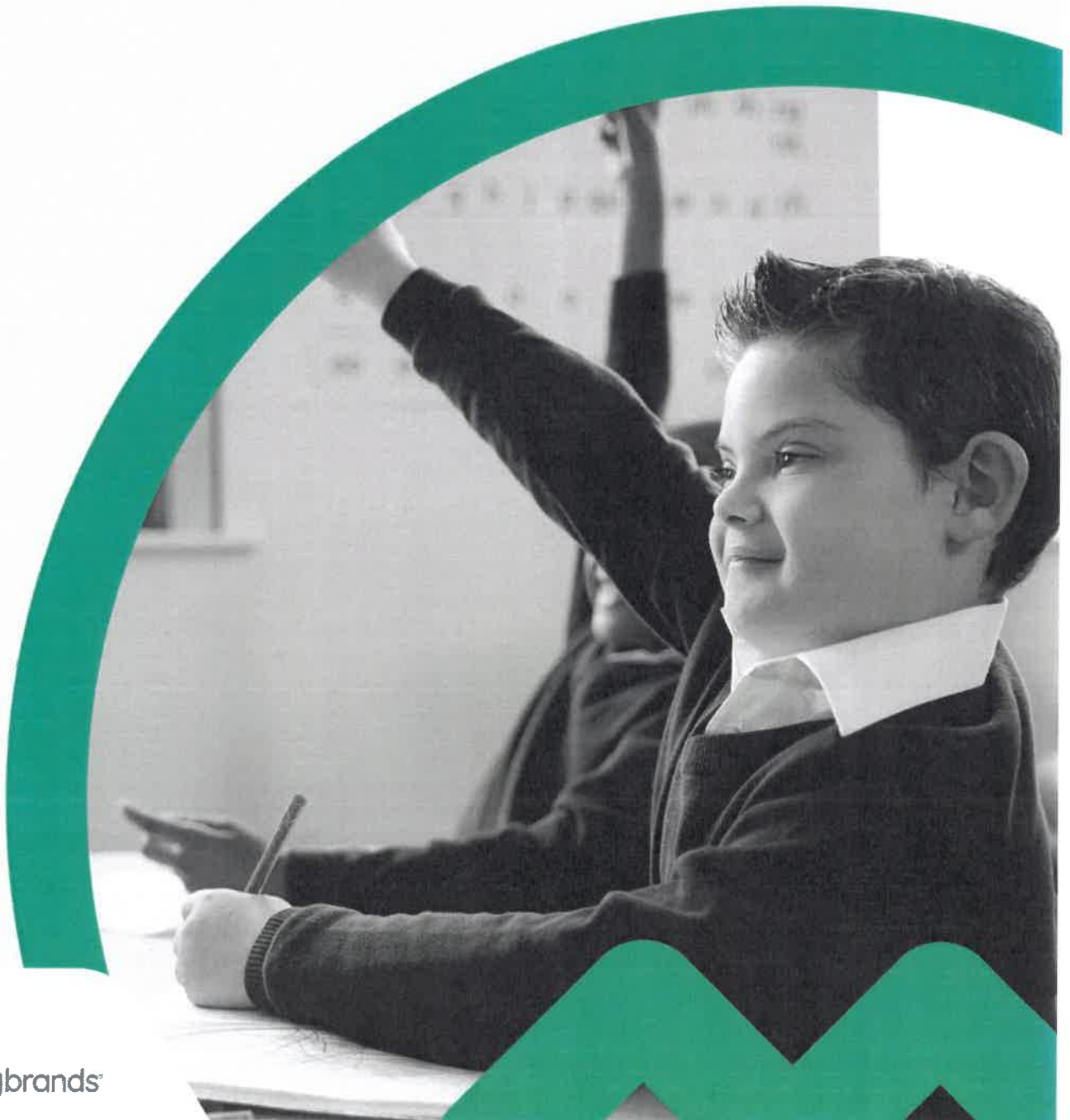




schoolmoney

Parent User Guide



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Dear Parents,

Welcome to **SchoolMoney**; an easy, safe, and secure way to pay for your child's trips, dinners, and other expenses online via your debit or credit card. The following user guide has been created to take you smoothly through these processes so that you and the school can gain the most out of the system.

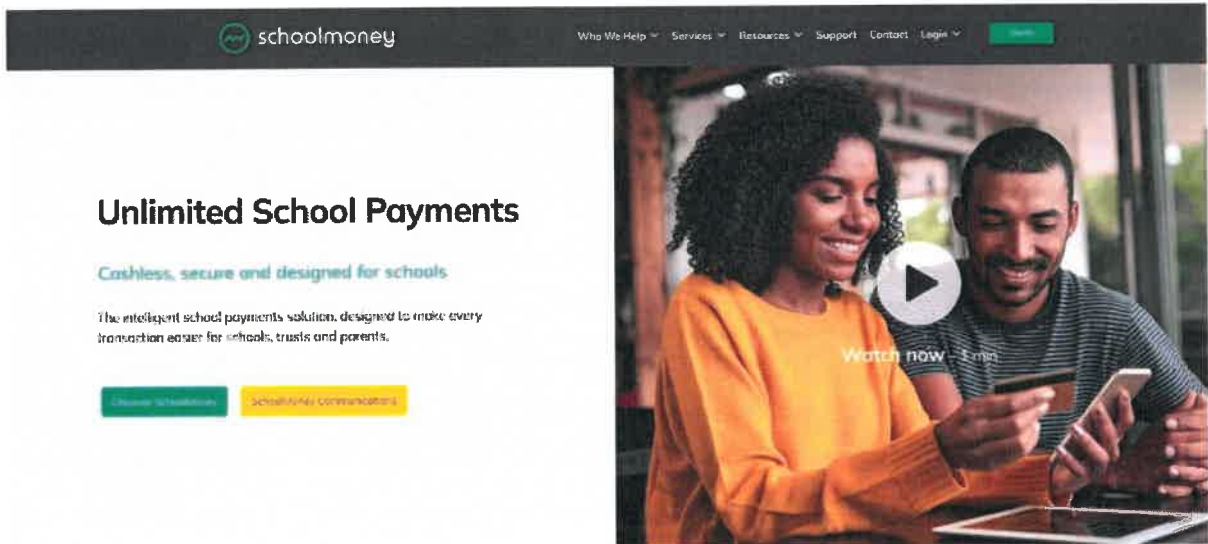
If you have any questions about making payments, simply contact your school and they can get in touch with us!

