easy payments plus

# *Training Notebook for Schools*

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# 1 Introduction

The purpose of this notebook is two-fold:

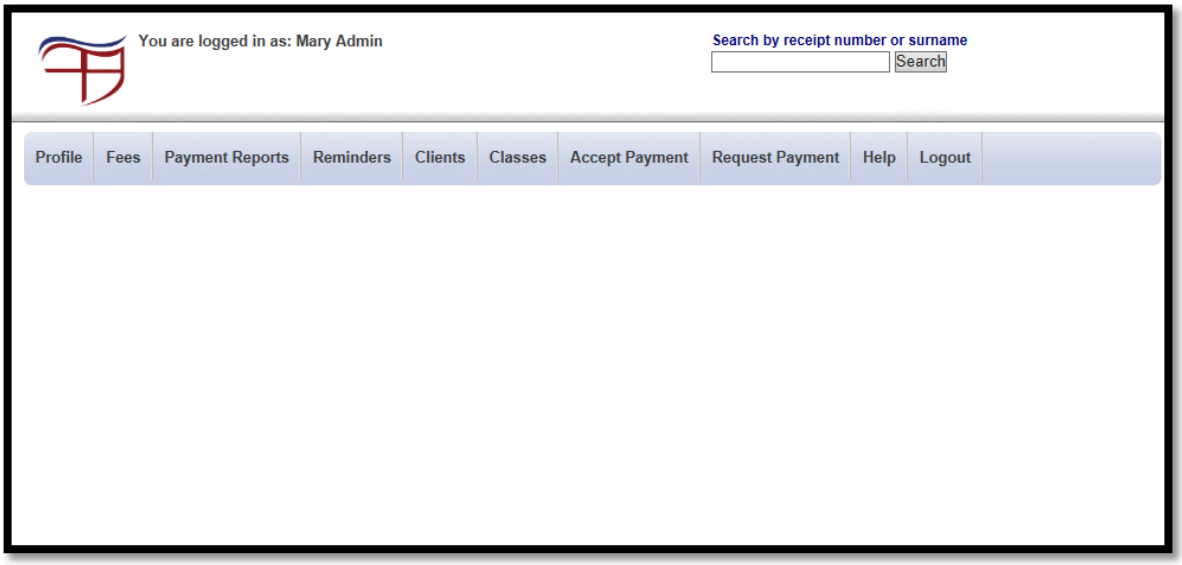
- To act as a **guide** covering the main areas of the Easy Payments Plus system that we will be covering during your training session.
- To provide a notebook for you on which to write your own notes during training.

# 2 Structure of Training Session

The training session will cover the following ….

- How to access your EPP account as an administrator (login).

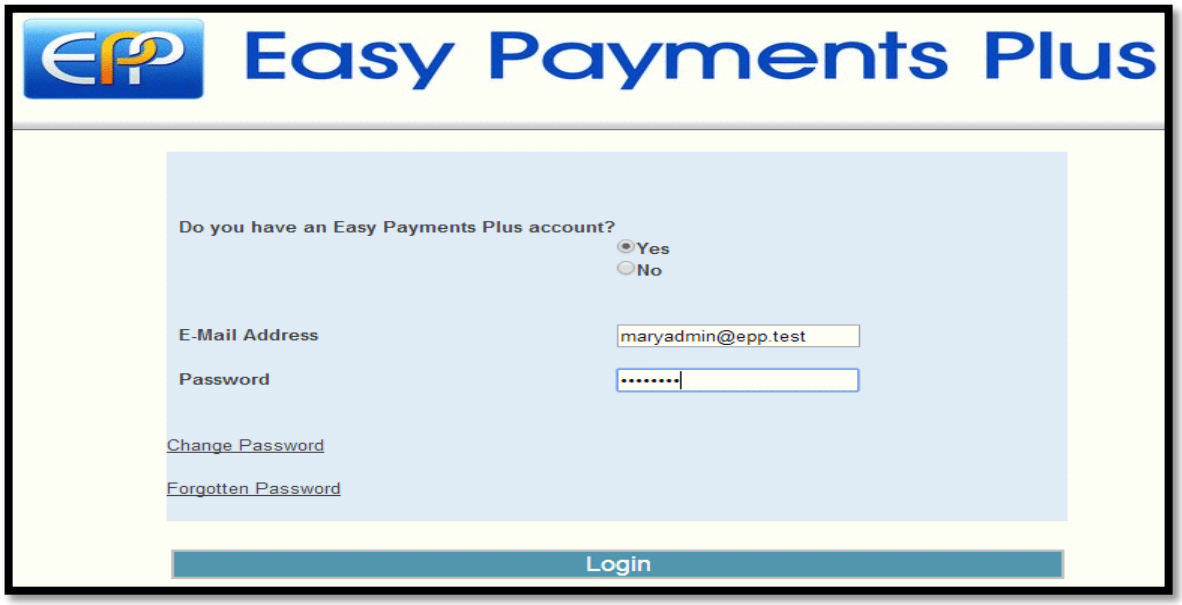
- The main menu options available to you …..
  - **Profile** – configure and tailor your account to your requirements (this is done during the on-boarding process).
  - **Fees** – define and manage your fees (any expense you want parents to pay for).
  - **Payment Report**s - report on all incoming payments using various detailed payment and bank reconciliation reports.
  - **Accept Payment** – accept cash/cheque/card payments from parents in the office or over the phone.
  - **Request Payment** – request cash or card payments from parents.
  - **Refunds** – process a refund.
  - **Reminders** – send out both email and text reminders.
  - **Classes** – maintain classes and generate class reports.
  - **Search** – view and edit all details relevant to a family.



# 3 How can I login to my EPP account?

- You should save the Easy Payments Plus website as a favourite on your browser for easy access (www.easypaymentsplus.com).

- Click on the **Login** button on the top right hand corner.




- Input your email address and password provided to you.

**NOTES**

# 4 Profile

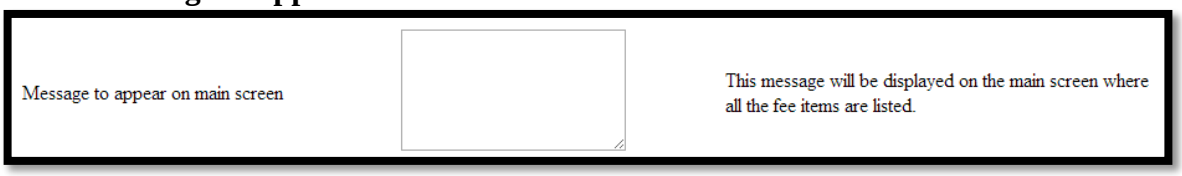
This menu option enables you to configure your EPP account. This will already have been completed for you during the on-boarding process.

The areas within Profile you may need to be aware of are outlined below.

## *4.1 Profile→Update Profile→Configuration*

- **Reporting Start Date**

- **Message to appear on main screen**

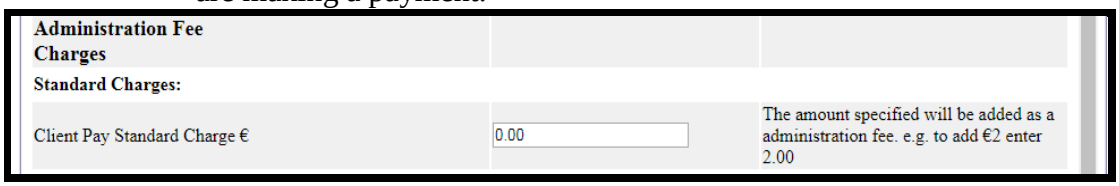



**NOTES**

## *4.2 Profile→Update Profile→Payment Options (processing fee)*

During training we will discuss how you wish to handle the processing fees associated with each transaction. For example:

1. Your school will absorb these processing fees (treat them like bank charges).
2. The parents will absorb an administration charge to try cover the processing fees.
    - Incorporate an extra amount to each payment item.
    - Pass on a standard administration charge which parents will see when they are making a payment.



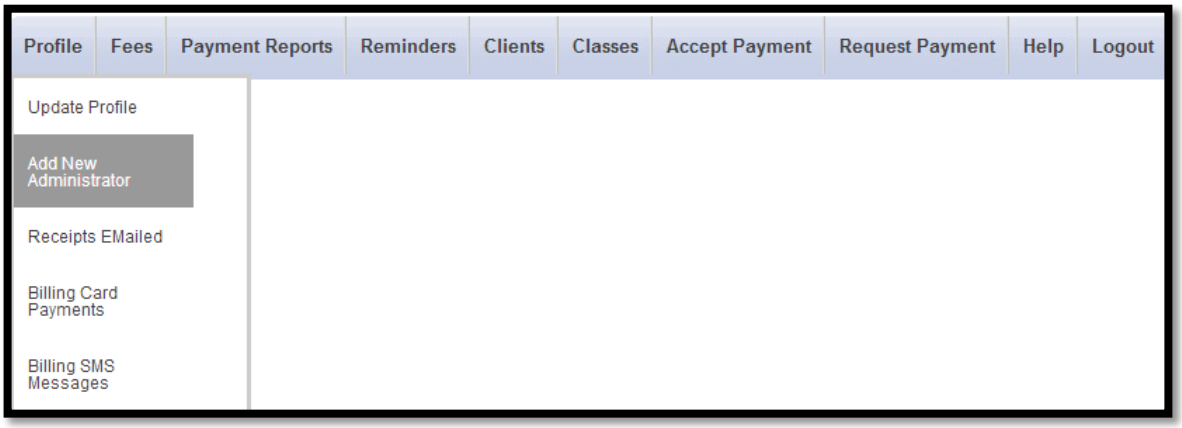
| | | |
|---|---|---|
| **Administration Fee Charges** | | |
| **Standard Charges:** | | |
| Client Pay Standard Charge € | 0.00 | The amount specified will be added as a administration fee. e.g. to add €2 enter 2.00 |

**NOTES**

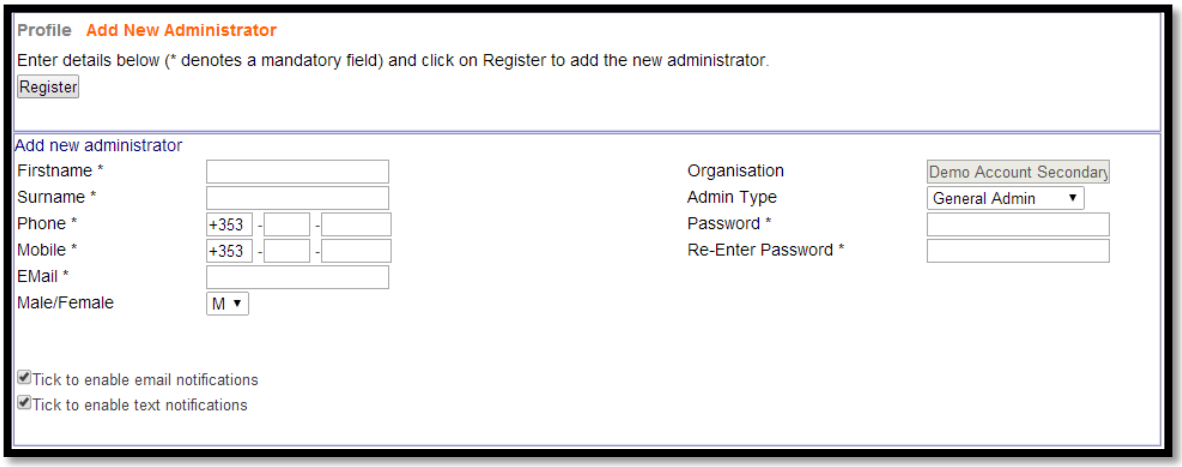
## *4.3 Profile → Add New Administrator*

You can add as many administrators as required by selecting **Profile** and then **Add New Administrator**.

You can specify an administrator as a **general or class administrator.**




Input the appropriate details as shown below and click on **Register**.




**NOTES**

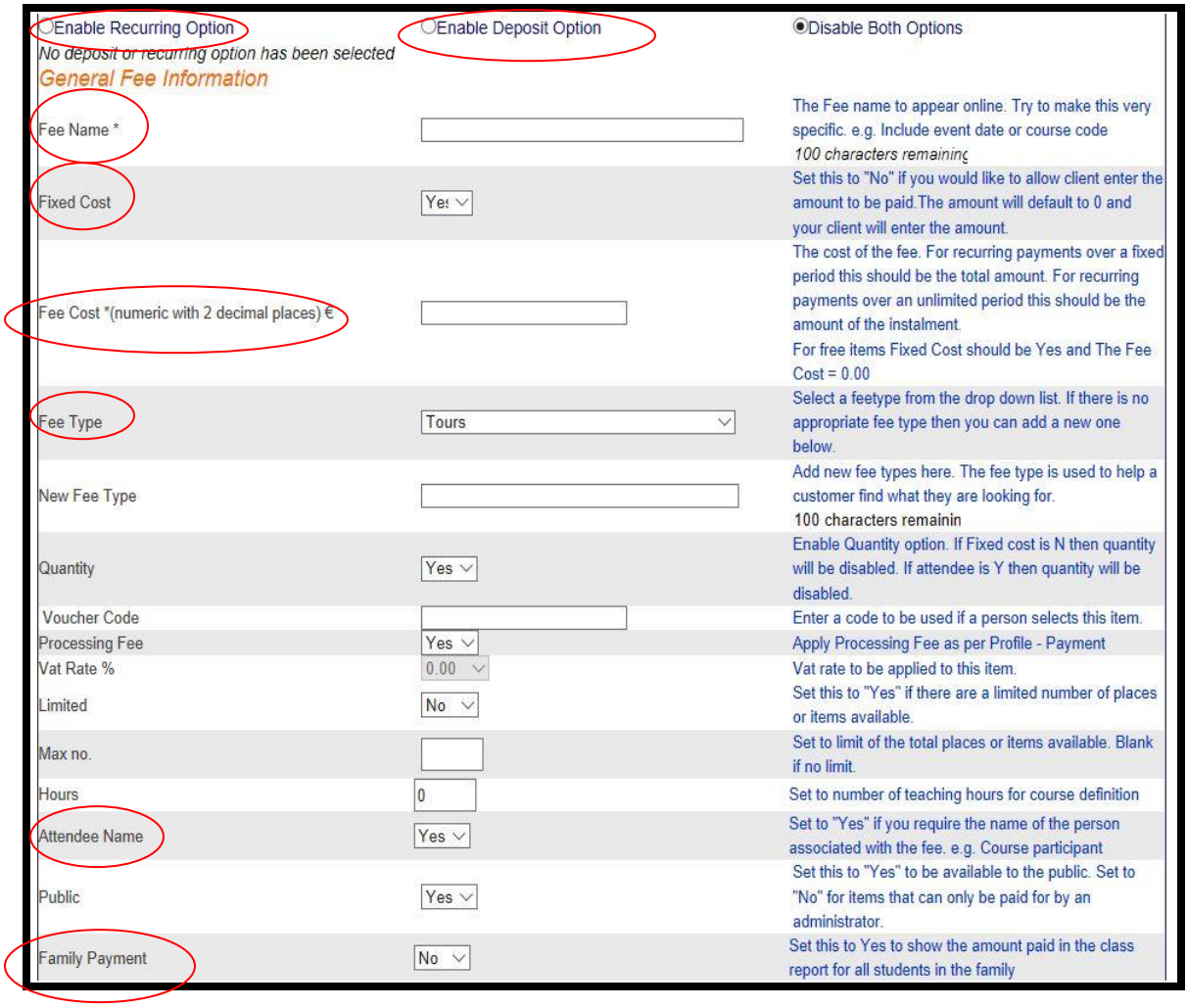
# 5 Fees

This menu option enables you to define and manage fee items.

## *5.1 Define New Fee*

To define a new fee simply input the relevant data in the screen shown below. The *important* headings to remember are circled in red as shown in **Screen 1, Screen 2 and Screen 3** in this section.

### SCREEN 1 – GENERAL FEE INFORMATION



Enable Recurring Option | Enable Deposit Option | Disable Both Options

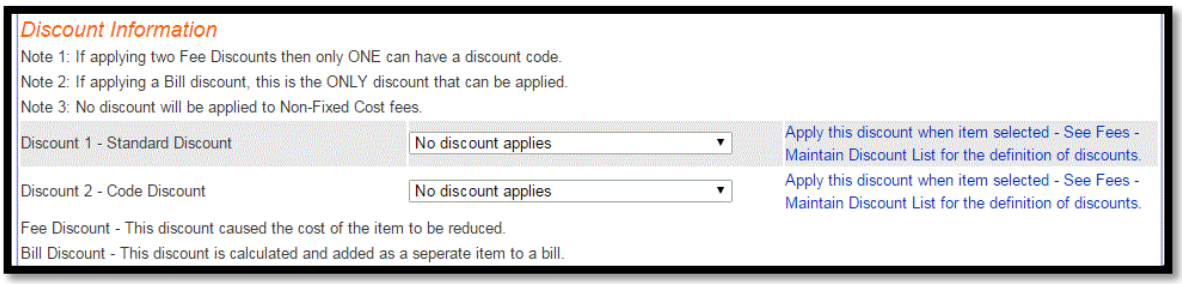
*No deposit or recurring option has been selected*

*General Fee Information*

| | | |
|---|---|---|
| Fee Name * | | The Fee name to appear online. Try to make this very specific. e.g. Include event date or course code *100 characters remaining* |
| Fixed Cost | Yes | Set this to "No" if you would like to allow client enter the amount to be paid.The amount will default to 0 and your client will enter the amount. |
| Fee Cost *(numeric with 2 decimal places) € | | The cost of the fee. For recurring payments over a fixed period this should be the total amount. For recurring payments over an unlimited period this should be the amount of the instalment. For free items Fixed Cost should be Yes and The Fee Cost = 0.00 |
| Fee Type | Tours | Select a feetype from the drop down list. If there is no appropriate fee type then you can add a new one below. |
| New Fee Type | | Add new fee types here. The fee type is used to help a customer find what they are looking for. 100 characters remainin |
| Quantity | Yes | Enable Quantity option. If Fixed cost is N then quantity will be disabled. If attendee is Y then quantity will be disabled. |
| Voucher Code | | Enter a code to be used if a person selects this item. |
| Processing Fee | Yes | Apply Processing Fee as per Profile - Payment |
| Vat Rate % | 0.00 | Vat rate to be applied to this item. |
| Limited | No | Set this to "Yes" if there are a limited number of places or items available. |
| Max no. | | Set to limit of the total places or items available. Blank if no limit. |
| Hours | 0 | Set to number of teaching hours for course definition |
| Attendee Name | Yes | Set to "Yes" if you require the name of the person associated with the fee. e.g. Course participant |
| Public | Yes | Set this to "Yes" to be available to the public. Set to "No" for items that can only be paid for by an administrator. |
| Family Payment | No | Set this to Yes to show the amount paid in the class report for all students in the family |

