



Way2Pay User Guide

A Guide for Parents and Schools to use Ireland's Fastest Growing Parental Payments System

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Way2Pay User Guide

Way2Pay for Schools

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Introduction

Background

Way2Pay Ltd is an online, Irish owned payments provider registered with The Central Bank of Ireland. Way2Pay provides a service to schools, parents and government (Educational Training Boards) enabling schools to request and receive payment, parents to pay and government to reconcile and audit school income.

Users

This application interfaces with three user groups; schools, parents and clusters (ETBs).

The Scope

The Scope of this document is to provide a user guide to assist users in using the application to request income, make payments and analyse / audit movement of money.

Quick Start Guide

Step 1: Go to <https://www.way2pay.org/>

Step 2: The Home page opens with a login for schools, parents and ETBs

Step 3: Login

Purpose

The purpose of this document is to demonstrate to User groups the unique functionality associated with their dashboard. The document is presented in three parts

1. Schools User guide
2. ETB User guide
3. Parents User guide

The latest version of this document was created in September 2017. The Way2Pay User guide is frequently updated.

Part 1 The Schools Dashboard

SMS and Email

Send a Text Message/Email to a Class or Group

Step 1: Go to www.way2pay.org & login. Click "SMS and Email" on the left side.

Step 2: Select the SMS and/or Email box and customize your message in the "Enter your message" box.

Step 3: Choose the recipients by clicking and dragging the tag to the "Recipients" box, you may also add students by typing in the name in the box under "Students."

Step 4: In the box to the right labelled "Actions," enter the start time and click "Send."

Step 5: You can add an attachment to your email, this is very useful for communication with parents, newsletters, forms etc.

Tick SMS, write message & click send

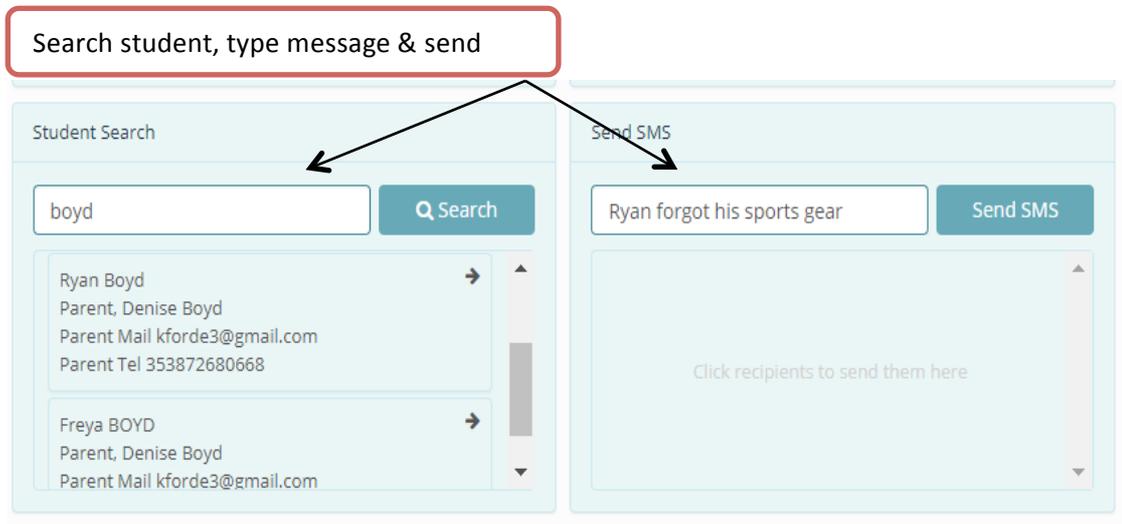
The screenshot shows the 'Send SMS/Emails' interface in the Way2Pay system. At the top, there are navigation links for 'Home', 'Reports', and 'Actions'. The main section is titled 'Send SMS/Emails' and contains three radio buttons: 'SMS (Parents)' (checked), 'SMS (Students)', and 'Email (Parents)'. Below these is a text input field with a character count '66 chars. 1 txt msg.' and the message content 'Reminder of Parent Teacher Meeting tonight with 2nd year parents.'. To the right of the message field is an 'Action:' panel with a '* Frequency:' dropdown menu set to 'Once' and a 'Send' button. Below the main interface are three panels: 'Tags' with a dropdown menu showing 'Groups' and '1.All Parents Only', 'Students' with a search input 'Enter students last name...' and a 'Search' button, and 'Recipients' which is currently empty. Red boxes and arrows highlight the 'SMS (Parents)' option, the message field, the 'Send' button, and the 'Tags' and 'Students' panels.

Select Recipients

How to Quickly Send a Text Message/Email to an Individual Parent or Guardian

There is an SMS feature on the dashboard where you can quickly send messages to a student/ parent or guardian.

This has been designed to quickly inform parents of student's issues who have come to the window of the school office. You can also quickly send SMS to teachers using this feature.



Step 1: On dashboard search for student by surname

Step 2: Type message and click Send SMS

Activities and Bills

Create a New Activity/Bill

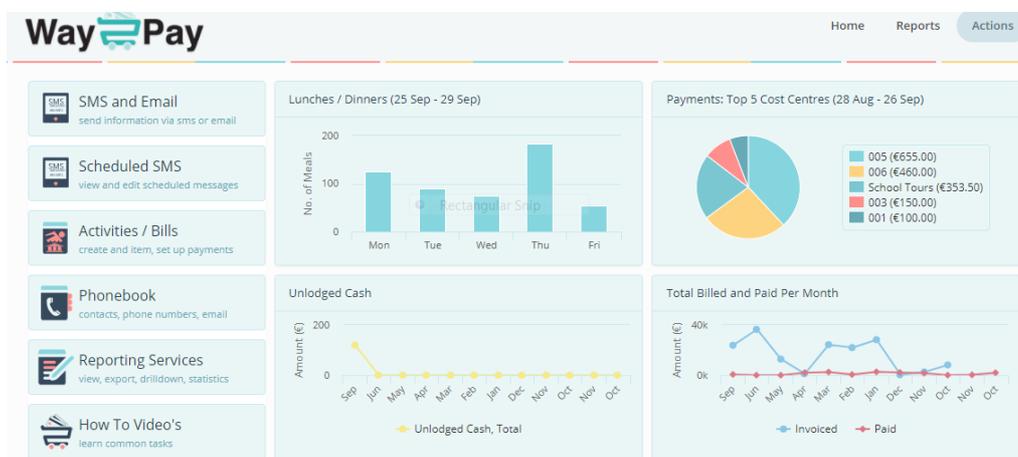
Step 1: Click on “Activities & Bills” on the left side of the main page.

Step 2: On “Actions” sub menu on right hand side and select “Add new activity” from dropdown.

Step 3: Enter the Activity Details and click “save & proceed”, details include “Name, Start Time, Finish Time, Description, Cost, Ledger Codes and family discounts”. When adding a family discount you will be prompted to add the amount the second third and fourth student in a family will pay, for example if the first child pays 100, the second 80 the third 50 and the fourth zero, please fill fields with these amounts.

Step 4: Add Recipients and click “proceed”, Click and drag the classes you want under “groups /classes” to “To Be Invoiced,” you may also add individual students by typing the name into the box under “Students.”

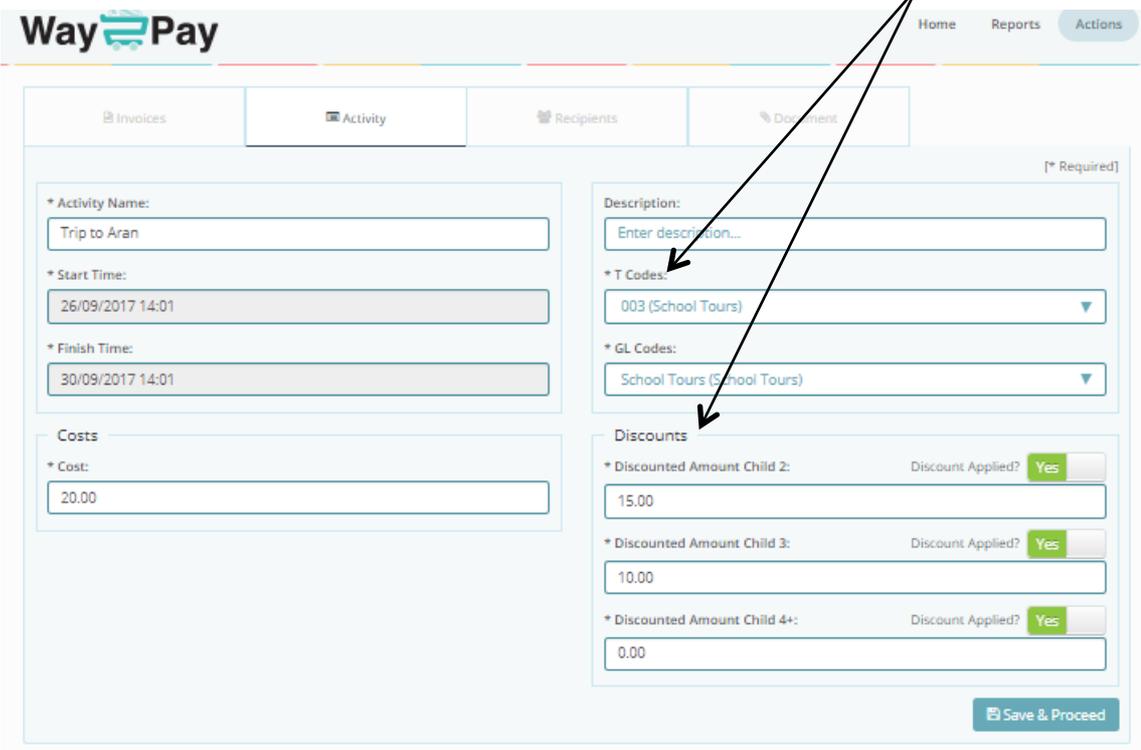
Step 5: Select “Save a Draft,” “Save & Bill Now,” or “Save & Bill Later.”



The screenshot shows the 'Add new activity' form with the following fields and sections:

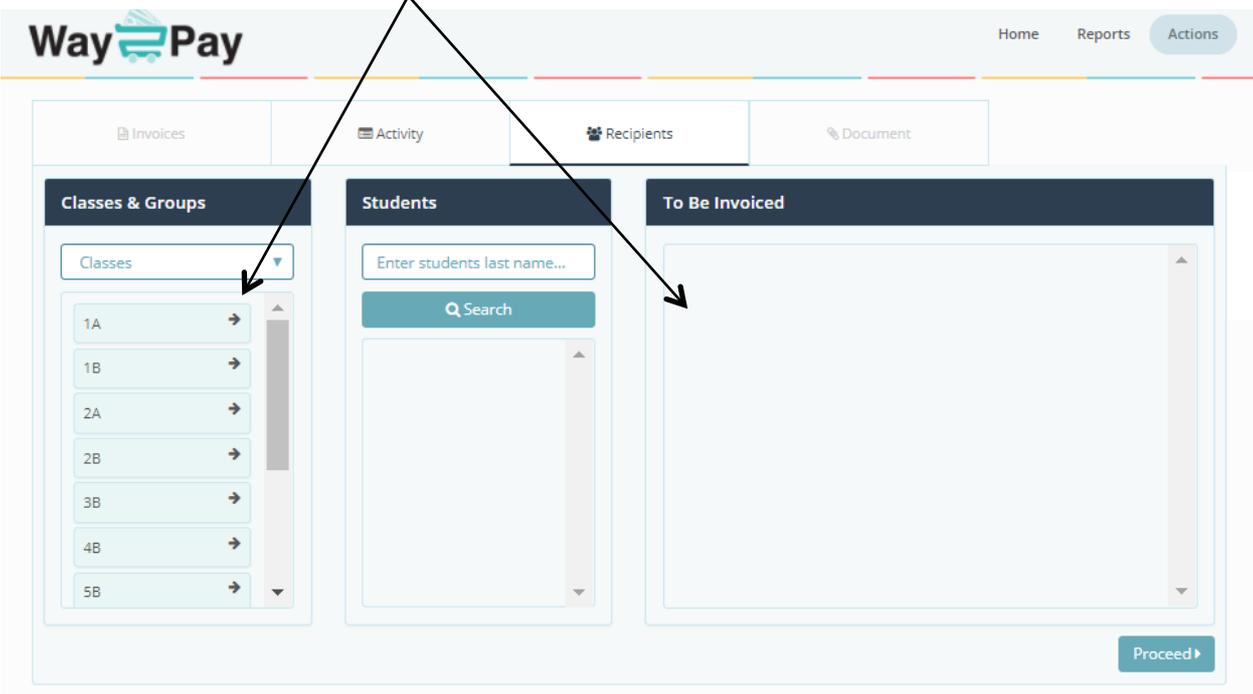
- Navigation:** Home, Reports, Actions
- Form Fields:**
 - * Activity Name: Enter name...
 - * Start Time: Select start time...
 - * Finish Time: Select finish time...
 - * Cost: Enter cost...
 - Description: Enter description...
 - * T Codes: Select T2 code
 - * GL Codes: Select GL code
- Costs Section:** * Cost: Enter cost...
- Discounts Section:**
 - * Discounted Amount Child 2: No discount applied. Discount Applied? No
 - * Discounted Amount Child 3: No discount applied. Discount Applied? No
 - * Discounted Amount Child 4+: No discount applied. Discount Applied? No

Enter details, codes and family discount



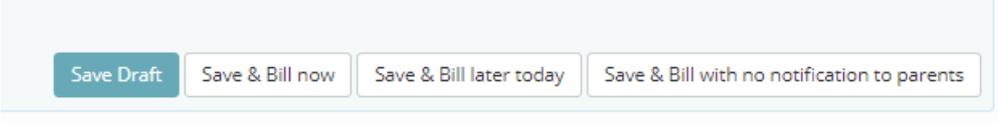
The screenshot shows the 'Activity' form in the Way2Pay system. The form is divided into several sections: 'Activity Name' (with 'Trip to Aran' entered), 'Start Time' (26/09/2017 14:01), 'Finish Time' (30/09/2017 14:01), 'Costs' (with '20.00' entered), 'Description' (with 'Enter description...' placeholder), 'T Codes' (003 (School Tours)), 'GL Codes' (School Tours (School Tours)), and 'Discounts' for three children. Each discount field has a 'Discount Applied?' checkbox with a 'Yes' button. A 'Save & Proceed' button is at the bottom right.

