



easy payments plus

Training Notebook for Schools

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1 Introduction

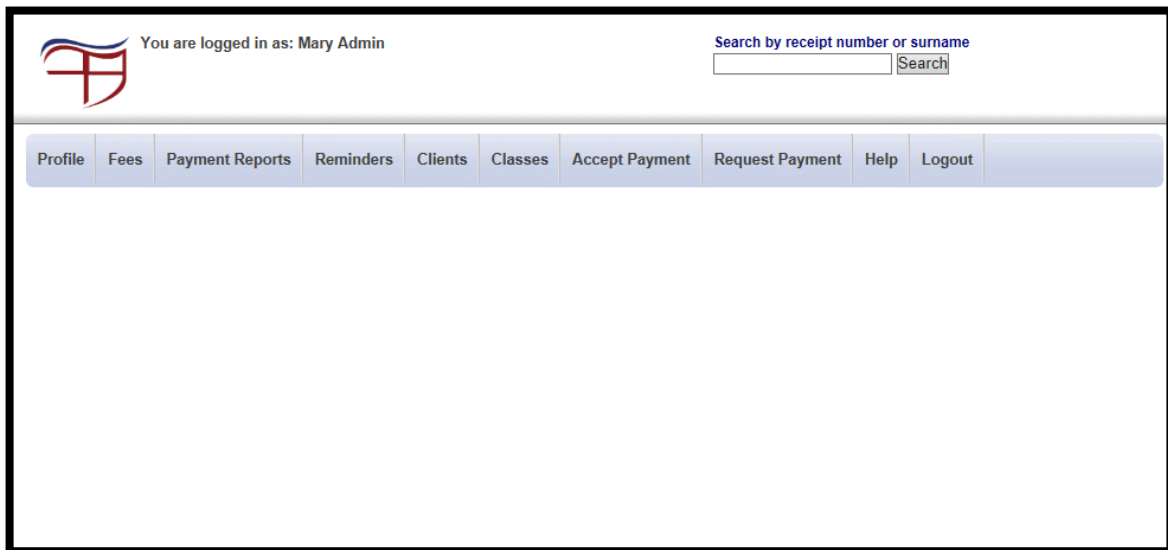
The purpose of this notebook is two-fold:

- 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 Reports** - 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.

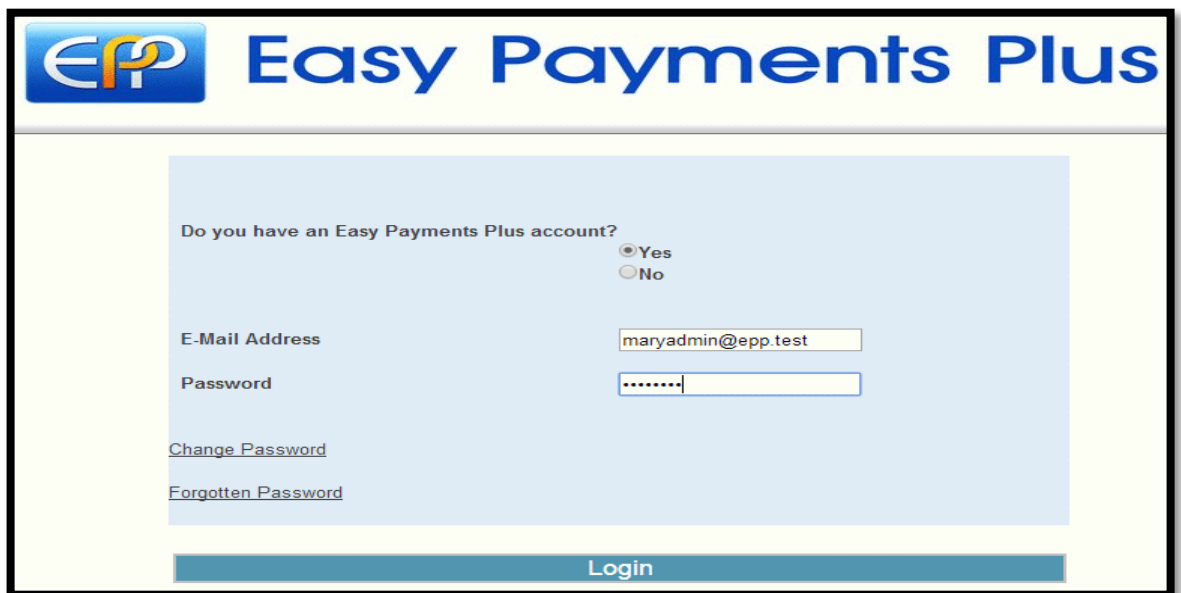


3 How can I login to my EPP account?

- 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

Reporting Start Date	01 ▾ 01 ▾ 2013 ▾	The date set here will be used as the default start date for all reports (except All Payments which shows the last 3 months by default)
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- Message to appear on main screen

Message to appear on main screen		This message will be displayed on the main screen where all the fee items are listed.
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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.

