

PARENT PAYMENTS

OUR GUIDE ON HOW TO USE THE PARENT PAYMENT SYSTEM



School Spider

SCHOOL SPIDER PARENT PAYMENTS

School Spider payments are integrated within the parents' area, meaning you really do have everything in one easy accessible place. There is no additional cost for this service and it's super easy to get up and running.

The payment system is designed to give you complete control over what products and services you are selling and who you are selling to.

Like all of School Spider, it's quick to set up and easy to use for you and your parents. Make sure you sync your school MIS with School Spider and send your parent log ins out, so you can start online payments now!



What do you want to know?

How does the payment system work	Page 1
How to create a payment category	Page 2
How to add a product	Page 3-4
How to manage your orders	Page 5
How to export your funds from School Spider	Page 6
How to run a report of your orders	Page 7-8
How to manage refunds	Page 9
Payment system cost and charges	Page 10
How do parents make an order	Page 11-12

HOW DOES IT WORK?

Create purchase options

Purchases are split between 2 sections, Categories and Products:

Categories – You can set up a category which you can then add products to. See page 2.

Products – This is where you enter exactly what you want to sell and at what price. See page 3.



Complete orders

Once parents have logged on and made their purchases, you are able to see all orders in School Spider. You then need to confirm these orders to export the funds. See page 5.



Export funds

Once you have accepted/fulfilled your orders you can then export your funds from School Spider. (Very similar to PayPal). See page 6.

WHAT CAN YOU USE IT FOR?

- Dinner/lunch money
- After school clubs
- Breakfast clubs
- School trips
- Extra curriculum activities
- Uniform orders
- School events
- Charity donations



And more!

You have complete control over what you are selling and how much for. So, you can use this system for just about everything!

CREATING A CATEGORY

Categories are a great way to organise the products you will be selling. This will help you keep track of your products and orders, along with making it clear and simple for your parents. Categories are great for things such as school trips, dinner money, after school clubs etc. Anything that can be used as an umbrella term for other products. To create a product just follow these steps:

Manage parents area → Manage your online payment system → Add a category

All you need to do now is enter your category title, you can add a description if you need to (parents will not be able to see this). Select “List all categories” to edit  or delete  categories.

SOME EXAMPLE CATEGORIES

- Dinner Money
- School Trips
- After School Clubs
- Breakfast Club
- School Uniform
- Charity Donations

ADDING A PRODUCT

You can add products as either part of a category or standalone products. You have complete control over what you are selling and for how much for, so you can use it for just about anything. Follow these steps to add a product

[Manage parents area](#) —————> [Manage your online payment system](#) —————> [Add a product](#)

Enter your title, description and price of the product and tick active. This is what your parents will see when they login (See Parent View page 9). See below the different options you can use to tailor your product to your requirements.

Categories this product is in

Use the dropdown box to select one or more categories you would like this product to appear under.

Classes this product is available to

Use the dropdown box to select one or more classes you would like this product to be available to.

Product options

If you have a product which has options, for example school uniform sizes, you can use this function rather than creating a new product for each size/colour. To add an option:

1. Select add an option to this product
2. Enter title, price and apply any of the relevant options available (limit number of purchases, only one per guardian)
3. Tick active

You can continue adding product options by selecting “add an option to this product”.

NOTE: If you use this option, you will override the price field in the general product information above. Only the prices you input in your options will show.

Purchase limiting / Times available to parents

- **Limiting purchases** – If you have limited stock or places available you can use this option. You will only receive the amount of orders you limit the product to.
- **Start/Finishing times** – Select when you want parents to be able to purchase the item. For example, if you are using this for a school trip with limited slots, you can allow parents to book from a certain date/time and pre-warn parents beforehand.

TIP: Use your purchase limiting and times to act as a booking system for trips and after/before school clubs. Let parents know when they are available to purchase and limit the number of orders you can receive. You can download order details to see who is attending in your exports.

MANAGING YOUR ORDERS

Once your parents start logging in and making their purchases you will start seeing your orders pop up in School Spider. You will then need to confirm these orders to export your funds. To view your orders:

[Manage parents area](#) → [Manage your online payment system](#) → [You can view your orders here](#)

New orders

New orders will appear in this list in blue. You just need to select the blue plus next to the order to view the order information and confirm. You will have 2 options when confirming an order:

1. **Complete the order** – This confirms you have reviewed/fulfilled the order you are then able to export the funds.
2. **Refund products/order** – Select tick box for individual items, or use the refund order button if you have received a refund request. This will confirm the order, so you are able to export the funds. When you export this order it will show any items that need to be refund. See full process on page 7.

Completed orders

Completed orders show in green. You can still go in and refund these items whether you have exported funds or not as the school will need to process the refunds.



EXPORTING FUNDS

Once you have completed your orders, you will be able to export your funds. School Spider will transfer your funds to your chosen bank account within 3 working days.

Requesting an export

Once you have reviewed and completed your orders, all you need to do is select Exports on the payments menu. Click on “**Request an export of payments**” this will request to export funds from all completed orders. It will take up to 3 working days for funds to be transferred to the school

Requested exports show in red and completed exports in blue.