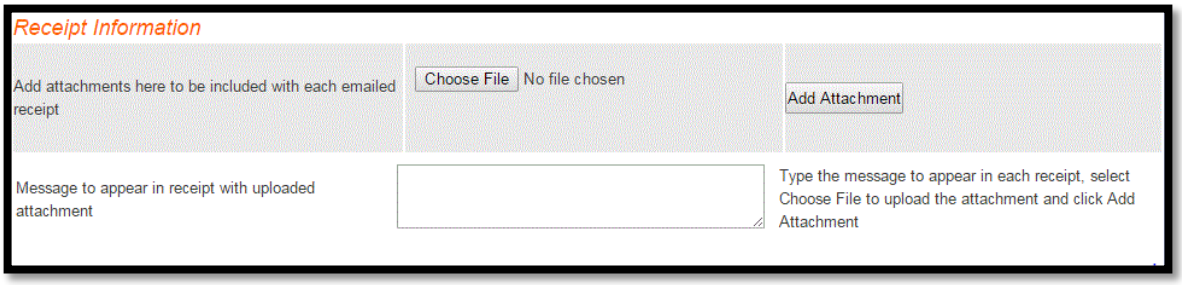
**YOUR NOTES/QUESTIONS**

## SCREEN 2 – DISCOUNT INFORMATION




**NOTES**

## SCREEN 3 – RECEIPT INFORMATION

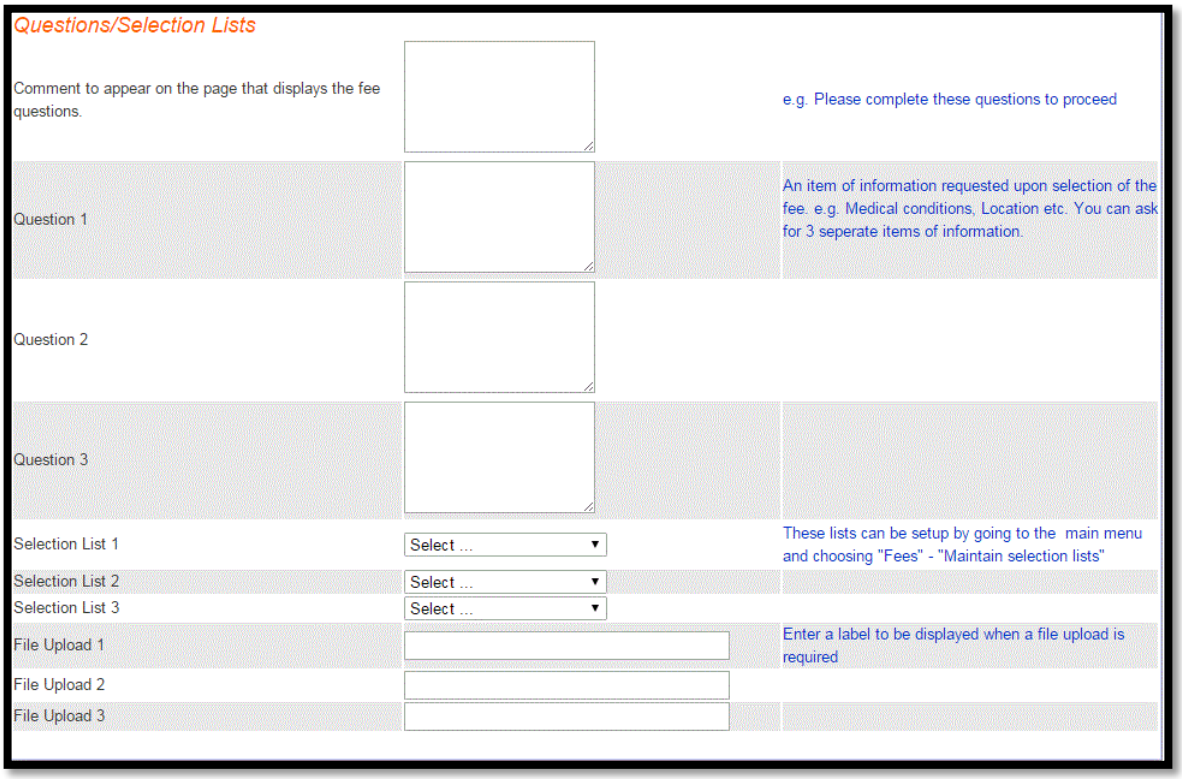



**NOTES**

## SCREEN 4 – DESCRIPTION SECTION

**NOTES**

## SCREEN 5 – QUESTION SECTION




**NOTES**

## SCREEN 6 – RECURRING SECTION

*Recurring Option*

| | | |
|---|---|---|
| Recurring | Yes | Set this to "Yes" if the payment is to be divided into multiple instalments. |
| Frequency | Weekly | This defines the instalment frequency |
| Instalments | | This defines the total number of instalments. Enter 9999 if unlimited |
| Fixed Start Date | 24 Mar 2015 | The start date of the first instalment. Ignored if next entry set to yes |
| Variable Start Date | No | This will set up a recurring schedule for each payment based on the day after the client selects the item. |
| Enable pay in full | No | Set this to "Yes" to give the client the option to pay in full. |

**NOTES**

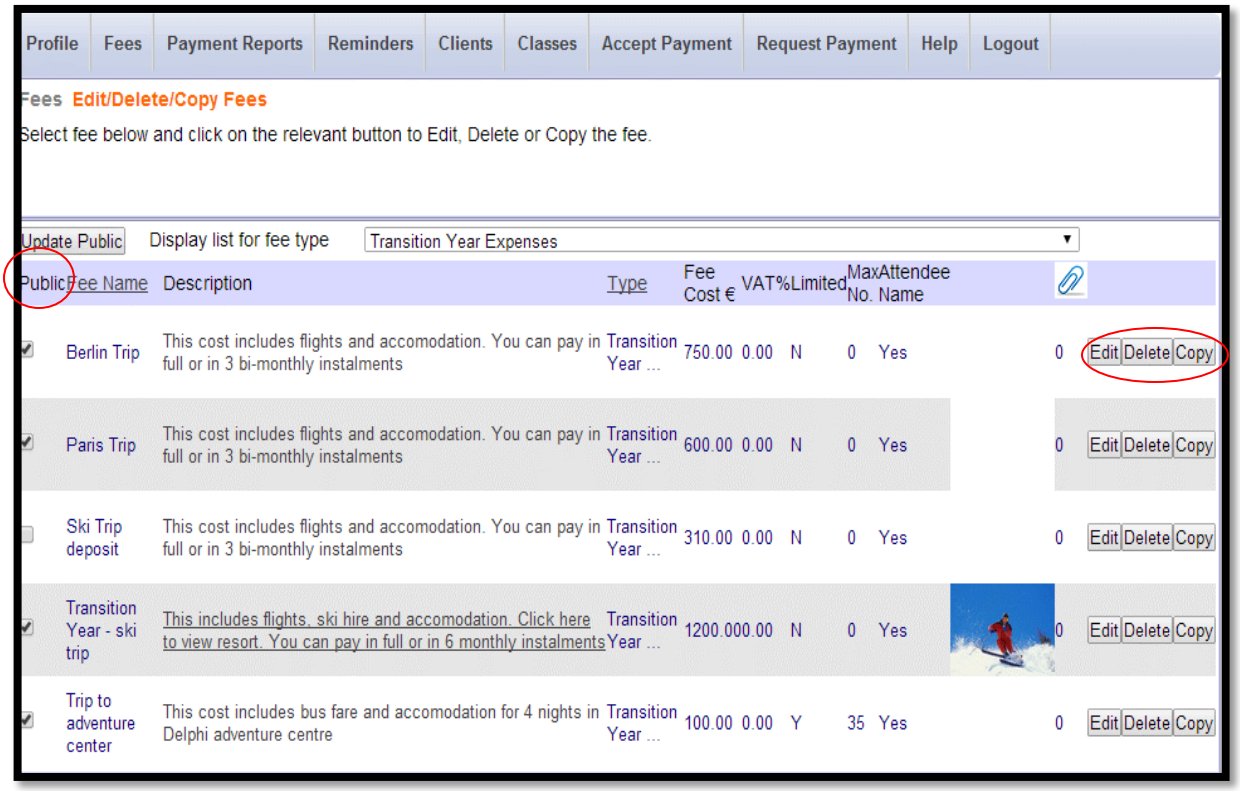
## SCREEN 7 – DEPOSIT/BALANCE SECTION

*Deposit Option*

| | | |
|---|---|---|
| Enable Deposit | Yes | Set this to "Yes" if you will accept a deposit payment and schedule the deposit for a later date. |
| Deposit amount | | Enter the amount of the deposit. Enter 0 to enable the client to choose the deposit amount. |
| Frequency of balance payment | Weekly | This defines the instalment frequency. The start date will be defined based on the frequency. e.g. If weekly then the first instalment will be drawn in 7 days, if monthly the the 1st instalment is drawn on the same date the following month. |
| No. of Instalments for balance | | This defines the total number of instalments for the balance. |

**NOTES**

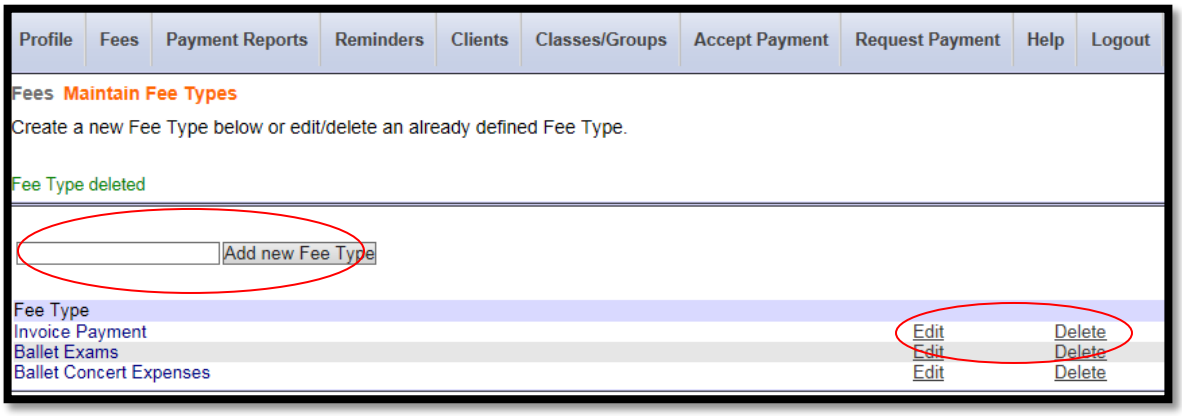
## *5.2 Maintain Fees*




**NOTES**

## *5.3 Maintain Fee Types*

This facility allows you to add, edit or delete Fee Types. Fee Types are general headings within which individual Fee Names can be grouped. It is recommended that these types correlate with the school's accounts package for easy reporting and bank reconciliation. For example, a Fee Type may be "Ballet/Music Exams". The Fee Names within this Fee Type might be "Grade 1 Exam", "Grade 2 Exam", and so on.



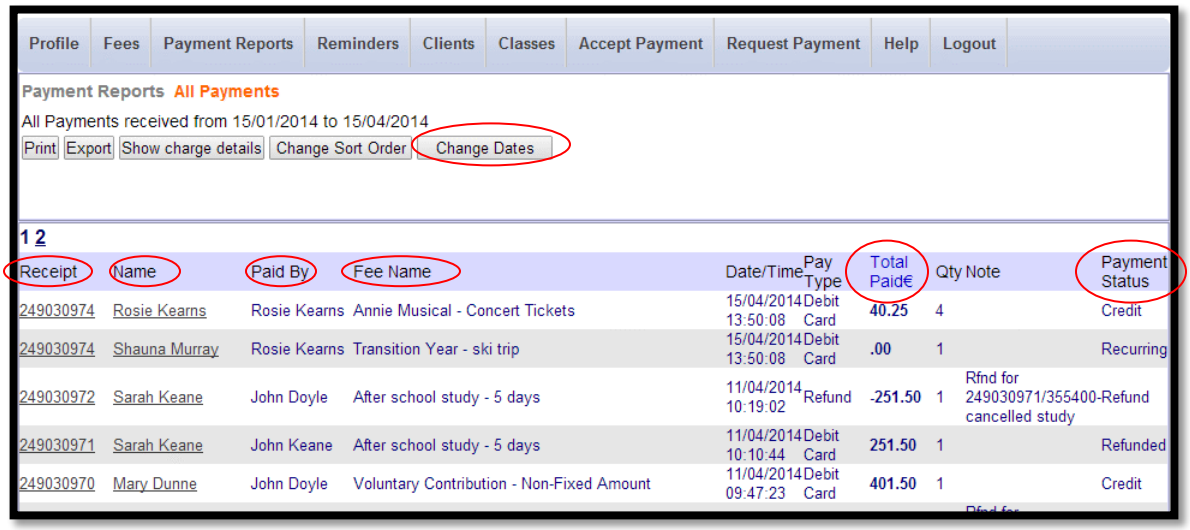

**NOTES**

# 6 Payment Reports

Easy Payments Plus provides organisations with a wide variety of payment reports. This section will show the main reports that are discussed during training.

## *6.1 All Payments*

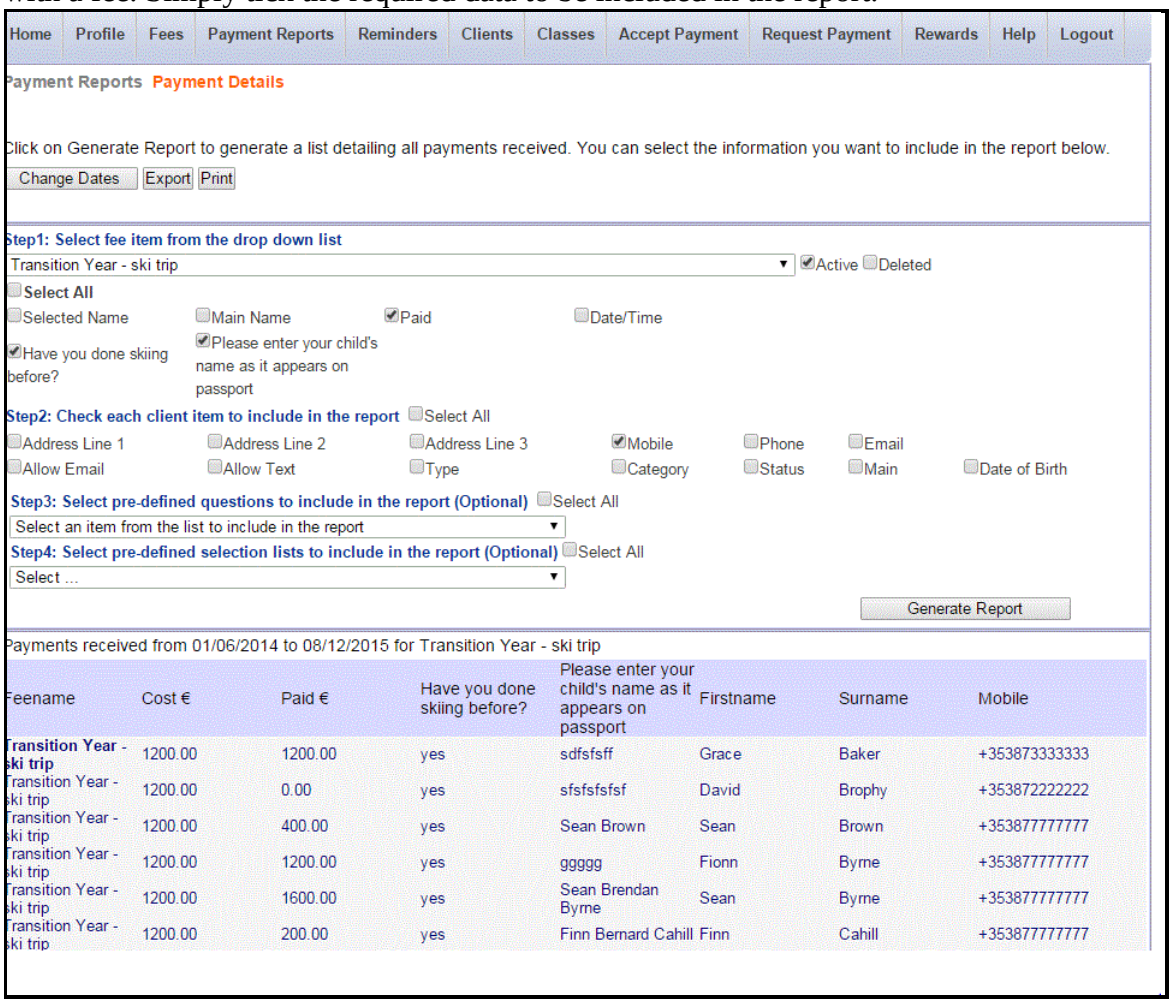
The most general payment report is the **All Payments** report – the first report available within the Payment Reports menu. The key headings in this report are circled in red.




**NOTES**

## *6.2 Payment Details by Feename*

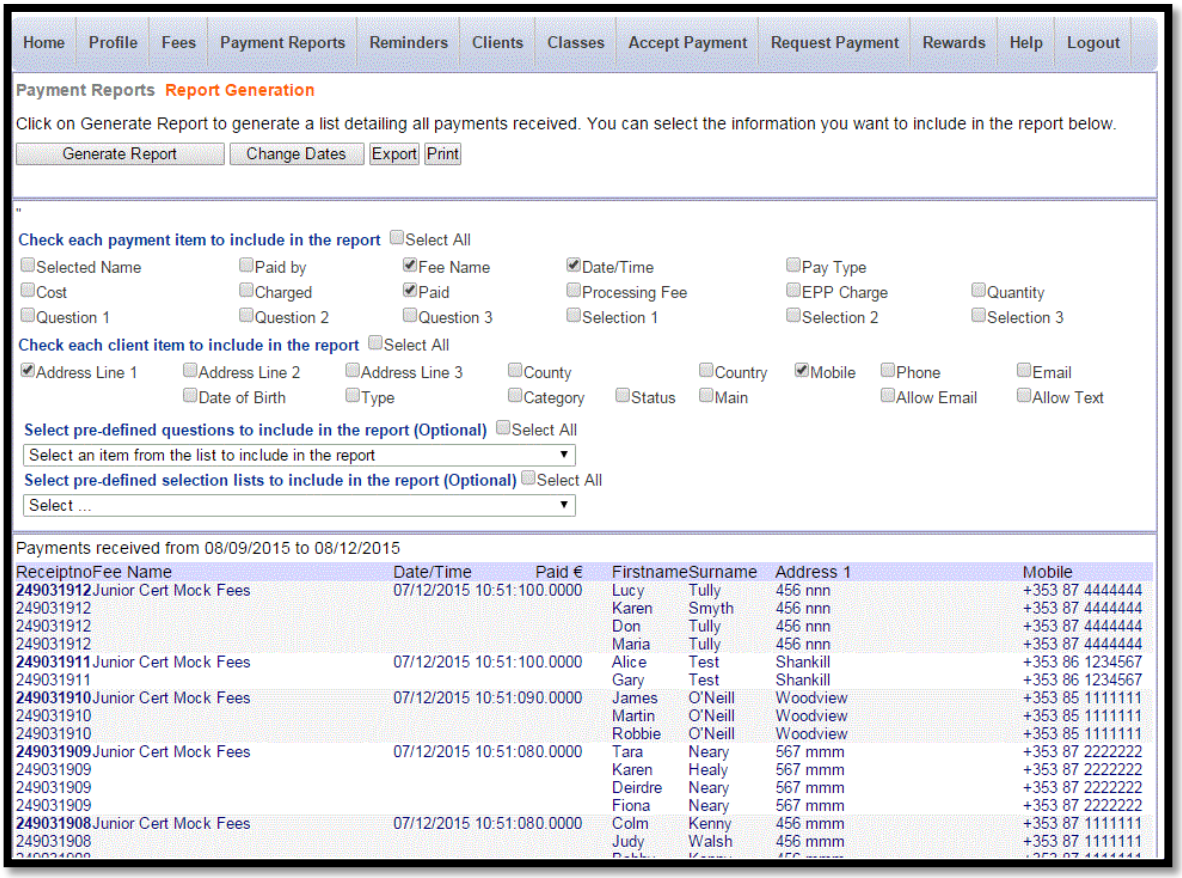
This report allows administrators to generate tailored reports showing detail associated with a fee. Simply tick the required data to be included in the report.