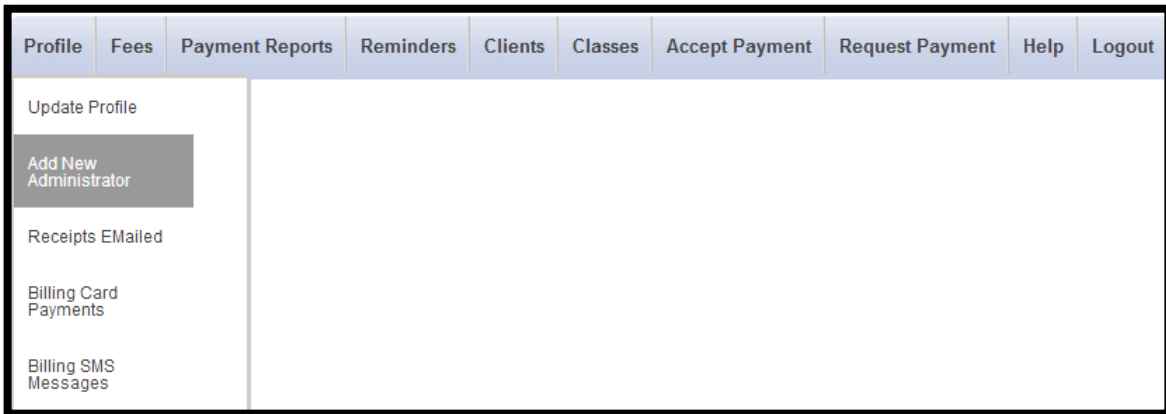
Administration Fee Charges	
Standard Charges:	
Client Pay Standard Charge €	<input type="text" value="0.00"/>
The amount specified will be added as a administration fee. e.g. to add €2 enter 2.00	

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**.

A screenshot of the 'Add New Administrator' registration form. The form title is 'Profile Add New Administrator'. Below the title, it says 'Enter details below (* denotes a mandatory field) and click on Register to add the new administrator.' There is a 'Register' button. The form fields are: Firstname *, Surname *, Phone * (+353 - -), Mobile * (+353 - -), EMail *, Male/Female (M), Organisation (Demo Account Secondary), Admin Type (General Admin), Password *, and Re-Enter Password *. There are also two checkboxes: 'Tick to enable email notifications' and 'Tick to enable text notifications'.

NOTES

A large empty rectangular box intended for taking 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

<input type="radio"/> Enable Recurring Option		<input type="radio"/> Enable Deposit Option		<input checked="" type="radio"/> Disable Both Options	
No deposit or recurring option has been selected					
General Fee Information					
Fee Name *	<input type="text"/>	The Fee name to appear online. Try to make this very specific. e.g. Include event date or course code <i>100 characters remaining</i>			
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) €	<input type="text"/>	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	<input type="text"/>	Add new fee types here. The fee type is used to help a customer find what they are looking for. <i>100 characters remainin</i>			
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	<input type="text"/>	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.	<input type="text"/>	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

Discount Information

Note 1: If applying two Fee Discounts then only ONE can have a discount code.
Note 2: If applying a Bill discount, this is the ONLY discount that can be applied.
Note 3: No discount will be applied to Non-Fixed Cost fees.

Discount 1 - Standard Discount	<input type="text" value="No discount applies"/>	Apply this discount when item selected - See Fees - Maintain Discount List for the definition of discounts.
Discount 2 - Code Discount	<input type="text" value="No discount applies"/>	Apply this discount when item selected - See Fees - Maintain Discount List for the definition of discounts.

Fee Discount - This discount caused the cost of the item to be reduced.
Bill Discount - This discount is calculated and added as a separate item to a bill.

NOTES

SCREEN 3 – RECEIPT INFORMATION

Receipt Information

Add attachments here to be included with each emailed receipt

No file chosen

Message to appear in receipt with uploaded attachment

Type the message to appear in each receipt, select Choose File to upload the attachment and click Add Attachment

NOTES

SCREEN 4 – DESCRIPTION SECTION

Description Section

Description	<input type="text"/>	Description of the item. Limit of 255 characters. This should include any information relevant to the item. e.g. Date and venue etc.
Detailed description saved as a HTML or PDF	Choose File No file chosen	Load file with fuller description
or		
Detailed description from your website	<input type="text"/>	Enter the URL of the page to be displayed
Load image	Choose File No file chosen	

NOTES

SCREEN 5 – QUESTION SECTION

Questions/Selection Lists

Comment to appear on the page that displays the fee questions.	<input type="text"/>	e.g. Please complete these questions to proceed
Question 1	<input type="text"/>	An item of information requested upon selection of the fee. e.g. Medical conditions, Location etc. You can ask for 3 separate items of information.
Question 2	<input type="text"/>	
Question 3	<input type="text"/>	
Selection List 1	Select ... ▼	These lists can be setup by going to the main menu and choosing "Fees" - "Maintain selection lists"
Selection List 2	Select ... ▼	
Selection List 3	Select ... ▼	
File Upload 1	<input type="text"/>	Enter a label to be displayed when a file upload is required
File Upload 2	<input type="text"/>	
File Upload 3	<input type="text"/>	

NOTES

SCREEN 6 – RECURRING SECTION

<i>Recurring Option</i>		
Recurring	Yes ▾	Set this to "Yes" if the payment is to be divided into multiple instalments.
Frequency	Weekly ▾	This defines the instalment frequency
Instalments	<input type="text"/>	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

<i>Deposit Option</i>		
Enable Deposit	Yes ▾	Set this to "Yes" if you will accept a deposit payment and schedule the deposit for a later date.
Deposit amount	<input type="text"/>	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	<input type="text"/>	This defines the total number of instalments for the balance.