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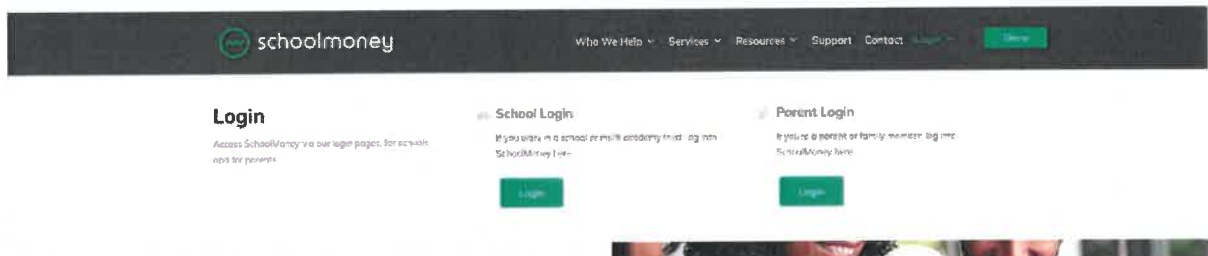
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1. Logging into SchoolMoney

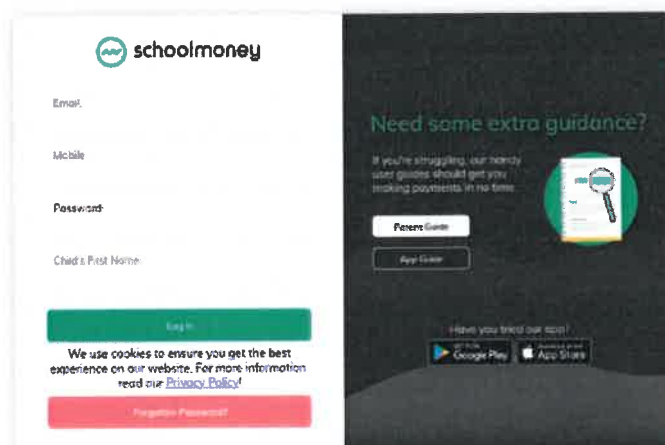
To log into **SchoolMoney**, please go to www.schoolmoney.co.uk and hover over the Login button in the top right-hand corner.



A drop-down box will appear, select the **Parent Login** option.



This will then send you to the parent login page.



Please enter the following information:

- Your mobile number
- Your email address
- The password the school has sent to you by text or email
- Your child's first name

Press Log In when you are ready.

Please note: The school will have sent you a password via text/email. If you have not received a message with a password in it, please contact the school directly to request one.

Please note: Only enter your child's **First Name**. This needs to be spelled in the same way as the school has it entered on their system, e.g. If the school's records have your child's name spelled as Samuel you should not enter Sam.

You will be logged into your SchoolMoney account providing the details that you have entered are correct.

Please note: If for any reason it won't allow you to log on, we would advise that you contact your school to double check the mobile number/email address that they have recorded against your child on **SchoolMoney**. If you are entering different details to the school, you will be unable to login until the school change your child's details.

If you are logging in for the first time, you will be required to reset your automatically generated password.

Log Out

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To help keep your account secure,
please update your password

Current Password

New Password

Confirm New Password

Your new password must:

- Be at least 8 characters in length
- Contain at least one uppercase letter
- Contain at least 1 number

Your new password will be applied to all of your
children who attend this school.

Save Password

A box will appear upon logging in that will ask you to type in your current password and then also create a new password you can use going forward.

Please note: *If you forget this password, you will need to ask the school to send you a reset password message.*

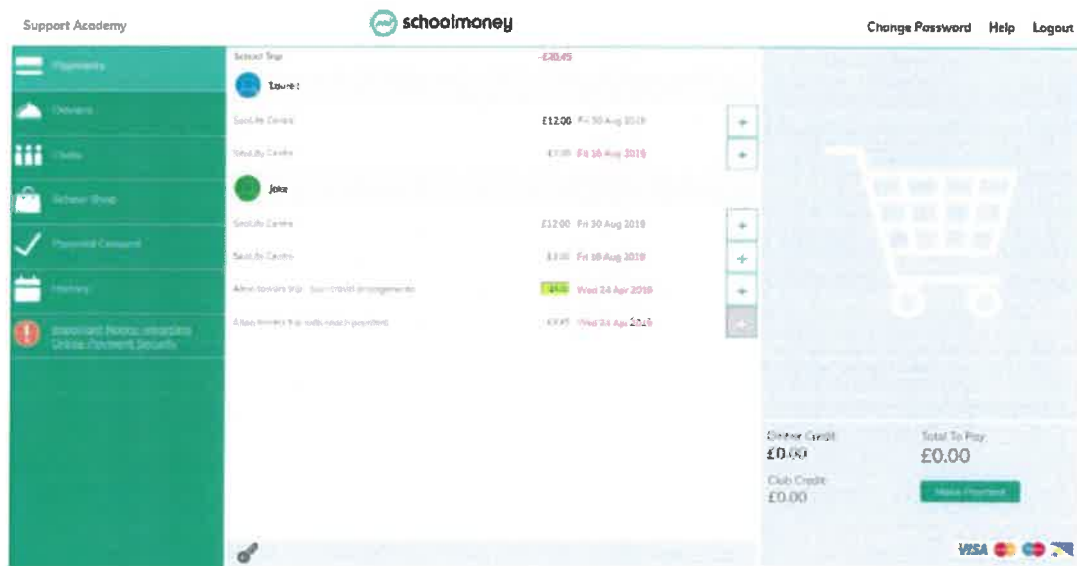
Once you are happy with your new password, press Save and you will proceed to your account.

2. Making a Payment

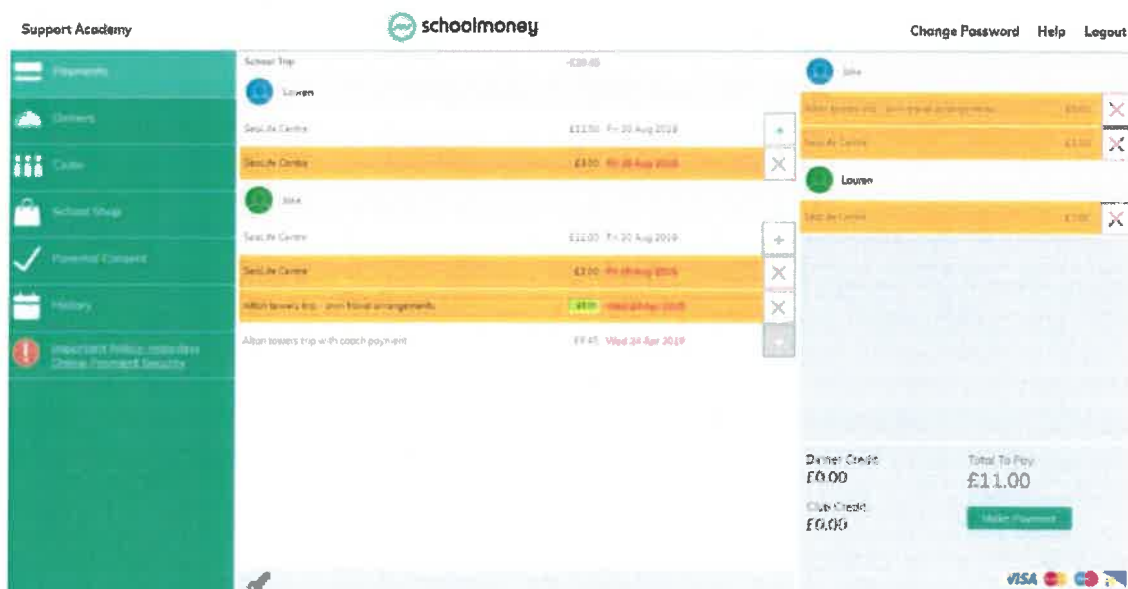
Once you have logged into your account, you will then be able to make payments for your child.