**NOTES**

## *6.3 Payment Details by Receipt Number*

This report allows administrators to generate tailored reports showing detail associated with a fee. This report differs to that above as it is displayed in order of the most recent receipt number. Simply tick the required data to be included in the report.



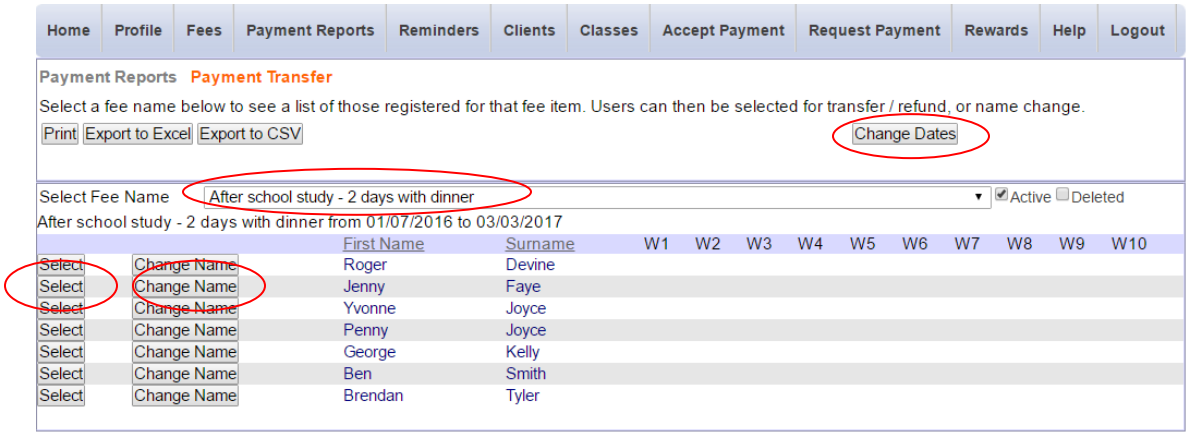

**NOTES**

## *6.4 Payment Transfer*

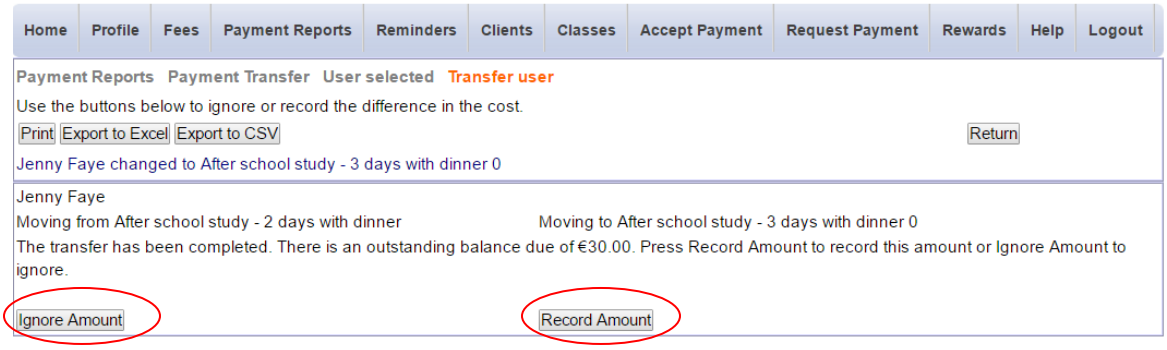
This facility is used in cases where errors are made during the payment process. For example, if the parent pays for the incorrect fee or if the incorrect child was selected as the attendee of a fee.

Using this facility, administrators can transfer pupils from the fee they paid for to another fee. The pupil's name can also be changed to another sibling's name.

- Change the dates to required period (if necessary).
- Select the fee name for which the pupil has paid.
- Select the pupil in question.
- You can either change the name of the pupil or Select to transfer to a new fee.



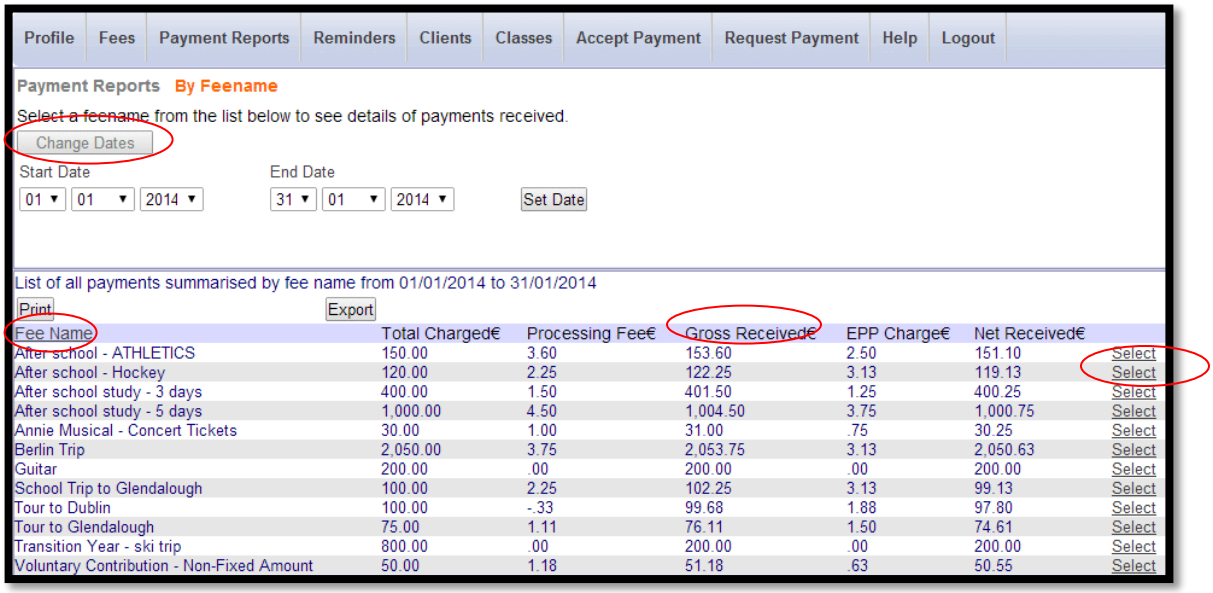

- When you transfer to a new fee, if there is a discrepancy between the old and new fee amounts, then the system will ask you to either ignore or record this discrepancy.




**YOUR NOTES/QUESTIONS**

## 6.5 Payments by Fee Name

Select this report to view all payments summarised by Fee Name. You can drill down further to see details of the individual payments by clicking on the **Select** button.

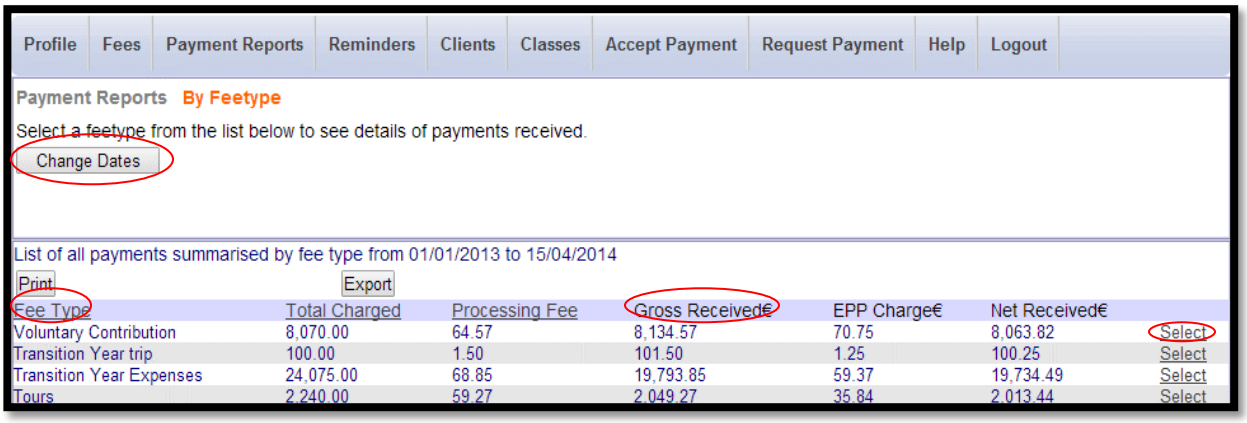



| Fee Name | Total Charged€ | Processing Fee€ | Gross Received€ | EPP Charge€ | Net Received€ | |
|---|---|---|---|---|---|---|
| After school - ATHLETICS | 150.00 | 3.60 | 153.60 | 2.50 | 151.10 | Select |
| After school - Hockey | 120.00 | 2.25 | 122.25 | 3.13 | 119.13 | Select |
| After school study - 3 days | 400.00 | 1.50 | 401.50 | 1.25 | 400.25 | Select |
| After school study - 5 days | 1,000.00 | 4.50 | 1,004.50 | 3.75 | 1,000.75 | Select |
| Annie Musical - Concert Tickets | 30.00 | 1.00 | 31.00 | .75 | 30.25 | Select |
| Berlin Trip | 2,050.00 | 3.75 | 2,053.75 | 3.13 | 2,050.63 | Select |
| Guitar | 200.00 | .00 | 200.00 | .00 | 200.00 | Select |
| School Trip to Glendalough | 100.00 | 2.25 | 102.25 | 3.13 | 99.13 | Select |
| Tour to Dublin | 100.00 | -.33 | 99.68 | 1.88 | 97.80 | Select |
| Tour to Glendalough | 75.00 | 1.11 | 76.11 | 1.50 | 74.61 | Select |
| Transition Year - ski trip | 800.00 | .00 | 200.00 | .00 | 200.00 | Select |
| Voluntary Contribution - Non-Fixed Amount | 50.00 | 1.18 | 51.18 | .63 | 50.55 | Select |

**NOTES**

## 6.6 Payments by Fee Type

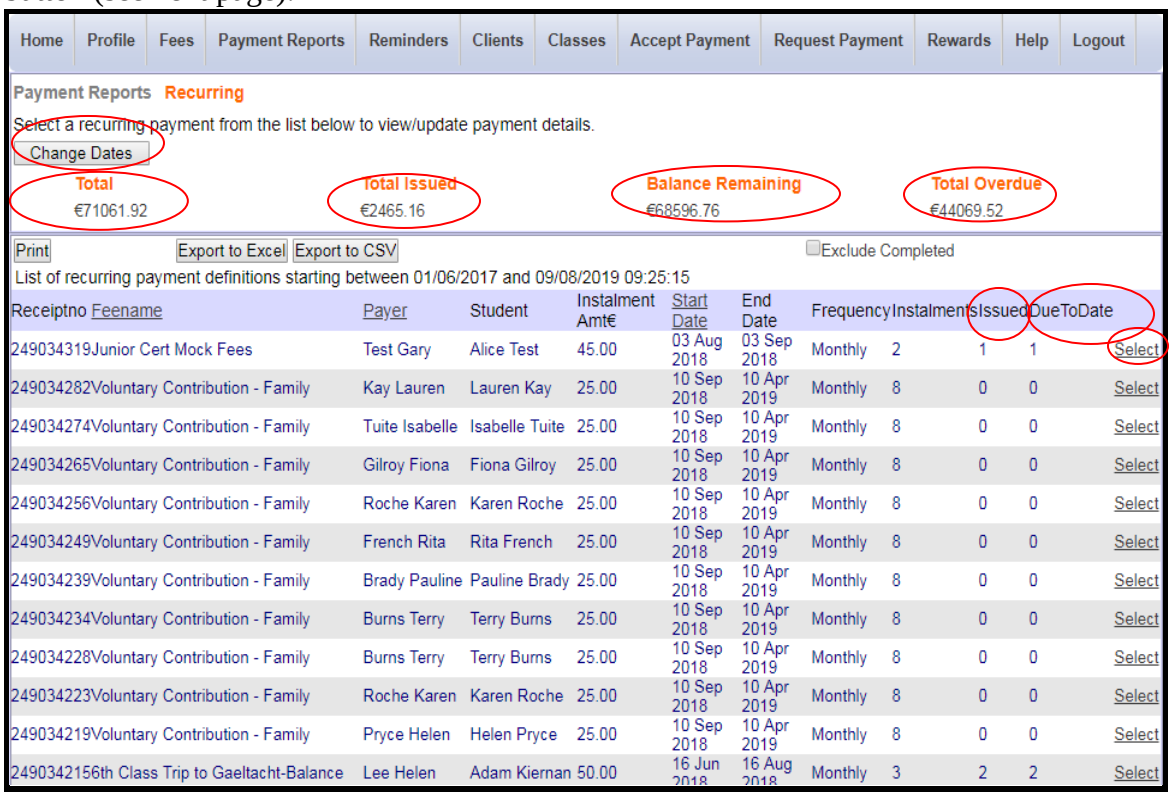
Select this report to view all payments summarised by Fee Type. You can drill down further to see details of the individual payments by clicking on the **Select** button.




**NOTES**

## 6.7 Recurring Payments

Select this report to view all recurring payments that have been setup. It is important to ensure the number of instalments due to date equals the number of instalments issued. To drill down further to view details of a recurring payment click on the associated **Select** button (see next page).



Home | Profile | Fees | Payment Reports | Reminders | Clients | Classes | Accept Payment | Request Payment | Rewards | Help | Logout

Payment Reports Recurring

Select a recurring payment from the list below to view/update payment details.

Change Dates

| Total | Total Issued | Balance Remaining | Total Overdue |
|---|---|---|---|
| €71061.92 | €2465.16 | €68596.76 | €44069.52 |

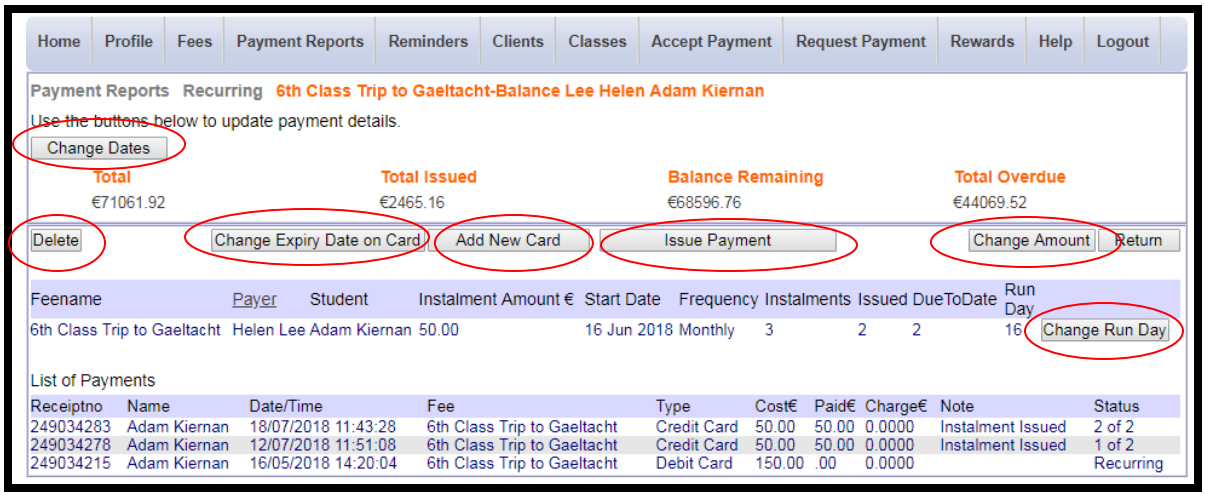
Print | Export to Excel | Export to CSV | Exclude Completed

List of recurring payment definitions starting between 01/06/2017 and 09/08/2019 09:25:15

| Receiptno | Feename | Payer | Student | Instalment Amt€ | Start Date | End Date | Frequency | Instalments | Issued | DueToDate | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 249034319 | Junior Cert Mock Fees | Test Gary | Alice Test | 45.00 | 03 Aug 2018 | 03 Sep 2018 | Monthly | 2 | 1 | 1 | Select |
| 249034282 | Voluntary Contribution - Family | Kay Lauren | Lauren Kay | 25.00 | 10 Sep 2018 | 10 Apr 2019 | Monthly | 8 | 0 | 0 | Select |
| 249034274 | Voluntary Contribution - Family | Tuite Isabelle | Isabelle Tuite | 25.00 | 10 Sep 2018 | 10 Apr 2019 | Monthly | 8 | 0 | 0 | Select |
| 249034265 | Voluntary Contribution - Family | Gilroy Fiona | Fiona Gilroy | 25.00 | 10 Sep 2018 | 10 Apr 2019 | Monthly | 8 | 0 | 0 | Select |
| 249034256 | Voluntary Contribution - Family | Roche Karen | Karen Roche | 25.00 | 10 Sep 2018 | 10 Apr 2019 | Monthly | 8 | 0 | 0 | Select |
| 249034249 | Voluntary Contribution - Family | French Rita | Rita French | 25.00 | 10 Sep 2018 | 10 Apr 2019 | Monthly | 8 | 0 | 0 | Select |
| 249034239 | Voluntary Contribution - Family | Brady Pauline | Pauline Brady | 25.00 | 10 Sep 2018 | 10 Apr 2019 | Monthly | 8 | 0 | 0 | Select |
| 249034234 | Voluntary Contribution - Family | Burns Terry | Terry Burns | 25.00 | 10 Sep 2018 | 10 Apr 2019 | Monthly | 8 | 0 | 0 | Select |
| 249034228 | Voluntary Contribution - Family | Burns Terry | Terry Burns | 25.00 | 10 Sep 2018 | 10 Apr 2019 | Monthly | 8 | 0 | 0 | Select |
| 249034223 | Voluntary Contribution - Family | Roche Karen | Karen Roche | 25.00 | 10 Sep 2018 | 10 Apr 2019 | Monthly | 8 | 0 | 0 | Select |
| 249034219 | Voluntary Contribution - Family | Pryce Helen | Helen Pryce | 25.00 | 10 Sep 2018 | 10 Apr 2019 | Monthly | 8 | 0 | 0 | Select |
| 249034215 | 6th Class Trip to Gaeltacht-Balance | Lee Helen | Adam Kiernan | 50.00 | 16 Jun 2018 | 16 Aug 2018 | Monthly | 3 | 2 | 2 | Select |