NOTES


5.2 Maintain Fees

Profile Fees Payment Reports Reminders Clients Classes Accept Payment Request Payment Help Logout

Fees **Edit/Delete/Copy Fees**

Select fee below and click on the relevant button to Edit, Delete or Copy the fee.

Update Public Display list for fee type Transition Year Expenses

Public	Fee Name	Description	Type	Fee Cost €	VAT%	Limited	MaxAttendee No.	Name		
<input checked="" type="checkbox"/>	Berlin Trip	This cost includes flights and accomodation. You can pay in full or in 3 bi-monthly instalments	Transition Year ...	750.00	0.00	N	0	Yes	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Paris Trip	This cost includes flights and accomodation. You can pay in full or in 3 bi-monthly instalments	Transition Year ...	600.00	0.00	N	0	Yes	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/>
<input type="checkbox"/>	Ski Trip deposit	This cost includes flights and accomodation. You can pay in full or in 3 bi-monthly instalments	Transition Year ...	310.00	0.00	N	0	Yes	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Transition Year - ski trip	This includes flights, ski hire and accomodation. Click here to view resort. You can pay in full or in 6 monthly instalments	Transition Year ...	1200.00	0.00	N	0	Yes		0 <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/>
<input checked="" type="checkbox"/>	Trip to adventure center	This cost includes bus fare and accomodation for 4 nights in Delphi adventure centre	Transition Year ...	100.00	0.00	Y	35	Yes	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/>

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.

Profile	Fees	Payment Reports	Reminders	Clients	Classes/Groups	Accept Payment	Request Payment	Help	Logout
---------	------	-----------------	-----------	---------	----------------	----------------	-----------------	------	--------

Fees **Maintain Fee Types**

Create a new Fee Type below or edit/delete an already defined Fee Type.

Fee Type deleted

Add new Fee Type

Fee Type	Edit	Delete
Invoice Payment	Edit	Delete
Ballet Exams	Edit	Delete
Ballet Concert Expenses	Edit	Delete

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.

Profile	Fees	Payment Reports	Reminders	Clients	Classes	Accept Payment	Request Payment	Help	Logout
Payment Reports All Payments									
All Payments received from 15/01/2014 to 15/04/2014									
Print Export Show charge details Change Sort Order Change Dates									
1 2									
Receipt	Name	Paid By	Fee Name	Date/Time	Pay Type	Total Paid€	Qty	Note	Payment Status
249030974	Rosie Kearns	Rosie Kearns	Annie Musical - Concert Tickets	15/04/2014 13:50:08	Debit Card	40.25	4		Credit
249030974	Shauna Murray	Rosie Kearns	Transition Year - ski trip	15/04/2014 13:50:08	Debit Card	.00	1		Recurring
249030972	Sarah Keane	John Doyle	After school study - 5 days	11/04/2014 10:19:02	Refund	-251.50	1	Rfnd for 249030971/355400-Refund cancelled study	
249030971	Sarah Keane	John Keane	After school study - 5 days	11/04/2014 10:10:44	Debit Card	251.50	1		Refunded
249030970	Mary Dunne	John Doyle	Voluntary Contribution - Non-Fixed Amount	11/04/2014 09:47:23	Debit Card	401.50	1		Credit

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.

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

Payment Reports **Payment Details**

Click on Generate Report to generate a list detailing all payments received. You can select the information you want to include in the report below.

Change Dates Export Print

Step1: Select fee item from the drop down list

Transition Year - ski trip Active Deleted

Select All

Selected Name Main Name Paid Date/Time

Have you done skiing before? Please enter your child's name as it appears on passport

Step2: Check each client item to include in the report Select All

Address Line 1 Address Line 2 Address Line 3 Mobile Phone Email

Allow Email Allow Text Type Category Status Main Date of Birth

Step3: Select pre-defined questions to include in the report (Optional) Select All

Select an item from the list to include in the report

Step4: Select pre-defined selection lists to include in the report (Optional) Select All

Select ...

Generate Report

Payments received from 01/06/2014 to 08/12/2015 for Transition Year - ski trip

Feename	Cost €	Paid €	Have you done skiing before?	Please enter your child's name as it appears on passport	Firstname	Surname	Mobile
Transition Year - ski trip	1200.00	1200.00	yes	sdfsfsff	Grace	Baker	+353873333333
Transition Year - ski trip	1200.00	0.00	yes	sfsfsfsfsf	David	Brophy	+353872222222
Transition Year - ski trip	1200.00	400.00	yes	Sean Brown	Sean	Brown	+353877777777
Transition Year - ski trip	1200.00	1200.00	yes	ggggg	Fionn	Byrne	+353877777777
Transition Year - ski trip	1200.00	1600.00	yes	Sean Brendan Byrne	Sean	Byrne	+353877777777
Transition Year - ski trip	1200.00	200.00	yes	Finn Bernard Cahill	Finn	Cahill	+353877777777

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.

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

Payment Reports Report Generation

Click on Generate Report to generate a list detailing all payments received. You can select the information you want to include in the report below.

