Way2Pay User Guide

A Guide for Parents and Schools to use Irelands Fastest Growing Parental Payments System

Way2Pay User Guide

Way2Pay for Schools

Way2pay for Parents

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

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.

Search student, type message & send

Student Search

boyd   🔍 Search

Ryan Boyd   ➜
Parent, Denise Boyd
Parent Mail kforde3@gmail.com
Parent Tel 353872680668

Freya BOYD   ➜
Parent, Denise Boyd
Parent Mail kforde3@gmail.com

Send SMS

Ryan forgot his sports gear   Send SMS

Click recipients to send them here
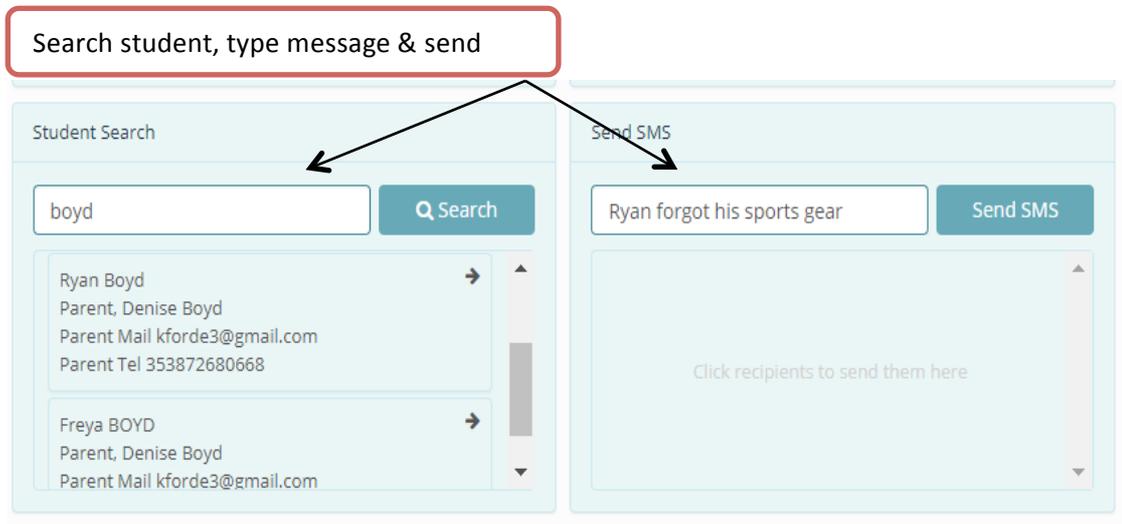
Step 1: On dashboard search for student by surname

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.
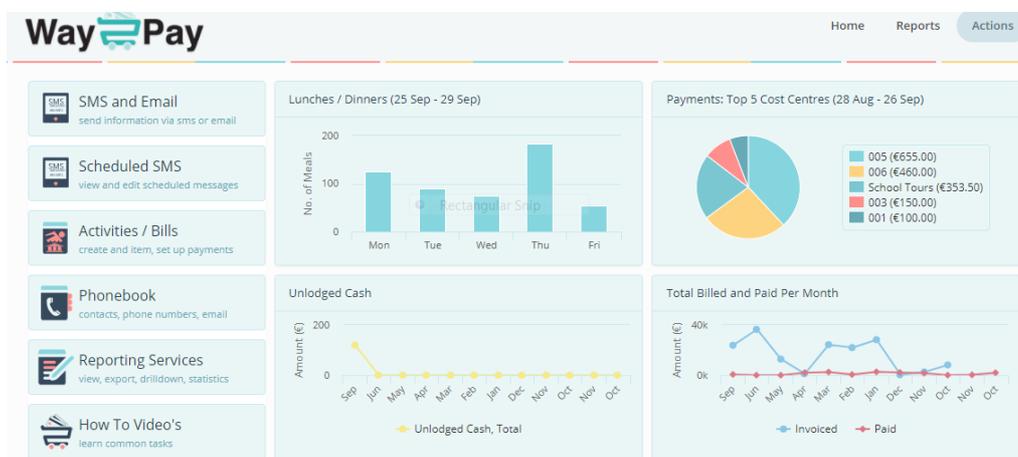
Enter details, codes and family discount
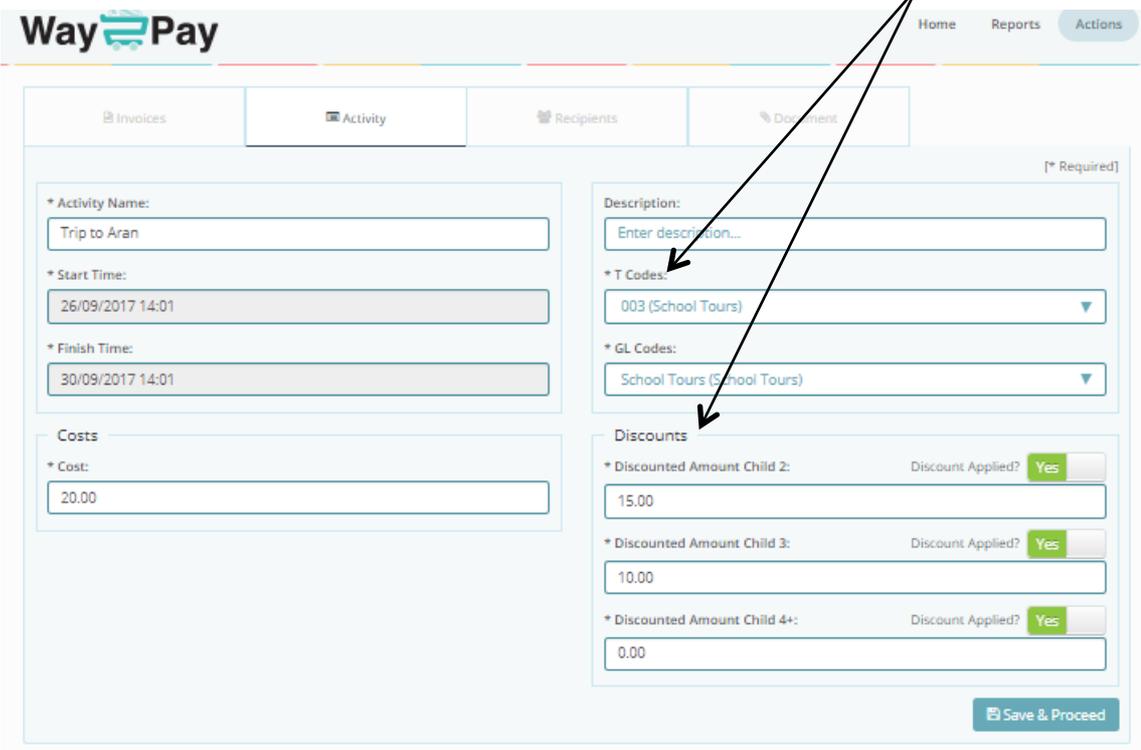
Way2Pay