If you have more than one child that attends the school, their payments will show beneath their names. Names are listed alphabetically.

Any dinner arrears that your child has accumulated will appear first on the list, followed by payments that the school has set up for things such as trips, clubs, and fees.



To pay for an item select the + sign next to the payment. This will add the payment to the basket and turn the payment yellow to show that it has been selected.



Harry Potter Studios	£30.00	Wed 28 Feb 2018
PGL	£130.00	Fri 12 Jan 2018

You may find that some of your payments are highlighted in a different colour:

Green: this means that you can pay off the amount in smaller chunks up until the due date when you will need to pay it off in full. Click into the green box and amend the amount.

Orange: this means you can pay as much towards this payment as you would like. This will then remove any remaining cost so that you do not have to pay any more towards it. You can pay either more or less than the amount stated.

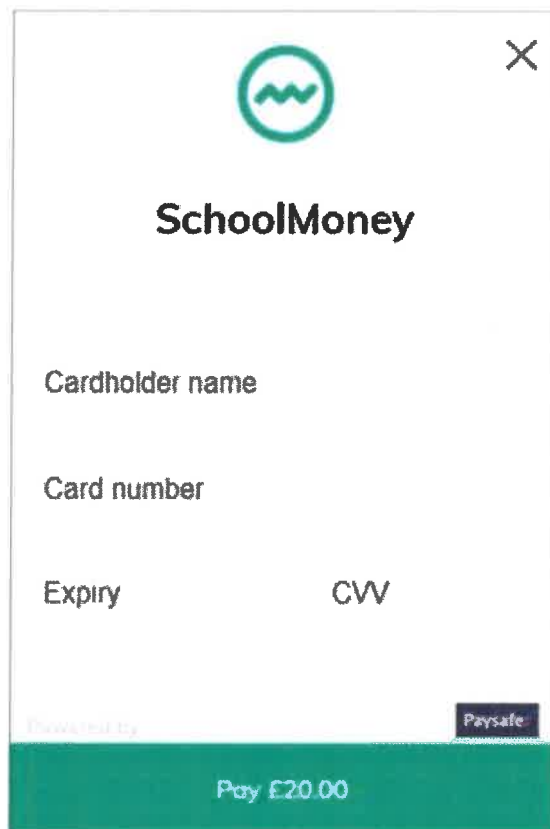
You will also be able to see that some of your due dates are in grey and some of them are in red. The due dates that are marked in red are payments that are overdue and need to be paid as soon as possible.

You may also find that when you select a certain payment, a pop-up will appear asking for your consent. You will have to give your consent to pay for this item/instalment.



Once you have selected all of the payments you would like to purchase, you will find them listed on the right-hand side of your screen. If you want to remove anything from your basket at this point, click the X next to the item. Click on the 'Make Payment' button when you are ready to check out.

The system will take you to a screen where you can enter your card details. You will have to do this every time that you want to make a payment due to the security of the system. **We do not store debit/credit card details.**



A screenshot of a payment confirmation pop-up window. At the top center is the SchoolMoney logo, a green circle with a white wavy line. To the right of the logo is a close button (an 'X' icon). Below the logo, the text 'SchoolMoney' is displayed in a bold, black font. Underneath, there are four input fields for card details: 'Cardholder name', 'Card number', 'Expiry', and 'CVV'. At the bottom left, there is a small, faint text 'Powered by' and a 'Paysafe' logo. At the bottom center, there is a green button with the text 'Pay £20.00'.

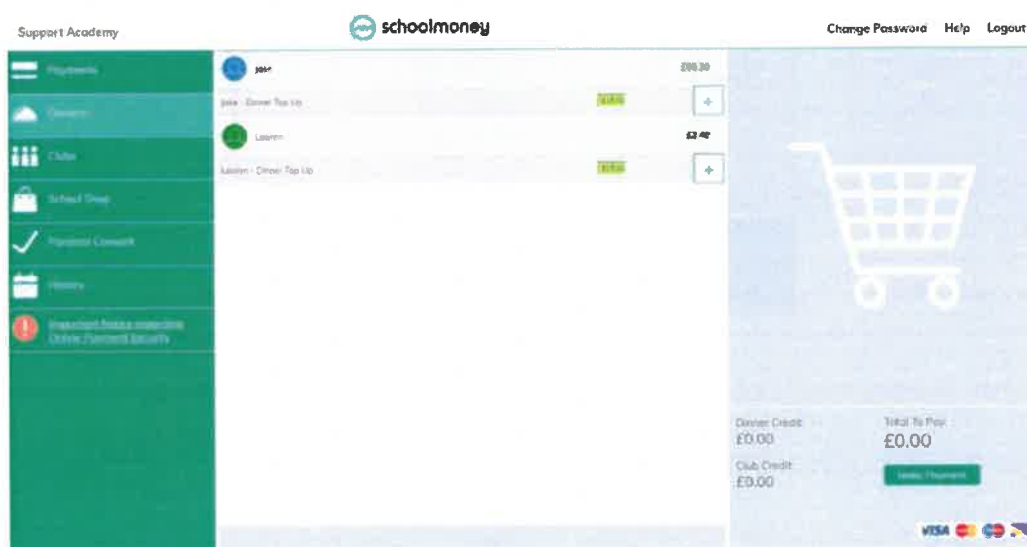
A confirmation pop up will appear once you have selected 'Pay Now' so that you know the details have been processed and you will receive an email receipt shortly afterward.