Select class & click on arrow



The screenshot shows the 'Classes & Groups' section of the Way2Pay system. It features a dropdown menu for 'Classes' and a list of classes: 1A, 1B, 2A, 2B, 3B, 4B, and 5B, each with a right-pointing arrow. To the right are 'Students' and 'To Be Invoiced' sections. A 'Proceed' button is at the bottom right.

Select Billing Options



The screenshot shows four buttons for billing options: 'Save Draft', 'Save & Bill now', 'Save & Bill later today', and 'Save & Bill with no notification to parents'.

View Existing Activities and Bills

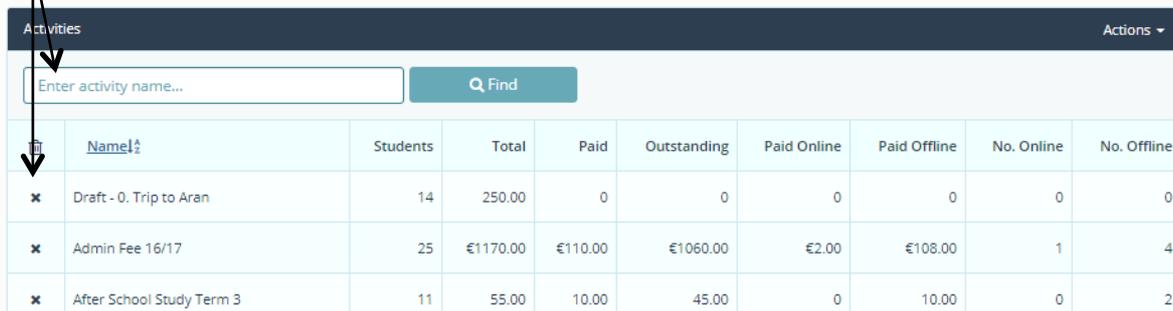
Step 1. On the home page, select “Activities/Bills” option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

Step 3. View bill details including student names, amount invoiced, and amount paid, online off line payments and notes associated with the payments and settled bills.

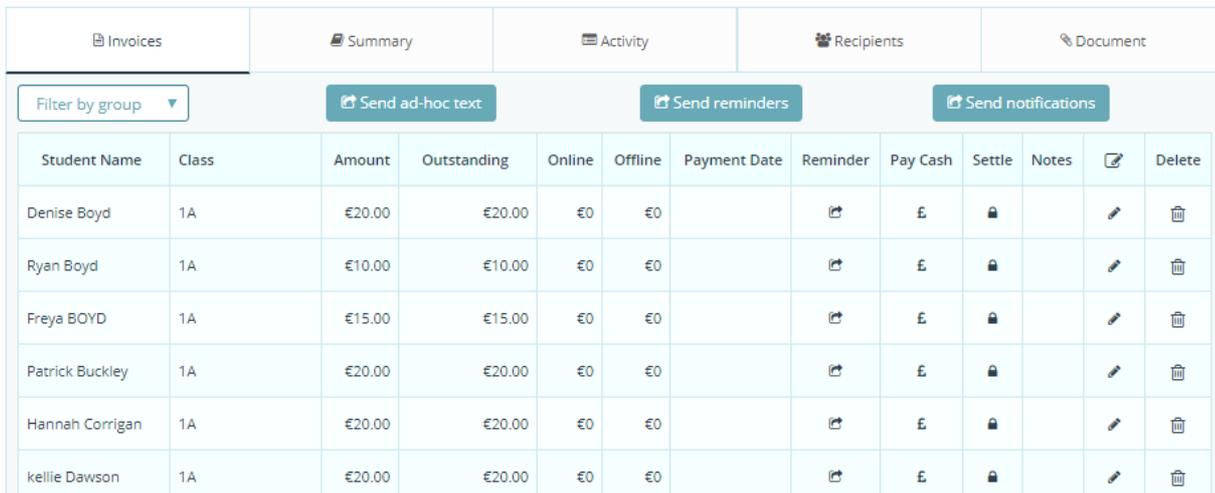
Step 4. From here you can add payments, notes and settle bills. You can also send reminders to individuals, several or all of the students on the invoice. You can send an ad hoc text to the students in this bill. Bills can also be archived from this screen.

Click on bill name to see details



Activities										Actions
Enter activity name...										Find
	Name	Students	Total	Paid	Outstanding	Paid Online	Paid Offline	No. Online	No. Offline	
✕	Draft - 0. Trip to Aran	14	250.00	0	0	0	0	0	0	
✕	Admin Fee 16/17	25	€1170.00	€110.00	€1060.00	€2.00	€108.00	1	4	
✕	After School Study Term 3	11	55.00	10.00	45.00	0	10.00	0	2	

0. Trip to Aran



0. Trip to Aran											
Invoices		Summary		Activity		Recipients		Document			
Filter by group		Send ad-hoc text		Send reminders		Send notifications					
Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0		📧	£	🔒		✎ 🗑
Ryan Boyd	1A	€10.00	€10.00	€0	€0		📧	£	🔒		✎ 🗑
Freya BOYD	1A	€15.00	€15.00	€0	€0		📧	£	🔒		✎ 🗑
Patrick Buckley	1A	€20.00	€20.00	€0	€0		📧	£	🔒		✎ 🗑
Hannah Corrigan	1A	€20.00	€20.00	€0	€0		📧	£	🔒		✎ 🗑
kellie Dawson	1A	€20.00	€20.00	€0	€0		📧	£	🔒		✎ 🗑

Working with Activities and Bills

In this section we will cover the following functionality for Activities and Bills. Once a bill is created there are many features to update, edit, view and print the bill in several formats.

- Edit recipients.
- Settle Bills
- Send Reminders
- Send Ad Hoc Text Message
- Add Notes
- Add Cash Payments
- Add Direct Debit or Standing Order.
- Filter by Class or Group
- Print Status Report of Activity or Bill.

Working with Activities and Bills; Edit Recipients.

Step 1. On the home page, select “Activities/Bills” option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

Step 3. Follow the grid along and click Recipients Tab, at the bottom of the page click ‘View and Edit’ button.

Step 4. Search for the student in question and add them to the bill by clicking on the arrow beside their name, then click proceed.

Step 5. Select the appropriate billing option, depending on whether you wish to send an SMS link to the parents select ‘Save and Bill with No Notification to Parent’ or ‘Save and Bill Now’.

The screenshot shows the 'Admin Fee 16/17' interface. At the top, there are tabs for 'Invoices', 'Summary', 'Activity', 'Recipients', and 'Document'. Below these are three main sections: 'Classes & Groups', 'Students', and 'To Be Invoiced'. The 'Students' section has a search bar with the text 'Enter students last name...' and a search button. A callout box with an arrow points to the search bar, containing the text 'Search for Students, drag & drop student name'. The 'To Be Invoiced' section is currently empty. At the bottom right of the 'Recipients' tab, there is a 'View and Edit' button. A callout box with an arrow points to this button, containing the text 'First Click View & Edit'. Below the main interface, there are two smaller screenshots. The first shows the 'Students' section with the search bar containing the text 'boyd' and a search button. The second shows a dialog box with 'Cancel' and 'Proceed' buttons.

Working with Activities and Bills; Send Reminders

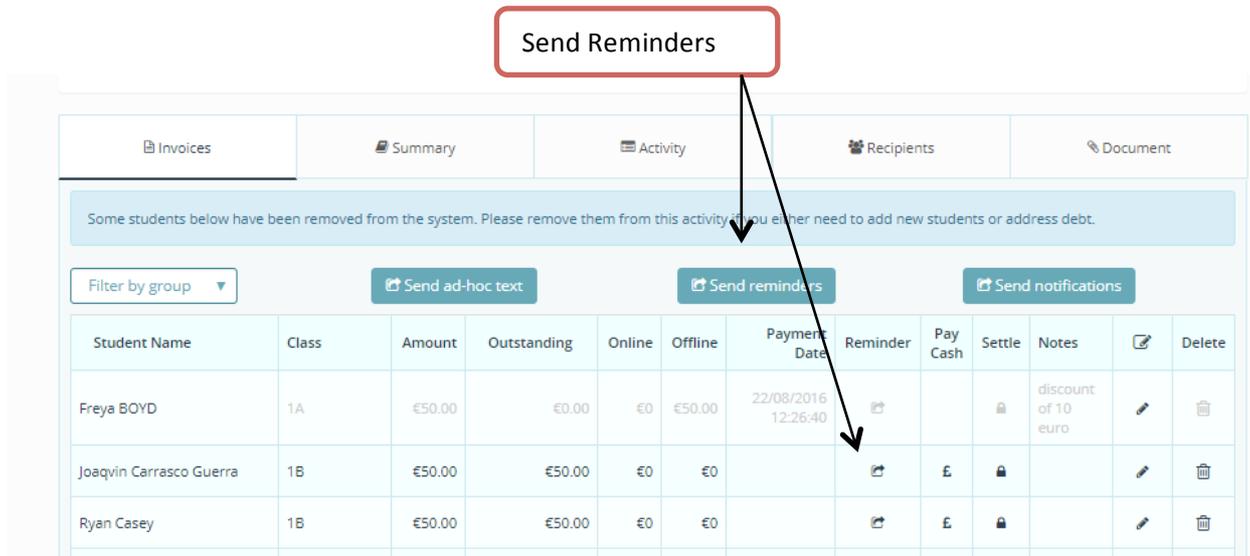
Step 1. On the home page, select “Activities/Bills” option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

Step 3. View bill details including student names, amount invoiced, and amount paid, online off line payments and notes associated with the payments and settled bills.

Step 4. To send a reminder to an individual click on the reminder icon beside their name, this can be repeated for several students. To send a reminder to the entire group click on the Send Reminder Button. The reminders will only send to those students with outstanding amounts, detailing the amount remaining to be paid.

Send Reminders



Some students below have been removed from the system. Please remove them from this activity if you either need to add new students or address debt.

Filter by group ▾ Send ad-hoc text Send reminders Send notifications

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes		Delete
Freya BOYD	1A	€50.00	€0.00	€0	€50.00	22/08/2016 12:26:40				discount of 10 euro		
Joaquin Carrasco Guerra	1B	€50.00	€50.00	€0	€0			£				
Ryan Casey	1B	€50.00	€50.00	€0	€0			£				

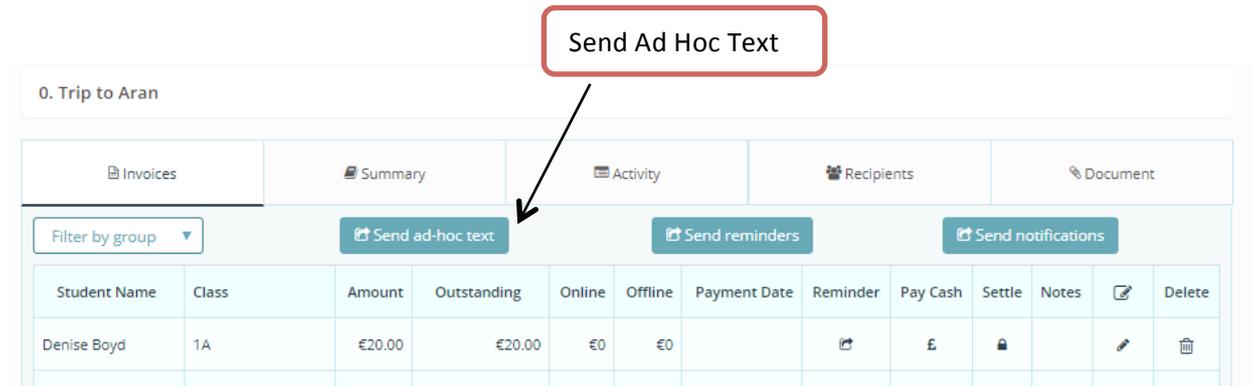
Working with Activities and Bills; Send Ad Hoc Text Message

Step 1. On the home page, select “Activities/Bills” option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

Step 3. View Invoice tab including all bill details name of student, class, amount, outstanding, online, offline payment date.

Step 4. To send an ad hoc Text Message to the group click on the Ad Hoc Message button. You can send an Ad hoc message to parents of students who have not paid or to the entire group. To send an SMS to a single student go to the homepage and search for the student under SMS section



The screenshot shows a web interface for an activity titled "0. Trip to Aran". At the top, there are navigation tabs: "Invoices", "Summary", "Activity", "Recipients", and "Document". Below these tabs is a toolbar with a "Filter by group" dropdown and three buttons: "Send ad-hoc text", "Send reminders", and "Send notifications". The "Send ad-hoc text" button is highlighted with a red box and an arrow pointing to it from the text "Send Ad Hoc Text" above. Below the toolbar is a table with the following columns: Student Name, Class, Amount, Outstanding, Online, Offline, Payment Date, Reminder, Pay Cash, Settle, Notes, and Delete. The table contains one row for "Denise Boyd" in class "1A" with an amount of €20.00 and an outstanding amount of €20.00.