Home   Reports   Actions

Invoices   Activity   Recipients   Document

[* Required]

* Activity Name:
Trip to Aran

Description:
Enter description...

* Start Time:
26/09/2017 14:01

* T Codes:
003 (School Tours) ▼

* Finish Time:
30/09/2017 14:01

* GL Codes:
School Tours (School Tours) ▼

Costs

* Cost:
20.00

Discounts

* Discounted Amount Child 2:   Discount Applied? Yes
15.00

* Discounted Amount Child 3:   Discount Applied? Yes
10.00

* Discounted Amount Child 4+:   Discount Applied? Yes
0.00

💾 Save & Proceed

Select class & click on arrow
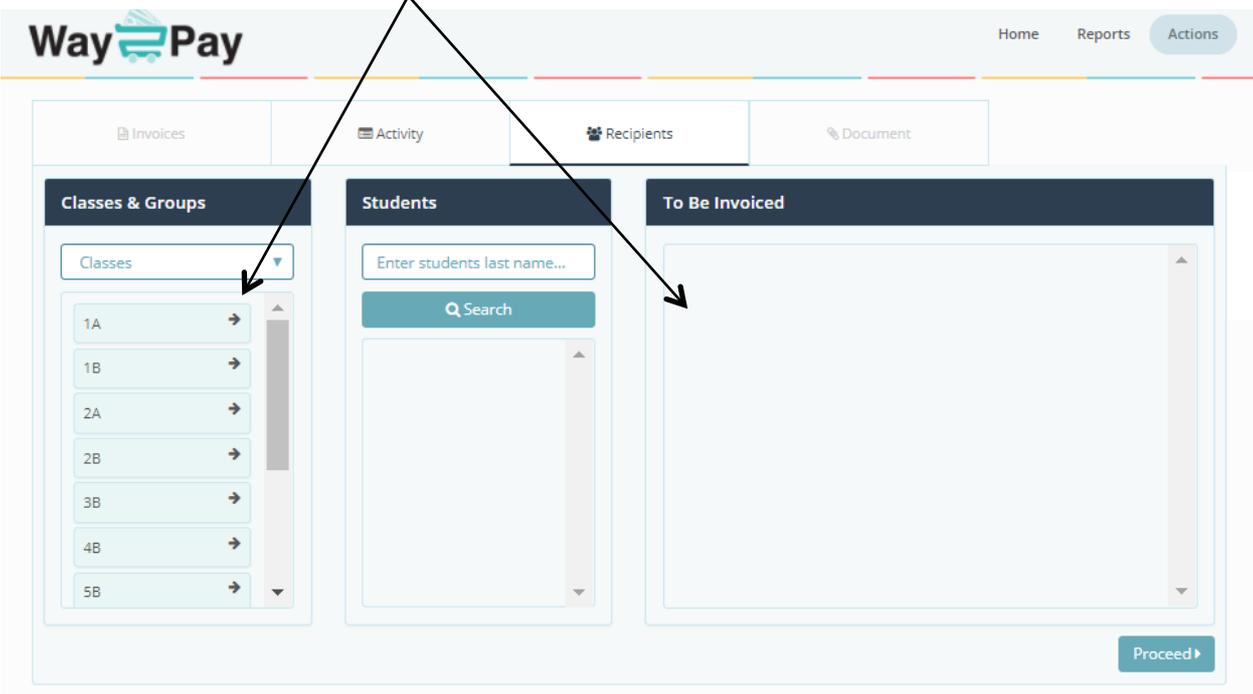
Way2Pay

Home   Reports   Actions

Invoices   Activity   Recipients   Document

Classes & Groups

Classes ▼

1A	→
1B	→
2A	→
2B	→
3B	→
4B	→
5B	→

Students

Enter students last name...