Check each payment item to include in the report Select All

<input type="checkbox"/> Selected Name	<input type="checkbox"/> Paid by	<input checked="" type="checkbox"/> Fee Name	<input checked="" type="checkbox"/> Date/Time	<input type="checkbox"/> Pay Type
<input type="checkbox"/> Cost	<input type="checkbox"/> Charged	<input checked="" type="checkbox"/> Paid	<input type="checkbox"/> Processing Fee	<input type="checkbox"/> EPP Charge
<input type="checkbox"/> Question 1	<input type="checkbox"/> Question 2	<input type="checkbox"/> Question 3	<input type="checkbox"/> Selection 1	<input type="checkbox"/> Selection 2
			<input type="checkbox"/> Selection 3	<input type="checkbox"/> Selection 3

Check each client item to include in the report Select All

<input checked="" type="checkbox"/> Address Line 1	<input type="checkbox"/> Address Line 2	<input type="checkbox"/> Address Line 3	<input type="checkbox"/> County	<input type="checkbox"/> Country	<input checked="" type="checkbox"/> Mobile	<input type="checkbox"/> Phone	<input type="checkbox"/> Email
<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Type	<input type="checkbox"/> Category	<input type="checkbox"/> Status	<input type="checkbox"/> Main	<input type="checkbox"/> Allow Email	<input type="checkbox"/> Allow Text	

Select pre-defined questions to include in the report (Optional) Select All

Select an item from the list to include in the report ▼

Select pre-defined selection lists to include in the report (Optional) Select All

Select ... ▼

Payments received from 08/09/2015 to 08/12/2015

Receiptno	Fee Name	Date/Time	Paid €	FirstnameSurname	Address 1	Mobile
249031912	Junior Cert Mock Fees	07/12/2015 10:51:100.0000		Lucy Tully	456 nnn	+353 87 4444444
249031912				Karen Smyth	456 nnn	+353 87 4444444
249031912				Don Tully	456 nnn	+353 87 4444444
249031912				Maria Tully	456 nnn	+353 87 4444444
249031911	Junior Cert Mock Fees	07/12/2015 10:51:100.0000		Alice Test	Shankill	+353 86 1234567
249031911				Gary Test	Shankill	+353 86 1234567
249031910	Junior Cert Mock Fees	07/12/2015 10:51:090.0000		James O'Neill	Woodview	+353 85 1111111
249031910				Martin O'Neill	Woodview	+353 85 1111111
249031910				Robbie O'Neill	Woodview	+353 85 1111111
249031909	Junior Cert Mock Fees	07/12/2015 10:51:080.0000		Tara Neary	567 mmm	+353 87 2222222
249031909				Karen Healy	567 mmm	+353 87 2222222
249031909				Deirdre Neary	567 mmm	+353 87 2222222
249031909				Fiona Neary	567 mmm	+353 87 2222222
249031908	Junior Cert Mock Fees	07/12/2015 10:51:080.0000		Colm Kenny	456 mmm	+353 87 1111111
249031908				Judy Walsh	456 mmm	+353 87 1111111

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.

Payment Reports **Payment Transfer**

Select a fee name below to see a list of those registered for that fee item. Users can then be selected for transfer / refund, or name change.

Print Export to Excel Export to CSV **Change Dates**

Select Fee Name **After school study - 2 days with dinner** Active Deleted

After school study - 2 days with dinner from 01/07/2016 to 03/03/2017

		First Name	Surname	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10
Select	Change Name	Roger	Devine										
Select	Change Name	Jenny	Faye										
Select	Change Name	Yvonne	Joyce										
Select	Change Name	Penny	Joyce										
Select	Change Name	George	Kelly										
Select	Change Name	Ben	Smith										
Select	Change Name	Brendan	Tyler										

- 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.

Payment Reports Payment Transfer User selected **Transfer user**

Use the buttons below to ignore or record the difference in the cost.

Print Export to Excel Export to CSV **Return**

Jenny Faye changed to After school study - 3 days with dinner 0

Jenny Faye

Moving from After school study - 2 days with dinner Moving to After school study - 3 days with dinner 0

The transfer has been completed. There is an outstanding balance due of €30.00. Press Record Amount to record this amount or Ignore Amount to ignore.

Ignore Amount **Record Amount**

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.

Profile	Fees	Payment Reports	Reminders	Clients	Classes	Accept Payment	Request Payment	Help	Logout
Payment Reports By Feename Select a feename from the list below to see details of payments received. <input type="button" value="Change Dates"/>									
Start Date		End Date							
01	01	2014	31	01	2014	<input type="button" value="Set Date"/>			
List of all payments summarised by fee name from 01/01/2014 to 31/01/2014									
<input type="button" value="Print"/>		<input type="button" value="Export"/>							
Fee Name	Total Charged€	Processing Fee€	Gross Received€	EPP Charge€	Net Received€	Select			
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.

Payment Reports **By Feetype**

Select a feetype from the list below to see details of payments received.