3. Dinners

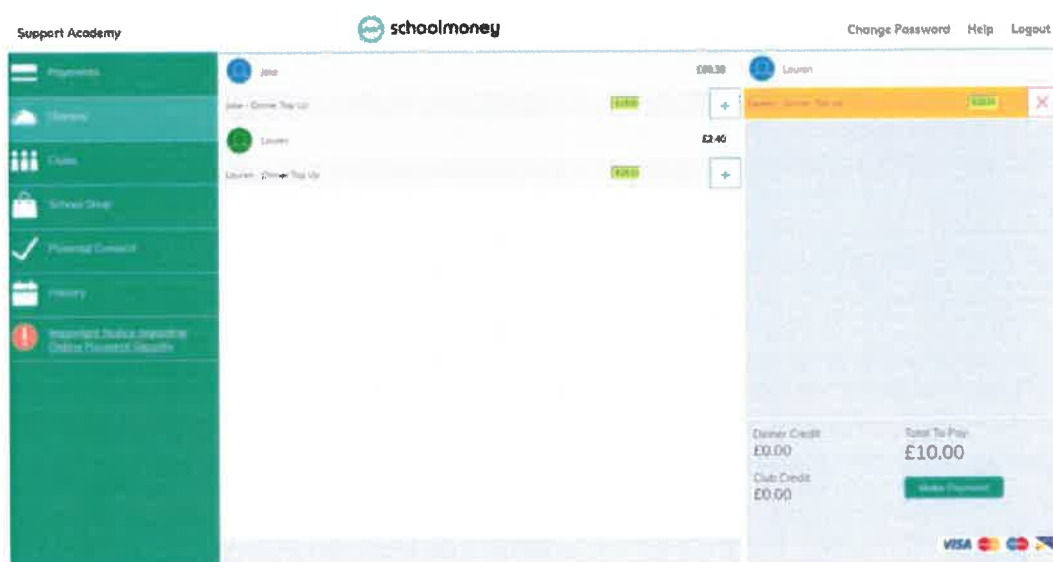
3.1 Dinner Top Up

If your school asks you to top up your child’s dinner account, this will be found in the Dinners section of the options menu on the left-hand side of your screen.

When you click on Dinners, it will come up with a screen that shows your child’s dinner balance with an option to top up below.



To top up, change the cost in the green box to the amount you would like to pay and click the + sign. This will add the cost to your basket on the right.



3.2 Dinner Bookings

If your school wants you to book dinners, there are a few ways that they could ask you to do this.

Please note: *If your child is eligible for free school meals or universal infant free school meals then you can book as normal but you will not be charged.*

Regardless of the various options, the first thing that you need to do is go to Dinners in the options menu. This will take you to a screen that will show each of the dinner weeks that are available to pre-book under your child's name.

The screenshot shows the SchoolMoney parent portal interface. On the left is a green navigation menu with options: Home, Dinners, Clubs, School Shop, Parental Consent, History, and an important notice about mobile security. The main content area is divided into two sections for children 'Iris' and 'Lourant'. Each section lists 'School Lunches W/C' for various dates in September 2019, with a '+' sign next to each entry. The total for Iris is £80.38 and for Lourant is £2.40. On the right, there is a shopping cart icon and a summary section showing 'Dinner Credit: £0.00', 'Total To Pay: £0.00', and 'Club Credit: £0.00'. A 'Make Payment' button is visible, along with logos for VISA, Mastercard, and American Express.

Pre-Booking Dinner Days

If your school requests you pre-book dinner days for your child:

- Select the + sign next to the week you would like to pre-book

School Lunches W/C: Mon 09 Sep 2019		
Cost per meal: £2.50		
Monday	None	£0.00
Tuesday	Meal	£0.00
Wednesday	Packed Lunch	£0.00
Thursday	None	£0.00
Friday	None	£0.00
		Total £0.00 <input type="button" value="Add To Basket"/>

- Tick the box next to the day you would like your child to eat
- Once all of the days have been chosen, click the 'Update Booking' button in the bottom right-hand corner
- A pop-up box will appear letting you know that the booking has been saved
- Repeat for any other weeks you want to book

Pre-Booking Meat and Vegetarian Options

If your school wants you to book whether your child is having a meat meal or a vegetarian meal:

- Select the + sign next to the week you would like to pre-book
- In the drop-down box next to the day you would like to book, choose the option of Meat or Veg

School Lunches W/C: Mon 05 Mar 2018		
Cost per meal: £3.60		
Monday	No Meal	£0.00
Tuesday	Meat	£0.00
Wednesday	Veg	£0.00
Thursday	No Meal	£0.00
Friday	No Meal	£0.00
		Total £0.00 <input type="button" value="Add To Basket"/>

- Tick the box next to the day you would like your child to eat
- Once all of the days have been chosen, click the 'Update Booking' button in the bottom right hand corner
- A pop up box will appear letting you know that the booking has been saved.

- Repeat for any other weeks you want to book

Pre-Booking Specific Meal Options

If your school asks you to book specific meal options for your child:

- Select the + sign next to the week you would like to pre-book

School Lunches W/C. Mon 05 Mar 2018	
Monday	No Dinner Chosen
Tuesday	No Dinner Chosen £2.20 - Chicken Korma & Rice £2.00 - Vegetable & Chickpea Korma with Rice £2.20 - Jacket Potato with Baked Beans £0.00 - Packed Lunch
Wednesday	
Thursday	
Friday	No Dinner Chosen

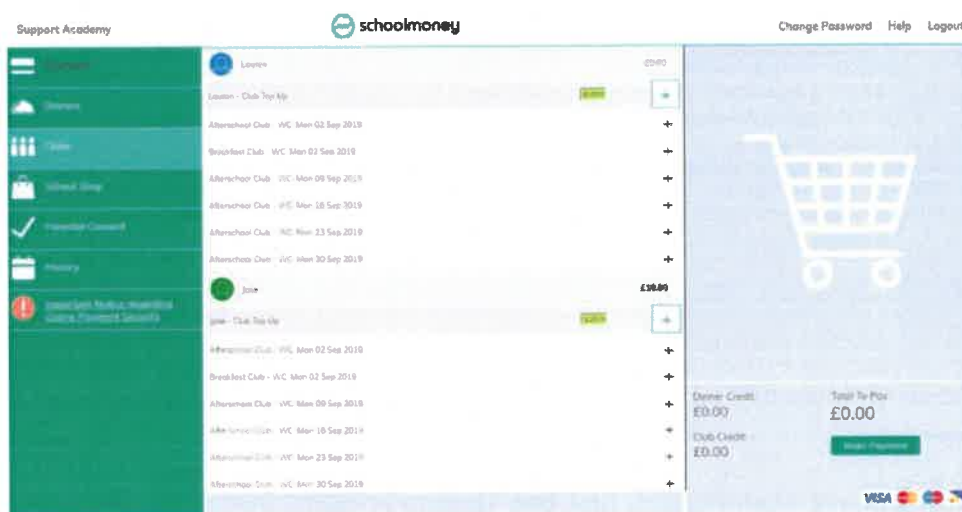
Total £0.00 [Update Booking](#)

- Select the drop-down box next to the day you want to book for and choose one of the options available
- Once all meals have been chosen, click the 'Update Booking' button in the bottom right-hand corner
- You can repeat for any other weeks you want to book.