🔍 Search

To Be Invoiced

Proceed ▶

Save Draft   Save & Bill now   Save & Bill later today   Save & Bill with no notification to parents   ← Select Billing Options

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

	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

🗎 Invoices	📖 Summary	🖳 Activity	👥 Recipients	🔗 Document

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'.

First Click View & Edit

Search for Students, drag & drop student name

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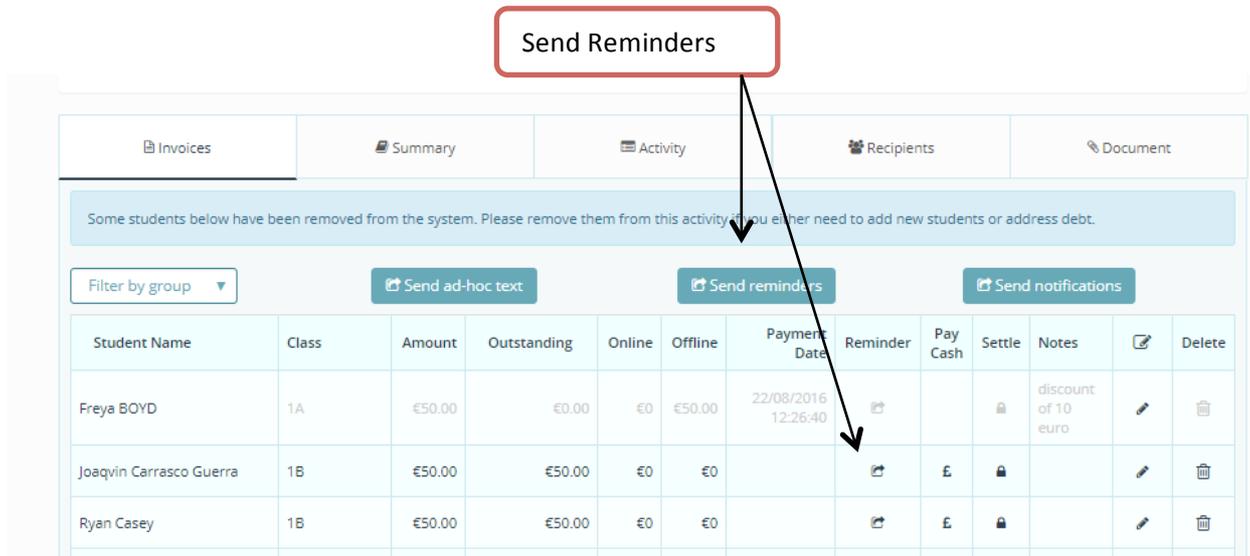
Student Name	Class	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	✎	Delete
Freya BOYD	1A	€50.00	€0.00	€0	€50.00	22/08/2016 12:26:40	↪		🔒	discount of 10 euro	✏	🗑
Joaqvin Carrasco Guerra	1B	€50.00	€50.00	€0	€0		↪	£	🔒		✏	🗑
Ryan Casey	1B	€50.00	€50.00	€0	€0		↪	£	🔒		✏	🗑

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

Send Ad Hoc Text

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		↪	£	🔒		✏	🗑

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

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		↪	£	🔒		✎	🗑

Edit Activity Note

[* Required]

Activity:	0. Trip to Aran
Student Name:	Denise Boyd
Notes:	Denise has arranged payment plan

☐ Do Not Send Reminder

Update | 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	€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

Click £ Symbol to Add Payment

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		↪	£	🔒		✏️	🗑️

Agree to T&C click Pay

Way Pay   Home   Reports   Actions

⊡ Cash Payment's

Activity Details		Cash Payment Details	
Bill ID:	326270	☑ * I agree to the Terms and Conditions	
Description:	0. Trip to Aran	☑ * I give permission for this activity	
Amount:	€5.00	26/09/2017 15:17	
Student:	Ryan Boyd	5.00	💾 Pay ↻ 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	↪	£	🔒		✏️	🗑️

See balance Reducing

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

Select Payment Type

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

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	↗	£	🔒		✎	🗑

0. Trip to Aran

	Invoices		Summary		Activity		Recipients		Document

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

Filter by group
1A (C)
4B (C)
1.All Parents Only (G)
abbey theatre (G)
Bunclody Hurling (G)
First Years (G)
French Exchange (G)
Hurling Team 2016 (G)
School Tour Poland (G)
TY 2016 2017 (G)
TY Killarney (G)
Under 15 Hurling (G)
year group1 (G)

	Amount	Outstanding	Online	Offline	Payment Date	Reminder	Pay Cash	Settle	Notes	✎	Delete
	€20.00	€20.00	€0	€0		↗	£	🔒	Denise has arranged payment plan	✎	🗑
	€10.00	€5.00	€0	€5.00	26/09/2017 15:17:00	↗	£	🔒		✎	🗑
	€15.00	€15.00	€0	€0		↗	£	🔒		✎	🗑
	€20.00	€20.00	€0	€0		↗	£	🔒		✎	🗑
	€20.00	€20.00	€0	€0		↗	£	🔒		✎	🗑

| 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

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.