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			€			

Working with Activities and Bills; Add Note

Step 1. On the home page, select “Activities/Bills” option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

Step 3. View bill details including student names, amount invoiced, amount paid, online off line payments and notes associated with the payments and settled bills.

Step 4. To add a note to a student invoice, click on the pen icon on the student line. Write the note in the Edit Activity Note pane and click update. This note will appear on the activity page. The note can be updated several times. System can also be instructed to not send reminders to specific students if payment plan has been agreed.

Click Pen Icon to Add Note

The screenshot shows the '0. Trip to Aran' activity page. At the top, there are tabs for 'Invoices', 'Summary', 'Activity', 'Recipients', and 'Document'. Below these are buttons for 'Filter by group', 'Send ad-hoc text', 'Send reminders', and 'Send notifications'. A table lists student invoices with columns for Student Name, Class, Amount, Outstanding, Online, Offline, Payment Date, Reminder, Pay Cash, Settle, Notes, and Delete. The table contains three rows: Denise Boyd (€20.00), Ryan Boyd (€10.00), and Evva Boyd (€15.00). A red box highlights the pen icon in the 'Notes' column for Denise Boyd. Below the table is the 'Edit Activity Note' modal, which shows the activity name '0. Trip to Aran', the student name 'Denise Boyd', and a text input field containing 'Denise has arranged payment plan'. There is also a checkbox for 'Do Not Send Reminder' and 'Update' and 'Cancel' buttons.

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			£	£		
Ryan Boyd	1A	€10.00	€10.00	€0	€0			£	£		
Evva Boyd	1A	€15.00	€15.00	€0	€0			£	£		

Edit Activity Note [* Required]

Activity: 0. Trip to Aran

Student Name: Denise Boyd

Notes:

Do Not Send Reminder

0. Trip to Aran

This screenshot shows the same '0. Trip to Aran' activity page as the previous one, but with the note 'Denise has arranged payment plan' now visible in the 'Notes' column of the table for Denise Boyd. The rest of the page, including the tabs and buttons, remains the same.

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			£	£	Denise has arranged payment plan	
Ryan Boyd	1A	€10.00	€10.00	€0	€0			£	£		

Working with Activities and Bills; Add Cash Payments

Step 1. On the home page, select "Activities/Bills" option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

Step 3. View bill details including student names, amount invoiced, amount paid, online off line payments and notes associated with the payments and settled bills.

Step 4. To add a cash payment to a student invoice, click on the Euro symbol on the student line. Enter the cash amount and payment date on the Cash Payments pane, select cash from the payment type, click to agree to the T&C and grant permission for participation in the event and finally click the 'Pay' button

0. Trip to Aran

Invoices Summary Activity Recipients Document

Filter by group Send ad-hoc text Send reminders Send notifications

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes		Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			€	🔒	Denise has arranged payment plan		
Ryan Boyd	1A	€10.00	€10.00	€0	€0			€	🔒			
Freya BOYD	1A	€15.00	€15.00	€0	€0			€	🔒			

Way2Pay Home Reports Actions

Cash Payment's

Activity Details	Cash Payment Details
Bill ID: 326270	<input checked="" type="checkbox"/> * I agree to the Terms and Conditions
Description: 0. Trip to Aran	<input checked="" type="checkbox"/> * I give permission for this activity
Amount: €5.00	26/09/2017 15:17
Student: Ryan Boyd	5.00
	<input type="button" value="Pay"/> <input type="button" value="Cancel"/>

0. Trip to Aran

Invoices Summary Activity Recipients Document

Filter by group Send ad-hoc text Send reminders Send notifications

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes		Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			€	🔒	Denise has arranged payment plan		
Ryan Boyd	1A	€10.00	€5.00	€0	€5.00	26/09/2017 15:17:00		€	🔒			

Working with Activities and Bills; Add Direct Debit or Standing Order

Step 1. On the home page, select “Activities/Bills” option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

Step 3. View bill details including student names, amount invoiced, amount paid, online off line payments and notes associated with the payments and settled bills.

Step 4. To add a Direct Debit or Standing Order to a student invoice, click on the Euro symbol on the student line. Enter the amount and payment date on the Cash Payments pane, select Direct Debit or Standing Order from the payment type, click to agree to the T&C and grant permission for participation in the event and finally click the ‘Pay’ button

0. Trip to Aran

Invoices		Summary		Activity		Recipients		Document				
Filter by group ▼		Send ad-hoc text		Send reminders		Send notifications						
Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes		Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			£	🔒	Denise has arranged payment plan		
Ryan Boyd	1A	€10.00	€10.00	€0	€0			£	🔒			
Freya BOYD	1A	€15.00	€15.00	€0	€0			£	🔒			

WayPay Home Reports Actions

Cash Payments

Activity Details		Cash Payment Details	
Bill ID:	326270	<input checked="" type="checkbox"/> * I agree to the Terms and Conditions	
Description:	0. Trip to Aran	<input checked="" type="checkbox"/> * I give permission for this activity	
Amount:	€5.00	<input type="text" value="26/09/2017 15:17"/>	
Student:	Ryan Boyd	<input type="text" value="5.00"/>	<input type="button" value="Pay"/> <input type="button" value="Cancel"/>

Select Payment Type

0. Trip to Aran

Invoices		Summary		Activity		Recipients		Document				
Filter by group ▼		Send ad-hoc text		Send reminders		Send notifications						
Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes		Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			£	🔒	Denise has arranged payment plan		
Ryan Boyd	1A	€10.00	€5.00	€0	€5.00	26/09/2017 15:17:00		£	🔒			

Working with Activities and Bills; Filter by Class or Group

Step 1. On the home page, select “Activities/Bills” option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

Step 3. View bill details including student names, amount invoiced, amount paid, online off line payments and notes associated with the payments and settled bills.

Step 4. To view a single class or a sub group in this activity select the filter by Class or Group tab on The LHS.

Filter by class or group

The screenshot displays the '0. Trip to Aran' activity page. At the top, there are tabs for 'Invoices', 'Summary', 'Activity', 'Recipients', and 'Document'. Below these are buttons for 'Filter by group', 'Send ad-hoc text', 'Send reminders', and 'Send notifications'. The main table lists bills with columns for Student Name, Class, Amount, Outstanding, Online, Offline, Payment Date, Reminder, Pay Cash, Settle, Notes, and Delete. The 'Filter by group' dropdown is open, showing a list of groups. The 'Export to CSV' button is located at the bottom right of the table area.

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			£	🔒	Denise has arranged payment plan	🗑️
Ryan Boyd	1A	€10.00	€5.00	€0	€5.00	26/09/2017 15:17:00		£	🔒		🗑️
Lil Jimmy Phelan	year group1	€20.00	€20.00	€0	€0			£	🔒		🗑️
Katie Stockbauer	1A	€20.00	€20.00	€0	€0			£	🔒		🗑️

Export to CSV

Working with Activities and Bills; Print Status Report of an Activity or Bill

Step 1. On the home page, select “Activities/Bills” option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

Step 3. View bill details including student names, amount invoiced, amount paid, online off line payments and notes associated with the payments and settled bills.

Step 4. To view a single class or a sub group in this activity select the filter by Class or Group tab on The LHS. To export and print this report click Export to CSV button on bottom right hand side. The Report CSV file can then be opened in excel and printed.

Lil Jimmy Phelan	year group1	€20.00	€20.00	€0	€0								
Katie Stockbauer	1A	€20.00	€20.00	€0	€0								

[Export to CSV](#)

Export to CSV

Payment History Report

Support
support@way2pay.ie

PaymentHistoryEx....csv SCH_OLD_GROUP....xlsx

Open
Always open files of this type
Show in folder
Cancel

	A	B	C	D	E	F	G	H	I
	Student Name	Activity Name	Class Name	Amount	Outstanding	Online	Offline	Payment Date	Notes
1	Katie Stockbauer	0. Trip to Aran	1A	20	20	0	0		
2	Lil Jimmy Phelan	0. Trip to Aran	year group1	20	20	0	0		
3	denise o grady	0. Trip to Aran	1A	20	20	0	0		
4	Jack Murphy	0. Trip to Aran	1A	20	20	0	0		
5	Ronan McCarthy	0. Trip to Aran	TY 2016 2017	10	10	0	0		
6	Olan McCarthy	0. Trip to Aran	School Tour Poland	15	15	0	0		
7	Oisín McCarthy	0. Trip to Aran	Under 15 Hurling	20	20	0	0		
8	Mark Kelly	0. Trip to Aran	1A	20	20	0	0		
9	kellie Dawson	0. Trip to Aran	1A	20	20	0	0		
10	Hannah Corrigan	0. Trip to Aran	1A	20	20	0	0		
11	Patrick Buckley	0. Trip to Aran	1A	20	20	0	0		
12	Freya BOYD	0. Trip to Aran	1A	15	15	0	0		
13	Ryan Boyd	0. Trip to Aran	1A	10	5	0	5	26/09/2017 15:17	
14	Denise Boyd	0. Trip to Aran	1A	20	20	0	0		Denise has arranged payment plan
15									
16									

Working with Activities and Bills; Settle Bills

Step 1. On the home page, select “Activities/Bills” option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

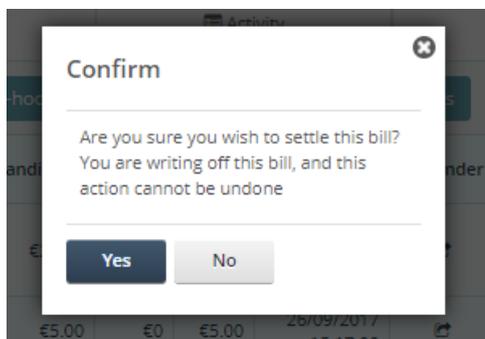
Step 3. View bill details including student names, amount invoiced, amount paid, online off line payments and notes associated with the payments and settled bills.

Step 4. To settle a bill for a particular student click on the lock icon, this will settle the student invoice meaning the bill will be removed from the parents’ dashboard. The school will no longer be able to add a cash payment for this bill. You will notice settled bills are noted and reminders and payments icons are greyed out.

Please note only the Superuser on an account can settle bills Principal or Bursar only.

0. Trip to Aran

Invoices		Summary		Activity		Recipients		Document				
Filter by group ▼		Send ad-hoc text		Send reminders		Send notifications						
Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes		Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			£		Denise has arranged payment plan		
Ryan Boyd	1A	€10.00	€5.00	€0	€5.00	26/09/2017 15:17:00		£				
Freya BOYD	1A	€15.00	€15.00	€0	€0			£				



Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes		Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			£		Denise has arranged payment plan		
Ryan Boyd	1A	€10.00	€5.00	€0	€5.00	26/09/2017 15:17:00		£				
Freya BOYD - Settled	1A	€15.00	€15.00	€0	€0			£				
Patrick Buckley	1A	€20.00	€20.00	€0	€0			£				

Bill marked Settled

Working with Activities and Bills; Archiving Activities and Bills

Step 1. On the home page, select “Activities/Bills” option.

Step 2. On the Activities Home page, on the left hand side of every activity listed you will see a bin icon.

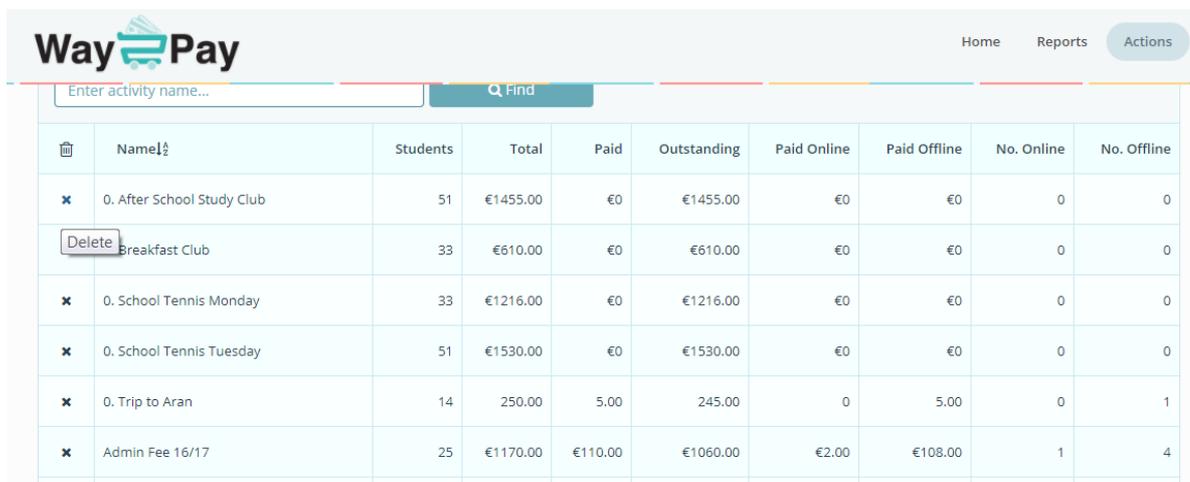
Step 3. Click on the Bin icon to Archive Bills

Step 4. All payments made on Archived Bills are available in report dropdown / detailed payments report

Note: Archived activities will remove the activity from the schools and parents dashboard. Parent will no longer be able to pay bills and schools will not be able to add cash payments to archived items. Schools can print reports on all activities / payments on archived bills.

