Make Online Payments in SchoolSpeak
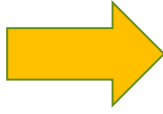
SchoolSpeak

This session will cover

- Online Payments
- SchoolSpeak and online resources
- Forms
- Online Store
- Daily Order
- Invoice

SchoolSpeak

Trends in Payments

People are changing the way that they pay for items

▶ We're rapidly approaching a cashless world *- Nasdaq, **2017 Payment Processing Trends, March 14, 2017***

▶ The TSYS survey found that people ages 25 to 44 preferred credit cards –
*Creditcard.com, **PAYMENT METHOD STATISTICS** - JASON STEELE, JULY 28, 2017*

▶ **The trend toward using credit cards as a sole method of payment**
In recent years, the percentage of people who use their credit cards as their sole payment method (rather than to finance purchases) has risen dramatically. More than half of all credit card holders use their cards for everyday spending.
*Creditcard.com, **PAYMENT METHOD STATISTICS** - JASON STEELE, JULY 28, 2017*

SchoolSpeak

Changing the way schools collect funds

Schools need to offer alternative methods of payments for parents

Registration fees
•School
•Sports Teams
•Clubs

Donations

Lunch orders

Extended day care/summer care

Book fees, breakage fees, cord fees

SchoolSpeak

SchoolSpeak is already able to handle on-line payments as well as still accept cash and checks

- Easy to use resources that are ready able to handle payments
  - Daily order
  - Forms
  - Online store
  - Invoice

- Simple to add the ability to track and accept payments

SchoolSpeak

Online Payments

▶ These resources can accept online payments
   ▶ Credit card options – Parents may pay via their credit cards
   ▶ ACH – Parents may opt to fund payments through ACH

▶ There is a fee for online payments. SchoolSpeak has the ability for schools to to charge a convenience fee per transaction. This gives you an option to pass transaction fees to parents.
   ▶ *Charging convenience fee is illegal in some states and you will need to check your state rules before turning on this option.*

▶ Schools always have the backup option of allowing parents to pay via cash or check and post the payments to the resource.

SchoolSpeak

Diamond Mind

- SchoolSpeak's recommended credit card processor
- Diamond Mind is a part of the family of products from Education Brands the consortium of companies that SchoolSpeak is part of
- Using a related company is giving SchoolSpeak access to technology and options that were until this time not available
- Diamond Mind can offer multiple solutions for schools. We encourage you to talk with them and select the option best suited for your school.

SchoolSpeak

The Resources
Forms

SchoolSpeak

Forms Resource

- WARNING – Forms are contagious – once you start it is hard to stop!!
- May accept payments
- Payments may be determined based on need:
  - Single amount – All submitted forms will be charged $10
    - *To join the PTA is costs $10*
  - Amount based on a field – The person completing the form makes a choice and that determines the payment amount
    - *Parents may opt for a regular membership ($10) or opt to donate $10 with a membership ($20)*
  - Calculated amount – The form may take amounts from many field choices and present a summary payment amount
    - *Parents may pay the fee ($10) and add a school hat or shirt*
- Able to view all submitted and pending forms
- Can send emails to parents
- Payment reports are available
- Can customize for almost any use
  - Donations, registration forms, applications, candy orders, notecard orders

SchoolSpeak

Registrations

- A basic registration is a form that is asking for information from a person
- Can make it as simple or as complex as necessary
  - **Simple is best!!
- Sample ideas
  - Sports
  - Clubs
  - Special programs
  - New student applications
  - Current student registration

SchoolSpeak

Basketball season is almost here - if you would like to sign up your child for this year please complete the following information.

When paying online, please note that there is a small convenience fee.

Parent Name: _____ _____ *

Student 1: _____ *

GradeLevel: _____ *

Shirt Size: _____ *

I agree that my child can play basketball for Homestead school. I understand that I will be charged a program fee of $20 per student and a shirt fee.

Parent Signature: _____ _____ _____ *

SchoolSpeak

Signup [Signup for Basketball]

1. Initial Payment Screen

Due amount: $32.00

Pay using:
- Credit Card (DiamondMind) (Convenience fee for the due amount: $0.99)
- Bank Transfer (DiamondMind) (Convenience fee for the due amount: $0.19)
- DiamondMind (DiamondMind) (Convenience fee for the due amount: $0.99)

Select Account:
- Pay using a new credit card   Add/Edit Credit Cards

Payment required for the due amount = $32.00 + $0.99 (convenience fee) = $32.99

Pay

2. Member clicks on the Select account – this screen is for the initial setup of a card

Signup [Signup for Basketball]

No payment option selected. Please select a payment option.

