



USER GUIDES

TEACHER USER GUIDE

School-Day Version 2
September 2016



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INTRODUCTION

Welcome to School-Day

Welcome to the School-Day Teacher User Guide. We know that running classes and groups can be challenging, which is why we are proud to offer a tool that helps organize your administrative tasks in one central location. Teachers play an important role in the school community – it is your dedication and participation that motivates School-Day to focus on your 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 which is why your feedback is important to us. As we develop new features we update our User Guides, and make them available online. This guide is our first effort and we encourage suggestions on how we can improve the process. Please take a moment to send us your comments at support@school-day.com or call us anytime at **1.855.253.1731**. Your feedback will make School-Day your solution. At the bottom of the cover page of your User Guide you will notice a version number. We will inform you when a new version has been uploaded on School-Day to keep you up to date.

The School-Day Team



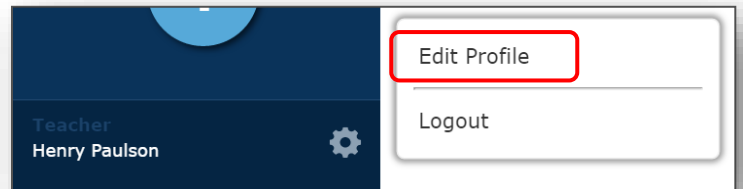
SIGNING IN

To access your School-Day account, navigate to www.school-day.com and log in using your unique username and password. Your username will be your school board email, and you don't have a password yet. Use the *Lost Password* link on the sign in page, and you can set your password. Please contact your Administrator to retrieve your username and password if you do not receive an email.

MANAGING YOUR TEACHER PROFILE

Look for the settings icon down near your username to begin. Your Personal Profile lets you change your password or language settings.

Click **Edit Profile**, change any information then click **Update**.





DASHBOARD

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

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.

SCHOOL OVERVIEW

61 Students 2 Classes & Groups

CALENDAR

SEPTEMBER 2016

MON	TUE	WED	THU	FRI	SAT	SUN
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

SCHOOL DETAIL

EVENTS GROUPS **STUDENTS** PRODUCTS

All Download CSV Search: Introduction Letters

- Jennifer Aaron**
Identifier: 090
Ellen Laurenston
1-2 • After School Club • Baseball Team • French • Grade 8 Room 100
- Emily Anders**
Identifier: 2254
Kris Anders • Jen smith
French • Grade 7 • Grade 8 Room 100 • Grade 9 Students • Gym • Pizza Group • Sports Group Jr. • Student Council
- Emma Anderson**
Identifier: 0497778
Lisa Fillmore • Jane Smithton
1-2 • 1/2 • Baseball Team • French • Grade 6 Room 400 • Grade 7 • Grade 8 Trip Group • Grade 9 Students • Gym • Pizza Group • Sports Group Jr. • Spring Break Camp
- Flynn Atkinson**
Identifier: 045
Janet Anderstel • Madeline Frick
1/2 • Baseball Team • French • Grade 8 Trip Group • Grade 9 Students • Gym • Junior Boys Football • Pizza Group • Senior Girls Basketball • Special Education • Sports Group Jr. • Student Council
- Alexandra Bain**
Identifier: 3344
Rae Midlene
1/2 • Baseball Team • French • Grade 4 Room 3 • Grade 8 Room 100 • Grade 8 Room 200 • Grade 8 Trip Group • Grade 9 Students • Gym • Pizza Group • Sports Group Jr.
- Ettiene Belanger**
Identifier: 3344
Marie Belanger
1/2 • Baseball Team • French • Grade 6 Room 400 • Grade 8 Room 100 • Grade 9 Students • Gym • Pizza Group • Sports Group Jr.
- Maria Bettencourt**
Identifier: 027
Tony Bettencourt
Baseball Team • Field Trip 1 • French • Grade 2 • Grade 9 Students • Gym • Pizza Group • Sports Group Jr. • Zoo Trip Group
- Mikaela Brown**
Identifier: 2473
Chantelle Brown • Jordan Brown
Baseball Team • ESL • French • Grade 6 Room 400 • Grade 8 Room 100 • Grade 9 Students • Gym • Pizza Group • Senior Girls Basketball • Sports Group Jr.