If the bin icon does not appear in your dashboard this is because your user is not authorised to archive bills.

Please note only the Superuser of the account has the rights to archive activities.

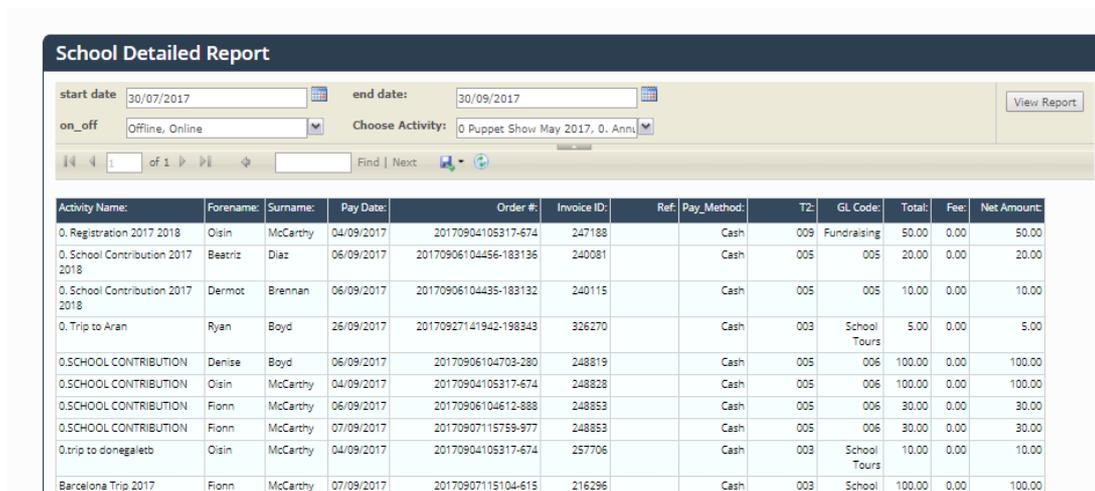


	Name	Students	Total	Paid	Outstanding	Paid Online	Paid Offline	No. Online	No. Offline
	0. After School Study Club	51	€1455.00	€0	€1455.00	€0	€0	0	0
	0. Breakfast Club	33	€610.00	€0	€610.00	€0	€0	0	0
	0. School Tennis Monday	33	€1216.00	€0	€1216.00	€0	€0	0	0
	0. School Tennis Tuesday	51	€1530.00	€0	€1530.00	€0	€0	0	0
	0. Trip to Aran	14	250.00	5.00	245.00	0	5.00	0	1
	Admin Fee 16/17	25	€1170.00	€110.00	€1060.00	€2.00	€108.00	1	4

Confirm

Are you sure you wish to delete this item?
 In doing so, you will be writing off ANY and ALL monies owed on this activity
 If you are not sure, click No.
 This operation cannot be undone.

Payment Report for Settled Bills

Activity Name:	Forename:	Surname:	Pay Date:	Order #:	Invoice ID:	Ref:	Pay Method:	TZ:	GL Code:	Total:	Fee:	Net Amount:
0. Registration 2017 2018	Oisín	McCarthy	04/09/2017	20170904105317-674	247188		Cash	009	Fundraising	50.00	0.00	50.00
0. School Contribution 2017 2018	Beatriz	Diaz	06/09/2017	20170906104456-183136	240081		Cash	005	005	20.00	0.00	20.00
0. School Contribution 2017 2018	Dermot	Brennan	06/09/2017	20170906104435-183132	240115		Cash	005	005	10.00	0.00	10.00
0. Trip to Aran	Ryan	Boyd	26/09/2017	20170927141942-198343	326270		Cash	003	School Tours	5.00	0.00	5.00
0.SCHOOL CONTRIBUTION	Denise	Boyd	06/09/2017	20170906104703-280	248819		Cash	005	006	100.00	0.00	100.00
0.SCHOOL CONTRIBUTION	Oisín	McCarthy	04/09/2017	20170904105317-674	248828		Cash	005	006	100.00	0.00	100.00
0.SCHOOL CONTRIBUTION	Fionn	McCarthy	06/09/2017	20170906104612-888	248853		Cash	005	006	30.00	0.00	30.00
0.SCHOOL CONTRIBUTION	Fionn	McCarthy	07/09/2017	20170907115759-977	248853		Cash	005	006	30.00	0.00	30.00
0.trip to donegal	Oisín	McCarthy	04/09/2017	20170904105317-674	257706		Cash	003	School Tours	10.00	0.00	10.00
Barcelona Trip 2017	Fionn	McCarthy	07/09/2017	20170907115104-615	216296		Cash	003	School	100.00	0.00	100.00

Family Discount on a Single Activity /Bill

Step 1. On the home page, select “Activities/Bills” option.

Step 2. On the Activities Home page, select create new activity from the actions menu.

Step 3. Populate the activity details. To apply a family discount enter the amount each family member should pay. In this example students across many classes are going on a trip to Aran. The first child in a family pays the full amount of €20, the second child €15 the third €10 and fourth or more children in the same family pay zero.

The screenshot shows a form for creating an activity. On the left, under 'Costs', the 'Cost' is set to 20.00. On the right, under 'Discounts', there are three rows for children 2, 3, and 4. Each row has a 'Discounted Amount' and a 'Discount Applied?' checkbox. For Child 2, the amount is 15.00 and the checkbox is checked. For Child 3, the amount is 10.00 and the checkbox is checked. For Child 4+, the amount is 0.00 and the checkbox is checked. Arrows point from a callout box to these checkboxes.

Apply discount to Trip to Aran Bill

When the activity is created, you will see the family has been applied, i.e. see the different invoice amounts for the Boyd family below.

The screenshot shows a table of invoices for the activity '0. Trip to Aran'. The table has columns for Student Name, Class, Amount, Outstanding, Online, Offline, Payment Date, Reminder, Pay Cash, Settle, Notes, and Delete. The Boyd family is highlighted with arrows pointing to their respective rows.

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			€	🔒	Denise has arranged payment plan	🗑️
Ryan Boyd	1A	€10.00	€5.00	€0	€5.00	26/09/2017 15:17:00		€	🔒		🗑️
Freya BOYD - Settled	1A	€15.00	€15.00	€0	€0			€	🔒		🗑️
Patrick Buckley	1A	€20.00	€20.00	€0	€0			€	🔒		🗑️

See family discount

Family Discounts on Multiple Activities

Introduction

In many cases a school will require a family discount to include several bills/activities of different amounts. Here are a few different scenarios where this would apply

- **Family Cap**, e.g. a family pays no more than €200 for several activities.
- **Percentage Discount Fixed**, e.g. a family receive 20% discount on total bill for several activities.
- **Family Cap Increasing (Advanced Family Discount)** is used when a family pays
 - no more than X on for two siblings in selected activities,
 - no more than Y for three siblings in selected activities, and
 - no more than Z for four siblings in selected activities etc.

Family Discount in a Multiple Activities; Family Cap

In this example a family pays no more than €200 for several activities.

Step 1. Create several activities with different bill amounts. E.g. Book Rental First years €200 a second bill for Book Rental TY at €100 and a third bill for Book Rental Third years at €50. As you create each bill do not add a discount.

Step 2. The next step is to bunch the activities together. In the actions menu select 'Group Activities for Discounts'. Enter the date range and view activities.

Step 3. In the example below there are three Book Rental Activities to bunch and apply a family cap of €220; Book Rental First yrs, Third yrs and TY. Select these activities click 'select and enter the discount type/method' button.

Step 4. Enter the Family Cap amount and click 'apply'

The screenshot shows a form for creating an activity. The form is divided into several sections:

- * Activity Name:** Book rental First Years
- * Start Time:** 27/09/2017 21:13
- * Finish Time:** 30/09/2017 21:13
- Costs:**
 - * Cost:** 200.00
- Description:** Enter description...
- * T Codes:** 005 (Contribution)
- * GL Codes:** 005 (Contribution)
- Discounts:**
 - * Discounted Amount Child 2:** No discount applied. Discount Applied? No
 - * Discounted Amount Child 3:** No discount applied. Discount Applied? No
 - * Discounted Amount Child 4+:** No discount applied. Discount Applied? No

A blue button labeled "Save & Proceed" is located at the bottom right of the form.

Bunch Book Rental Bills

* Activity Name:
Book rental Third Years

* Start Time:
27/09/2017 21:17

* Finish Time:
30/09/2017 21:17

Costs

* Cost:
50.00

Bunch Book Rental Bills

Actions ▾

- Add new activity
- Reset search
- Group Activities For Discount

Paid Offline No. Online No. Offline

Group Activities for Discount

Search for Activities

Search

* Start Time: 24/09/2017 21:26 * Finish Time: 30/09/2017 21:26 Find

Name	Students	Total	Paid	Outstanding	Select All?
0. Trip to Aran	14	250.00	5.00	245.00	<input type="checkbox"/>
Book rental First Years	33	€6600.00	€0	€6600.00	<input checked="" type="checkbox"/>
Book rental Third Years	22	€1100.00	€0	€1100.00	<input checked="" type="checkbox"/>
Book rental TY	54	€5400.00	€0	€5400.00	<input checked="" type="checkbox"/>

Page 1 of 1 Total Items: 43

Group Activities for discount?

Select and enter the discount types and methods

Select Activities

Activities to be grouped for Family Discount

Name	Activity Amount	Outstanding	Existing Discount Child 2	Existing Discount Child 3	Existing Discount Child 4 plus
Book rental First Years	200.00	€6600.00	No Discount	No Discount	No Discount
Book rental Third Years	50.00	€1100.00	No Discount	No Discount	No Discount
Book rental TY	100.00	€5400.00	No Discount	No Discount	No Discount

Page 1 of 1 Total Items: 3

Discount Type

* Select discount type:
Family discount

Family Discounts

* Enter the maximum amount a family is to pay:
220.00

A family will obtain the discount when at least one child appears in two or more of the selected activities.

Select Family Discount, Enter Family Cap

Book rental First Years												
Invoices		Summary		Activity		Recipients		Document				
Filter by group ▼		Send ad-hoc text		Send reminders		Send notifications						
Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	✎	Delete
Denise Boyd	1A	€120.00	€120.00	€0	€0		📧	£	🔒	Family group discount applied on 27/09/2017	✎	🗑️
Freya BOYD	1A	€0.00	€0.00	€0	€0		📧		🔒	Family group discount applied on 27/09/2017	✎	🗑️
Patrick Buckley	1A	€200.00	€200.00	€0	€0		📧	£	🔒		✎	🗑️
Joaqvin Carrasco Guerra	1B	€200.00	€200.00	€0	€0		📧	£	🔒		✎	🗑️



View Family Discounts Applied

Book rental TY												
Invoices		Summary		Activity		Recipients		Document				
Filter by group ▼		Send ad-hoc text		Send reminders		Send notifications						
Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	✎	Delete
Ryan Boyd	1A	€100.00	€100.00	€0	€0		📧	£	🔒		✎	🗑️
Dermot Brennan	árainn mhór vc kayaking sailing	€100.00	€100.00	€0	€0		📧	£	🔒		✎	🗑️

Family Discount in a Multiple Activities; Percentage Discount

Percentage Discount Fixed, e.g. a family receive 20% discount on total bill for several activities.

Steps 1&2. Follow steps one and two for family cap above to create activities and bills and bunch these activities to apply a discount. In this case it is a family percentage, select % discount from the dropdown.

Step 3. Enter the discount percentage amount and click 'Apply Discount Now & Save' button.

Step 4. Verify your discount has been applied, in the case below the Boyd family received 20% off a total bill of €150; reflected in Ryan's School Tennis Tuesday Bill being reduced by €30 to €10.

Activities to be grouped for Family Discount

Name	Activity Amount	Outstanding	Existing Discount Child 2	Existing Discount Child 3	Existing Discount Child 4 plus
0. School Tennis Monday	40.00	€1320.00	No Discount	No Discount	No Discount
0. School Tennis Tuesday	30.00	€1590.00	No Discount	No Discount	No Discount

Page 1 of 1 Total Items: 2

Discount Type

* Select discount type:

% discount

% Family Discount

* Enter the discount percentage:

20%

A family will obtain the discount when at least one child appears in two or more of the selected activities.

You cannot apply a percentage reduction to the same activity more than once.

Apply discounts to activities

Apply Discounts now & Save

Select Percentage Discount

0. School Tennis Tuesday

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete
Ryan Boyd	1A	€30.00	€30.00	€0	€0			€			
Dermot Brennan	árainn mhór vc	€30.00	€30.00	€0	€0			€			

0. School Tennis Monday

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete
Denise Boyd	1A	€40.00	€40.00	€0	€0			€			
Ryan Boyd	1A	€10.00	€10.00	€0	€0			€		%age group discount applied on 27/09/2017	
Freya BOYD	1A	€40.00	€40.00	€0	€0			€			

View Family Discounts Applied

Family Discount in a Multiple Activities; Family Cap Increasing

Family Cap Increasing (Advanced Family Discount) is used when a family pays

- no more than X on for two siblings in selected activities,
- no more than Y for three siblings in selected activities, and
- no more than Z for four siblings in selected activities etc.

Steps 1&2. Follow steps one and two for family discount cap above to create activities and bills and bunch these activities in order to apply a discount. In this case it is a family percentage increasing for additional family members, select 'Advanced Family Discount' from the dropdown.