Export to CSV

Payment History Report

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		🖸	£	🔒 Settle this Bill		✏️	🗑️

Confirm ⊗

Are you sure you wish to settle this bill? You are writing off this bill, and this action cannot be undone

[Yes] [No]

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.

Payment Report for Settled Bills

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.

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.

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 <u>do not</u> 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'

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   Actions ▾

Search

Start Time: **Finish Time:**

24/09/2017 21:26   30/09/2017 21:26   Q Find

Name↓⦿	Students	Total	Paid	Outstanding	Select All? ☐
0. Trip to Aran	14	250.00	5.00	245.00	☐
Book rental First Years	33	€6600.00	€0	€6600.00	☑
Book rental Third Years	22	€1100.00	€0	€1100.00	☑
Book rental TY	54	€5400.00	€0	€5400.00	☑

Select Activities

|◀ ◀◀ Page 1 of 1 ▶▶ ▶| Total Items: 43

Group Activities for discount?

Select and enter the discount types and methods

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.

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

See Discounts Applied

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.

Enter course details

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

* Course Type:

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 ▾
🗑	Name↓ᴬᵤ	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.
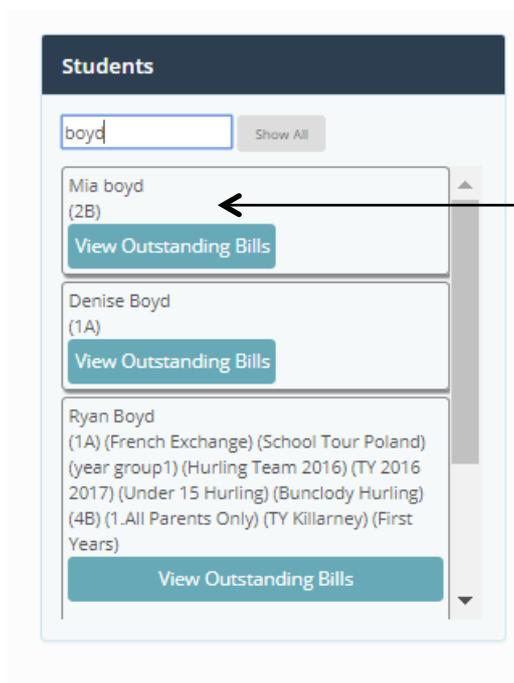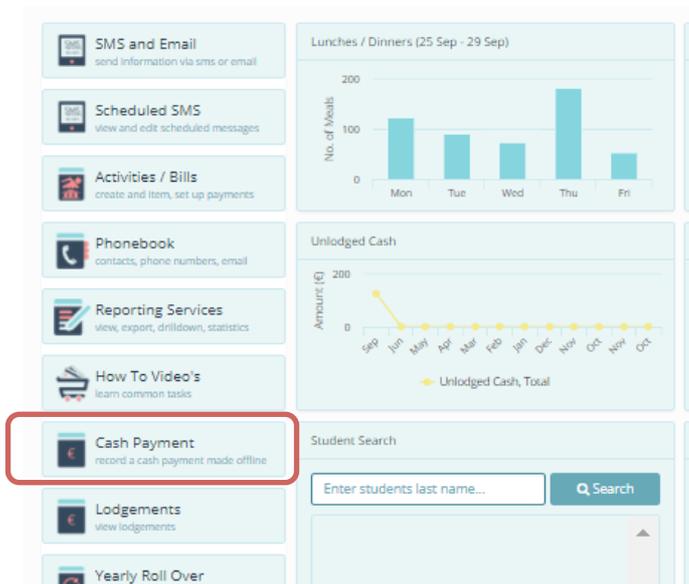
Enter Students surname. Click show all and View Outstanding

Pay Bills By Cash

Childs Name	Activity	Original Amount	Pay Now?	Balance
Mia boyd	Basketball Under 14	120.00	**+** **−**	120.00

[* Required]

* Currency: Euro €

* Amount To Be Paid: 0

Optional Payment Date: 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	**+** **−**	70.00

[* Required]

* Currency: Euro €

* Amount To Be Paid: 70.00

Optional Payment Date: Optional - Payment Date

☑ * I agree to the Terms and Conditions
☑ * I give permission for this activity

[Pay Cash & Print Receipt]

Agree to T&C and Pay Cash

Activity:	Basketball Under 14
Student Name:	Mia boyd
Paid On:	27/09/2017
Payment Method:	Cash
Amount Paid Net of Fees:	€70.00
Fees:	€0.00
Total Amount Paid:	€70.00
School Name:	DemoSchool1
Paid By:	gerry canavan

🖨 Print

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

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

Basketball Under 14

	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
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.

Click create batch when going to Bank with lodgement

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.