Due amount: $32.00

Pay using:
- Credit Card (DiamondMind) (Convenience fee for the due amount: $0.99)
- Bank Transfer (DiamondMind) (Convenience fee for the due amount: $0.19)
- DiamondMind (DiamondMind) (Convenience fee for the due amount: $0.99)

Select Account:
- Pay using a new credit card   Add/Edit Credit Cards

(The card details will be collected in the next step)
- Save this payment method for future transactions

Pay

Credit Card

VISA BANK

Credit card number:
Enter your 13-19 digit card numb

Expiration (MMYY): CVV:
MMYY   CVV No.

Cardholder's first name:
Anthony

Cardholder's last name:
Brown

Address:
1714 Main St

City:
Main City

State/Province:
CO

Postal Code:
06809

Phone number:
555-555-5555

Email address:
demo@schoolspeak.com

Add

*Your payment information is securely processed through DiamondMind

3. Member completes the information page

Manage Accounts

Add new account:
🔲 Add a new credit card

Existing account details:

#	Account Details		
1	Credit Card 490000******0086		🔲 Edit 🔲 Delete

4. Successful addition

✔ Successfully added the new payment account.

Signup [Signup for Basketball]

Due amount: $32.00

Pay using:

● **Credit Card (DiamondMind) (Convenience fee for the due amount: $0.99)**
○ **Bank Transfer (DiamondMind) (Convenience fee for the due amount: $0.19)**
○ **DiamondMind (DiamondMind) (Convenience fee for the due amount: $0.99)**

Select Account:

● Credit Card 490000******0086   🔲 Add/Edit Credit Cards
○ Pay using a new credit card

Payment required for the due amount = $32.00 + $0.99 (convenience fee) = $32.99

Pay

5. Once account is setup the parent clicks on the card and PAY

Note the convenience fee

6. Payment is successful!

(1) Order ——— (2) Payment ——— (3) Thank You

✔ Payment completed successfully

Continue 🔲

Confirmation for parent

Donations

- For your school, specific causes, teams, sports, religious education programs
- Parents who opt to donate funds instead of service time
- Can make available to parents on SchoolSpeak portal but can also make available to people outside of SchoolSpeak by linking on your external website or social media pages
- May add a field asking what area you would like the donation to be used in
  - Scholarships
  - General fund
  - Technology

Link to your external site

When setting up a form, choose settings that allow non-SchoolSpeak members to access the donation form. This feature is also useful when setting up application or information request forms.

Miscellaneous Payments

▶ Schools may use applications that are outside of SchoolSpeak or have miscellaneous payment needs

  ▶ Lunch order

  ▶ Library systems

  ▶ Books services

  ▶ Class trips

▶ Solution – Create a simple form that allows parents to indicate the reason for payment and the amount

SchoolSpeak

To make a payment to the school, please complete the information requested. You may opt to send cash or check, or take advantage of our online payment system.

When paying online, please note that there is a small convenience fee.

SchoolSpeak Member: _____ *

Reason for payment: _____ *

Invoice or Reference # (if applicable): _____

Payment Amount: _____ *

SchoolSpeak

Online Order

Online Order

- ▶ Enables a members to indicate a purchase
- ▶ Items sold have a price designated by the coordinator
- ▶ Once the member indicates the transaction is complete the total amount owed for the order is displayed. Member can click on PAY button
- ▶ Resource allows tracking of number of items purchased, inventory levels, fulfillment details and payment status
- ▶ If used as part of fundraising, the information may be downloaded from Online order and uploaded to Goal tracking
- ▶ Examples:
  - ▶ Spirit wear
  - ▶ Auction/fundraiser tickets, special events
  - ▶ PE or uniform options
  - ▶ Wreaths, flowers, chocolate, magnetic car decals

SchoolSpeak

Sample Online Order

Please join us for our annual Breakfast with Santa. We will have delicious food, holiday music and a very special surprise.
ℹ Select each item you want to buy, enter quantity and click 'Add to cart'

Select Category: All

Select Item:
- ✓ Adult Tickets – $8.00
- Child Ticket – $5.00
- Special Take Home Picture – $5.00

ℹ [Item - $Price]

Item Quantity: - 0 +

🛒 Add to cart

Summary for Order #2 🖨 Print this order

Order Date	Ordered By	Ordered For	Order Status	Payment Status
07 Nov, 2017 08:10 PM	Adam, Janice	Adam, Janice	Pending Fulfillment	Paid