[Change Dates](#)

List of all payments summarised by fee type from 01/01/2013 to 15/04/2014

[Print](#) [Export](#)

Fee Type	Total Charged	Processing Fee	Gross Received€	EPP Charge€	Net Received€	Select
Voluntary Contribution	8,070.00	64.57	8,134.57	70.75	8,063.82	Select
Transition Year trip	100.00	1.50	101.50	1.25	100.25	Select
Transition Year Expenses	24,075.00	68.85	19,793.85	59.37	19,734.49	Select
Tours	2,240.00	59.27	2,049.27	35.84	2,013.44	Select

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 €71061.92			Total Issued €2465.16			Balance Remaining €68596.76			Total Overdue €44069.52		
Print	Export to Excel		Export to CSV		<input type="checkbox"/> 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	DueTo	Date	Select		
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....

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

Payment Reports Recurring **6th Class Trip to Gaeltacht-Balance Lee Helen Adam Kiernan**

Use the buttons below to update payment details.

Change Dates

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

Delete **Change Expiry Date on Card** **Add New Card** **Issue Payment** **Change Amount** **Return**

Feename	Payer	Student	Instalment Amount €	Start Date	Frequency	Instalments	Issued	DueTo	Date	Run Day
6th Class Trip to Gaeltacht	Helen Lee Adam Kiernan		50.00	16 Jun 2018	Monthly	3	2	2		16 Change Run Day

List of Payments

Receiptno	Name	Date/Time	Fee	Type	Cost€	Paid€	Charge€	Note	Status
249034283	Adam Kiernan	18/07/2018 11:43:28	6th Class Trip to Gaeltacht	Credit Card	50.00	50.00	0.0000	Instalment Issued	2 of 2
249034278	Adam Kiernan	12/07/2018 11:51:08	6th Class Trip to Gaeltacht	Credit Card	50.00	50.00	0.0000	Instalment Issued	1 of 2
249034215	Adam Kiernan	16/05/2018 14:20:04	6th Class Trip to Gaeltacht	Debit Card	150.00	.00	0.0000		Recurring

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**.

Profile	Fees	Payment Reports	Reminders	Clients	Classes	Accept Payment	Request Payment	Help	Logout
Payment Reports Failed Instalments									
<input type="button" value="Print"/> <input type="button" value="Change Dates"/>									
List of failed instalment payments from 01/01/2013 to 16/04/2014									
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.

Payment Reports **Card Lodgements**

Print Export

Start Date: 01/01/2014 End Date: 31/01/2014 **Set Date**

Banked payments from 01/01/2014 to 31/01/2014

Hover over column headings for further detail

Banked Date	no. Payments	Total Banked €	Total Charged €	Processing Fee€	EPP Charge€			
31/01/2014	3	505.35	500.00	5.35	3.75	Detail	Summary by Fee Type	Summary by Fee Name
29/01/2014	1	10.36	10.00	.36	.25	Detail	Summary by Fee Type	Summary by Fee Name
25/01/2014	3	22.50	20.00	2.50	3.25	Detail	Summary by Fee Type	Summary by Fee Name
23/01/2014	5	1,126.00	1,120.00	6.00	6.25	Detail	Summary by Fee Type	Summary by Fee Name
21/01/2014	2	103.60	100.00	3.60	2.50	Detail	Summary by Fee Type	Summary by Fee Name
18/01/2014	1	551.50	550.00	1.50	1.25	Detail	Summary by Fee Type	Summary by Fee Name
15/01/2014	2	251.50	250.00	1.50	1.88	Detail	Summary by Fee Type	Summary by Fee Name
10/01/2014	2	950.00	950.00	.00	2.50	Detail	Summary by Fee Type	Summary by Fee Name
Totals		€3520.81	€3500	€20.81	€21.63			

Detail -01/01/2014 to 31/01/2014 Feetype summary - 01/01/2014 to 31/01/2014 Feename summary - 01/01/2014 to 31/01/2014

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.

Payment Reports **Card Lodgements - Monthly Summary**

Print | Export | Change Dates | Daily Lodgements

Hover over column headings for further detail

Month	no. Payments	Total Banked €	Total Paid €	Processing Fee€	EPP Charge€	Lodgements	Summary by Fee Type	Summary by Fee Name
May 2014	32	5,575.25	5,340.00	35.25	36.25	Lodgements	Summary by Fee Type	Summary by Fee Name
Apr 2014	32	4,041.75	3,870.00	31.75	34.97	Lodgements	Summary by Fee Type	Summary by Fee Name
Mar 2014	24	4,338.75	4,270.00	28.75	28.75	Lodgements	Summary by Fee Type	Summary by Fee Name
Feb 2014	38	6,713.55	6,465.00	48.55	45.00	Lodgements	Summary by Fee Type	Summary by Fee Name
Jan 2014	19	3,520.81	3,480.00	20.81	21.63	Lodgements	Summary by Fee Type	Summary 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.

Payment Reports **All Cash/Cheque**

Print Export **Change Dates** **Total Cash/Cheques**

Cash/Cheques from 01/01/2013 to 23/04/2014

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.

Pay Type	Date	Total Banked €		
Cash	22/04/2014	100.00	Detail	
Cheque	22/04/2014	200.00	Detail	
Total	22/04/2014	300.00		Summary by Fee Type Summary by Fee Name
Cash	09/04/2014	340.00	Detail	
Cheque	09/04/2014	510.00	Detail	
Total	09/04/2014	850.00		Summary by Fee Type Summary by Fee Name

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.