To view any lodgements you have created click view lodgements
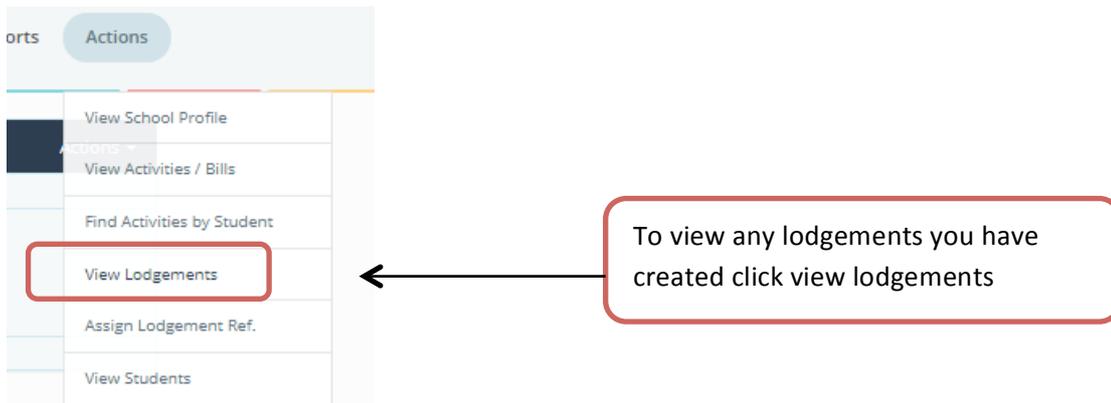
Lodgement Batches — Search

* Start Time:	* Finish Time:	
25/09/2017 23:36	30/09/2017 23:36	Q Find

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

Page 1 of 1   Total Items: 1

Batch Line Items

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	✖

Page 1 of 1   Total Items: 2   ⬇ Export to CSV

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'.

Enter Parent phone number for password
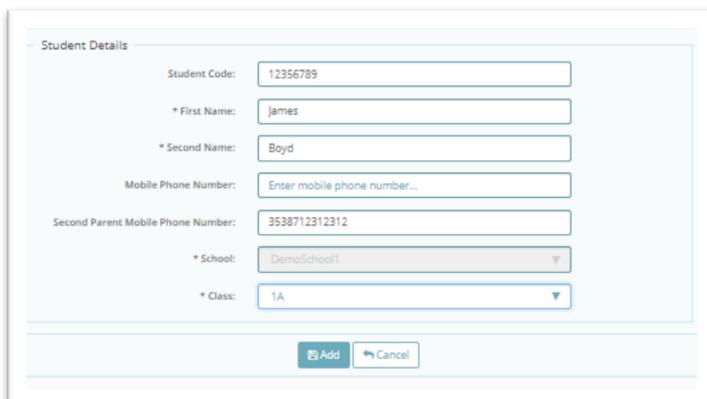
Add an Additional Student to a Parent

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'
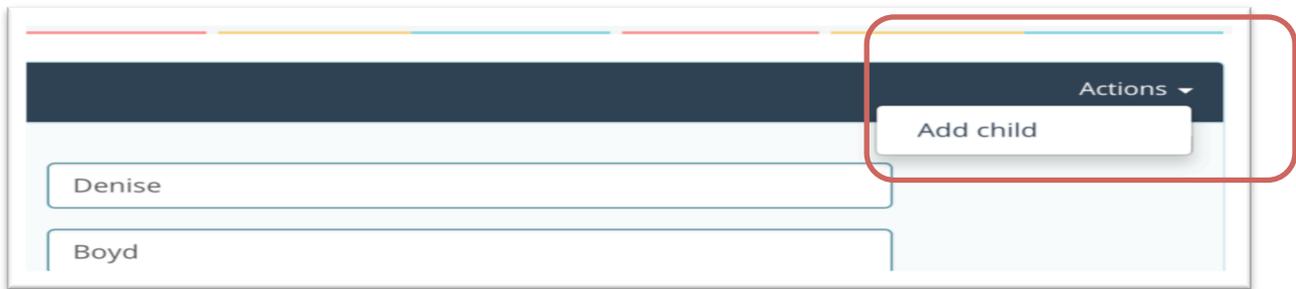
Children will be listed together, Click Save

Add an Additional Student to a Parent

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.