**NOTES**

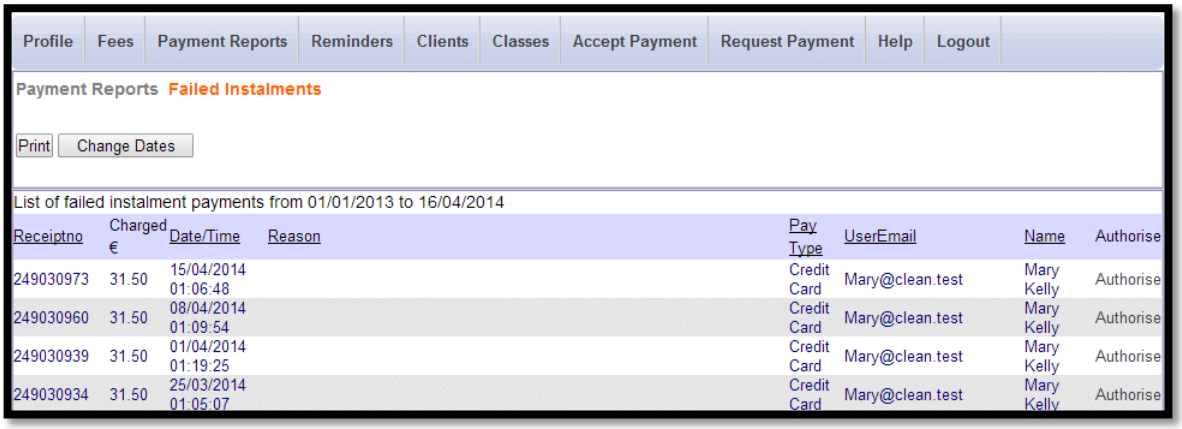
When a recurring payment is selected further details are displayed and various facilities are available to maintain the recurring payment….




**NOTES**

## 6.8 Failed Payments/Failed Instalments

When a payment/instalment has failed you can view details of this failure as shown in the payment reports, **Failed/Deleted** and **Failed Instalments.**




| Receiptno | Charged € | Date/Time | Reason | Pay Type | UserEmail | Name | Authorise |
|---|---|---|---|---|---|---|---|
| 249030973 | 31.50 | 15/04/2014 01:06:48 | | Credit Card | Mary@clean.test | Mary Kelly | Authorise |
| 249030960 | 31.50 | 08/04/2014 01:09:54 | | Credit Card | Mary@clean.test | Mary Kelly | Authorise |
| 249030939 | 31.50 | 01/04/2014 01:19:25 | | Credit Card | Mary@clean.test | Mary Kelly | Authorise |
| 249030934 | 31.50 | 25/03/2014 01:05:07 | | Credit Card | Mary@clean.test | Mary Kelly | Authorise |

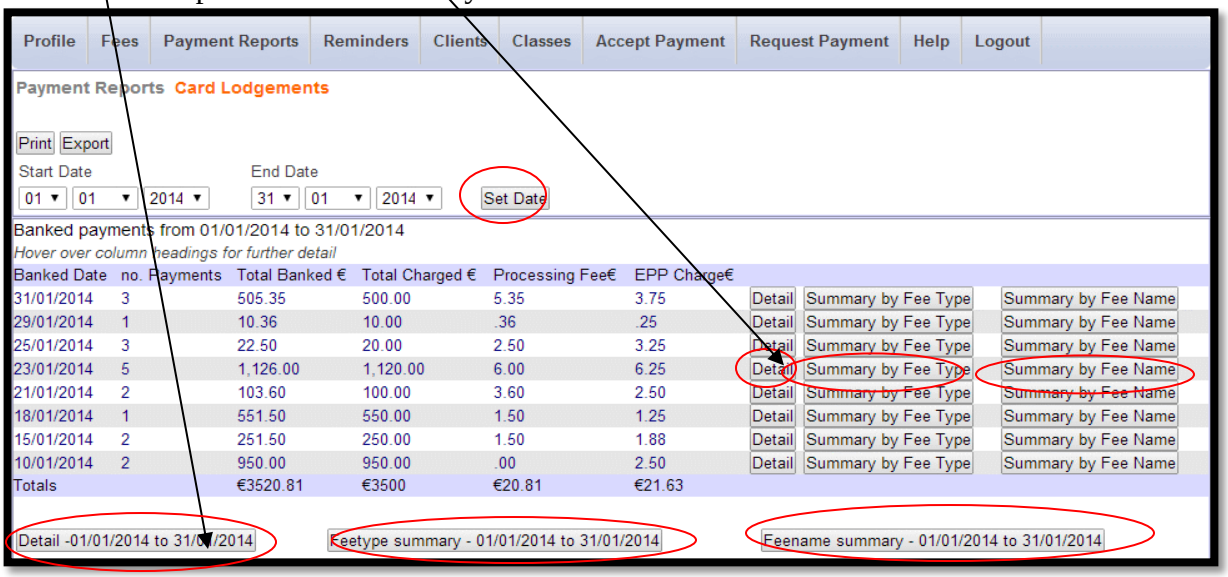
**NOTES**

## 6.9 Bank/Accounts Package Reconciliation – Card Lodgements Report

This report can be used to reconcile a bank statement.
You can reconcile payments over a specific period or a specific month using the **Change Dates** and **Monthly Summary** buttons.

### 6.9.1 Reconciliation of card lodgements for a specific period

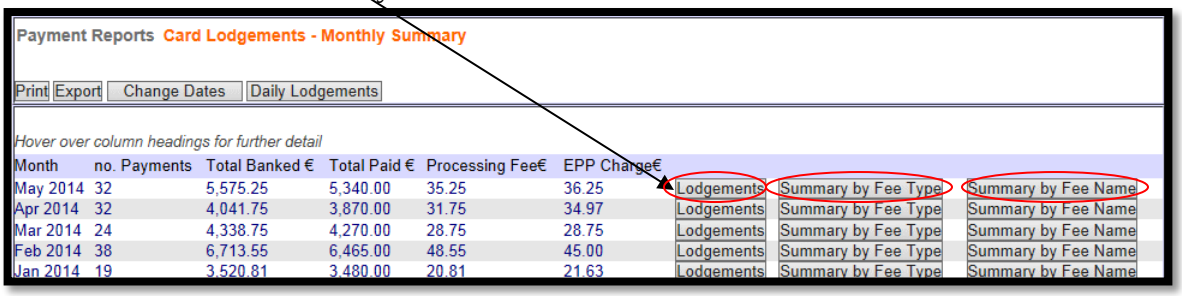
- Use **Change Dates** to set the date to the required period.
- Drill down to view more detail for a **particular day** by selecting …
  - **Detail –** for a general breakdown of payments made on this day.
  - **Summary by Fee Type** – for a breakdown of payments made on this day summarised by fee type.
  - **Summary by Fee Name** – for a breakdown of payments made on this day summarised by Fee Name.
- Drill down to view more detail for the specified **period** by selecting …
  - **Detail –** for a general breakdown of payments during this period.
  - **Summary by Fee Type** – for a breakdown of payments made during this period summarised by fee type.
  - **Summary by Fee Name** – for a breakdown of payments made during this period summarised by Fee Name.




**NOTES**

### 6.9.2 Reconciliation of monthly card lodgements

- Click **Monthly Summary** to get a Total Card Lodgements Summary per month.
- Drill down to view more detail for a **particular month** by selecting …
  - **Lodgements –** for a breakdown of lodgements for this month.
  - **Summary by Fee Type** – for a breakdown of lodgements for this month summarised by fee type.
  - **Summary by Fee Name** – for a breakdown of lodgements for this month summarized by Fee Name.

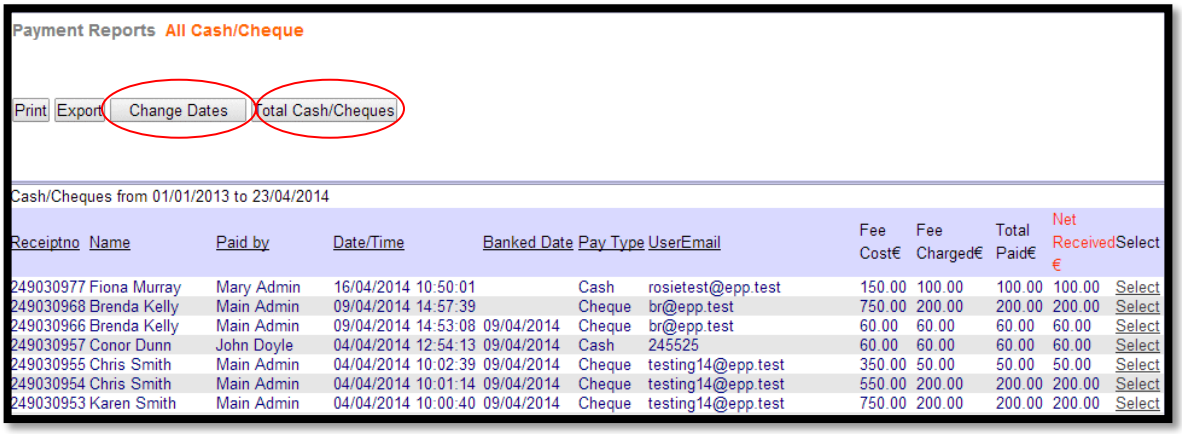



**NOTES**

## 6.10 Bank Reconciliation – All Cash/Cheque and Cash/Cheque Lodgements Reports

If you record cash and cheque payments using Easy Payments Plus, you will need to do the following in order to be able to reconcile your bank statements with the system's reports:

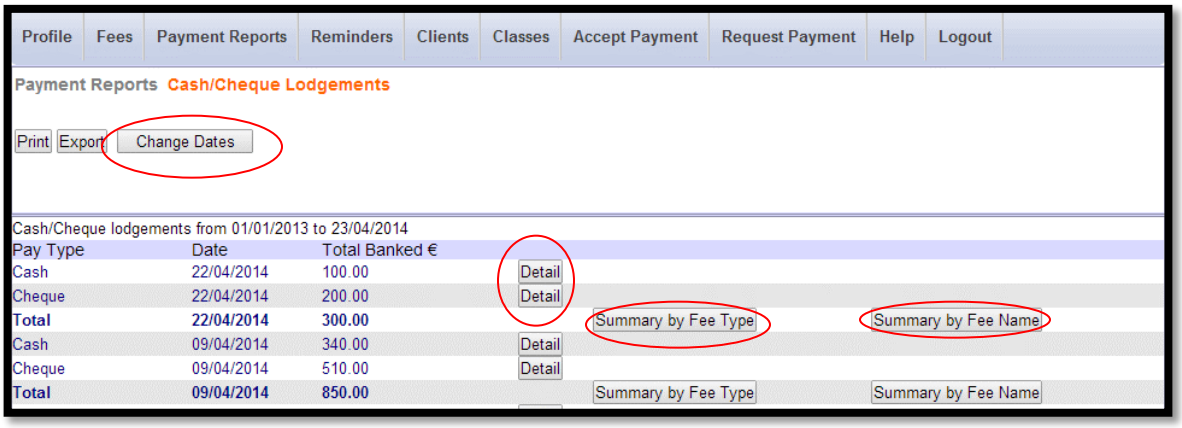
- **All Cash/Cheques -** On the day you are lodging cash/cheques to the school's bank account ….
    - From the Payment Reports menu, select the **All Cash/Cheque** report.
    - Click on the **Total Cash/Cheques** button.




| Receiptno | Name | Paid by | Date/Time | Banked Date | Pay Type | UserEmail | Fee Cost€ | Fee Charged€ | Total Paid€ | Net Received € | Select |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 249030977 | Fiona Murray | Mary Admin | 16/04/2014 10:50:01 | | Cash | rosietest@epp.test | 150.00 | 100.00 | 100.00 | 100.00 | Select |
| 249030968 | Brenda Kelly | Main Admin | 09/04/2014 14:57:39 | | Cheque | br@epp.test | 750.00 | 200.00 | 200.00 | 200.00 | Select |
| 249030966 | Brenda Kelly | Main Admin | 09/04/2014 14:53:08 | 09/04/2014 | Cheque | br@epp.test | 60.00 | 60.00 | 60.00 | 60.00 | Select |
| 249030957 | Conor Dunn | John Doyle | 04/04/2014 12:54:13 | 09/04/2014 | Cash | 245525 | 60.00 | 60.00 | 60.00 | 60.00 | Select |
| 249030955 | Chris Smith | Main Admin | 04/04/2014 10:02:39 | 09/04/2014 | Cheque | testing14@epp.test | 350.00 | 50.00 | 50.00 | 50.00 | Select |
| 249030954 | Chris Smith | Main Admin | 04/04/2014 10:01:14 | 09/04/2014 | Cheque | testing14@epp.test | 550.00 | 200.00 | 200.00 | 200.00 | Select |
| 249030953 | Karen Smith | Main Admin | 04/04/2014 10:00:40 | 09/04/2014 | Cheque | testing14@epp.test | 750.00 | 200.00 | 200.00 | 200.00 | Select |

**NOTES**

- **Cash/Cheques Lodgements -** On the day you are reconciling your cash/cheque totals on your bank statement with the system's reports ….
    - From the Payment reports menu, select the **Cash/Cheque** lodgement report.
    - Set the date to the appropriate period.
    - Drill down to more specific detail as described in the previous section.



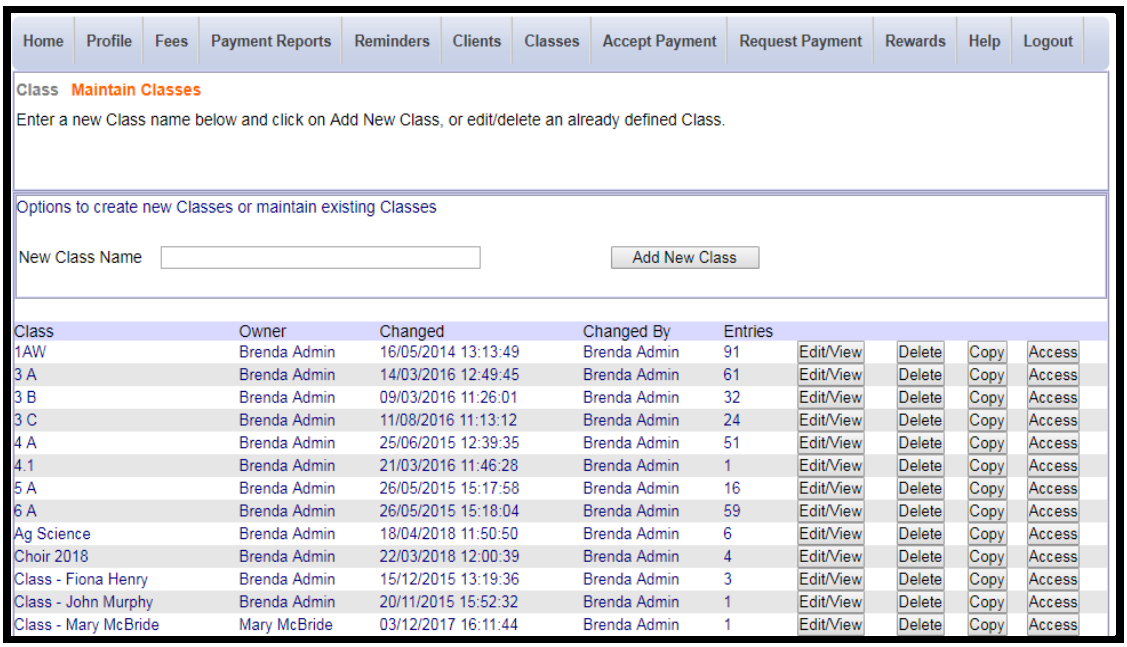

**NOTES**

# 7 Classes→Maintenance and Reports

## *7.1 Maintain Classes*

This option allows you to maintain your classes that are populated on your database according to the school data you provide on a yearly basis.
You can:

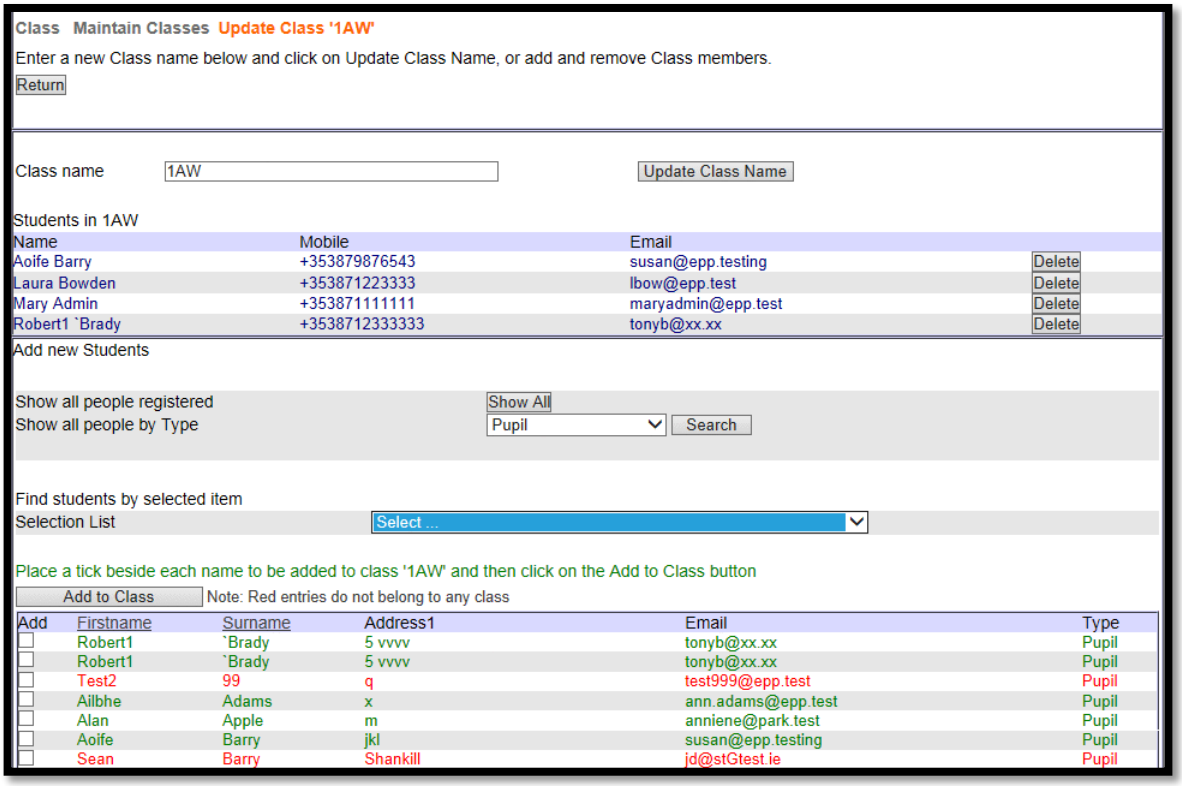
- edit or view pupils in  a class,
- delete a class,
- copy a class and rename it,
- restrict access to this class to certain administrators.