ID: 2	Requested: 2018-01-12 10:57		Orders: 1	£16.98	
ID: 1	Requested: 2018-01-11 10:27	Completed: 2018-01-11 10:28	Orders: 2	£88.27	

You can view your exported orders at any time using the blue plus button. Once your export is complete, you can download a receipt and a full product breakdown of all orders. See page 7 regarding refunds.

NOTE: You can only request one export at a time. You can request another export once we have transferred your funds.

RUNNING ORDER REPORTS

Order reports allow you to view and export information on any orders you have received. You can filter the orders by products or order status.

Manage parents area → Manage your online payment system → Select reports

Report by order status

Select orders tab and use the dropdown box to select completed, unprocessed or fully refunded orders. Use the time boxes to specify over what period you want to view the orders from. You then have 3 options:

1	Order overview This will give you a list of all orders you have received, select the blue plus to view more.
2	Order with products This will give you a list of all orders you have received with what products were ordered.
3	Product purchase breakdown This will give you a list of all products and how many orders you have had for each. You can use the blue plus to see who has ordered what.

Report by product

After you have followed the above steps to get to the report section, select products and then you have 3 options to select to view your report:

1	Orders to display Show all orders, completed orders, unprocessed orders or refunded orders
2	Timescale Select date range you want to view the orders from
3	Show purchases of this product Select the product you want to see the orders for. Select RUN REPORT.

Once you have run the reports, you will be able to download the list of orders onto an excel or PDF format.

TIP: This is a great tool for if you're going to use the payment system for your school trips and after/before school clubs. Use the product option to view all orders made for your trip/club and download your PDF to see who's coming.

PROCESSING REFUNDS

Refunds are all processed from the school. You will receive all funds, from all orders whether these have been refunded or not. It is then up to the school to check the orders and refund these back to the parents. To see if any orders have been refunded you can do one of two options below.

Option 1 View refunded orders in School Spider	Option 2 Download your product breakdown
<ol style="list-style-type: none">1. Manage parents area2. Manage your online payment system3. Exports4. Select blue plus for export you want to view5. Use blue plus to view orders, any refunds will be in red.	<ol style="list-style-type: none">1. Manage parents area2. Manage your online payment system3. Exports4. Select blue plus next to any completed exports5. Download product breakdown <p>This will download a csv with all order information, the last column shows any refunds.</p>

COSTS AND CHARGES

Payment System Cost

There is no additional charge to get the payment system up and running in School Spider. This is all inclusive in your annual charge you already pay for your website package.

School Spider Fees

The fee is 3% per transaction for all transactions. This can be managed in either of the following ways:

- a. Paid by the school; this 3% will be deducted automatically in your administration area when you export your orders. For example, an order of £10 will cost the user £10, and the school would receive £9.70 of this.
- b. Paid by the parent; this 3% will be added on during the checkout process and will be completely transparent to the user. For example, an order of £10 will cost the user £10.30 and the school would receive £10 of this.

We will initially set up the service fee to be processed by option a, unless stated otherwise.

This service charge is to cover all the administration and software for the payment system. If you would like more information on this, feel free to get in touch.

PARENT VIEW

Making a purchase

Once parents have logged in they just need to select “payments” to begin shopping.

View all items **View your basket** ← Parents can add multiple items to their basket before checking out.

After School Clubs

Football	VIEW
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School Lunches

← These are your categories

Termly	VIEW
Weekly	VIEW
Daily	VIEW

← These are your products

Product options appear when you select view

School Trips

Chester Zoo Trip	VIEW
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Completing a purchase

Once parents have selected their items, it works pretty much the same as a normal online shop. They can then view their basket and proceed to checkout.

Your shopping basket

DELETE	Termly	Sarah O'Learly	1 ▾	£90.00	£90.00
DELETE	Chester Zoo Trip	Sarah O'Learly	1	£20.00	£20.00
Total					£110.00

[Proceed to checkout](#)


Oakwood Primary School

Thank you for your order

Oakwood Primary School have received your order and will process in due course, you will be updated along the way.

Receipt: 90007-2

Termly	Sarah O'Learly	1	£90.00	£90.00
Chester Zoo Trip	Sarah O'Learly	1	£20.00	£20.00
Total				£110.00

Powered by 

Once parents have gone through the checkout process, they will see a confirmation and receive an email with their order details. This will include a receipt number which will match up to your orders on School Spider, so you can view them easily.

Parents will need to contact the school if they would like to request a refund.

NOTE: Parents who have multiple children in the school can switch accounts without losing their basket. This means they can do one order with products

You now have the tools to tackle

PARENT PAYMENTS...

What next?

We hope you're now feeling prepared to start using online parent payments. If you have any questions on the payments system, or anything to do with School Spider, please feel free to get in touch on the details below.

Still not sure? Get in touch and we can always do a free online demonstration on how the system works.

Call 0161 635 0255 or email hello@schoolspider.co.uk

School Spider