Home	Profile	Fees	Payment Reports	Reminders	Clients	Classes	Accept Payment	Request Payment	Rewards	Help	Logout
<p>Class Maintain Classes</p> <p>Enter a new Class name below and click on Add New Class, or edit/delete an already defined Class.</p> <hr/> <p>Options to create new Classes or maintain existing Classes</p> <p>New Class Name <input type="text"/> <input type="button" value="Add New Class"/></p>											
Class	Owner	Changed	Changed By	Entries	Edit/View	Delete	Copy	Access			
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.

Class Maintain Classes **Update Class '1AW'**

Enter a new Class name below and click on Update Class Name, or add and remove Class members.

[Return](#)

Class name

Students in 1AW

Name	Mobile	Email	
Aoife Barry	+353879876543	susan@epp.testing	<input type="button" value="Delete"/>
Laura Bowden	+353871223333	lbow@epp.test	<input type="button" value="Delete"/>
Mary Admin	+353871111111	maryadmin@epp.test	<input type="button" value="Delete"/>
Robert1 `Brady	+3538712333333	tonyb@xx.xx	<input type="button" value="Delete"/>

Add new Students

Show all people registered

Show all people by Type

Find students by selected item

Selection List

Place a tick beside each name to be added to class '1AW' and then click on the Add to Class button

Note: Red entries do not belong to any class

Add	Firstname	Surname	Address1	Email	Type
<input type="checkbox"/>	Robert1	`Brady	5 vvvv	tonyb@xx.xx	Pupil
<input type="checkbox"/>	Robert1	`Brady	5 vvvv	tonyb@xx.xx	Pupil
<input type="checkbox"/>	Test2	99	q	test999@epp.test	Pupil
<input type="checkbox"/>	Ailbhe	Adams	x	ann.adams@epp.test	Pupil
<input type="checkbox"/>	Alan	Apple	m	anniene@park.test	Pupil
<input type="checkbox"/>	Aoife	Barry	jkl	susan@epp.testing	Pupil
<input type="checkbox"/>	Sean	Barry	Shankill	jd@stGtest.ie	Pupil

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.

Classes [List Classes](#)

Select the information to be included in the report, and click on Generate Report.

Generate Class reports

Step 1 : Check each item to include in the report

Address Line 1
 Address Line 2
 Address Line 3
 Mobile
 Phone
 Email
 M/F
 Type
 Status
 Main
 Date of Birth
 Student ID:

Step 2 : Select a Class

6 A

Step 3 : Select a Fee Or **Select a Fee Type**

Leaving Cert Mock Fees Select ...

Start Date End Date

01 12 2016 15 03 2017

Step 4 : Click Generate Report

Class: 6 A

Fee Item: Leaving Cert Mock Fees

From: 01/12/2016 To: 15/03/2017

* The amount shown in the Family Payment column is the total amount paid for the family. If there are multiple family members on the report then this total is shown for each member.

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

Profile	Fees	Payment Reports	Reminders	Clients	Classes	Accept Payment	Request Payment	Help	Logout
---------	------	-----------------	-----------	---------	---------	----------------	-----------------	------	--------

Payment **Accept Payment**

Enter Surname and hit Find to locate an existing name otherwise use Register New Name to create a new account.

Surname

Select the name of the person making the payment

Firstname	Surname	Address1	Mobile	EEmail	Type	Status		
Robert1	Brady	5 ww	+353 87 12333333	tonyb@xx.xx	Pupil	A	Edit	Select Name
Robert1	Brady	5 ww	+353 87 12333333	tonyb@xx.xx	Pupil	A	Edit	Select Name
Karen	Brady	5 www	+353 87 1234444	kb@xxx.xx	Parent/Guardian	A	Edit	Select Name
Sean	Brady	5 www	+353 87 1234444	kb@xxx.xx	Pupil	A	Edit	Select Name
Tom	Brady	w cccc	+353 87 1111111	tombrady@epp.test	Parent/Guardian	A	Edit	Select Name
Tony	Brady	5 ww	+353 87 12333333	tonyb@xx.xx	Parent/Guardian	A	Edit	Select Name

NOTES

8.2 Step 2 - Select the Payment Type

Payment Accept Payment Payer - Karen Brady

Select the payment type from the available options

Step 1. Select the payment type.

Cash Cheque Debit/Credit Card No Payment Invoice

Select Payment Type

NOTES

Empty notes box for Step 2.

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

Select the desired item from the drop down list

Step 1. Select the payment type.

Cash Cheque Debit/Credit Card No Payment Invoice

Select Payment Type

Step 2. Select the fee from the drop down Fee List. Use the Fee Type list to narrow the search.

Fee Type Fee List

Tours Tour to Glendalough

Add item to Bill

NOTES

Empty notes box for Step 3.

8.4 Step 4 - Select attendee (if relevant)

Payment Accept Payment Payer - Karen Brady

Select person relevant to Tour to Glendalough or enter their details below

Firstname	Surname	Select	If not already listed please enter details below	
Sean	Brady	Select	Type	Please select... ▼
			Firstname	<input type="text"/>
			Surname	<input type="text"/>

NOTES

8.5 Step 5 - Answer questions (if relevant)

Payment Accept Payment Payer - Karen Brady

Complete the following items for Tour to Glendalough on behalf of Sean Brady to proceed.