Teacher: Henry Paulson

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.

If you teach or supervise multiple Classes or Groups, you will have access to all of them from your *Teacher Dashboard*. Simply select the Class/Group you wish to view/manage from the *Groups* tab.

You may encounter a Google Translate widget on some pages in School-Day. School-Day has offered this widget for user convenience. We cannot verify the accuracy of any translations provided by this third party. Please use with caution. To use this feature, choose a language from the drop-down list provided



INTRODUCTION LETTERS

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.

SCHOOL DETAIL

EVENTS **GROUPS** STUDENTS PRODUCTS

Download CSV Search:

Baseball Team
SDPS's Baseball Team!

Grade 8 Room 100
Grade 8 In Room 100

1 to 2 of 2 groups

To print Introduction Letters to be circulated to Parents click the *Groups* tab on your Dashboard, and then click the Group name.

Select *Student List*.

CLASSROOM: GRADE 8 ROOM 100

School
School-Day Public School

School Board
School-Day School Board

Supervisor:
Henry Paulson

Website: www.eighthgraders.com

Announcements | 38
Event | 41
Products | 22
Student List | 29

Use the *Select/Unselect All* button to select Students, and click *Generate Introduction Letters*. To print individual letters, check the *Introduction Letter* selection under a Student's name, and then select *Generate Introduction Letters*.

DOWNLOAD CSV **GENERATE INTRODUCTION LETTER(S)**

All Search:

Jennifer Aaron
Identifier: 090
Jennifer Aaronson
 Introduction Letter

1-2 • After School Club • Baseball Team • French
• Grade 8 Room 100

Emily Anders
Identifier: 2254
Kris Anders • Jen smith
 Introduction Letter

French • Grade 7 • Grade 8 Room 100 • Grade 9 Students • Gym • Pizza Group • Sports Group Jr.
• Student Council

The letters will open in Adobe Reader. From Adobe Reader you can print, save or email the introductory letters to distribute to Parents.

In the Event that an additional Parent/Guardian needs access to a Student's information, the Administrator can create a new key for the Student and provide a letter to the additional Parent/Guardian. Please contact your Administrator if you require additional *Secure-Match™* keys.

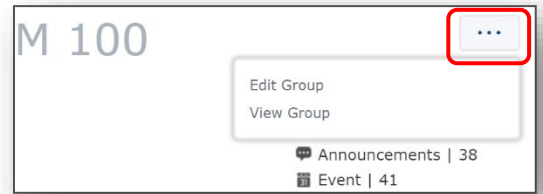


EDITING CLASS AND GROUP PROFILES

Class and Group Profiles can be used to share information, pictures or class rules with users. Each Profile will begin blank, with just the Class/Group name.

To edit a Class or Group Profile page click on the Class/Group name.

Once on the Group page, select **Edit Group** from the **More** menu.



APPROVALS

Your School Administrator may set controls on the posting of Events, Products, Announcements, Permission Forms and Files, requiring approval before they are posted. At the time of creation, you will see a pop-up message indicating that the posting has been sent to the Administrator for approval. You will only be able to view your postings in the system once your Administrator has approved them.

This event can not be seen by consumers until it is approved by an administrator.

You will receive an email notifying you if the posting has been approved or rejected.



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. 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.

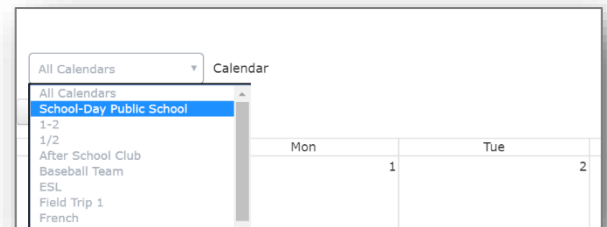
Click on **Announcement** to see the details or to edit. If you edit your Announcement, only select **Publish and Notify** if the content of your message has altered significantly, as this will re-send an email about your Announcement to all users. Many users find multiple copies of Announcement emails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



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**. 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.