| Class | Owner | Changed | Changed By | Entries | | | | |
|---|---|---|---|---|---|---|---|---|
| 1AW | Brenda Admin | 16/05/2014 13:13:49 | Brenda Admin | 91 | Edit/View | Delete | Copy | Access |
| 3 A | Brenda Admin | 14/03/2016 12:49:45 | Brenda Admin | 61 | Edit/View | Delete | Copy | Access |
| 3 B | Brenda Admin | 09/03/2016 11:26:01 | Brenda Admin | 32 | Edit/View | Delete | Copy | Access |
| 3 C | Brenda Admin | 11/08/2016 11:13:12 | Brenda Admin | 24 | Edit/View | Delete | Copy | Access |
| 4 A | Brenda Admin | 25/06/2015 12:39:35 | Brenda Admin | 51 | Edit/View | Delete | Copy | Access |
| 4.1 | Brenda Admin | 21/03/2016 11:46:28 | Brenda Admin | 1 | Edit/View | Delete | Copy | Access |
| 5 A | Brenda Admin | 26/05/2015 15:17:58 | Brenda Admin | 16 | Edit/View | Delete | Copy | Access |
| 6 A | Brenda Admin | 26/05/2015 15:18:04 | Brenda Admin | 59 | Edit/View | Delete | Copy | Access |
| Ag Science | Brenda Admin | 18/04/2018 11:50:50 | Brenda Admin | 6 | Edit/View | Delete | Copy | Access |
| Choir 2018 | Brenda Admin | 22/03/2018 12:00:39 | Brenda Admin | 4 | Edit/View | Delete | Copy | Access |
| Class - Fiona Henry | Brenda Admin | 15/12/2015 13:19:36 | Brenda Admin | 3 | Edit/View | Delete | Copy | Access |
| Class - John Murphy | Brenda Admin | 20/11/2015 15:52:32 | Brenda Admin | 1 | Edit/View | Delete | Copy | Access |
| Class - Mary McBride | Mary McBride | 03/12/2017 16:11:44 | Brenda Admin | 1 | Edit/View | Delete | Copy | Access |

Click on **Edit/View**:

- The name of the class can be updated.
- The pupils in the class are displayed and can be deleted if required.
- You can refine your search for pupils (e.g., just search for 1st years).
- Tick **Add** beside a pupil's name to add to the selected class.

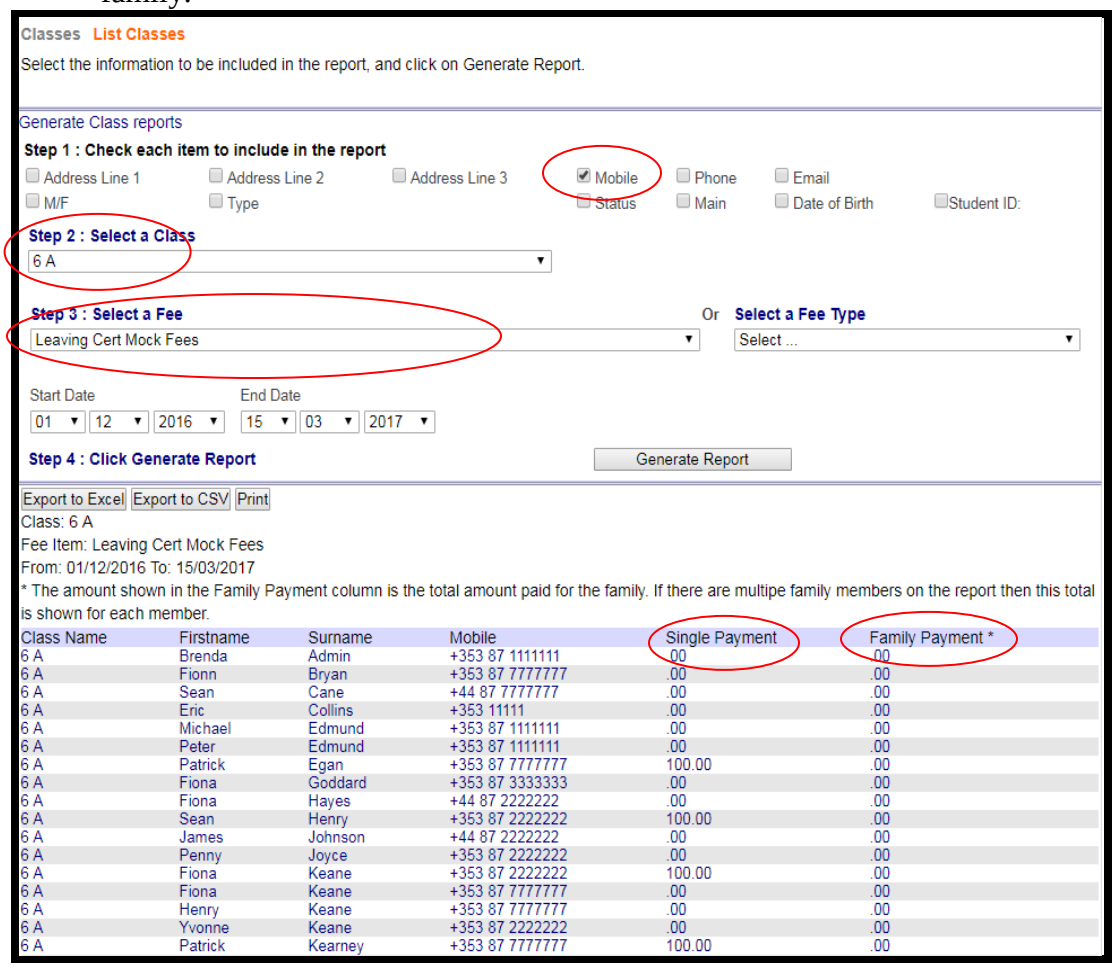



**YOUR NOTES/QUESTIONS**

## *7.2 Class Reports*

Class reports can be generated as follows …

- Select any required data to be included in the report (e.g., contact number).
- Select the relevant class.
- Select the relevant fee.
- Specify a start and end date.
- Click on **Generate Report** to view all pupils in the selected class who have **paid/not paid** for the selected fee within the specified time-frame.
- The report will show if the payment is relevant to the single pupil or the pupil's family.



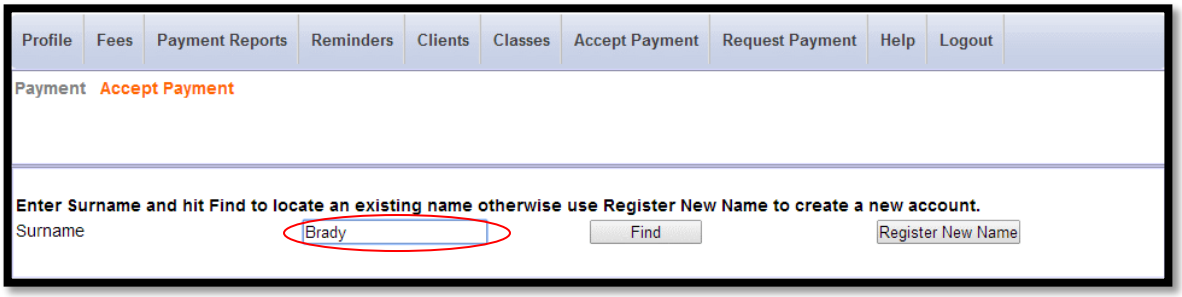

| Class Name | Firstname | Surname | Mobile | Single Payment | Family Payment * |
|---|---|---|---|---|---|
| 6 A | Brenda | Admin | +353 87 1111111 | .00 | .00 |
| 6 A | Fionn | Bryan | +353 87 7777777 | .00 | .00 |
| 6 A | Sean | Cane | +44 87 7777777 | .00 | .00 |
| 6 A | Eric | Collins | +353 11111 | .00 | .00 |
| 6 A | Michael | Edmund | +353 87 1111111 | .00 | .00 |
| 6 A | Peter | Edmund | +353 87 1111111 | .00 | .00 |
| 6 A | Patrick | Egan | +353 87 7777777 | 100.00 | .00 |
| 6 A | Fiona | Goddard | +353 87 3333333 | .00 | .00 |
| 6 A | Fiona | Hayes | +44 87 2222222 | .00 | .00 |
| 6 A | Sean | Henry | +353 87 2222222 | 100.00 | .00 |
| 6 A | James | Johnson | +44 87 2222222 | .00 | .00 |
| 6 A | Penny | Joyce | +353 87 2222222 | .00 | .00 |
| 6 A | Fiona | Keane | +353 87 2222222 | 100.00 | .00 |
| 6 A | Fiona | Keane | +353 87 7777777 | .00 | .00 |
| 6 A | Henry | Keane | +353 87 7777777 | .00 | .00 |
| 6 A | Yvonne | Keane | +353 87 2222222 | .00 | .00 |
| 6 A | Patrick | Kearney | +353 87 7777777 | 100.00 | .00 |

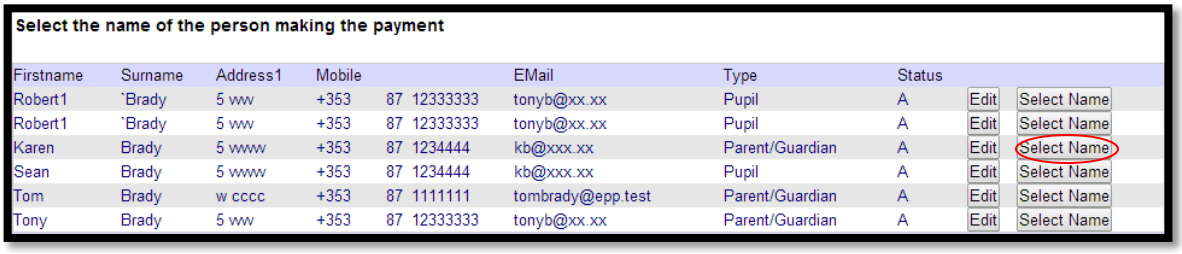
**YOUR NOTES/QUESTIONS**

# 8 Accept Payment

Easy Payments Plus can be used to accept cash, cheque or card payments from clients by following the steps outlined below ….

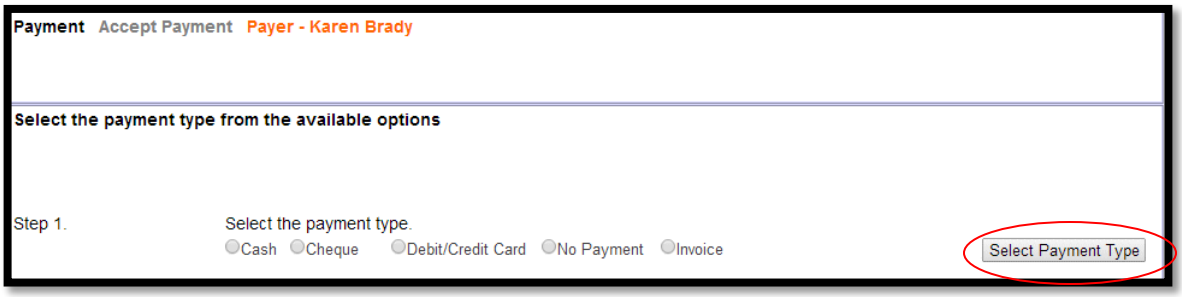
## *8.1 Step 1 - Find the relevant payer*