Step 3. Enter the family cap amount for each additional sibling and click 'Apply Discount Now & Save' button

Step 4. Verify your discount applied, in the case below the Boyd family had four activities and therefore were billed €55 (max for four children bills) reflected in Ryan's After School Study club being Zero and Freya Breakfast Club Invoice being reduced to €15

Activities to be grouped for Family Discount

Name	Activity Amount	Outstanding	Existing Discount Child 2	Existing Discount Child 3	Existing Discount Child 4 plus
0. After School Study Club	30.00	€1515.00	No Discount	No Discount	No Discount
0. Breakfast Club	20.00	€610.00	No Discount	No Discount	No Discount

Page 1 of 1 Total Items: 2

Discount Type
* Select discount type:
Advanced family discount

Advanced Family Discount
* Enter the max. amount a family is to pay with 2 bills:
40.00
* Enter the max. amount a family is to pay with 3 bills:
45.00
* Enter the max. amount a family is to pay with 4 or more bills:
55.00

Apply discounts to activities
Apply Discounts now & Save

Apply Advanced Family Discounts

0. After School Study Club

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete
Ryan Boyd	1A	€0.00	€0.00	€0	€0					Advanced family group discount applied on 27/09/2017	
Dermot Brennan	árainn mhór vc kayaking sailing	€30.00	€30.00	€0	€0			€			

See Discounts Applied

0. Breakfast Club

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete
Denise Boyd	1A	€20.00	€20.00	€0	€0			€			
Ryan Boyd	1A	€20.00	€20.00	€0	€0			€			
Freya BOYD	1A	€15.00	€15.00	€0	€0			€		Advanced family group discount applied on 27/09/2017	
Patrick Buckley	1A	€20.00	€20.00	€0	€0			€			

PLC Course Registration, External Activities / Extra Curricular Registration

One of the features of Way2Pay is a Registration Feature, where people can register for activities. These people may already be in the school but they do not have to be. If they are in the school they will simply login in and pay, whereas participants who are not in the school will have to register their details / create an account first.

External course option is being used by a number of schools for after school study where they are limited with the number of places available for Study.

The steps below show schools how to set up an Activity with Registration on Way2Pay.

Step 1. On the home page, select “Activities/Bills” option.

Step 2. From the Actions Menu on the RHS select Add an External Course.

Step 3. Enter the details for the course and click ‘Save and Proceed’.

Step 4. Enter the course type, a description, attach a file and click save. The course will then appear in your list of activities in draft format. A URL will be generated for your school to put on your school website with a ‘Click here to Register’ button.

Step 5. As people register for the activity their names are added to the list of participants in the activity dashboard.

The image shows two screenshots from the Way2Pay interface. On the left is the 'Actions' menu, where 'Add an External Course' is highlighted with a red box. On the right is the 'Add an External Course' form, which includes fields for Activity Name, Available From/To, Activity Start/Finish Time, Description, T Codes, GL Codes, Number of Places, Pay Upfront?, Costs & Fees, and Discounts & this school only. A red box with an arrow points to the form with the text 'Enter course details'.

The image shows a dropdown menu for 'Course Type' with the following options: Select Course Type, PLC, Kayaking, Voluntary Contribution, Sports, Christmas Wonderland, After School Study, Outdoor Adventure Centre, and Evening Training. The 'Sports' option is highlighted. Below the menu, it says 'Please save this activity before attaching a file'.

Yoga for Parents

Invoices

Summary

Activity

Document

* Course Type:

Sports

All parents are invited to join our yoga class on Monday nights in the main school Hall
Beginners Welcome
Bring a Mat , Tracksuits a good plan.

Enter course description

This activity has no attachment currently

File (optional):

Parents Letter Feb 2017.pdf

Select File...

Attach File

Save

✕	Draft - Yoga for Parents	0	€0	€0	€0	€0	€0	0	0
---	--------------------------	---	----	----	----	----	----	---	---

Fund Raising and Charitable Donations

Included in Way2Pays functionality is a Registration /Donation feature, where people can register for activities or make a donation to a cause. Schools often use this to fundraise for a new building, a social event or for tickets to the school play. In the settings the school can chose to widen the audience beyond the current parent population and except registrations from the public.

If they registrants are parents in the school they will simply login in and pay, whereas registrants who are not in the school will have to register their details / create an account before donating. The steps below show schools how to set up a Fundraising Event on Way2Pay.

Step 1. On the home page, select “Activities/Bills” option.

Step 2. From the Actions Menu on the RHS select ‘Add a Fundraising Activity’.

Step 3. Enter the details for the Activity and click ‘Save and Proceed’.

Step 4. Enter a description, attach a file (promotional PDF) and click save. The Fundraiser will then appear in your list of activities in draft format. A URL will be generated for your school to put on your school website with a ‘Click here to Register’ button.

Step 5. As people donate, their names are added to the list of participants in the activity dashboard.

Activities										Actions ▾
<input type="text" value="Enter activity name..."/>			<input type="button" value="Find"/>							
	Name↓	Students	Total	Paid	Outstanding	Paid Online	Paid Offline	No. Online	No. Offline	
	Ladies Day Out 2nd April 2017	18	540.00	360.00	180.00	360.00	0	12	0	
	Sponsor A Sod	10	€901.00	€801.00	€100.00	€801.00	€0	9	0	

Page 1 of 1 Total Items: 2

Cash Management

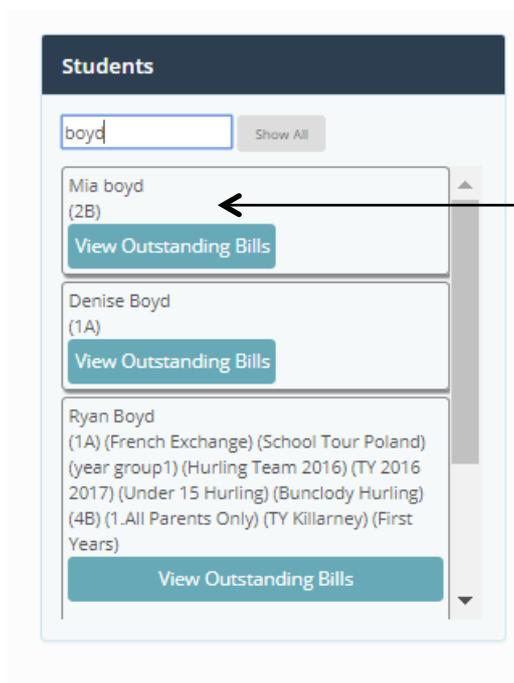
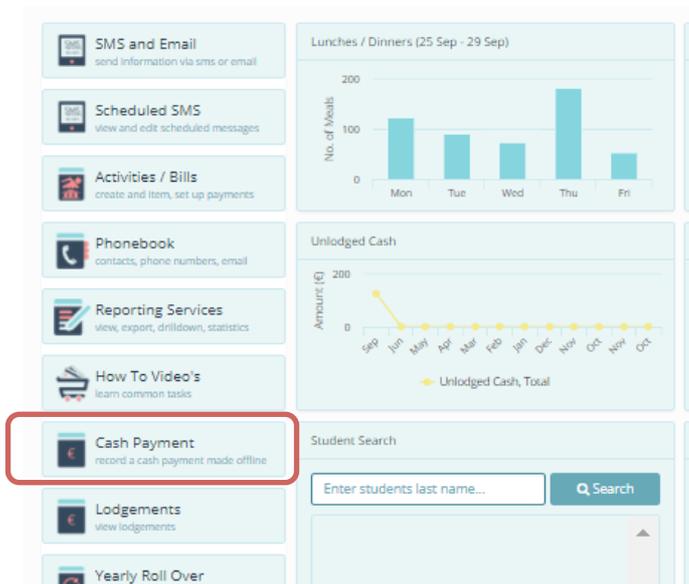
Record Cash Payments from Schools Dashboard

In Way2Pay we have developed a feature to quickly search for a student and record cash against their outstanding bills. This is designed to assist school secretaries /bursars when a student comes to the school office with an envelope and is unsure of which bill they are paying.

Step 1: Click on the icon under the “Pay Cash” column to the right of the name

Step 2: View the terms and conditions and mark the box, give permission to the activity by marking the next box, and enter the amount to be paid if different from what is given. To finish, click pay.

Receipts: An SMS receipt will immediately be sent to the parent’s phone as well as receipt by email to their email account. Schools can also print a receipt from the system.



Enter Students surname. Click show all and View Outstanding

Pay Bills By Cash

Childs Name	Activity	Original Amount	Pay Now?	Balance
Mia boyd	Basketball Under 14	120.00	+ -	<input type="text" value="120.00"/>

[* Required]

* Currency:

* Amount To Be Paid:

Optional Payment Date:

* I agree to the [Terms and Conditions](#)

Pay Bills By Cash

Childs Name	Activity	Original Amount	Pay Now?	Balance
Mia boyd	Basketball Under 14	120.00	<input checked="" type="checkbox"/> + -	<input type="text" value="70.00"/>

[* Required]

* Currency:

* Amount To Be Paid:

Optional Payment Date:

* I agree to the [Terms and Conditions](#)

* I give permission for this activity

Agree to T&C and Pay Cash



Activity:

Student Name:

Paid On:

Payment Method:

Amount Paid Net of Fees:

Fees:

Total Amount Paid:

School Name:

Paid By:

Record Cash Payments within the Activity

Step 1. On the home page, select “Activities/Bills” option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

Step 3. View bill details including student names, amount invoiced, amount paid, number of online and off line payments, notes associated with the payments and settled bills.

Step 4. To add a cash payment to a student invoice, click on the Euro symbol on the student line. Enter the cash amount and payment date on the Cash Payments pane, select cash from the payment type, click to agree to the T&C and grant permission for participation in the event and finally click the ‘Pay’ button

Basketball Under 14

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete	
Mia boyd	2B	€120.00	€50.00	€0	€70.00	27/09/2017 22:24:04		£				
Ryan Boyd	1A	€120.00	€120.00	€0	€0			Pay Cash				

Cash Payment Details

* I agree to the [Terms and Conditions](#)

* I give permission for this activity

28/09/2017 06:00

20.00

Pay **Cancel**

Basketball Under 14

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete	
Mia boyd	2B	€120.00	€30.00	€0	€90.00	28/09/2017 06:00:00		£				

How to Record Direct Debits and Standing Orders

Way2Pay has been developed to facilitate parental payments and will accept bank transfers (DD and SO) as part of income collected in schools.

Step 1. On the home page, select “Activities/Bills” option.

Step 2. To select an activity enter activity name and click search or click on the name of the activity.

Step 3. View bill details including student names, amount invoiced, amount paid, online off line payments and notes associated with the payments and settled bills.

Step 4. To add a cash payment to a student invoice, click on the Euro symbol on the student line. Enter the cash amount and payment date on the Cash Payments pane, select Direct Debit or Standing Order from the payment type, click to agree to the T&C and grant permission for participation in the event and finally click the ‘Pay’ button

The screenshot displays the 'Basketball Under 14' activity page. At the top, there are navigation tabs: Invoices, Summary, Activity, Recipients, and Document. Below these are buttons for 'Filter by group', 'Send ad-hoc text', 'Send reminders', and 'Send notifications'. The main table lists student invoices with columns for Student Name, Class, Amount, Outstanding, Online, Offline, Payment Date, Reminder, Pay Cash, Settle, Notes, and Delete. Two rows are visible: Mia Boyd (Class 2B, Amount €120.00, Outstanding €50.00) and Ryan Boyd (Class 1A, Amount €120.00, Outstanding €120.00). A 'Pay Cash' button is highlighted over the Ryan Boyd row. Below the table is a 'Cash Payment Details' form with two checked checkboxes: '* I agree to the Terms and Conditions' and '* I give permission for this activity'. There are input fields for a date (28/09/2017 06:00) and an amount (20.00), along with 'Pay' and 'Cancel' buttons.

Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	Delete
Mia Boyd	2B	€120.00	€50.00	€0	€70.00	27/09/2017 22:24:04		£	🔒		
Ryan Boyd	1A	€120.00	€120.00	€0	€0			Pay Cash			

Cash Payment Details

* I agree to the [Terms and Conditions](#)

* I give permission for this activity

28/09/2017 06:00

20.00

Pay Cancel

Closing off Cash

How to Create a Lodgement & Reference Number

When a school records cash payments, they need to lodge that cash into the bank. Way2Pay creates a reference number for the bank lodgement slip, thus matching Way2Pay with the bank statement. This facilitates easy bank reconciliation. Every transaction in Way2Pay has a lodgement reference recorded against it and is easily identified in an audit trail.

Step 1: Click on the lodgements button on the main menu (LHS) on your dashboard, or click the actions in the top left hand corner.

Step 2: Navigate to the drop down box called "Actions" and select "Assign lodgement ref"

Step 3: Select relevant "start time" & "finish time", once selected, click "Find". All of the bills between the selected dates will appear.

Step 4: Navigate to the left hand side of the screen and click "Select All", all payments should now be selected, with the accumulated amount appearing in the "running total" box.

Step 5: You can de-select any item to reduce the balance.

Step 6: Navigate to the bottom left hand corner. Select "Lodgement Date", enter the relevant information, then click on the "Batch Reference for override" box and enter the reference number you wish to assign to this particular transaction.

Step 7: Click on "Create Batch". This will assign a lodgement ID to all of the payments selected in the batch.