Do you give permission for your child to go on this tour?

97 characters remaining

NOTES

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

Feename	Name	Quantity	Cost€	Total€	Note	Owing	Owing€	Recurring	
Tour to Glendalough	Sean Brady	1	25.00	25.00	N	0	N		Change Remove

Feename	Name	Quantity	Cost€	Total€	Note	Owing	Owing€	Recurring	
Tour to Glendalough	Sean Brady	<input type="text" value="1"/>	<input type="text" value="25.00"/>	25.00	<input type="text"/>	<input type="text" value="Y"/>	<input type="text" value="0"/>	<input type="text" value="N"/>	Update Cancel Remove

8.7 Step 7 - Pay bill

Step 3. Use the Pay button to complete the payment. Total €25.00

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

Payment Accept Payment Payer - Karen Brady

Select card type to proceed

VISA MasterCard Verified by VISA MasterCard SecureCode.

VISA MasterCard

Amount

Please select payment type

Debit Card

Credit Card

For debit cards, the total processing fee will be €0.25.

For credit cards, the total processing fee will be €0.2.

NOTES

8.9 Step 9 - Accept organisation's terms and conditions

Payment Accept Payment Payer - Karen Brady

Agree to terms and conditions to proceed

VISA MasterCard Verified by VISA MasterCard SecureCode.

Fee Amount	€25.00
Processing Fee	€ 25
Total Amount	€25.25

Accept Terms and Conditions Agree Disagree

[Accept terms and conditions of Demo Account Secondary Schools](#)

Cancel Proceed

8.10 Step 10 - Enter Card details

Payment Amount: EUR25.25

Payment Type: * Visa

Card Number: *

Expiry Date: * -Month- -Year-

CVV: * [What's this?](#)

Cardholder Name: *

Pay Now * Mandatory field

VERIFIED BY NORTON SECURED powered by Symantec ABOUT SSL CERTIFICATES

VISA MasterCard LASER

Secure payments by WORLDNET

NOTES


Empty box for 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:

The screenshot shows the 'Request Payment' section of a web application. At the top, there is a navigation menu with items: Home, Profile, Fees, Payment Reports, Reminders, Clients, Classes, Accept Payment, Request Payment, Rewards, Help, and Logout. Below the menu, the 'Request Payment' tab is active, and a dropdown menu is open showing options: Request Payment, Payment Request List, and Payment Requests Sent. The main content area has a heading 'Payment Create Payment Request'. Below this, there is a search instruction: 'Enter Surname and hit Find to locate an existing name otherwise use Register New Name to c'. There is a text input field for 'Surname', a 'Find' button, and a 'Name' label. Below the search section, there is a heading 'Use the drop down list(s) below to select a group of names'. There are two dropdown menus: 'Class' with 'Please Select ...' and a 'Select' button, and 'Group' with 'Please Select ...' and a 'Select' button.

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

The screenshot shows the 'Create Payment Request' interface. At the top, there is a navigation menu with items: Payment, Create Payment Request, and Payer - Josephine Kenny. Below the menu, there is a heading 'Select the desired item from the drop down list'. There are two steps: Step 1: 'Select the payment type.' with a radio button selected for 'Payment Request'. Step 2: 'Select the fee from the drop down Fee List. Use the Fee Type list to narrow the search.' There is a 'Fee Type' dropdown menu with '* All' selected and a 'Fee List' dropdown menu with 'After school study - Saturday study' selected. There is an 'Add item to Bill' button. Below the dropdowns, there is a table with the following data:

Feename	Name	Quantity	Cost€	Total€	Note
After school study - Saturday study	Paul Kenny	1	150.00	150.00	Change Remove

The 'Change' button in the table is circled in red. Below the table, there is an 'Attachment' section with a 'Choose File' button, 'No file chosen' text, and an 'Attach' button. There is also a 'Message' text area. At the bottom, there is a heading 'Step 3. Use the Create button to setup and send the payment request' and a 'Total €150.00' label with a 'Create' button.

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



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

Empty box for 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:

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

Payment **Create Payment Request**

Use the drop down list(s) below to select a group of names

Class

Select the feename and indicate if you would like to see members who have paid or not paid for the item since the date displayed. The date can be changed here if required.

Feename Paid Not Paid

< January 2018 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

3 A who have not paid for Junior Cert Mocks since 31/01/2018

Use the tick box to select any names that are required and hit Continue

Firstname	Surname	Address1	Mobile	EEmail	Type	Status	Allow text	Allow Email	Select
Robert1	Brady	5 vvvv	+353 8712333333	tonyb@xx.xx	Pupil	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mary	Admin	Demo Account	+353 8711111111	maryadmin@epp.test	General Admin	A	<input checked="" type="checkbox"/>	Admin	<input type="checkbox"/>
Aoife	Barry	jkl	+353 879876543	susan@epp.testing	Pupil	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Laura	Bowden	4 tnnnnn	+353 871223333	lbow@epp.test	Camp Student	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sean	Brady	5 vvvvvv	+353 871234444	kb@xxx.xx	Pupil	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tom	Brophy	234 mmm	+353 872222222	hdonovan@epp.test	1st Year	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Adam	Brophy	43556 mmmm	+353 872222222	brophy@epp.test	1st Year	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

Payment Reports All Payments									
All Payments received from 16/02/2014 to 16/05/2014									
Print Export Show charge details Change Sort Order Change Dates									
1 2 3									
Receipt	Name	Paid By	Fee Name	Date/Time	Pay Type	Total Paid€	Qty	Note	Payment Status
<u>249031055</u>	<u>Sean Brady</u>	Brenda Kilroy	Tour to Glendalough	16/05/2014 11:14:20	Debit Card	25.25	1		Credit

- **Search Facility** – input the payer’s name or receipt number


You are logged in as: Brenda Kilroy

Search by receipt number or surname

Profile
Fees
Payment Reports
Reminders
Clients
Classes
Accept Payment
Request Payment
Help
Logout

- 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**.