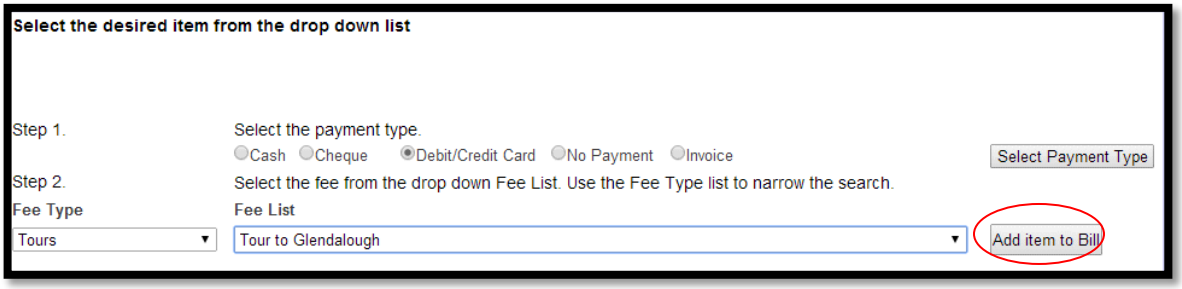

**NOTES**

## *8.2 Step 2 - Select the Payment Type*



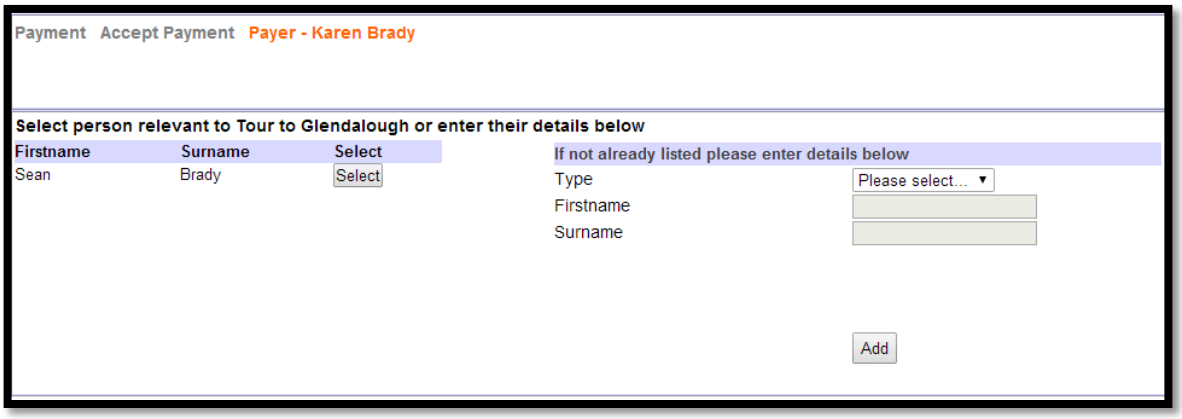

**NOTES**

## 8.3 Step 3 - Select item for payment and Add to Bill



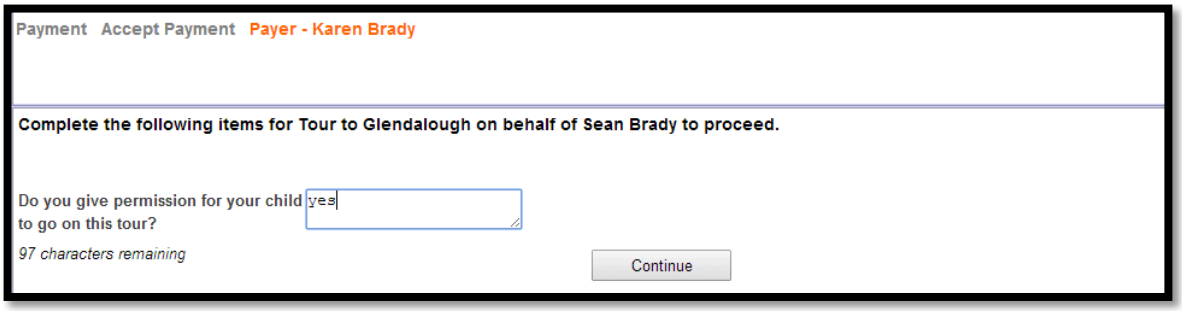

**NOTES**

## 8.4 Step 4 - Select attendee (if relevant)



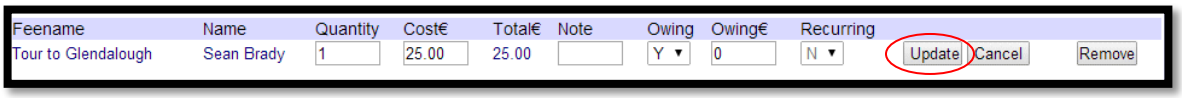

**NOTES**

## 8.5 Step 5 - Answer questions (if relevant)



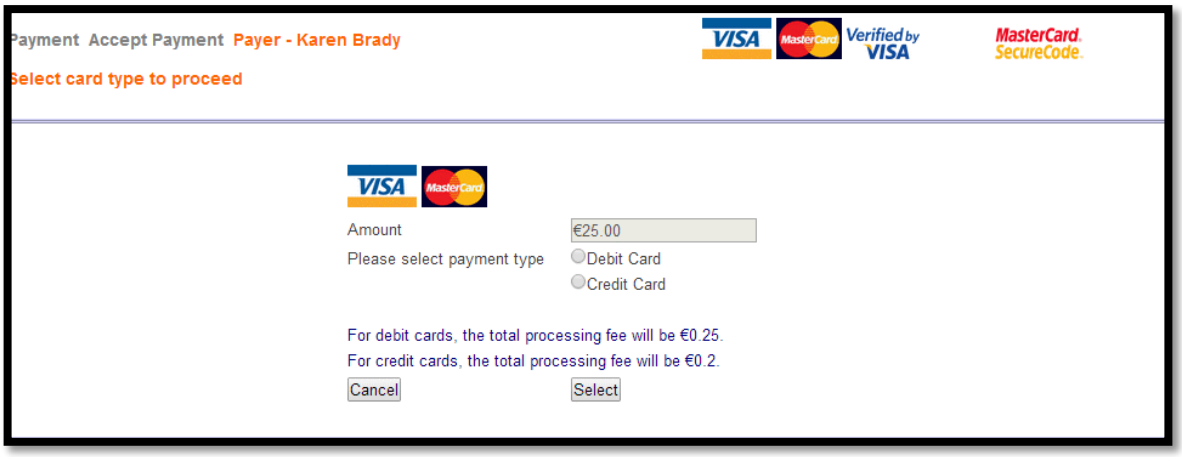

**NOTES**

## 8.6 Step 6 - Make any necessary changes (if relevant)



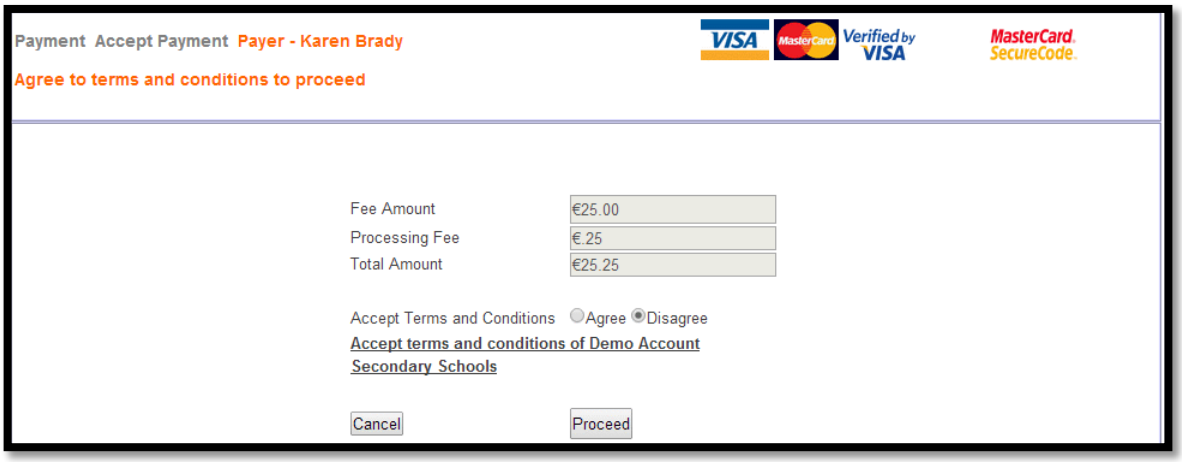

## *8.7 Step 7 - Pay bill*

## 8.8 Step 8 - Select Card Type (if payment is by card)




**NOTES**

## 8.9 Step 9 - Accept organisation's terms and conditions




## 8.10 Step 10 - Enter Card details

**NOTES**

## 8.11 Step 11 – Receipt is electronically emailed to the client

Printer Friendly Version

Copy of receipt sent to kb@xxx.xx

**Demo Account Secondary Schools**

Karen Brady
5 vvvvvv
bbbbbb

Co. Dublin

Receipt No:249031055
Payment date: 16/05/2014 11:14:20
Payer name:Karen Brady

| Fee Name | Unit Price€ | Quantity | Total Paid€ |
|---|---|---|---|
| Tour to Glendalough | 25.00 | 1 | 25.00 |

Processing fee €0.25

Total amount received €25.25 (Debit Card)

| First Name | Surname | Feename | |
|---|---|---|---|
| Sean | Brady | Tour to Glendalough | |
| | | Do you give permission for your child to go on this tour? | yes |

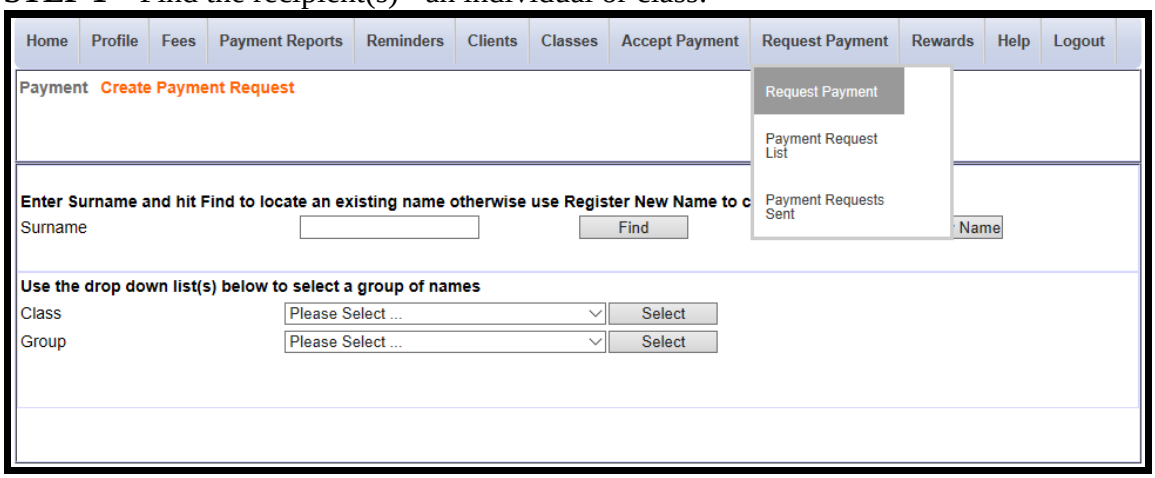
**NOTES**

# 9 Request Payment – can be paid by card or cash

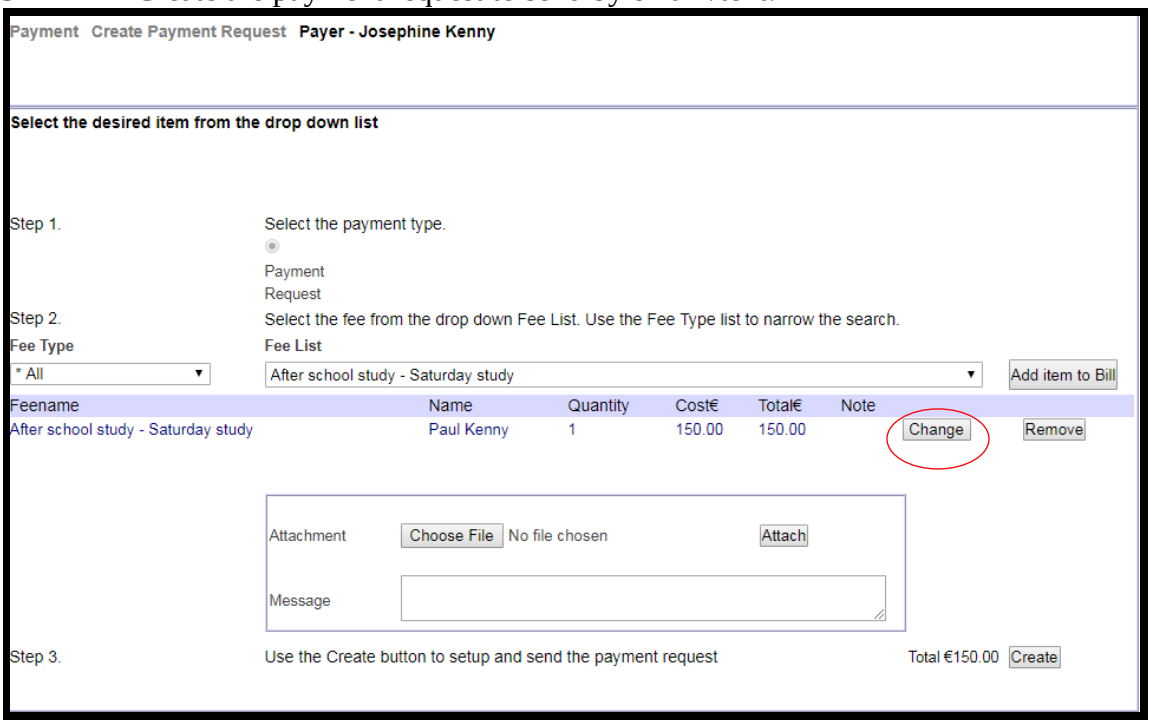
Easy Payments Plus can be used to request payments from parents by email and text. These requests can be paid:

- online by card
- OR by cash at their local payzone retail agent.

**STEP 1** – Find the recipient(s) - an individual or class:




**STEP 2** – Create the payment request to send by email /text:




**YOUR NOTES/QUESTIONS**

**STEP 3** – The parent receives a link to pay online by **card** OR they can print the barcode displayed on their emailed payment request and pay by **cash** at their local payzone outlet.

**Registered address details:** 32 The willow tree road Hayden
**Family ID:**N/A
**Mobile:** +353-87-1232222
**Email:** jkenny@xxx.xx

Dear Josephine Kenny

An amount of **€**150.00 is now due for payment to Demo Account Secondary Schools
Your reference no. is **249033151**

Click Pay Now to pay online using email address jkenny@xxx.xx

Or

Present this at your local Payzone outlet to complete your payment

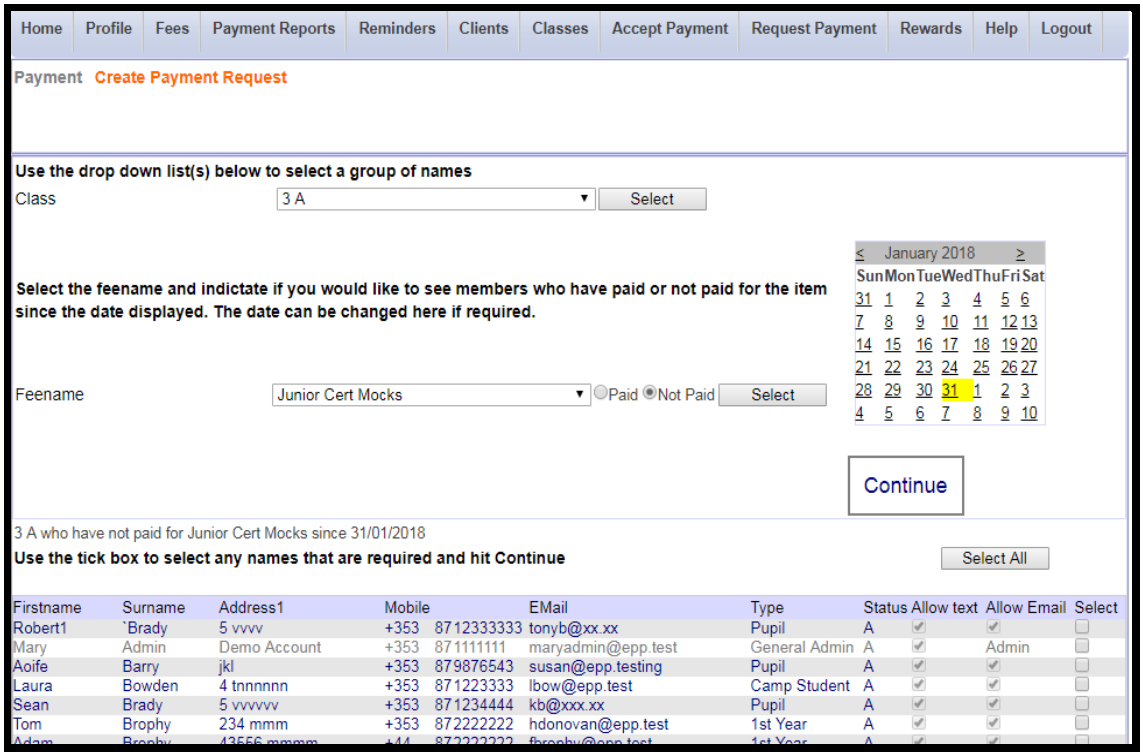
BARCODE

**Item(s)**
After school study - 5 days **Unit Price €**250.00 **Charged €**150.00 **Quantity** 1 **Total €**150.00
**Status** Unpaid

**Item Details**
After school study - 5 days
**Student name** Paul Kenny

**YOUR NOTES/QUESTIONS**

**PLEASE NOTE**: You can identify pupils in a class who have not paid for a specific fee by a certain date and then send these pupils a payment request. See screenshot below:

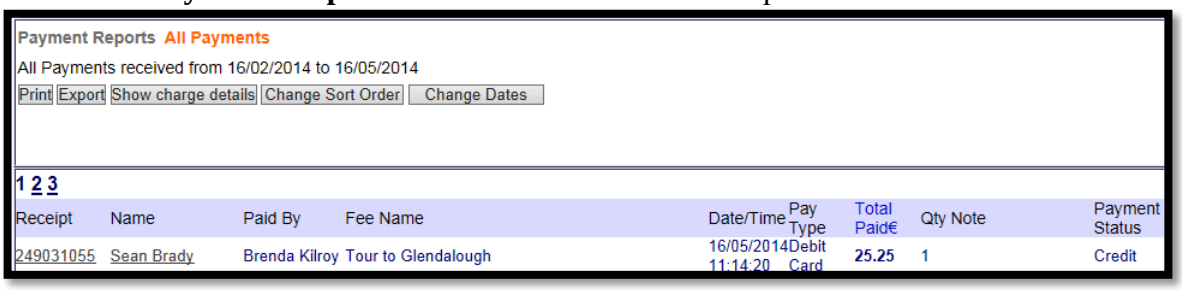



**YOUR NOTES/QUESTIONS**

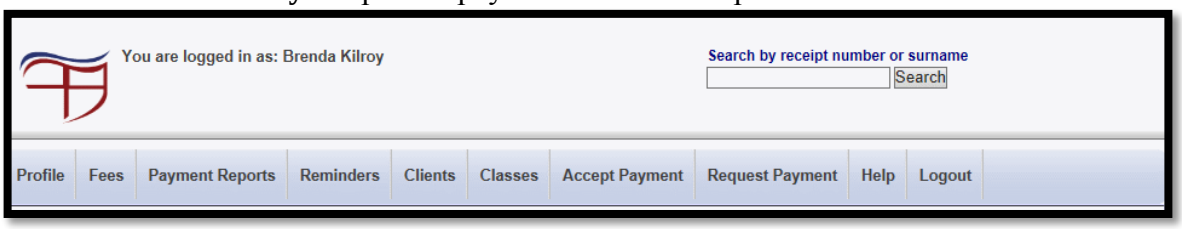
# 10 How to process a refund

You can process a refund with the payer's receipt number or surname using the **All Payments Report** or the **Search** facility.

- **All Payments Report –** select the underlined Receipt number or Name ….



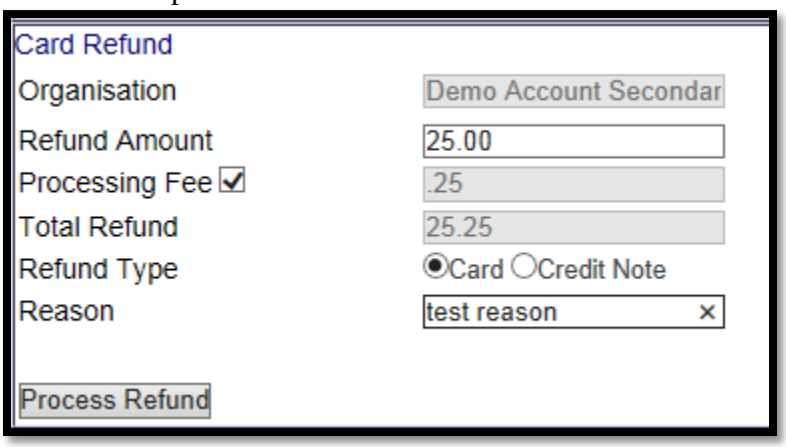

- **Search Facility –** input the payer's name or receipt number ….



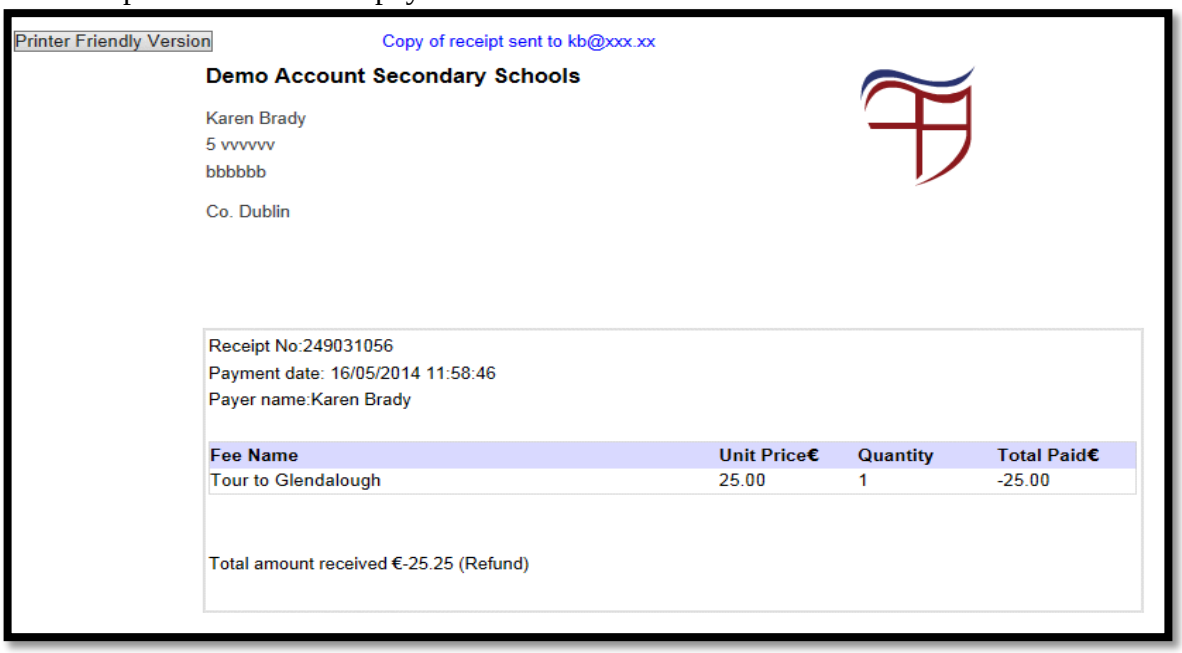

- In both cases the appropriate payment receipt is selected.
- Simply click on the **Refund** button to the right of the item to be refunded.
- Note: If all items on the receipt are to be refunded use **Refund Total Payment**.

**NOTES**

- Modify the headings below …..
  - **Refund Amount –** the full amount or a partial amount.
  - **Processing Fee –** leave ticked if the processing fee paid is to be included in the refund.
  - **Refund Type** – Select "Card"
  - **Reason** – input the reason for the refund.




- The receipt is emailed to the payer.