The screenshot displays the 'Cash Payments By School' interface. At the top, there is a search bar with fields for '* Start Time:' (25/09/2017 00:00:00) and '* Finish Time:' (30/09/2017 23:59:59), a 'Find' button, and a 'Running Total:' box showing '90'. Below this is a table with columns: Student Name, Activity Name, Net Amount Paid, Date Paid, Recv Batch ID, Lodgement Date, Select All?, and a trash icon. The table contains three rows: Ryan Boyd (€5.00), Mia boyd (€70.00), and Mia boyd (€20.00). A red box highlights the table, and a red box highlights the 'Running Total' box. Below the table, there are navigation buttons (Page 1 of 1, Total Items: 3) and a section titled 'Assign Reference to Selected Items' with buttons for 'Select Lodgement Date...', 'Enter a Batch Ref for Override', and 'Create Batch'. A red box highlights the 'Create Batch' button, with an arrow pointing to it from a text box below that says 'Click create batch when going to Bank with lodgement'.

Student Name	Activity Name	Net Amount Paid	Date Paid	Recv Batch ID	Lodgement Date	Select All?	
Ryan Boyd	0. Trip to Aran	€5.00	26/09/2017 15:17:00			<input type="checkbox"/>	✕
Mia boyd	Basketball Under 14	€70.00	27/09/2017 22:24:04			<input checked="" type="checkbox"/>	✕
Mia boyd	Basketball Under 14	€20.00	28/09/2017 06:00:00			<input checked="" type="checkbox"/>	✕

View Lodgement details.

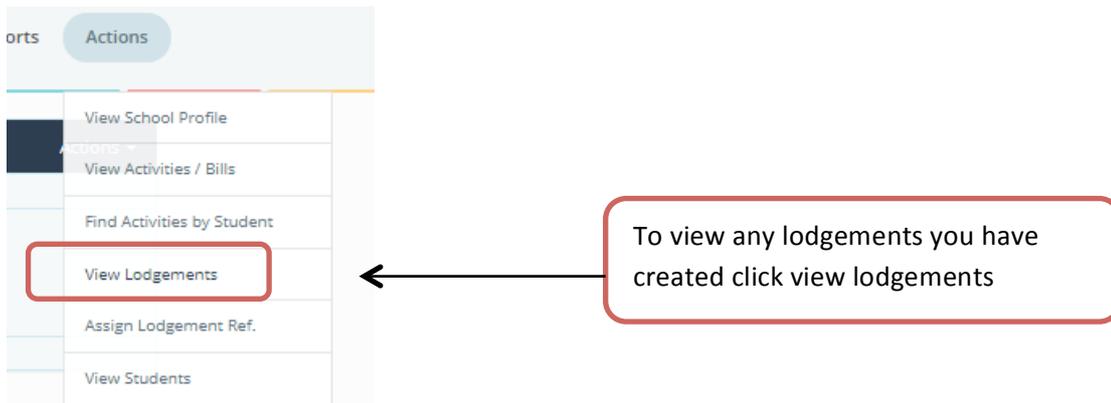
Once a lodgement is created, all transactions in the batch will be assigned to that lodgement. You can click on a lodgement to see the transactions listed.

Step 1: In the actions menu, click View Lodgements,

Step 2: Enter the date range and click find.

Step 3: Click on the lodgement reference title to view details

Step 4: You can export the detailed view to excel.



A screenshot of the 'Lodgement Batches' search results. It features a search bar with 'Start Time' (25/09/2017 23:36) and 'Finish Time' (30/09/2017 23:36) fields, and a 'Find' button. Below is a table with one row highlighted in red:

Batch ID	From	To	Number of Payments	Total Amount
Pats College w2p 1	27/09/2017 22:24:04	28/09/2017 06:00:00	2	€90.00

Navigation controls at the bottom show 'Page 1 of 1' and 'Total Items: 1'.

A screenshot of the 'Batch Line Items' table. It contains two rows of data:

Student Name	Activity Name	Net Amount Paid	Date Paid	Server Reference	Recon Batch ID	Lodgement Date	
Mia boyd	Basketball Under 14	€70.00	27/09/2017 22:24:04	20170927222404-369	Pats College w2p 1	27/09/2017 23:33:00	✕
Mia boyd	Basketball Under 14	€20.00	28/09/2017 06:00:00	20170927223017-198607	Pats College w2p 1	27/09/2017 23:33:00	✕

Navigation controls at the bottom show 'Page 1 of 1' and 'Total Items: 2'. A red-bordered callout box highlights the 'Export to CSV' button.

MIS / Phonebook Management

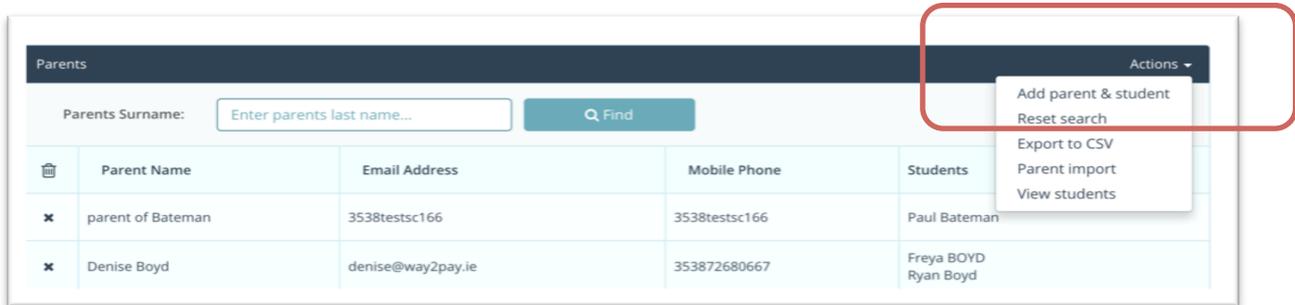
Add a New Parent and Student to phonebook

Step 1: Click the Phonebook button from the main menu (LHS) on the schools dashboard.

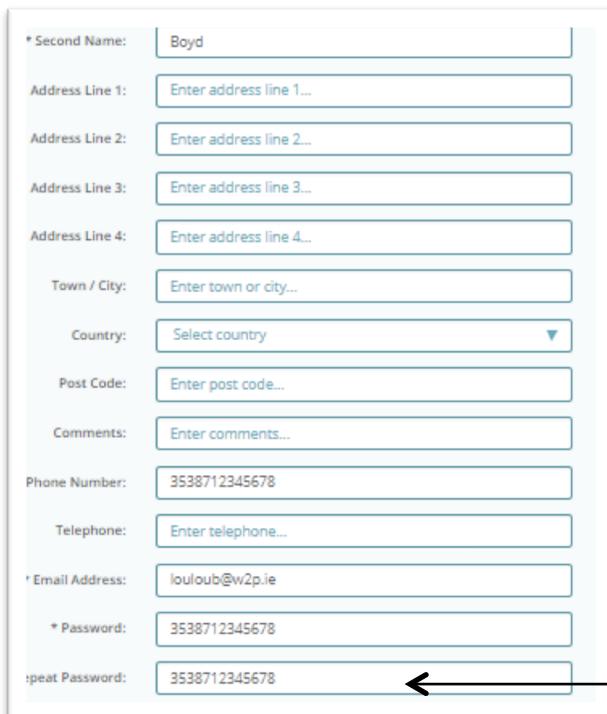
Step 2: In the actions menu on RHS click "Add Parent and Student."

Step 3: Add parent details to all of the required boxes.

Step 4: Add the student details to the required boxes and click 'Save'.



Parents					Actions ▾
Parents Surname: <input type="text" value="Enter parents last name..."/>					<input type="button" value="Q Find"/>
	Parent Name	Email Address	Mobile Phone	Students	
✘	parent of Bateman	3538testsc166	3538testsc166	Paul Bateman	
✘	Denise Boyd	denise@way2pay.ie	353872680667	Freya BOYD Ryan Boyd	



* Second Name:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

Town / City:

Country:

Post Code:

Comments:

Phone Number:

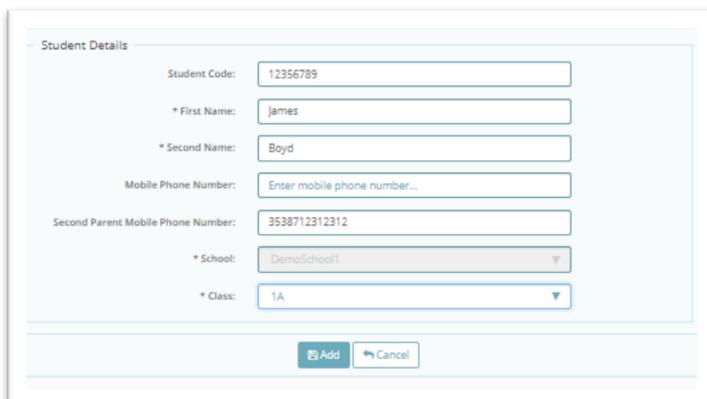
Telephone:

* Email Address:

* Password:

Repeat Password:

Enter Parent phone number for password



Student Details

Student Code:

* First Name:

* Second Name:

Mobile Phone Number:

Second Parent Mobile Phone Number:

* School:

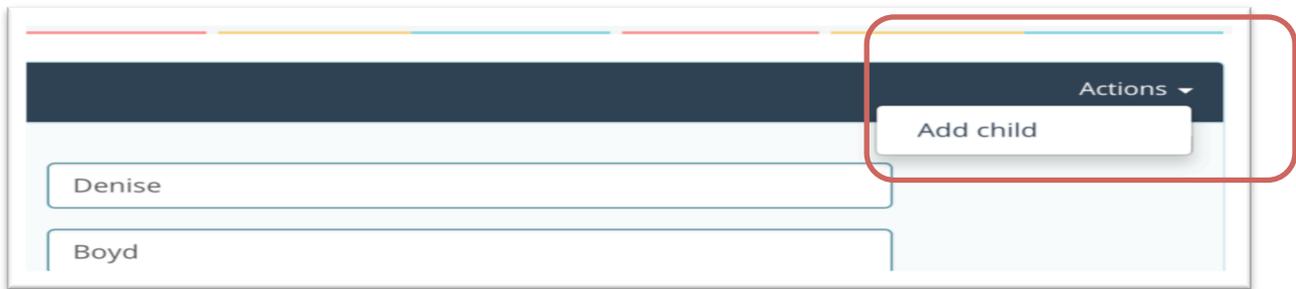
* Class:

Add an Additional Student to a Parent

Step 1: From the dashboard click 'Phonebook'

Step2: Click on the parent record, in the Actions menu on the RHS click "Add Child"

Step 2: Add the student details to all of the required boxes, and then choose the school, class and click 'save'



Parent Name: Denise Boyd

Student Code:

* First Name:

* Second Name:

Mobile Phone Number:

Mobile Phone Number:

* School:

* Class:

Children:

- Colum Gleeson
- Denise Boyd
- Freya BOYD
- Joyd Boyd

Children will be listed together,
Click Save

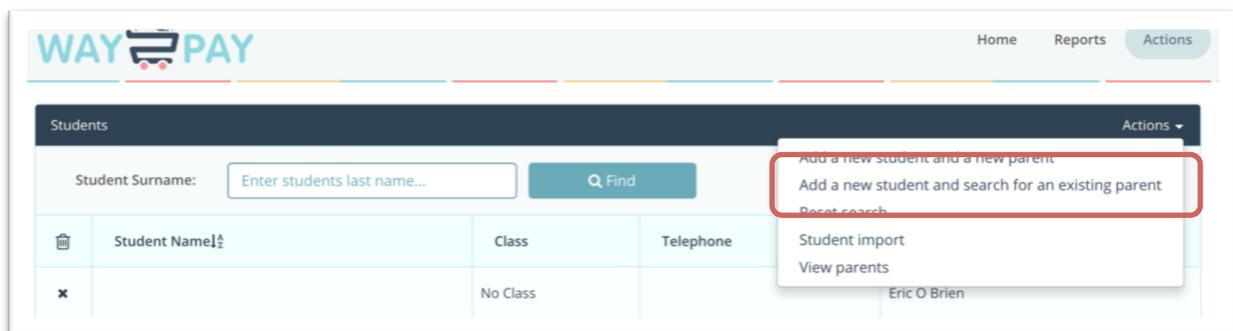
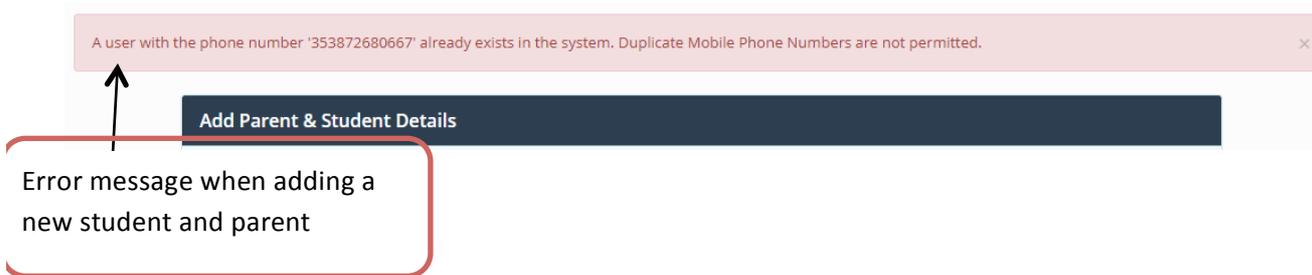
When a Parent Cannot Be Added

If a parent already exists in the Way2Pay database, it is not possible to add them a second time. An error message is displayed 'A user with the phone number '353872680xx7' already exists in the system. Duplicate Mobile Phone Numbers are not permitted.' You will need a different method, to add the student and search for their parent phone number in the database. When the parent details are found and displayed, click 'use this parent'.