Error message when adding a new student and parent

e

Enter Phone number & click search
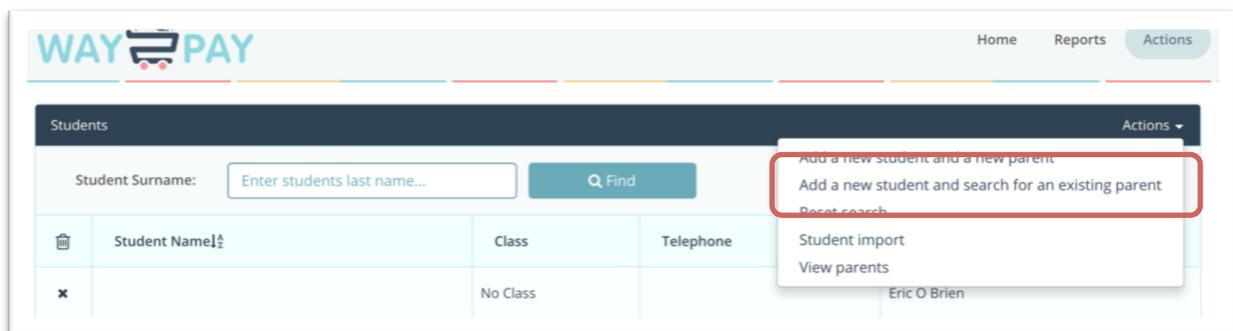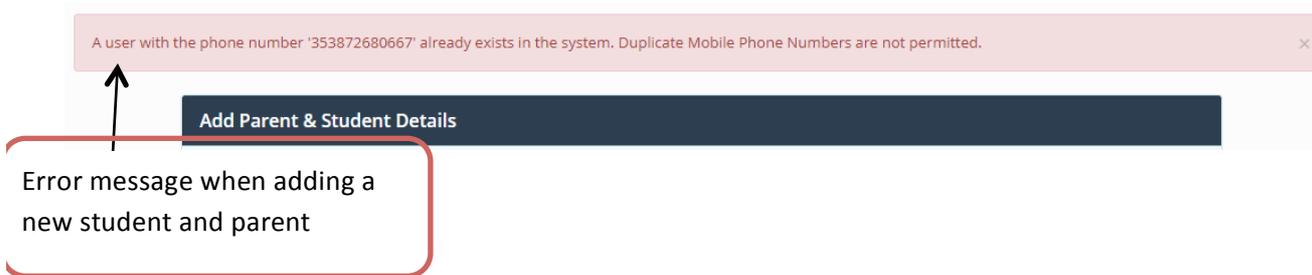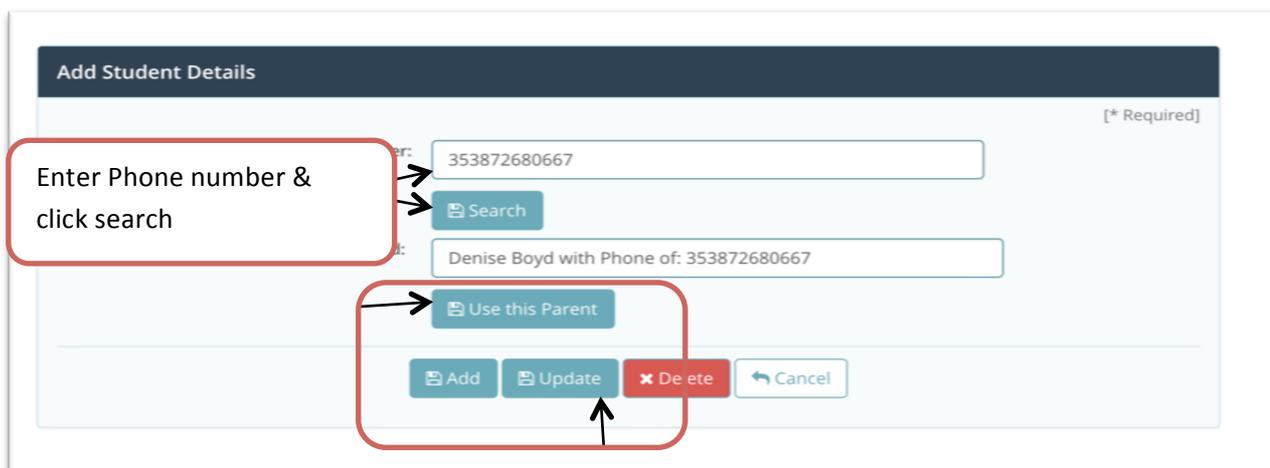
Linking Siblings /Changing a Students' Parent.

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".

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.

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).

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.

Create Group		
Group Name:	Swimming	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.

Students		Class List
Enter student name…		
Hide All		
(4A)		
test student (Staff)	X	
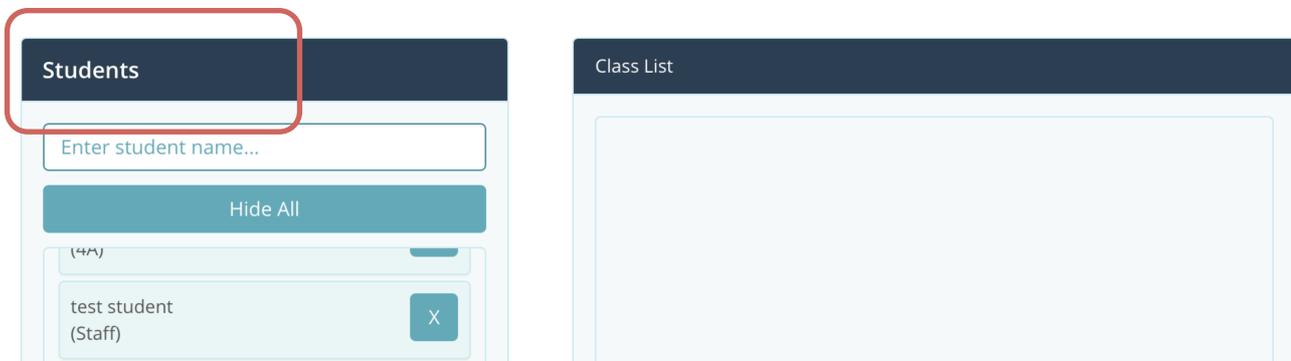
You can drag and drop classes into a group also.