'View Only' Event? *
No ▾

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.

Actual Cost *

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.

Display Price *

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%).

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

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.

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



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:	4.88
Display Price:	5.00
Payment Category:	Field Trip

CREATE EVENT
CANCEL

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 that 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.

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

Add Event Form This event has a form that needs to be filled in

<div style="border: 2px solid red; padding: 2px; margin-bottom: 2px;">Label</div> <div style="padding: 2px; margin-bottom: 2px;">Text Box</div> <div style="padding: 2px; margin-bottom: 2px;">Large Text Box</div> <div style="padding: 2px; margin-bottom: 2px;">Option Box</div> <div style="padding: 2px;">Checkbox List</div>	
--	--

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.



Label Text Box Large Text Box Option Box Checkbox List	<p>[1] Label: Enter the text for the label</p> <input type="text" value="Contact Information in Case of Emergency"/>
	<p>[2] Text Box: Enter the title for the textbox</p> <input type="text" value="Please enter a phone number and contact name"/> <input type="checkbox"/> Mandatory
	<p>[3] Large Text Box: Enter the title for the textbox</p> <input type="text" value="Please enter any special instructions"/> <input type="checkbox"/> Mandatory

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 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

Enter Options:

Mandatory

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

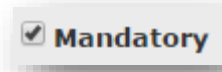
Enter Options:

Mandatory

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.



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.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Product Purchase Report with Form Data												
2	Product: Running Trip												
3													
4	First Name	Last Name	Identifier	Homeorder	Order Date	Please enter a phone number and contact name	Please enter any special instructions	Transportation Option	Can you donate any of these items				
5	Rachel	Laurensto	24735	Baseball T	#####	June Miller - 416.599.5500	Rachel is allergic to bees and will have an EpiPen with her at all times.	Will Drive	Snacks, Soda				
6													
7													

Participants

The Participants widget lets you invite any or all Students in a Class/Group or the entire Class/Group, to your Event. 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.



Participants
Optional. Select students who will participate in this particular event.

No one is currently invited to this event

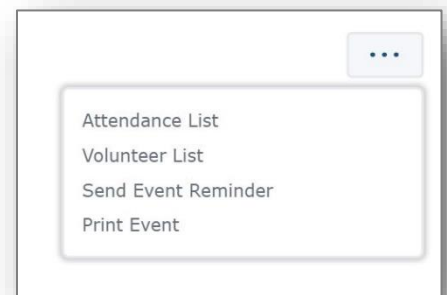
SELECT PARTICIPANTS

OPEN EVENT TO ALL IN: GRADE 1

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.



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

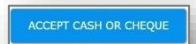
All Classes Search:

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 settings 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.

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.

Accept Cash Completed					
Jennifer Aaron			Order #127727		
Description	Type	Qty	Price	Subtotal	Subsidy
Zoo Trip		1	5.00	5.00	0.00
			Total	5.00	0.00
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					



Parent Conferences

The Parent Conferences feature allows your Administrator to create schedules of appointments that parents can book themselves. To access this feature, select **Parent Conferences** from the left hand menu on your Teacher Dashboard.

Under *Conference Events*, you will see any Conferences that you've been included in. Click on a date range within any schedule to view details. Only the school administrator can create a Conference.

Click any time spot and the **Block Selected** to keep interview slots free.

Click **Unblock** to clear.

Click **Book** to book a Student yourself and select a Student from anyone enrolled in your classes.

If the Student has a linked Parent/Guardian, you can select them. If a Parent/Guardian isn't linked, select the Student and pick *None Specified*.

Click **Book** to save.

LAST NAME	FIRST NAME	IDENTIFIER	HOMEROOM
Aaron	Jennifer	090	1-2
Anders	Emily	2254	Grade 8 Room 100
Anderson	Emma	0497778	1/2
Atkinson	Flynn	045	Special Education
Bain	Alexandra	024	Baseball Team
Belanger	Ettiene	3344	Baseball Team
Bettencourt	Maria	027	Grade 2
Brown	Mikaela	2473	Senior Girls Basketball
Candes	Melinda	24734	Grade 8 Room 100
Cash	Carolyn	444	Baseball Team

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

Note: If Conferences have not been opened for booking yet (marked as Active), Parents cannot view or book appointments. Please wait, or contact your school administrator.