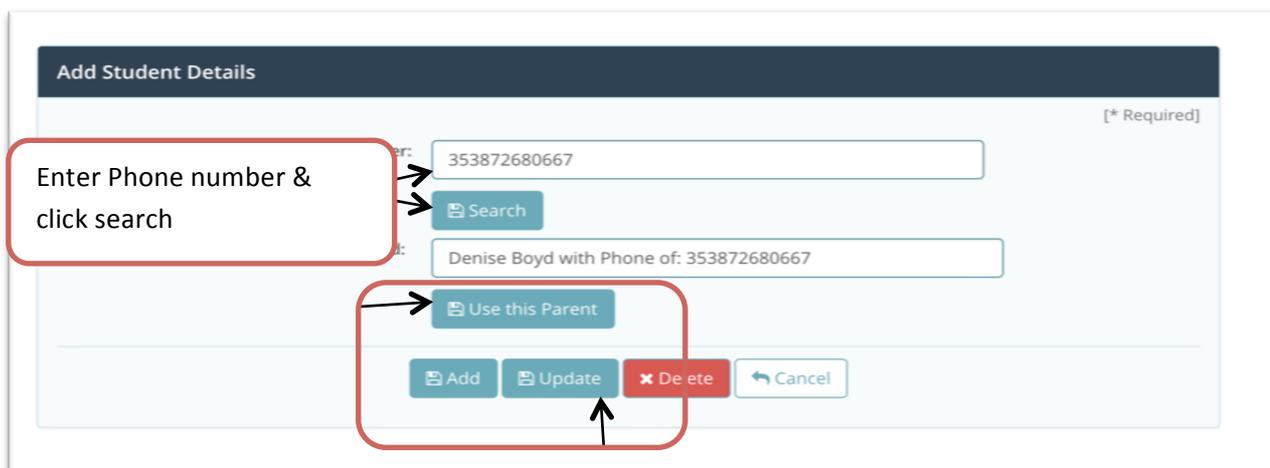
Step 1: Navigate to the students' phonebook and click 'Add a new student and search for an existing parent'.

Step 2: Enter the phone number of the parent you wish to add and click search. The parent details will appear and if correct, click "Use This Parent".

Step 3: Once the parent has been selected you will be able to add the student details.



e



Linking Siblings /Changing a Students' Parent.

Occasionally students are not entered with the same family record, as the phone number is not correct for the second sibling. You will simply need to find that student with the inaccurate phone number and click "change parent". This will enable you to move the student from the incorrect parent to the correct parent. You may also need to update bills for that student.

Step 1. Navigate to phonebook, scroll down to see the family in question. You will immediately see which family member has an incorrect phone number. You can see here Sophia needs to be added to the parent with the correct mobile number e.g. 086260050

parent of French	0862600050	353862600050	Mark French
parent of French	3538testsc131	3538testsc131	Sophia French

Step 2. Click Sophia's name and click "Change Parent".

Parent Name: parent of French
Student Code: Enter student code...
* First Name: Sophia
* Second Name: French
le Phone Number: Enter mobile phone number...
le Phone Number: Enter 2nd parent mobile phone number...
* School: DemoSchool1
* Class: 2a

Update Change Parent Delete Cancel

Siblings will not be linked if parents' phone number does not match.

Step 3. Enter the correct mobile phone number and click search. The correct parent will appear.

Phone Number: 353862600050
Search
We found: Parent of French with Phone of: 353862600050
Use this Parent

Parent Name: parent of French
Student Code: Enter student code...
* First Name: Sophia
* Second Name: French

Update Student

Step 4. Click use this parent. Please note, if there are bills created for this student with a family discount you will have to remove the student from the bill and add them again. You do this by editing the bill recipient list (see Working with Bills & Activities, Edit Recipients).

Working with Groups

Creating new groups

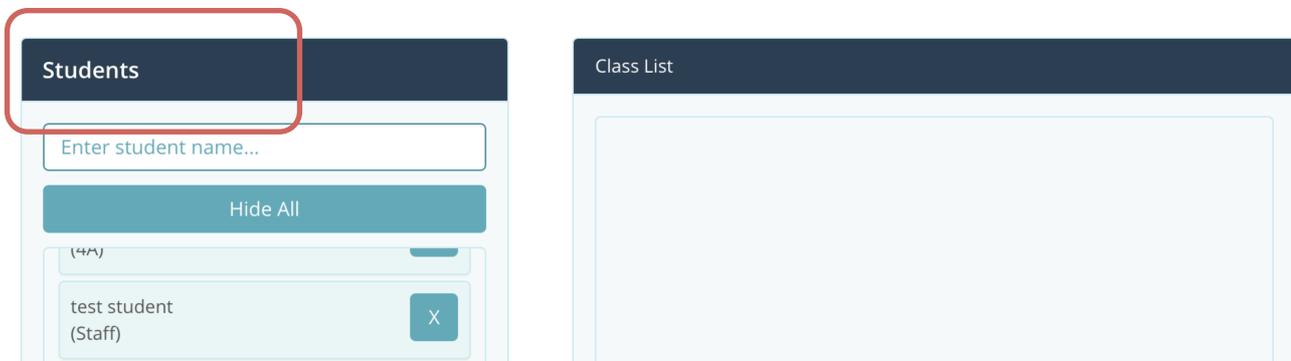
You can create a group of students or a group of classes to send SMS, Email and new Bills to.

Step 1: Click groups on the main menu LHS

Step 2: Enter the name of the group and click create group.



Step 3 Drag **students** across to enter the group. If you would like to drag **classes** across please click button "Create group of Classes". The class list will appear.



You can drag and drop classes into a group also.



When you are finished click "Save"

Exporting Pre Rollover Groups

Every year during the rollover process old groups are cleared out. The system holds a copy of all the groups and each school has the option to recreate these groups post Rollover.

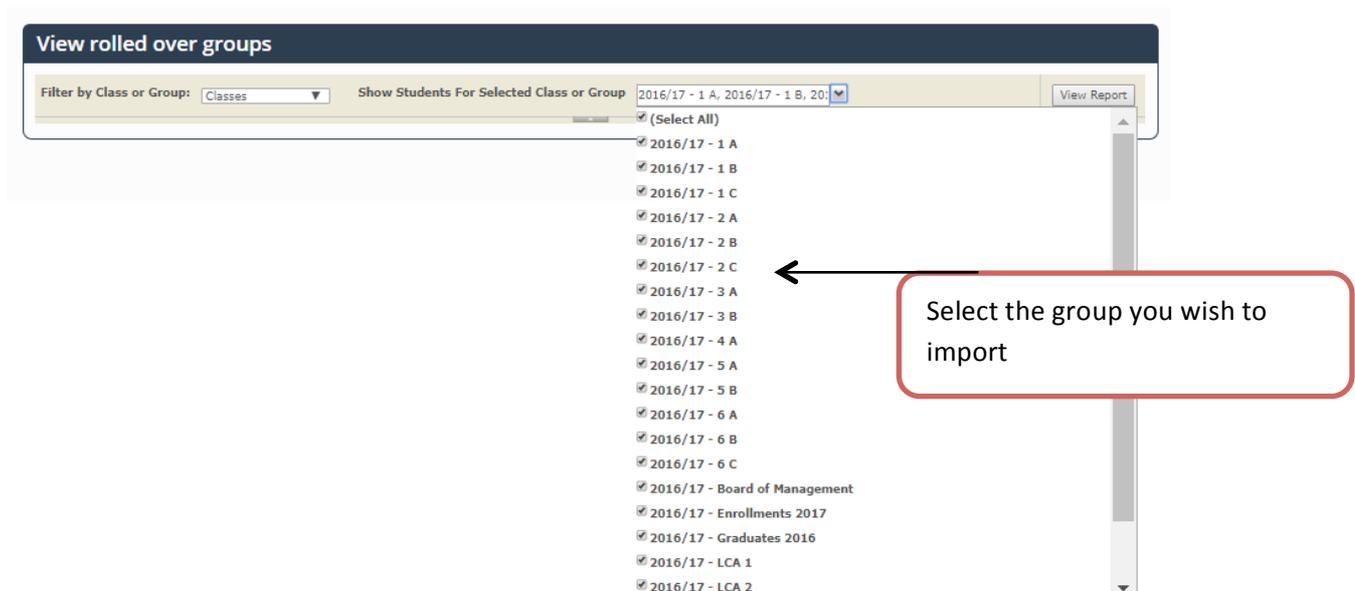
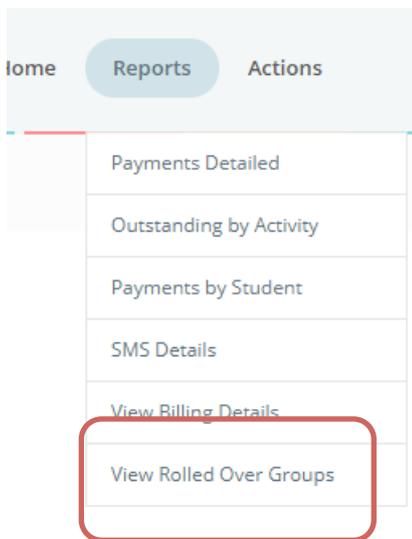
Step 1: From the Reports dropdown select 'View Rolled Groups'

Step 2: Select the filter, either class or group and the old groups/class lists will display.

Step 3: Export the list to excel by clicking on the disk icon

Step 4: Working in excel format the groups for import into Way2Pay using the import template.

Step 5: On the parent import tab, browse to the file saved above, to import the group /class. These imported groups will now appear in the groups available to send SMS to



Annual Rollover

In 2017 Way2Pay launched a new class rollover process, which required minimal effort from each school and no onerous validation of any student data changes made during the year. This was a two-step process

- Step 1: Exporting Data from MIS System.
- Step 2: Secure Upload of Data to Way2Pay

Detailed instructions on how to export data from various MIS systems are available on the Way2Pay website. Once the file is ready in Microsoft Excel, login into Way2Pay, select Annual Rollover, here you can securely upload this file for rolling over.

Rollover date	Schools Deadline for Data Upload
Friday 16 th June	Thursday 15 th 3pm
Friday 23 rd June	Thursday 22 nd 3pm
Friday 30 th June	Thursday 29 th 3pm
Friday 11 th August	Thursday 10 th 3pm
Friday 18 th August	Thursday 17 th 3pm
Friday 25 th August	Thursday 21 st 3pm

[Click here for VSWare Instructions](#)

[Click here for Facility Instructions](#)

File:

Please mail us at schoolsdata@way2pay.ie, letting us know the filename of the excel file uploaded.

Browse to the file you have created and click upload

WAY2PAY FOR PARENTS

Way2Pay Leads the Way for Parental Payments



SMARTPHONE

Ireland's only Schools system developed for **busy parents** who want to pay on their smartphone.

MONEY MANAGEMENT SYSTEM

Shows you in real time a complete list of what has been paid and what is still outstanding. You can view your payment history, print receipts and more.

REAL TIME

As soon as you pay the school dashboard is updated.

You don't need a password, enter your phone number and click for a link to pay



TAX BACK & MORE

Increase the revenue to the your child's school with the way2pay Tax Back System.



EXCELLENT SUPPORT

Do you prefer to talk to a real person? Way2pay offers support for schools and parents, from 9am to 5pm Monday to Friday.

Ask your school if they use way2pay to increase their revenue with Tax Back.

Way2Pay User Guide

A Guide for Parents and Schools to use Ireland's Fastest Growing Parental Payments System

Way2Pay Ltd, 25/26 Westland Square, Pearse Street, Dublin 2

Way2pay Parents Dashboard

Introduction

Way2Pay has been designed to help parents manage school payments from a planning and paying perspective. We offer ultimate convenience, enabling secure on-phone payments without passwords.

- **Paying:** most bills are paid without parents logging in. This is wonderfully convenient as you do NOT have to remember a password to access Way2Pay. You will receive an SMS/Text Message from the school requesting payment for various bills and activities. Each SMS has a unique code linking that request to your child.

What to expect: 'Please pay for your child's (Ryan Boyd) school activity (Trip to Aran) by clicking on the following link'. You simply click on the link you are taken to your own dashboard listing any outstanding bills for Ryan.

- **Planning** as you can access the system at all times you can pay for school fees, trips and activities in installments over time. Many schools will send out payment requests early so that parents have a good chance to budget.

How To for Parents

In this section we will show parents how to best login and best use Way2Pay. We will take you through paying without logging to using all the functions on your dashboard. The functions included are

- How to Pay a School Bill on my Phone, 'Pay by Text'
- How to Login to Way2Pay for the first time
- What can I do if I have forgotten my username and/or password?
 - Send me a link to pay
 - Send me a link to reset my password
- How to Pay on any Device
- How to View Payment History
- How to Print Payment Receipts
- How to Contact Way2Pay Support
- View Way2Pay Support Videos

How to Pay a School Bill on my Phone, 'Pay by Text'

Step 1: You will receive an SMS from your school, click on the link and follow the instructions.