Classes & Groups		Class List
Classes	▲▼	
1A		
2a		
3A		

When you are finished click "Save"

Click save and update

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
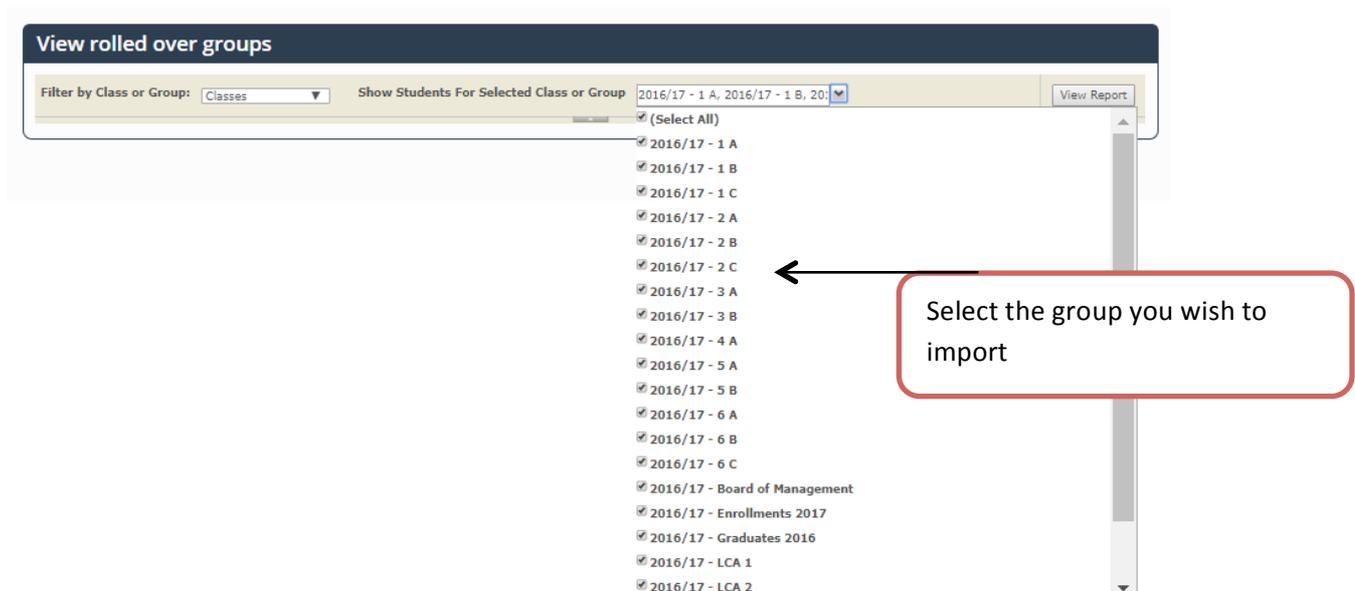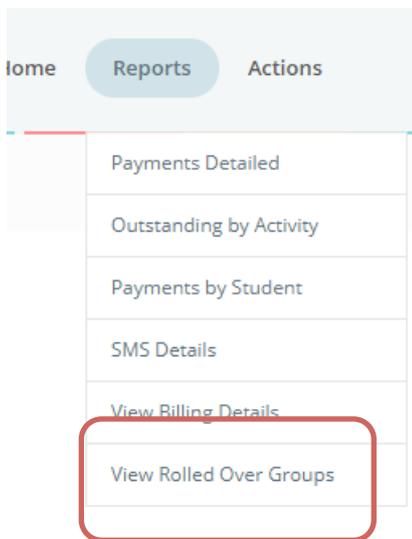
Annual Rollover

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 16th June	Thursday 15th 3pm
Friday 23rd June	Thursday 22nd 3pm
Friday 30th June	Thursday 29th 3pm
Friday 11th August	Thursday 10th 3pm
Friday 18th August	Thursday 17th 3pm
Friday 25th August	Thursday 21st 3pm

Click here for VSWare Instructions

Click here for Facility Instructions

File:
Select File...   Upload

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

Way🛒Pay | 3

Leads the Way for Parental Payments

SMARTPHONE

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

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

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 recipts and more.

REAL TIME

As soon as you pay the school dashboard is updated.

TAX BACK & MORE

Increase the revenue to the your childs school with the way2pay Tax Back System.

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

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.

Way2Pay User Guide

A Guide for Parents and Schools to use Irelands Fastest Growing Parental Payments System