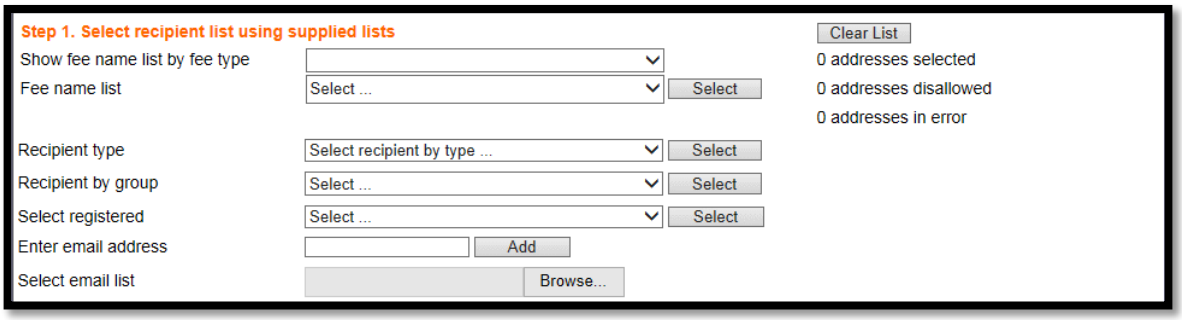



**NOTES**

# 11 Reminders by Email/Text

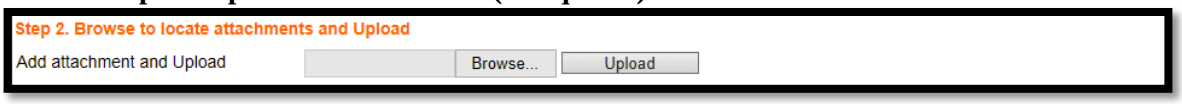
To send out reminders by email or text, please follow the steps below …

- Step 1 – Select recipient(s)



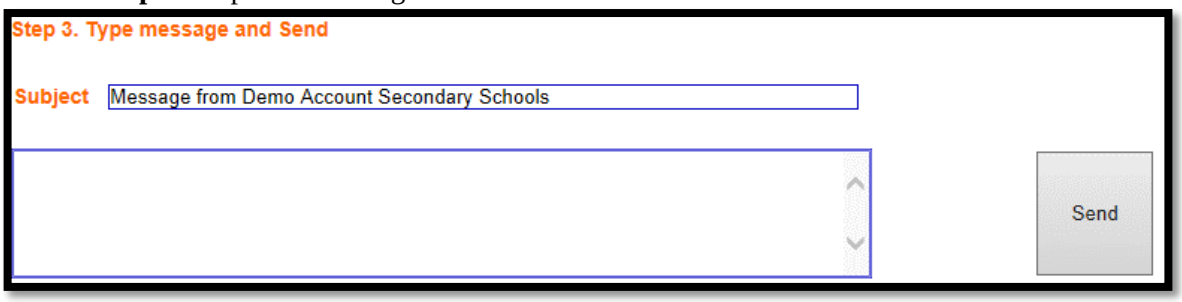

**NOTES**

- **Step 2 – Upload an attachment (if required)**




**NOTES**

- **Step 3 –** Input the message and SEND.




**NOTES**

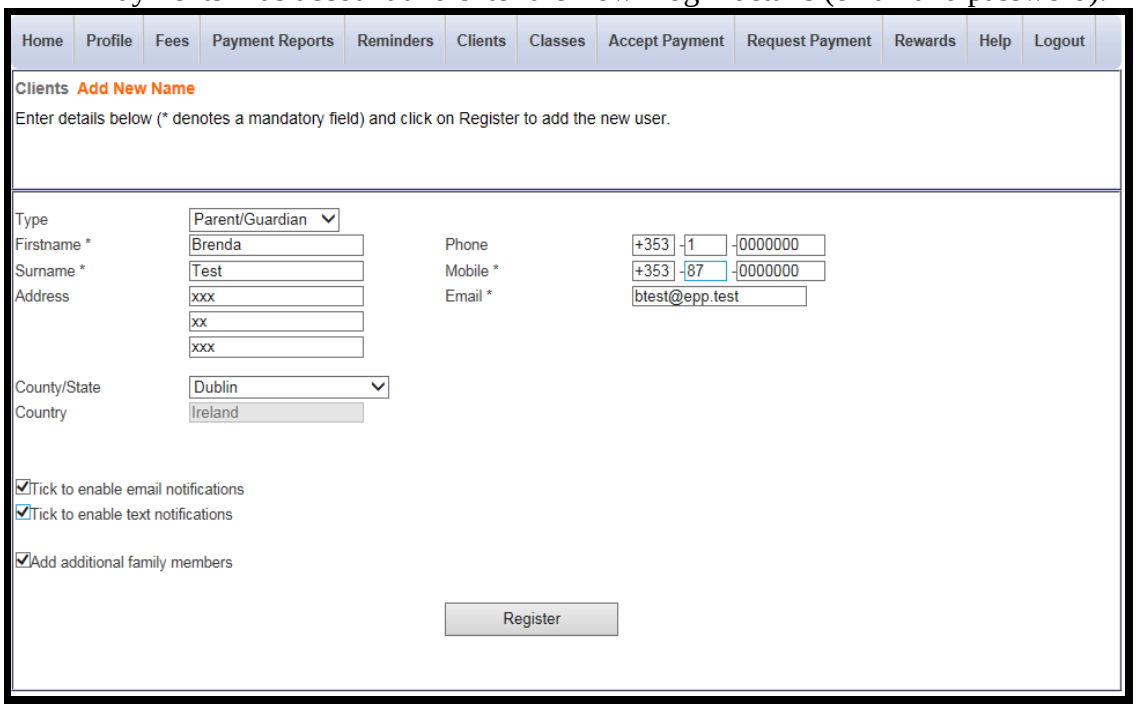
# 12 Your Client Database

You can add new pupils to your Easy Payments Plus (EPP) database.
You can also view and generate reports from your client database.

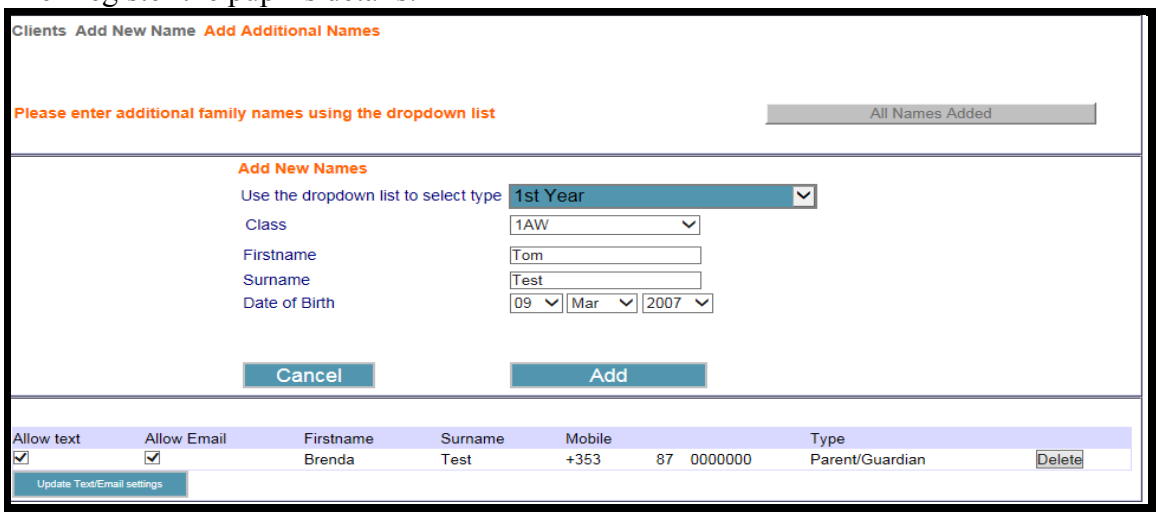
## *12.1 Add new pupils to your database*

At the start of each new academic year, you will provide EPP with your student data, which is then populated to your EPP database.
You can then add new students to this database during the year:

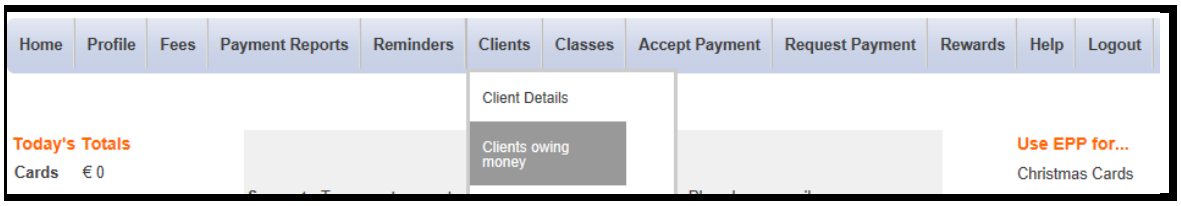
- Click on **Clients→Add New Name** and register the parent's details, followed by the pupil's details.
- Note: The parent will then receive an email requesting them to **activate** their Easy Payments Plus account and enter their own login details (email and password).




Then register the pupil's details:

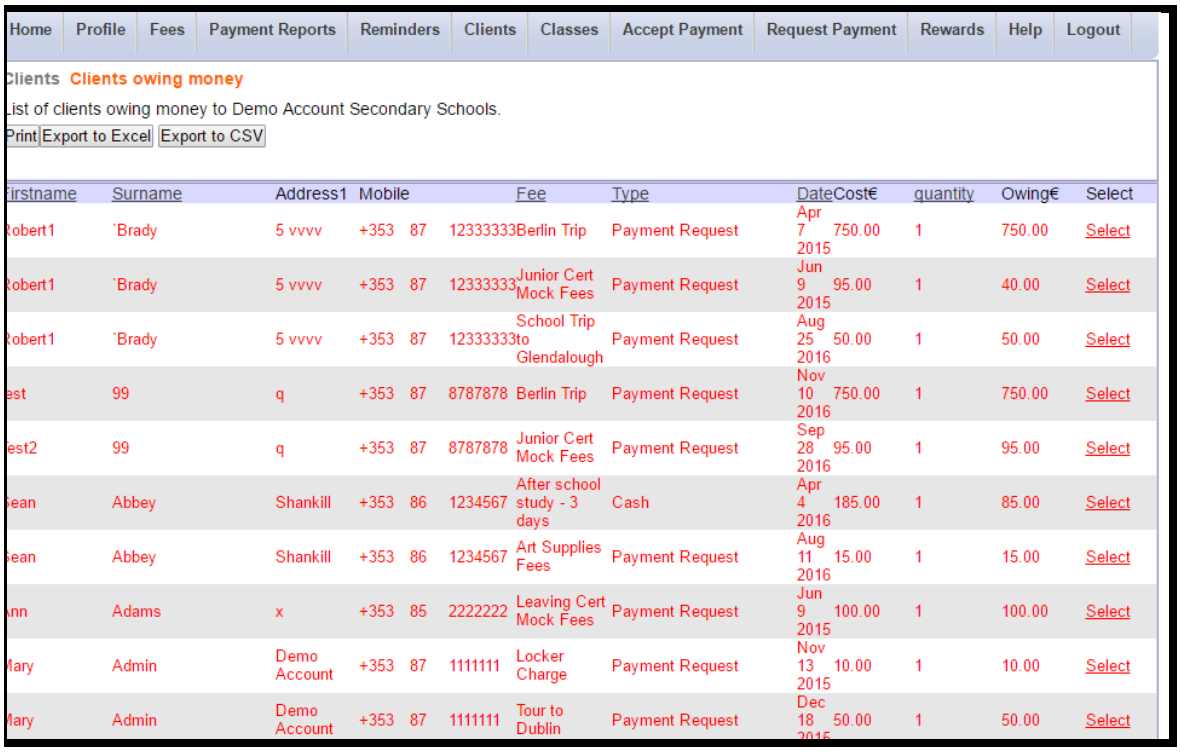


## *12.2 Clients Owing Money*




This list shows all clients owing money, for example:

- Clients who have received a payment request but have not yet paid.
- Clients from whom you have accepted a part payment and have not yet paid the owed balance.

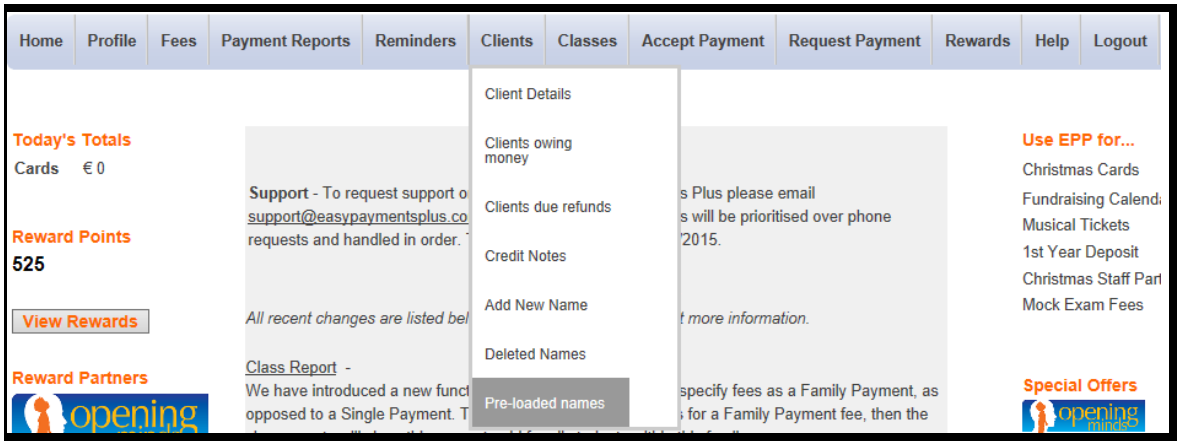


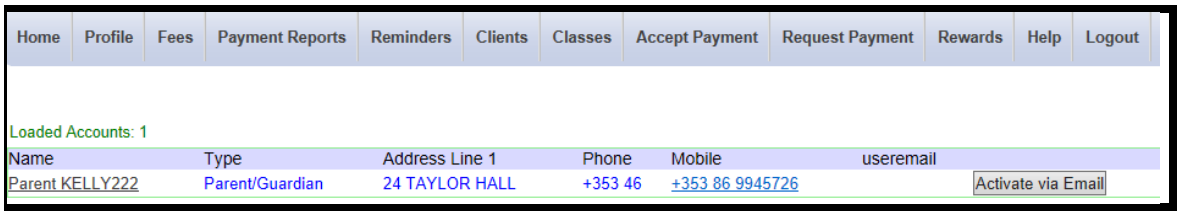

| irstname | Surname | Address1 | Mobile | Fee | Type | DateCost€ | quantity | Owing€ | Select |
|---|---|---|---|---|---|---|---|---|---|
| Robert1 | `Brady | 5 vvvv | +353 87 12333333 | Berlin Trip | Payment Request | Apr 7 2015 750.00 | 1 | 750.00 | Select |
| Robert1 | `Brady | 5 vvvv | +353 87 12333333 | Junior Cert Mock Fees | Payment Request | Jun 9 2015 95.00 | 1 | 40.00 | Select |
| Robert1 | `Brady | 5 vvvv | +353 87 12333333 | School Trip to Glendalough | Payment Request | Aug 25 2016 50.00 | 1 | 50.00 | Select |
| est | 99 | q | +353 87 8787878 | Berlin Trip | Payment Request | Nov 10 2016 750.00 | 1 | 750.00 | Select |
| est2 | 99 | q | +353 87 8787878 | Junior Cert Mock Fees | Payment Request | Sep 28 2016 95.00 | 1 | 95.00 | Select |
| ean | Abbey | Shankill | +353 86 1234567 | After school study - 3 days | Cash | Apr 4 2016 185.00 | 1 | 85.00 | Select |
| ean | Abbey | Shankill | +353 86 1234567 | Art Supplies Fees | Payment Request | Aug 11 2016 15.00 | 1 | 15.00 | Select |
| nn | Adams | x | +353 85 2222222 | Leaving Cert Mock Fees | Payment Request | Jun 9 2015 100.00 | 1 | 100.00 | Select |
| ary | Admin | Demo Account | +353 87 1111111 | Locker Charge | Payment Request | Nov 13 2015 10.00 | 1 | 10.00 | Select |
| ary | Admin | Demo Account | +353 87 1111111 | Tour to Dublin | Payment Request | Dec 18 50.00 | 1 | 50.00 | Select |

**YOUR NOTES/QUESTIONS**

## *12.3 Loaded Data*

You can view and manage all data that has been loaded to your Easy Payments Plus database. The next section describes how you can manually activate these loaded accounts.



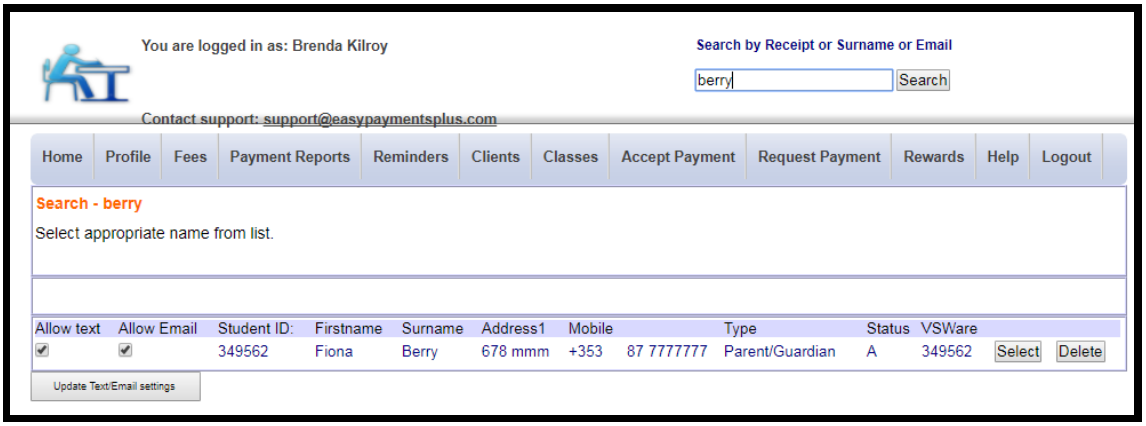




**YOUR NOTES/QUESTIONS**

# 13. Search Facility

This facility allows you to search by surname, receipt number or email for a parent/pupil and view or maintain all their data and payment history on the one screen.

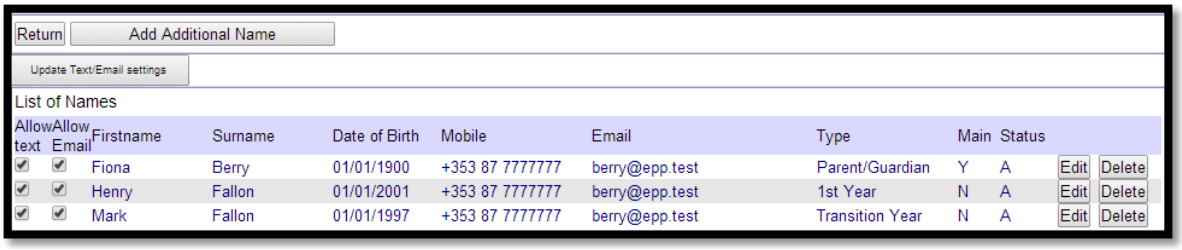
- Input the surname of either the parent or pupil and **Select**.