4. Clubs

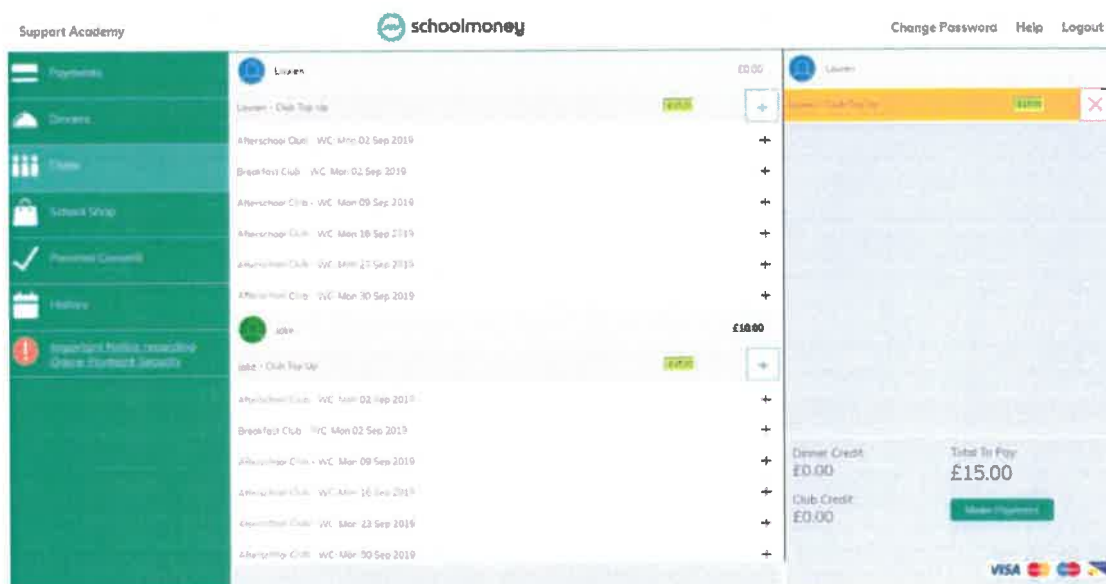
4.1 Club Top Up

If your school asks you to top up your child's club account then this will be found in the Club section of the options menu.



When you click on Clubs it will come up with a screen that shows your child's club balance with the option to top up below.

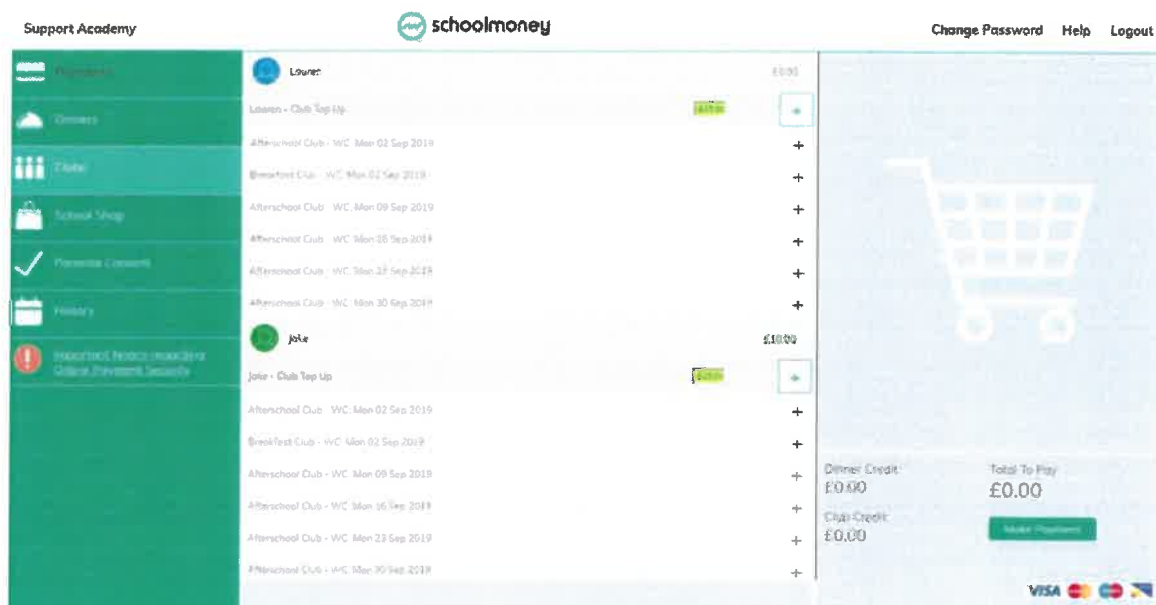
To top up, change the cost in the green box to the amount you would like to pay and click the + sign. This will add the cost to the total at the bottom of your screen, as well as your basket.



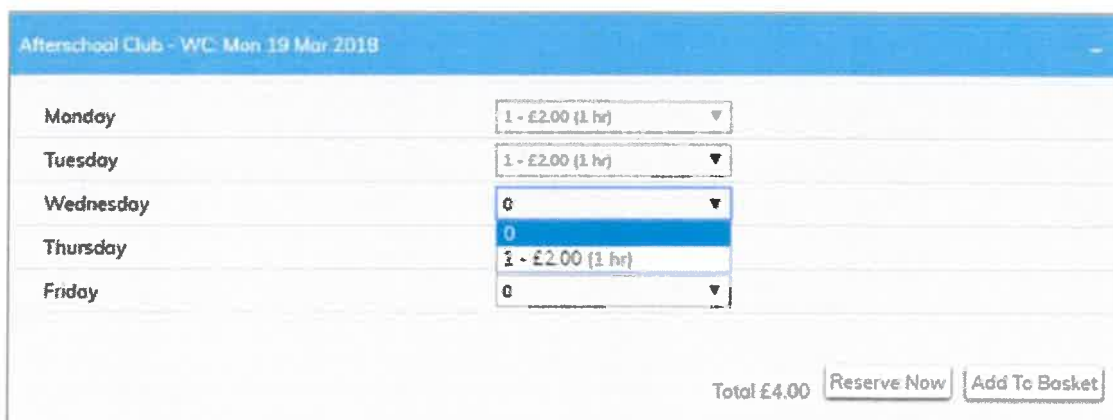
4.2 Club Bookings

If your school asks you to pre-book your child’s club sessions then this will be found in the Clubs section of the options menu.

Each club that is available to book will appear underneath your child’s name and will be listed in date order. They appear on a week-by-week basis.