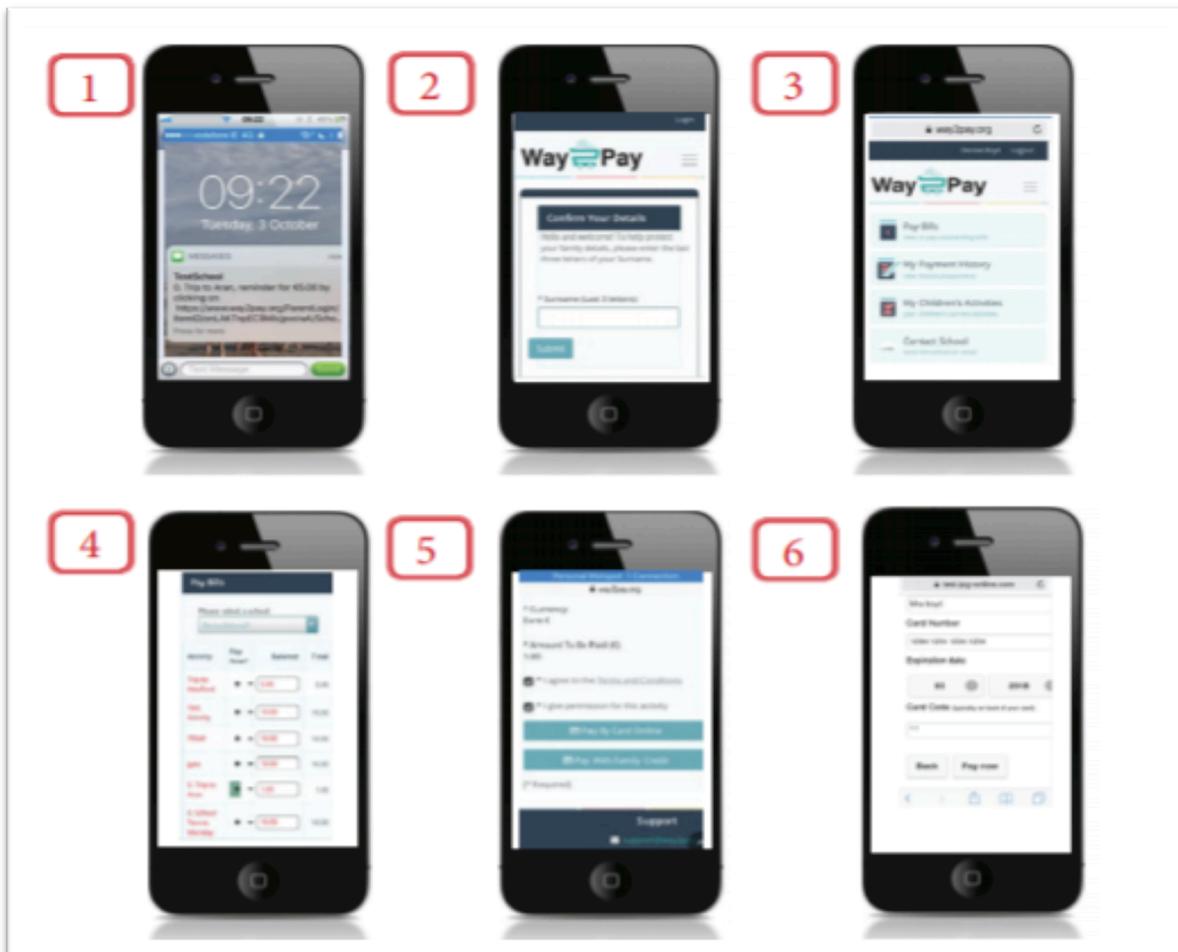
Step 2: Answer the security question and click submit. Example of question; enter last 3 digits of your phone number.

Step 3: Select pay bills from the menu

Step 4: Press the PLUS sign beside the bills you wish to pay, agree T&C and click pay now.

Step 5: Click 'Pay Now' to enter secure payments page.

Step 6: Complete the payment for your child's event.



How to Login to Way2Pay for the first time

Step 1. Go to www.way2pay.org and select the “Login”.

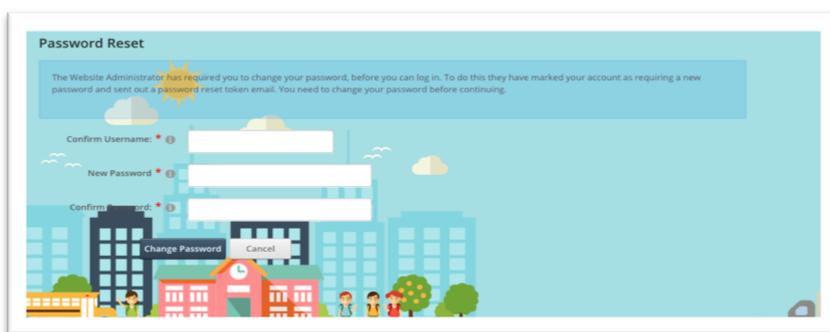
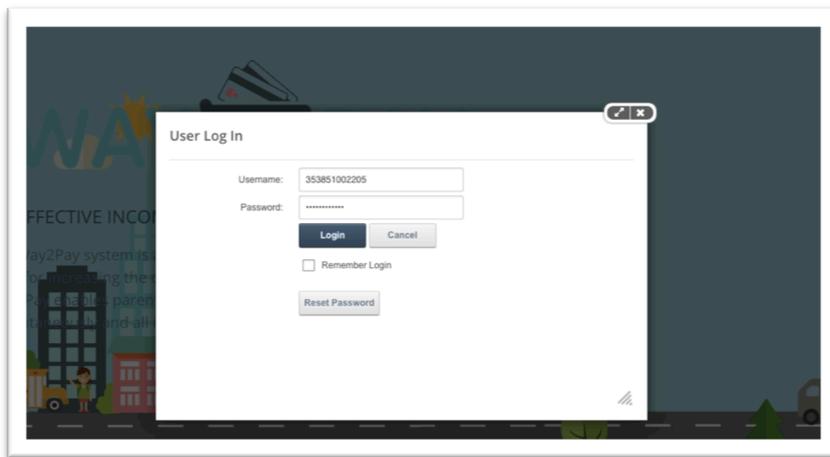
Step 2. Your mobile number Enter for both “username/ password” options, click “Login”. Ensure the number entered is the number your school has on record and it is in 35387xxxxxxx format.

Step 3. When logging in for the first time, the website will redirect to a “password reset page”, this will allow you to enter a new password of your choosing.

Step 4. Enter your mobile number in the “confirm username” box then enter a new password.

Step 5. When new password is selected, click on “change password”.

Step 6. When your password has been reset your parent dashboard will open.



What can I do if I have forgotten my username and/or password

Send me a link to pay

Step 1. Go to www.way2pay.org and select the “make a payment”.

Step 2. Your mobile number and click ‘send me a link’



AN EFFECTIVE INCOME COLLECTION SYSTEM FOR SCHOOLS

1. Click Make a Payment if you are new to Way2Pay or do not remember your login details
2. Click Login if you know your username and password (payments can then be made)

Make A Payment OR Login

[Forgot Your Password?](#)

Make a payment

To log in and make a payment, please enter your mobile number below. We will then send you an sms which will let you log in.

Please note your mobile phone number should be entered in international format. For example, 087xxxxxxx should be entered as 35387xxxxxxx. For UK numbers, please enter 44xxxxxxx.

* Enter your mobile no. here

I'm not a robot

 reCAPTCHA
[Privacy - Terms](#)

Send me a link to Reset My Password

Step 1. Go to www.way2pay.org and select the “Forgotten Password”.

Step 2. Your mobile number and click ‘Send Reset Link’



AN EFFECTIVE INCOME COLLECTION SYSTEM FOR SCHOOLS

1. Click Make a Payment if you are new to Way2Pay or do not remember your login details
2. Click Login if you know your username and password (payments can then be made)

Make A Payment OR Login

[Forgot Your Password?](#)

Way2Pay > Home

User Name: your email address or mobile phone number (In most cases).
Please note: the mobile phone number must be entered in standard international format
e.g.: 353xxxxxxxx or 44xxxxxxxx etc.. (Please drop all leading zeros). Thank you.

User Name:

If you forgot your password a message with a password reset link will be sent to your registered email address and mobile telephone number. Click on the link and you will be taken to a page where you can then create a new password.

Enter mobile number and click ‘Send Reset Link’

Pay on any device

(Devices my Phone/PC/ Laptop /iPad/ Tablet etc.)

Step 1: Go to <https://www.way2pay.org> can click login, enter your username (mobile phone number in 35387xxx format) and password. From your dashboard you can do manage all your school payments pay bills, view history and print receipts.

Step 2. Select “Pay Bills” option on the left hand side of the screen.

Step 3. On the “Pay Bills” screen all active bills will be listed under “Activity”. In the example below I want to pay “Trip to Aran” for my Ryan.

Step 5. Click on the “Pay Now” option by clicking the plus sign. You can edit the payment amount before clicking, in the example I only want to pay €1 off a €5 bill.

Step 6. Go to the bottom of the screen, tick to agree to the T&C and give permission for participation in the event and click ‘Pay Now by Card Online’

Step 7. When payment has gone through successfully, you will be redirected to your dash board.

Step 8. “Item added successfully” message will appear on the top of your dash board, along with an update in your “recent payments” box.

Step 9. For further information on your payment, select “My Payment History” on the left hand side of the screen.

The image shows two screenshots from the Way2Pay website. The left screenshot is the login page, titled "Log In". It includes instructions for username and password, a "Remember Login" checkbox, and a "Forgot Your Password?" link. The right screenshot is the user's dashboard, titled "Way2Pay". It features a navigation menu on the left with options like "Pay Bills", "My Payment History", and "My Children's Activities". The main content area shows "Your Details" (Name: Denise Boyd, Address: digital depot roe lane dublin8, Telephone: 353872680668, Email: kforde3@gmail.com), "Outstanding vs. Payments in last 30 days" (Pie chart showing Paid €155 and Outstanding €930), and "Recent Payments" (Table with columns: Activity Name, Amount Paid, Balance, Date).

Pay Bills					
Please select a school: DemoSchool1					
Childs Name	Activity	Original Amount	Pay Now?	Balance	Total
Colum Gleeson	Trip to Wexford	10.00	+ -	5.00	5.00
Colum Gleeson	Test Activity	10.00	+ -	10.00	10.00
Colum Gleeson	TTRIP	10.00	+ -	10.00	10.00
Colum Gleeson	gala	10.00	+ -	10.00	10.00
Ryan		10.00	+ -	1.00	1.00

Click the + button to indicate the activity you are paying

* Currency: Euro €

* Amount To Be Paid (€): 1.00

* I agree to the [Terms and Conditions](#)

* I give permission for this activity

[Pay By Card Online](#)

[Pay With Credit Card](#) Pay with credit card online

[* Required]

Click Pay by Card Online option to also use pre-paid Credit

Order Confirmation

Transaction State APPROVED

Order id 2017:10:03-10:10:20-219

Time 03/10/17 12:11:19

Ref. No. 601704

Approval Code Y:601704:4514143777:PPXP:1479

Total 1.00

Currency EUR

Please retain this copy for statement verification.

[Return to Shop](#)



Your Payment completed successfully!

Thank you for your payment of 1.00

[Click here to return Home](#)

<p>Pay Bills view or pay outstanding bills</p> <p>My Payment History view historical payments</p> <p>My Children's Activities your children's current activities</p> <p>Contact School send the school an email</p> <p>View My Courses My Courses</p>	<p>Your Details</p> <p>Name: Denise Boyd</p> <p>Address: digital depot roe lane dublin8</p> <p>Telephone: 353872680667</p> <p>Email: denise@way2pay.ie</p> <p>Recent Payments</p> <table border="1"> <thead> <tr> <th>Activity Name</th> <th>Amount Paid</th> <th>Balance</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>0. Trip to Aran</td> <td>€1.00</td> <td>€4.00</td> <td>03/10/2017</td> </tr> <tr> <td>Basketball Under 14</td> <td>€20.00</td> <td>€30.00</td> <td>28/09/2017</td> </tr> </tbody> </table>	Activity Name	Amount Paid	Balance	Date	0. Trip to Aran	€1.00	€4.00	03/10/2017	Basketball Under 14	€20.00	€30.00	28/09/2017
Activity Name	Amount Paid	Balance	Date										
0. Trip to Aran	€1.00	€4.00	03/10/2017										
Basketball Under 14	€20.00	€30.00	28/09/2017										

View my Payment History

Step 1: Go to <https://www.way2pay.org> click login, enter your username and password and click login once more.

Step 2. Your Way2Pay parents' dashboard will be displayed, where you can manage all functions relating to your Childs payments including pay bills, view history and print receipts.

Step 3. Select "My Payment History" option on the left hand side of the screen.

You will see the payments methods and the balance outstanding for each bill, in the example below the Trip to Aran includes a cash payment of €5 and card payment of €1, the balance remaining is €4

Way2Pay

Pay Bills
view or pay outstanding bills

My Payment History
view historical payments

Parent can view my Payment History to see all payments made

Payment History

School: DemoSchool1

Student Name	Activity Name	Net Amount Paid	Outstanding Balance	Date Paid	Payment Method	Print Receipt
Ryan Boyd	0. Trip to Aran	€1.00	€4.00	03/10/2017	Authipay	
Mia boyd	Basketball Under 14	€30.00	€30.00	28/09/2017	Cash	
Mia boyd	Basketball Under 14	€70.00	€50.00	27/09/2017	Cash	
Ryan Boyd	0. Trip to Aran	€5.00	€5.00	26/09/2017	Cash	

Print my Payment Receipts

Follow the steps 1-3 above to display a list of payments made. Click on the Print Receipt Icon.

Contact Way2Pay Support

The support line number appears on the bottom of the Way2Pay website. Our support lines are open between 9am and 5pm Monday-Friday. Email support is available at support@way2pay.ie all calls are logged and ticketed. A copy of Way2Pay's Terms and Conditions are available on our Website.

Support Videos for Parents

Way2Pay are currently preparing a host of support videos for presentation in your dashboard. These videos are constantly being updated. Check in soon to view and comment.

Thank you from the Way2Pay Support Team