All data relevant to the selected user is displayed in three sections ….

**Section 1 – General Details**

- Click **Add Additional Name** to add another family member.
- Click **Edit** to edit the displayed data.
- Click **Delete** to delete a user.




**YOUR NOTES/QUESTIONS**

## Section 2 – Fee Details

- Click **Edit** to change any recorded answers to fees purchased.

Fee Details

| Fee | Name | Q1 | Q2 | Q3 | Item1 | Item2 | Item3 | |
|---|---|---|---|---|---|---|---|---|
| Paris Trip | Mark Fallon | hgfhgfh | fhgfgfh | | | | | Edit |
| School Trip to Glendalough | Henry Fallon | | | | | | | Edit |
| Transition Year - ski trip | Mark Fallon | yes | Mark Henry Fallon | | | | | Edit |
| Voluntary Contribution - Family | Fiona Berry | | | | | | | Edit |

**NOTES**

## Section 3 – Address Details

- Edit address details and click **Update Detail**

Address Details

Address: 678 mmm
mm
mm

Status: A

County: Co. Dublin

Display merge list

Update Detail

**NOTES**

## Section 4 – Payment Details

- **Select** a receipt to view further details of the payment (see screenshot below)….

List of Payments

| Receipt | Name | Paid By | Fee Name | Date/Time | Pay Type | Fee Cost€ | Fee Charged€ | Processing Fee€ | Total Paid€ | EPP Charge€ | Qty | Note | Payment Status | Select |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 249031050 | Mark Fallon | Mary Admin | Paris Trip | 15/05/2014 11:08:00 | Cash | 100.00 | 100.00 | .00 | 100.00 | .00 | 1 | 249031049 | Credit | Select |
| 249031049 | Mark Fallon | Mary Admin | Paris Trip | 15/05/2014 11:06:46 | Debit Card | 600.00 | 500.00 | 1.50 | 501.50 | 1.25 | 1 | 249031050 | Paid | Select |
| 249031048 | Henry Fallon | Mary Admin | School Trip to Glendalough | 15/05/2014 11:03:50 | Cash | 50.00 | 50.00 | .00 | 50.00 | .00 | 1 | | Credit | Select |
| 249031047 | Fiona Berry | Fiona Berry | Voluntary Contribution - Family | 15/05/2014 10:52:23 | Debit Card | 400.00 | 400.00 | .75 | 400.75 | .63 | 1 | | Credit | Select |
| 249031047 | Fiona Berry | Fiona Berry | Annie Musical - Concert Tickets | 15/05/2014 10:52:23 | Debit Card | 10.00 | 10.00 | .75 | 50.75 | .63 | 5 | | Credit | Select |
| 249031047 | Mark Fallon | Fiona Berry | Transition Year - ski trip | 15/05/2014 10:52:23 | Debit Card | 1,200.00 | 1,200.00 | .00 | .00 | .00 | 1 | | Recurring | Select |

- This screen enables you to:
  - **Refund** the payer
  - View and Email a **Copy of Receipt**

Search - berry  Select - Fiona Berry

Payment details for receipt no. 249031048

Return | Copy of Receipt | Refund Total Payment | Delete Payment

| Receipt | Name | Paid By | Fee Name | Date/Time | Pay Type | Fee Cost€ | Fee Charged€ | Processing Fee€ | Total Paid€ | EPP Charge€ | Qty | Payment Status | Refund |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 249031048 | Henry Fallon | Mary Admin | School Trip to Glendalough | 15/05/2014 11:03:50 | Cash | 50.00 | 50.00 | .00 | 50.00 | .00 | 1 | Credit | Refund |

| Receipt No | listno | Fee | First Name | Surname Name | Note | |
|---|---|---|---|---|---|---|
| 249031048 | 365926 | School Trip to Glendalough | Henry | Fallon | | Edit Note |

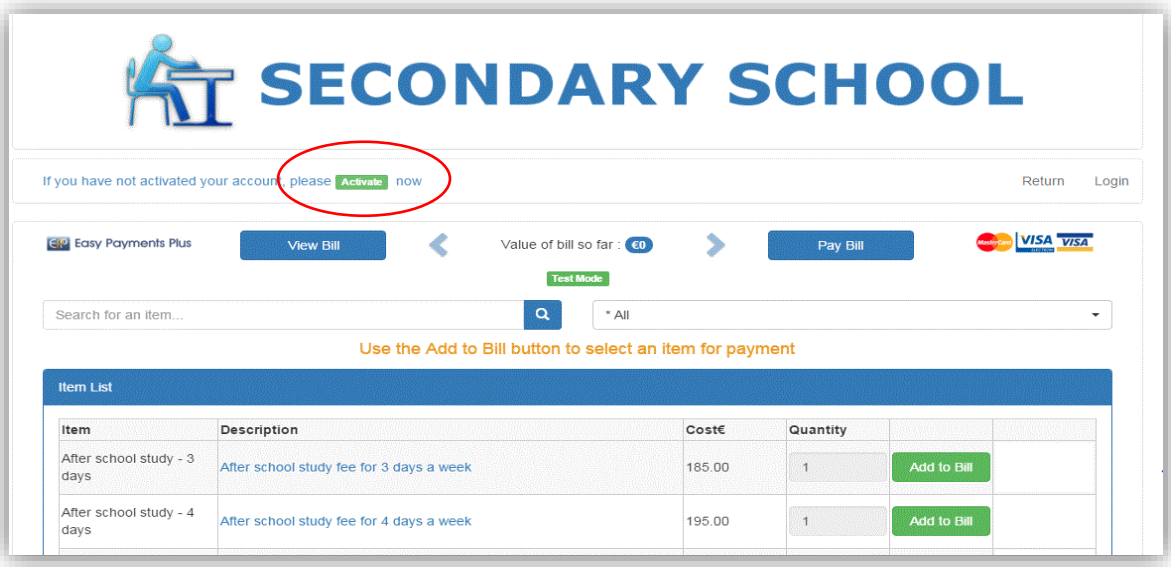
**NOTES**

# 14 Account Activation

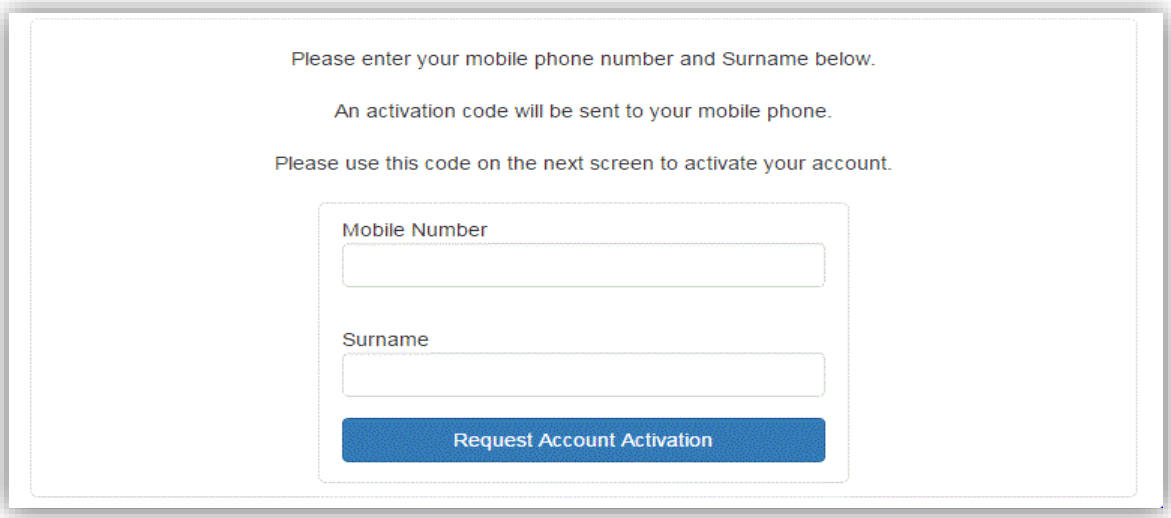
When a new parent is added to your Easy Payments Plus database, This section describes the simple steps involved in parents activating their account. It also outlines how school administrators can manage and support any activation issues that may arise.

## *14.1 How does a parent activate their account?*

1. Go to the school's website.
2. Click on **Activate** button.

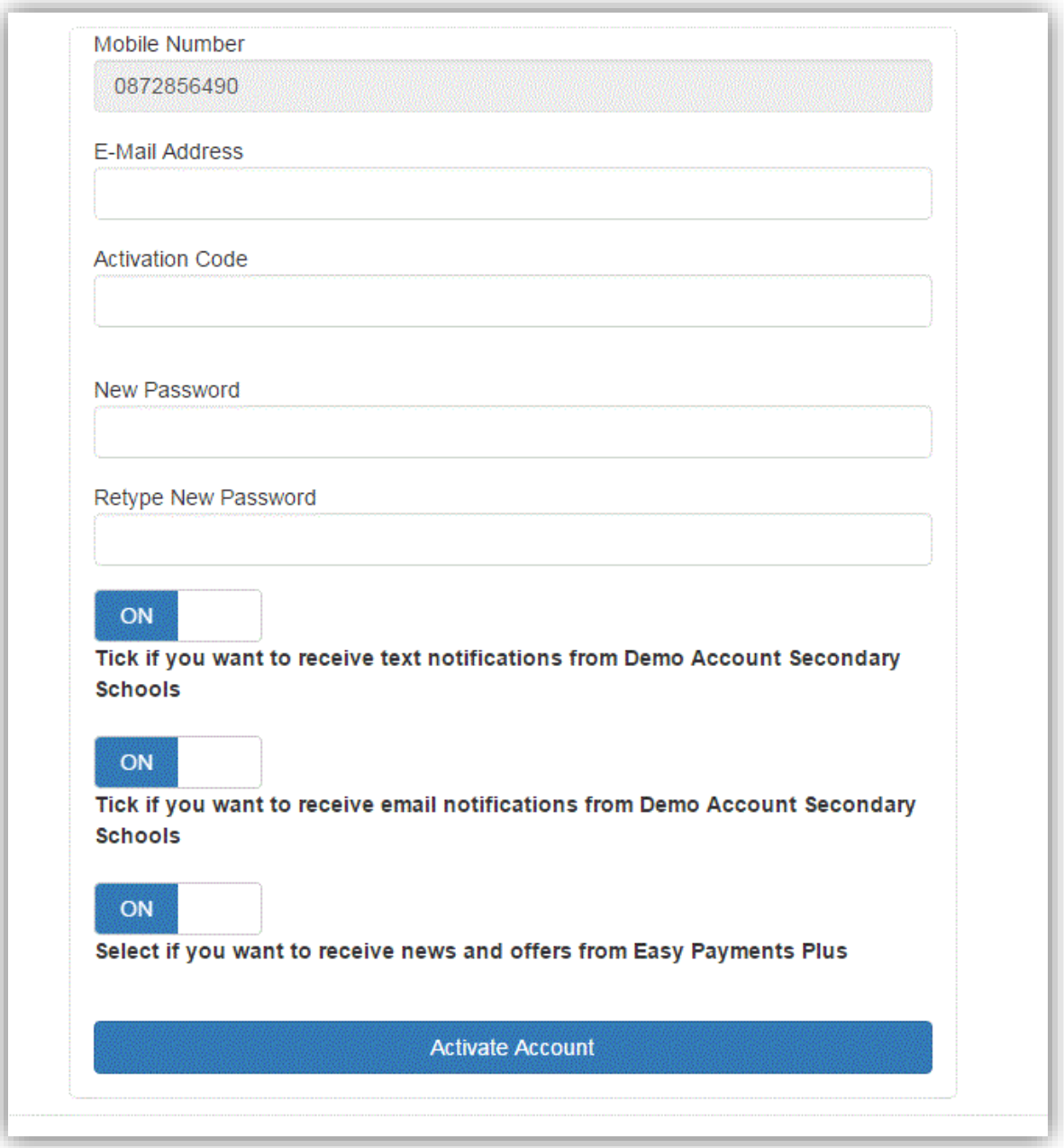



3. Input mobile number and surname (as per the school's records).




4. Easy Payments Plus will try to match the above data against the school's EPP database. If a match is successful, then the parent will be texted a code to their mobile phone.

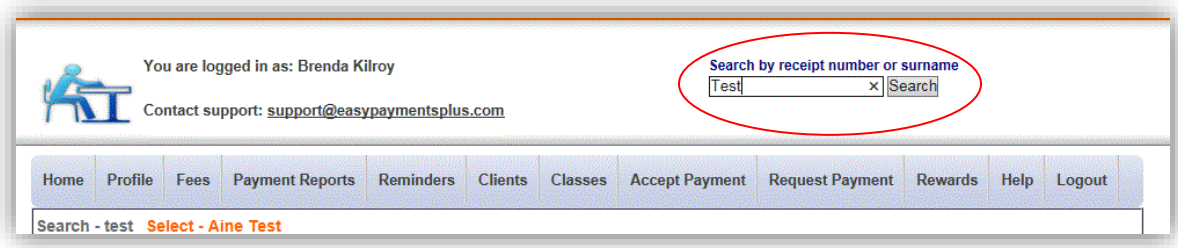
5. The user then completes their account activation by inputting the data on the screen below:



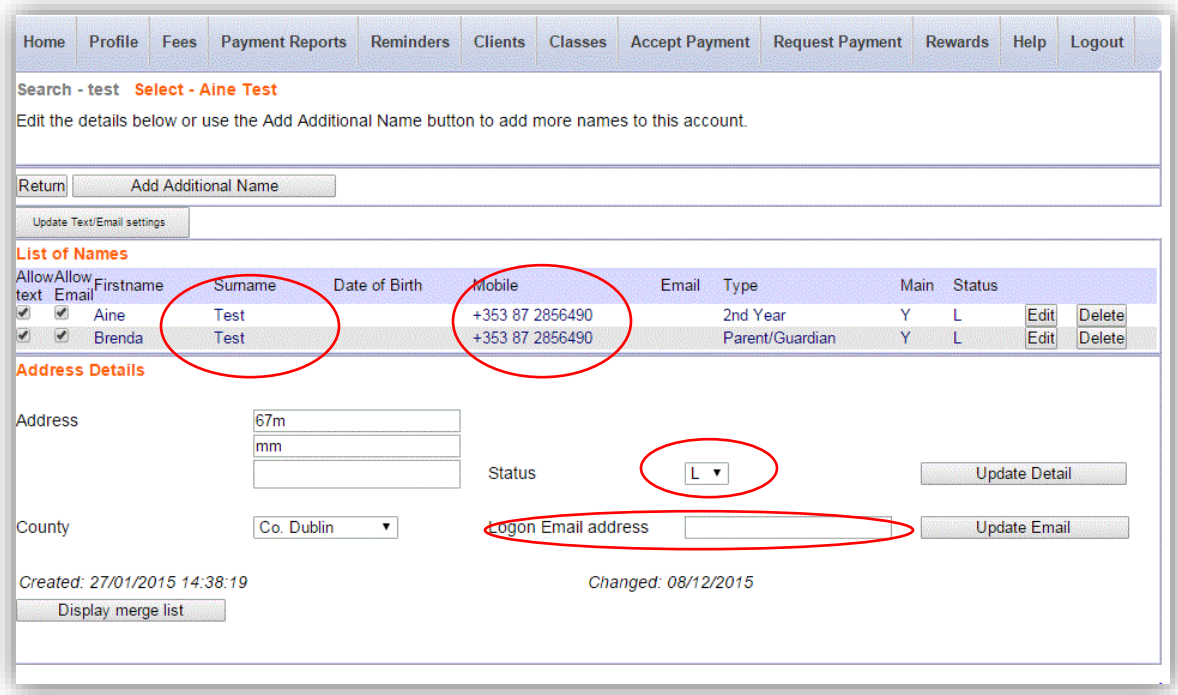
## *14.2 How can an administrator manage support calls regarding account activation?*

If a school receives a query from a parent regarding difficulty in activation their EPP account, please follow the steps below:

1. **SEARCH** for the parent's surname using the Search facility.



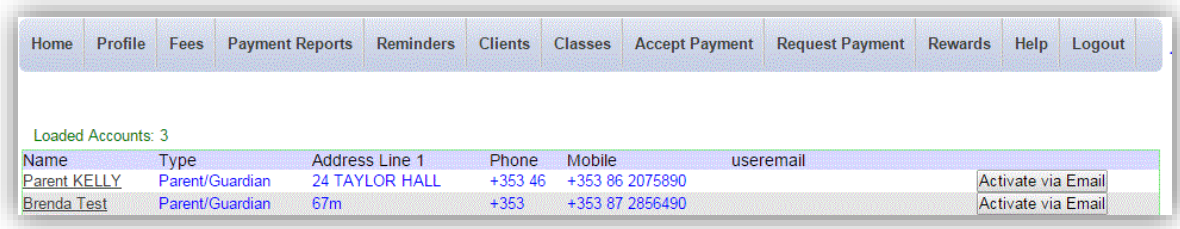

2. Check the mobile number and surname recorded on the system.
3. Confirm these exactly match what the parent is inputting during their activation.
4. Check the account has a status of **L** (for Loaded).



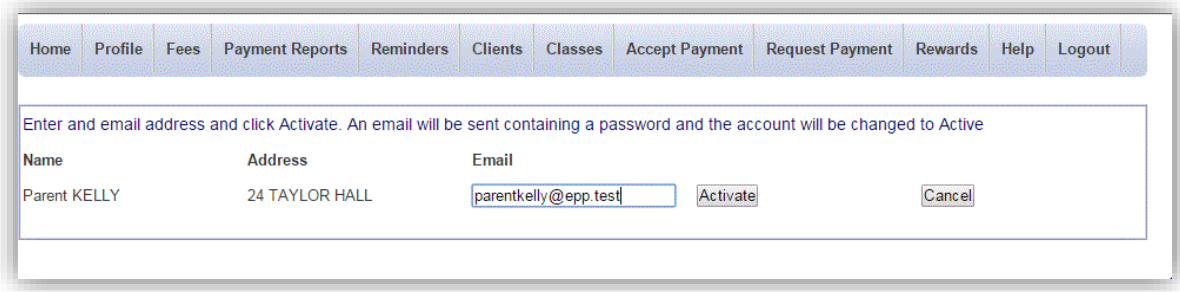
## *14.3 How can an administrator manually activate an EPP account?*

Follow the simple steps below to manually activate a parent's EPP account:

1. Click on Clients→Pre-Loaded Names




2. A list of all Loaded (not yet activated) parents is displayed in alphabetical order.
3. Click on **Activate via Email** to the right of the selected parent.
4. Input the relevant email address and click on **Activate.**




5. An email will be sent to this parent's email address requesting them to **set their password**. They can then simply then login with this email address and password.