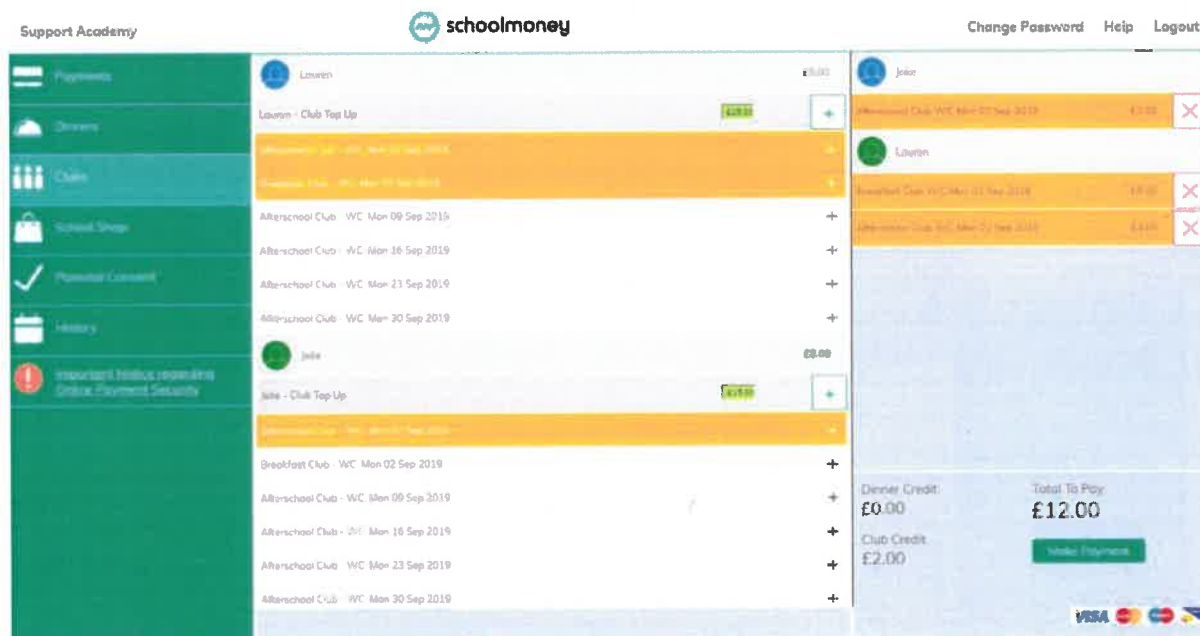


- Click on the + sign next to the week you would like to pre-book. This will open the booking and show you the days that are available
- Click on the drop-down box next to the day you would like to book and choose the session you need



- Once all sessions have been chosen, click ‘Add to Basket,’ or if available and you do not want to pay yet, ‘Reserve Now’ in the bottom right-hand corner.

Please Note: Reserve Now may not be a feature available when booking. Allowing reservations for sessions without payment is at the discretion of the school.



- A pop up box will appear letting you know that the booking has been saved. The club will highlight in yellow to show that it has been added to your basket.
- Repeat for any other weeks you want to book.

5. School Shop

If there is a school shop in which you can purchase items such as uniform or stationery, then the school may make this available in the shop section of the system. This section will always be available for you to log in and order/pay for.

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Item	Price	Quantity
Jake - Book Bag	£10.00	1
Jake - Calculator	£10.00	1
Jake - Drink Bottle	£2.98	1
Jake - Football	£8.00	1
Jake - Football Shirt	£10.00	1
Jake - Football Socks	£3.90	1
Jake - Jumper Size Small	£14.00	1
Jake - Library Card	£2.15	1
Jake - Large Sweatshirt	£7.99	1
Jake - PE Bag	£5.99	1
Jake - Pencil Case	£2.50	1
Jake - Ruler	£0.49	1
Jake - Sweatshirt	£8.50	1
Jake - Swimming Kit	£9.80	1

Item	Price	Quantity
Jake - Book Bag	£10.00	1
Jake - Drink Bottle	£2.98	1
Jake - Football Shirt	£10.00	1
Jake - Drink Bottle	£2.98	1

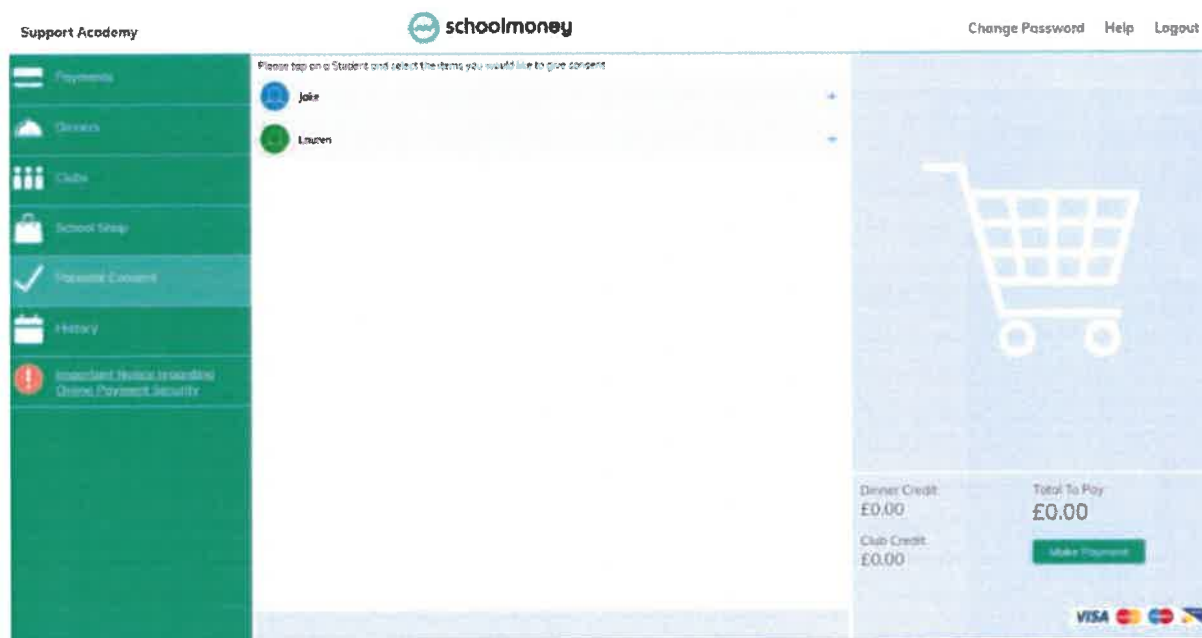
Diviner Credit: £0.00
 Club Credit: £0.00
Total To Pay: £25.98
[Make Payment](#)

You will be able to purchase items for all of your children, so please ensure the correct child is selected. Please make sure to scroll right down to the bottom of the page if you have more than one child at the school as they will be listed alphabetically.

Select the + sign next to the item you would like to purchase. This will add the cost to the basket on the left-hand side of the screen. If you want to purchase more than one item, select the + sign as many times as you need.

6. Parental Consent

When schools set up payments, such as school trips or clubs, they can request that you give parental consent when you pay.



This section of your account enables you to check which payments you have given consent for and amend as appropriate.

Select the + sign next to the child and give or take away consent as needed by selecting the box next to the relevant payment.

Child	Payment	Date	Consent Status
Lauren	Swimming Autumn Swimming Lessons	Wed 21 Aug 2019	<input checked="" type="checkbox"/>
	School Trip Madam Tussauds	Sat 31 Aug 2019	<input type="checkbox"/>
	Residential residential trip	Wed 21 Aug 2019	<input checked="" type="checkbox"/>

A green box means that you have given consent, and a blank box means that you haven't. To give consent for a payment, simply check the blank box and it will turn green.