Products

Products in School-Day are designed to help your groups 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**.

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

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.

ADD PRODUCT

School or Classroom* Select if this product is for the entire School OR a specific Classroom

Product Details

Products are listed on your Dashboard or under the Administration Tools. To view details about a Product and its 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.

Event Products		
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"/>



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.

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 shows a form builder interface. On the left is a sidebar with a list of form elements: Label, Text Box, Large Text Box, Option Box, and Checkbox List. The 'Text Box' and 'Large Text Box' items are highlighted with a red rectangular box. The main area on the right displays three form items in a list:

- [1] **Label:** Enter the text for the label. Below the label is a text input field containing the word "Feedback".
- [2] **Text Box:** Enter the title for the textbox. Below the title is a text input field containing "How would you rate your experience, on scale of 1 (poor) to 10 (exce)". A checkbox labeled "Mandatory" is checked.
- [3] **Large Text Box:** Enter the title for the textbox. Below the title is a large text input field containing "Please give us some more details". A checkbox labeled "Mandatory" is unchecked.

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 form item titled "[1] Option Box: Enter the title for the option box". Below the title is a text input field containing "Chose One Juice". Underneath is a section labeled "Enter Options:" with a text input field containing "Apple x Orange x Grape x". A checkbox labeled "Mandatory" is 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,

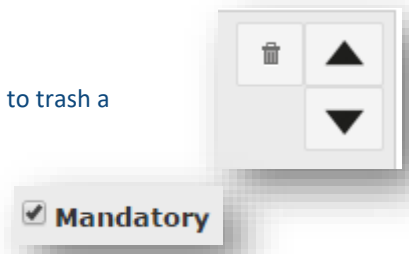
The screenshot shows a form item titled "[2] Checkbox List: Enter the title for the checkbox options". Below the title is a text input field containing "Sub Toppings - Pick any you want". Underneath is a section labeled "Enter Options:" with a text input field containing "Tomatoes x Cheese x Lettuce x Green Pepper x Mushrooms x Onions x Pineapple x Olives x". A checkbox labeled "Mandatory" is unchecked.

then enter the **Options** by typing and selecting **Enter**.

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.



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.



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 **Add** menu, and **File**. You must set who can view your posting by checking off 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.

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 Classes/Groups.

Payment History

Teachers can view all the transactions in their Classes/Group 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.

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.

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 NUMBER	FIRST	LAST	CREATED	TOTAL
356299	Ellen	Lauremston	04/05/2016	\$10.00
349921	Tommy	Willington	03/17/2016	\$5.00
321097	Ellen	Lauremston	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.



Accept Payment

The Accept Payment page allows you to quickly enter cash payments for Students 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

Past Events

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

◀ ▶
CANCEL

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**.

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
Sarah	Angler	Grade 4	056
Flynn	Atkinson	Special Education	045
Alexandra	Bain	Baseball Team	024
Teresa	Baldwin	Junior Kindergarten	017
Keith	Bannister	Grade 4	042
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.

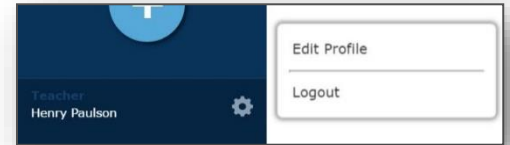
When you're adding items, use the **Search** field or the drop-down list to filter your available options. Multiple products can be selected by clicking on the item's name and clicking **Add Selected**.

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**.



ENDING A SESSION

To ensure the privacy of your School-Day account, it is important to log out after each session. To log out, simply click **Logout** in the lower right corner of the screen under the Settings option.



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 416.599.5500, email support@school-day.com or visit our support website at ww.school-day.com/support. Here you can browse User Guides, open a service ticket, or even chat online with a live agent.

CONTACT US

For more information, please contact School-Day at:

1.855.253.1731

www.school-day.com