W a y 2 P a y L t d , 2 5 / 2 6 W e s t l a n d S q u a r e , P e a r s e S t r e e t , D u b l i n 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.
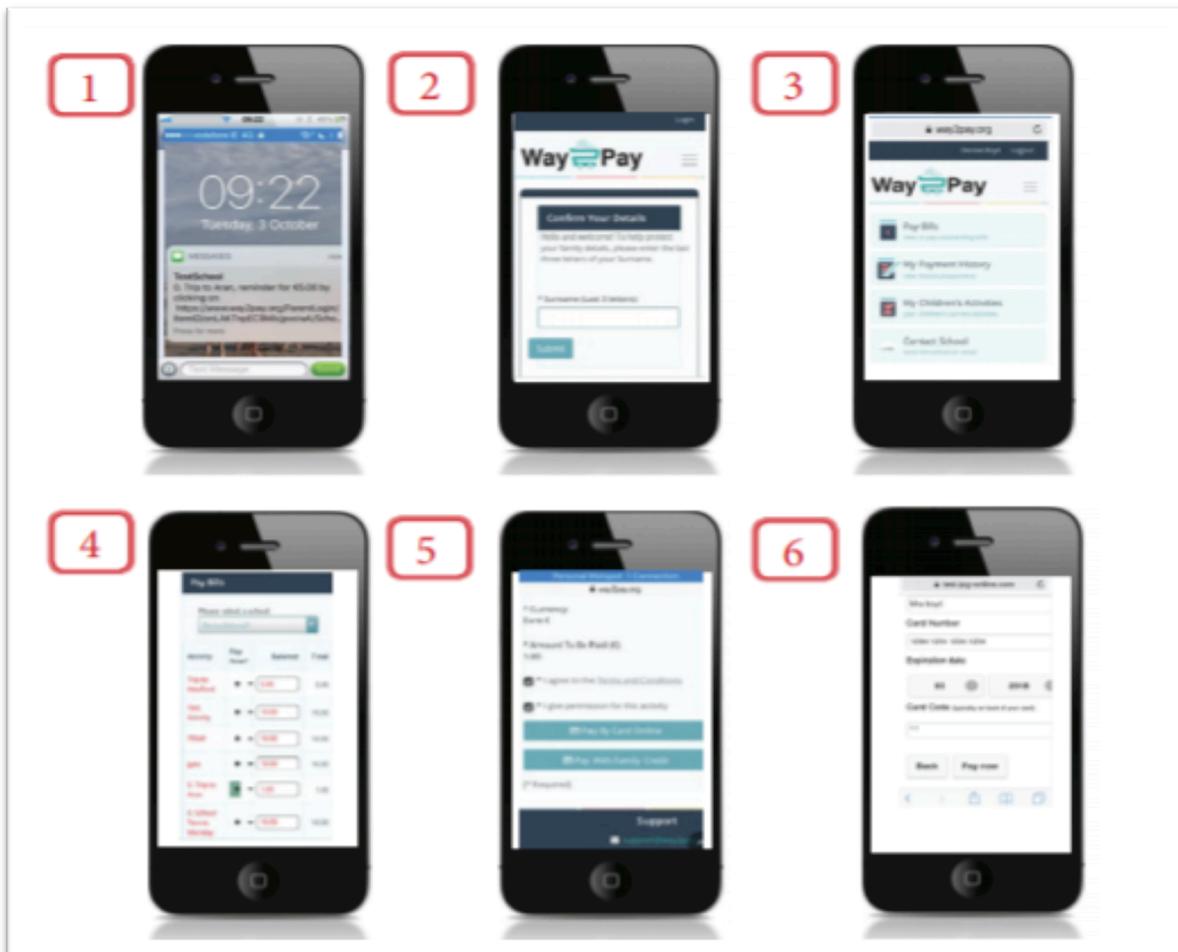
How to Login to Way2Pay for the first time

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 35387xxxxxxxx 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.
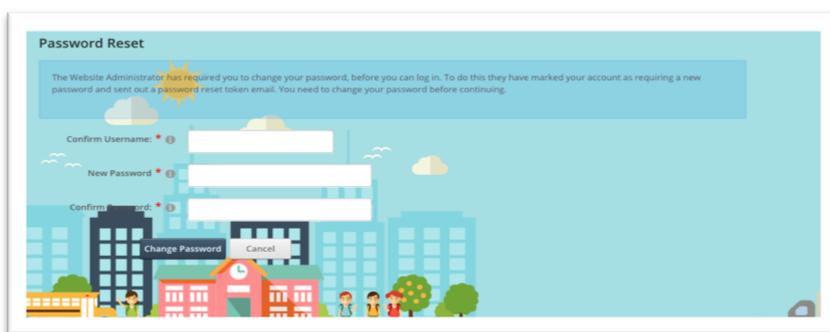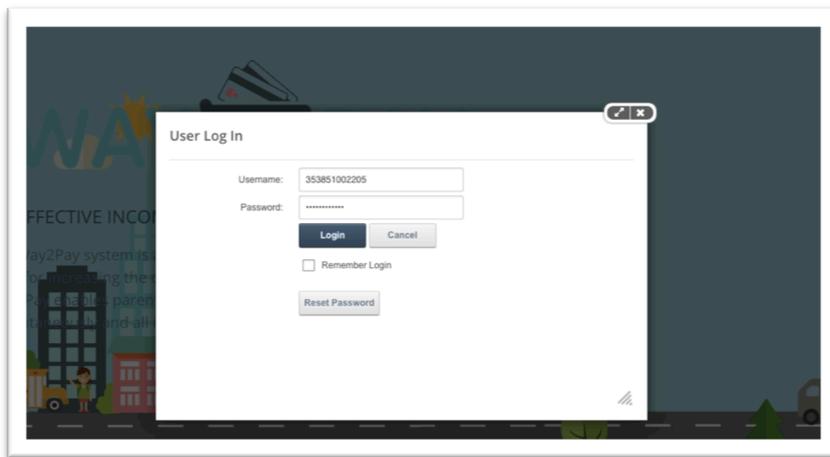
What can I do if I have forgotten my username and/or password

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'

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'

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 in35387xxx 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.

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 online

▭ Pay Wi...

[* 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

Way2Pay

Your Payment completed successfully!

Thank you for your payment of 1.00

▭ Click here to return Home

Pay Bills	
view or pay outstanding bills	

My Payment History	
view historical payments	

My Children's Activities	
your children's current activities	

Contact School	
send the school an email	

View My Courses	
My Courses	

Your Details

Name:	Denise Boyd
Address:	digital depot roe lane dublin8
Telephone:	353872680667
Email:	denise@way2pay.ie

Recent Payments

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

Parent can view my Payment History to see all payments made

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	€20.00	€70.00	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