A popup box will appear letting you know this consent has been saved.

7. History

If you would like to know what transactions you have made or you would like to see what dinners/club sessions have been taken, you can find this in the History section.

The first tab available is the Transaction History tab. This tab gives you a breakdown of any payments you have made, whether that be by debit/credit card or by cash/cheque within the school.

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Transaction History Club History Dinner History Meal Selections

Jake

Description	Book Bag
Instalment	-
Paid	£10.00
Payment Date	Mon 12 Aug 2019
Refunded	-
Payment Method	Cash
Description	Trip to the Lake
Instalment	1 of 1
Paid	£12.00
Payment Date	Mon 12 Aug 2019
Refunded	-
Payment Method	Cash
Description	Theatre Trip
Instalment	1 of 2
Paid	£10.00
Payment Date	Mon 12 Aug 2019
Refunded	-
Payment Method	Visa
Description	Eden project trip
Instalment	2 of 3
Paid	£10.00

Dinner Credit: £0.00
 Club Credit: £0.00
Total To Pay: £0.00
[Make Payment](#)

VISA M C B

The Club History tab will give you a breakdown of the club sessions your child has taken and whether you have paid for them or not. There is also a key to help you see exactly what each block means.

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Transaction History **Club History** Dinner History Meal Selections

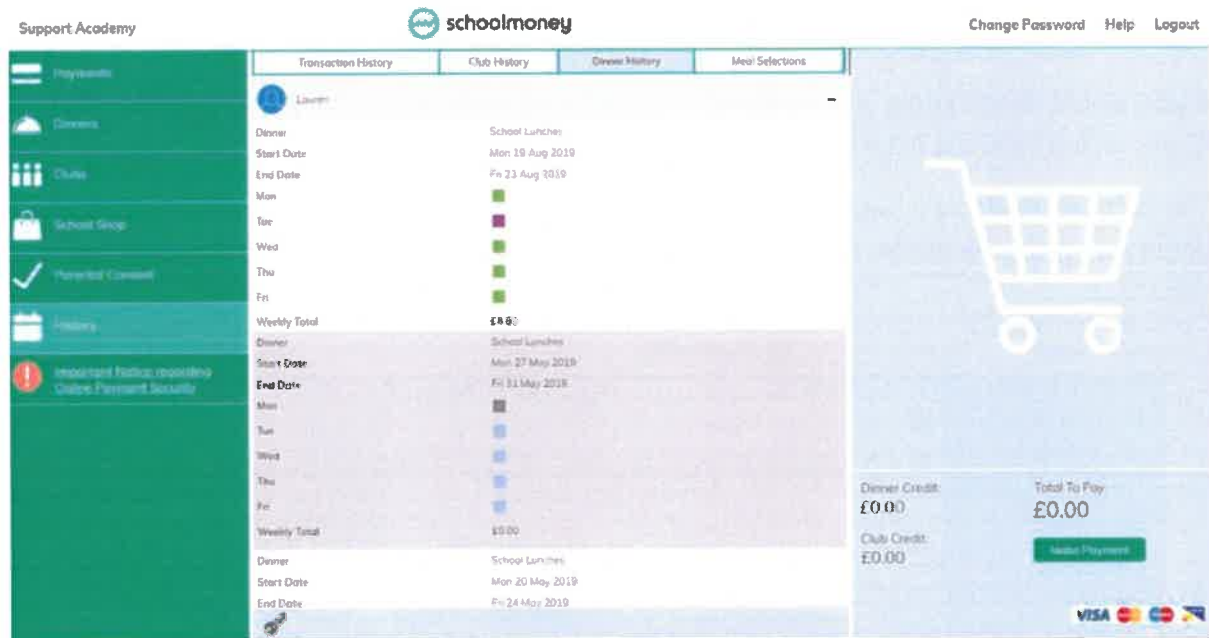
Leahen

Description	Breakfast Club
Start Date	Mon 02 Sep 2019
End Date	Fri 06 Sep 2019
Cost So Far	£8.00
Paid So Far	£8.00
Mon	£1
Tue	£1
Wed	£1
Thu	£1
Fri	£1
Weekly Total	£8.00
Amount Paid	£0.00
Description	Afternoon Club
Start Date	Mon 18 Mar 2019
End Date	Fri 22 Mar 2019
Cost So Far	£0.00
Paid So Far	£0.00
Mon	£0.00
Tue	£0.00
Wed	£0.00
Thu	£0.00

Dinner Credit: £0.00
 Club Credit: £0.00
Total To Pay: £0.00
[Make Payment](#)

VISA M C B

The Dinner History tab will give you a breakdown of the meals your child has taken and the cost of these meals. There is also a key to help you see exactly what each block means.



If your school uses the option of pre-booking specific meals online, you will be able to use the Dinners Booked tab.

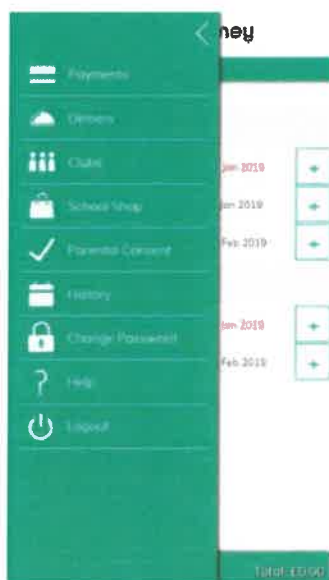
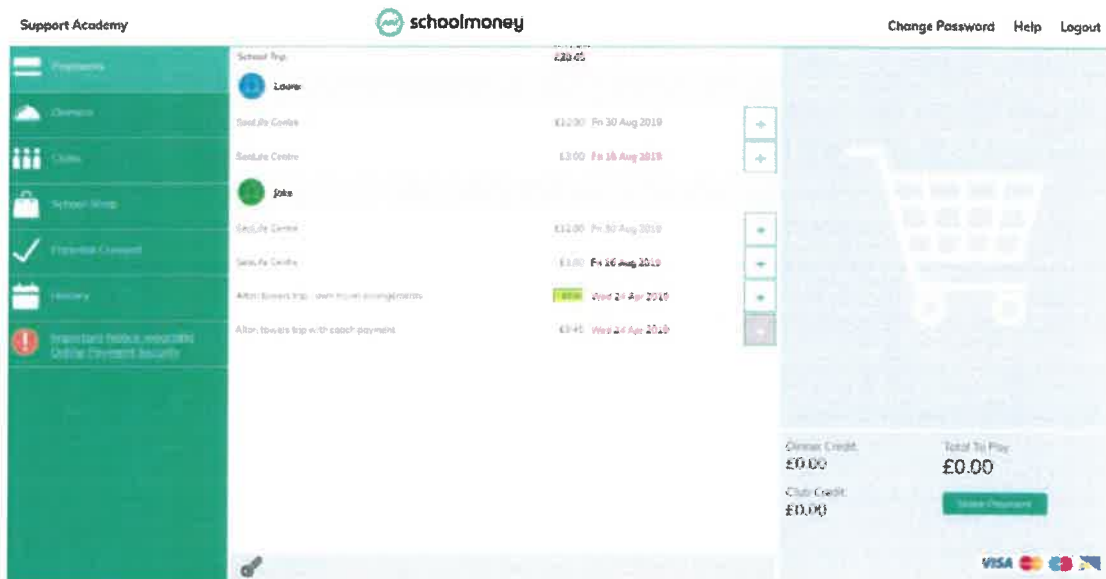
This tab shows all the meals that have been booked for your child and on what days.



