursement** button.

Once you click **Create**, your Petty Cash Reimbursement will be applied to your Petty Cash Balance. You can see a record of all Petty Cash Disbursements and Reimbursements by viewing the *Petty Cash* page.

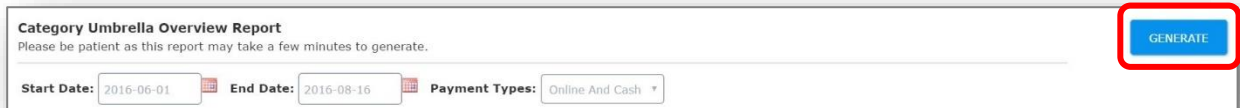
Note: Your School District may not be using this feature at this time.

Confirm that the amount you have indicated matches the funds you have accepted, and click **Accept Payments**. You may wish to view or print the order details after you have confirmed the cash payments.

## Reports

The Reports section in School-Day will be where easy to pull financial reports or other types or reports can be found.

School-Day comes pre-loaded with one basic report, allowing you to generate a payment Category (or general ledger) Umbrella Overview Report. The Category Umbrella Overview Report provides a summary GL/Category report of your school, filtered by your selected date range.



**Category Umbrella Overview Report**  
Please be patient as this report may take a few minutes to generate.

**Start Date:** 2016-06-01 **End Date:** 2016-08-16 **Payment Types:** Online And Cash

**GENERATE**

To create your report, select a Start and End Date, and click **Generate**, next to the report of your choosing. Please note that this report can be very large, and so may take several minutes to load. Your report will open as a CSV.

If your board has other reports installed, they will be listed here.

## ENDING A SESSION

To ensure privacy of your School-Day Account, it is important to log out after each Session. To log out, simply click the **Action Icon** and **Logout** in the lower left corner of your screen.

## SUPPORT

We have made every effort to keep School-Day as user-friendly and self-contained as possible. If you require assistance after using our manuals please contact School-Day at 1.855.253.1731, email [support@school-day.com](mailto:support@school-day.com) or visit our support website at [www.school-day.com/support](http://www.school-day.com/support). Here you can browse User Guides, open a service ticket, or chat online with a live agent.

## CONTACT US

For more information, please contact School-Day at:

1.855.253.1731

[info@school-day.com](mailto:info@school-day.com)

[www.school-day.com/support](http://www.school-day.com/support)