Order Details

#	Item	Unit Price	Quantity	Fulfilled	Total Price
1	Adult Tickets	$8.00	3	0	$24.00
2	Child Ticket	$5.00	2	0	$10.00
3	Special Take Home Picture	$5.00	1	0	$5.00
TOTAL			**6**		**$39.00**

SchoolSpeak

Summary information

Items for Sale   ☐ Show Deleted Items

Item	Unit Price	Pre Order Limit	Stock	Ordered	Available	Paid Order
Adult Tickets Categories: None	$8.00			5		3
Child Ticket Categories: None	$5.00			5		2
Special Take Home Picture Categories: None	$5.00			1		1
Gross value	$0.00		0	11	0	6

SchoolSpeak

Daily Order

- Lunch Order
  - Parents may order daily or in blocks
  - Teachers may update/take orders as part of attendance
  - Supports multiple price lists with reporting
    - Default, free, reduced
  - Parents may view orders, make payments and view prior payments
  - Schools may display full menus or make very simple with a single option – up to the school
  - Cafeteria staff may view orders by school, class, and time frame
  - Cafeteria coordinators may run payment reports, and update orders as needed

SchoolSpeak

Lunch Order ▸ Home

🛒 Place Order $ Pay

Total due amount is: $43.50 $ Pay Now

🛒 Place Order

🖨 Print Order

↻ Order History

Nov 07, 2017 (Tue)	Adam, Janice
Chicken Sandwich Apple Slices	✔
MILK	☐
EXTRA ENTREE	
Nov 08, 2017 (Wed)	**Adam, Janice**
Hot Dog Beans	✔
MILK	✔
EXTRA ENTREE	
Nov 09, 2017 (Thu)	**Adam, Janice**
French Toast Sticks Turkey Bacon	✔
MILK	☐
EXTRA ENTREE	

Lunch Order ▸ Pay

🏠 Home   🛒 Place Order

Your current due

Name	Due
Adam, Janice	$43.50
Total	$43.50

$ Pay   🖨 Print

Payment report for Adam, Janice as of 11/7/2017 8:44:38 PM   🖨 Print

ⓘ Total Payment = Paid Amount + Convenience Fee

Date & Time	Name	Notes	Total Payment	Payment Details	Status	
9/1/2016 8:46:18 AM	Adam, Janice	Payment Type: Check, Processor: Manual, TxnId: 454177, Transaction By: Schoolspeak, Support003 - #100	$10.00	Adam, Janice: $10.00	Paid	↻ History
Total (includes only paid and pending payments)			**$10.00**			

SchoolSpeak

Another use of Daily Order Extended Day Care

▶ Combine the power of calculating daily totals with ease of the SchoolSpeak attendance resource

▶ Set price levels based on how parents are charged
  ▶ A set daily fee
  ▶ An hourly fee

▶ Care provider enters the amount in the attendance book linked to the daily order resource

▶ As children are marked in the day care area, the balance that parents owe will be increased

SchoolSpeak

After Care

⚫ **After Care**
Total due: $10.00
Click here to pay for your after care Go ▸

	Nov 07, 2017 Tuesday
👤 Adrew, Gracie	**1** x DAILY AMOUNT
👤 Adrew, Jane	**1** x DAILY AMOUNT

Order details for all members for 11/7/2017

Name	Daily amount	Total Amount
Adrew, Gracie	1 * $5.00	**$5.00**
Adrew, Jane	1 * $5.00	**$5.00**
Total#	2	$10.00
Default	2 * $5.00	**$10.00**

After Care ▸ Home

[$ Pay]

Total due amount is: $10.00

Your current due

Name	Due
Adrew, Gracie	**$5.00**
Adrew, Jane	**$5.00**

SchoolSpeak

Invoice

SchoolSpeak

Invoice Resource

▶ Schools may create invoices for any kind of fee
  - ▶ School materials
  - ▶ Programs
  - ▶ Media fees
  - ▶ Trip fees
  - ▶ Sacrament fees
▶ Invoices may be created for an individual member or group of members
▶ Invoices may be paid by parents initiating payments or via scheduled transactions

SchoolSpeak

Let's setup an online payment

SchoolSpeak

Steps

▶ Setup your online payment account with the vendor
  ▶ Determine the fees or convenience fee chargers that may be required
▶ Complete the settings in the resource
▶ Setup the resource
▶ Good to go!!!!

SchoolSpeak

Questions?
Please contact
SchoolSpeak Support

877-773-2513

support@schoolspeak.com

SchoolSpeak