8. Changing Passwords

When you are sent your initial welcome message you will receive a system-generated password. However, once you are logged in you can amend this password to something more memorable.

- Log in to your account with the password that the school has provided to you
- If you are using a computer you will see 'Change Password' in the top right-hand corner. If you are using a mobile device, when you navigate to the menu sidebar it will be listed below History.



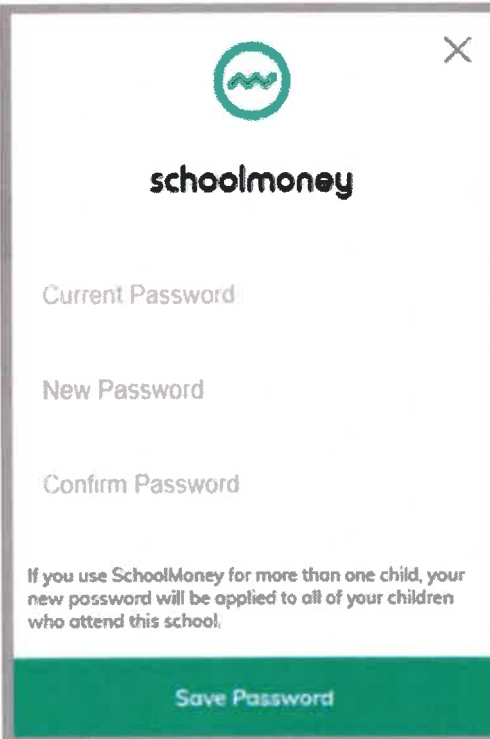
Please Note: If you have more than one child at the school; you can change the password for one student and the change will apply to all of the children who attend the school.

- A screen will pop up asking for you to type in your current password (the one that the school sent to you and then enter and confirm your new password. These passwords must include:

- At least 8 characters.
- At least 1 capital letter
- At least 1 number

- Select Save Password

Forgotten password? A 'Password Reset' message can be sent to you via text message or email with a special URL that will take you to a website where you can set a new password. If you need to reset your password you will need to contact your school and ask them to send you this message.



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Current Password

New Password

Confirm Password

If you use SchoolMoney for more than one child, your new password will be applied to all of your children who attend this school.

Save Password

9. FAQ

I cannot log in to my account

If you are receiving the invalid Login Details error when trying to log into **SchoolMoney** we would advise you to take the following steps:

- Check that the mobile number/email address the school has on record for you matches the details you are entering
- Ask the school to send you a reset Password link. You will then be able to change your password to something more memorable
- Make sure you are entering your child's first name only
- Try logging in with a different device
- Login with a wifi connection and not 4G
- Make sure you are not autocompleting the details. Type each section in from scratch
- Clear your history/cache on the device you are using
- Make sure that you are not keeping the website open in the background of your device. Close it completely before trying to login again.

I am logging in with one child but cannot see my other children, what is wrong?

If your children attend the same school but you cannot see them when logging in, it will be because they are not linked as siblings on the **SchoolMoney** system. To link children as siblings the mobile numbers and email addresses need to be the same. We advise that you contact the school and ask them to check that all of your children's details match.

I have forgotten my password

A 'Password Reset' message can be sent to you via text message or email with a special URL that will take you to a website where you can set a new password. If you need to reset your password you will need to contact your school and ask them to send you this message.

I have not received a message from my child's school with the password

You will need to speak to your child's school directly and ask them to either send you the welcome message which will include your pre-set password, or a password reset link.

I have separated from my partner, can we both have a login

The **SchoolMoney** system does have a feature that enables schools to add secondary contacts to the system. This will then create a separate login for the secondary contact. Whilst this is something that **SchoolMoney** can do, please be aware that offering this to parents is at the schools' discretion.

Can I change my password?

When you first log in to **SchoolMoney** you will be sent a system-generated password. Once you have logged in you are able to change your password as explained on Page 20 of this guide. If you forget your password or what to reset it before you have logged in for the first time, you can ask the school to send you a password reset link.

What happens if I change my mobile number or email address?

If you change any of your contact details, you need to let the school know as soon as possible. If they do not have the correct contact details for your child then you may not be able to access your **SchoolMoney** account and you won't receive message updates from the school.

Does SchoolMoney store my card details when I make a payment?

SchoolMoney never stores card details, making the process of paying for your child's school items highly secure. Each time you start the payment process you will need to input your card details.

Do you offer the facility to pay by PayPal?

We do not currently offer the facility to pay by PayPal. If you would like more information on which payment methods the school allows other than online, you will need to contact them directly.

Do you offer the facility to pay by PayPoint?

PayPoint enables you to pay for your child's trips, dinners, etc without using the online facility. You will need to contact your child's school and request a PayPoint barcode sheet. Once you have this sheet, take it to your local PayPoint and ask them to scan the relevant barcode. You can pay by cash or card. Please contact your school to see if this is a feature available to you.

Can I access the website on multiple devices?

Yes! You can use your computer/laptop, your mobile phone, or a tablet. As long as you have access to the internet, you will be able to log in and pay.

What happens if I pay for the wrong thing?

If you have paid for the wrong item or on the wrong child, you will need to contact your child's school and explain to them what has happened. They will either be able to move the money as requested or process a refund so that you can pay for the correct payment.

Who do I contact if I need help?

If you have questions or need help with anything, you must contact your school directly. They will be able to answer your questions or pass the information over to us.

I know that I am in credit and would like a refund, how do I do this?

If you can see that there is a credit on your account and you would like that money back, you will need to contact the school directly. Only the school can process this refund back to you.

I want to pay using childcare vouchers. How do I do this?

Currently, you are unable to pay using childcare vouchers through our online system. You can let the school know and they will mark this manually for you.

Some of my costs are highlighted in green and orange, what does this mean?

Green: this means that you can pay off the amount in smaller chunks up until the due date when you will need to have paid it off in full. Click into the green box and amend the amount.

Orange: this means you can pay as much towards this payment as you would like. This will then remove any remaining cost so that you do not have to pay any more towards it.

I want to buy more than one shop item but there is nowhere to change the quantity.

If you would like to purchase more than one shop item you need to select the plus sign next to the items as many times as you would like and they will be added to your total.



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eduspot