Profile Fees Payment Reports Reminders Clients Classes Accept Payment Request Payment Help Logout													
Search - brady Select - Sean Brady													
Payment details for receipt no. 249031055													
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
249031055	Sean Brady	Brenda Kilroy	Tour to Glendalough	16/05/2014 11:14:20	Debit Card	25.00	25.00	.25	25.25	.00	1	Credit	Refund
Receipt No	listno	Fee	First Name	Surname Name	Note								
249031055	366391	Tour to Glendalough	Sean	Brady									
<input type="button" value="Edit Note"/>													

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.

Card Refund

Organisation Demo Account Secondar

Refund Amount 25.00

Processing Fee .25

Total Refund 25.25

Refund Type Card Credit Note

Reason test reason x


Process Refund

- The receipt is emailed to the payer.

[Printer Friendly Version](#) Copy of receipt sent to kb@xxx.xx

Demo Account Secondary Schools

Karen Brady
5 vvvvvv
bbbbbb
Co. Dublin



Receipt No:249031056
Payment date: 16/05/2014 11:58:46
Payer name:Karen Brady

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

Total amount received €-25.25 (Refund)

NOTES

11 Reminders by Email/Text

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

- Step 1 – Select recipient(s)

Step 1. Select recipient list using supplied lists

Show fee name list by fee type	<input type="text"/>	<input type="button" value="Clear List"/>
Fee name list	<input type="text" value="Select ..."/> <input type="button" value="Select"/>	0 addresses selected
Recipient type	<input type="text" value="Select recipient by type ..."/> <input type="button" value="Select"/>	0 addresses disallowed
Recipient by group	<input type="text" value="Select ..."/> <input type="button" value="Select"/>	0 addresses in error
Select registered	<input type="text" value="Select ..."/> <input type="button" value="Select"/>	
Enter email address	<input type="text"/> <input type="button" value="Add"/>	
Select email list	<input type="text"/> <input type="button" value="Browse..."/>	

NOTES

- Step 2 – Upload an attachment (if required)

Step 2. Browse to locate attachments and Upload

Add attachment and Upload	<input type="button" value="Browse..."/>	<input type="button" value="Upload"/>
---------------------------	--	---------------------------------------

NOTES

- Step 3 – Input the message and SEND.

Step 3. Type message and Send

Subject

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:

Allow text	Allow Email	Firstname	Surname	Mobile	Type	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Brenda	Test	+353 87 0000000	Parent/Guardian	Delete

12.2 Clients Owing Money

Home	Profile	Fees	Payment Reports	Reminders	Clients	Classes	Accept Payment	Request Payment	Rewards	Help	Logout
<p>Today's Totals</p> <p>Cards € 0</p>					<p>Client Details</p> <p>Clients owing money</p>		<p>Use EPP for... Christmas Cards</p>				

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.

Home	Profile	Fees	Payment Reports	Reminders	Clients	Classes	Accept Payment	Request Payment	Rewards	Help	Logout
<p>Clients Clients owing money</p> <p>List of clients owing money to Demo Account Secondary Schools.</p> <p>Print Export to Excel Export to CSV</p>											
Firstname	Surname	Address1	Mobile	Fee	Type	Date	Cost€	quantity	Owing€	Select	
Robert1	'Brady	5 vvvv	+353 87	12333333	Berlin Trip	Apr 7 2015	750.00	1	750.00	Select	
Robert1	'Brady	5 vvvv	+353 87	12333333	Junior Cert Mock Fees	Jun 9 2015	95.00	1	40.00	Select	
Robert1	'Brady	5 vvvv	+353 87	12333333	School Trip to Glendalough	Aug 25 2016	50.00	1	50.00	Select	
est	99	q	+353 87	8787878	Berlin Trip	Nov 10 2016	750.00	1	750.00	Select	
est2	99	q	+353 87	8787878	Junior Cert Mock Fees	Sep 28 2016	95.00	1	95.00	Select	
ean	Abbey	Shankill	+353 86	1234567	After school study - 3 days	Apr 4 2016	185.00	1	85.00	Select	
ean	Abbey	Shankill	+353 86	1234567	Art Supplies Fees	Aug 11 2016	15.00	1	15.00	Select	
nn	Adams	x	+353 85	2222222	Leaving Cert Mock Fees	Jun 9 2015	100.00	1	100.00	Select	
lary	Admin	Demo Account	+353 87	1111111	Locker Charge	Nov 13 2015	10.00	1	10.00	Select	
lary	Admin	Demo Account	+353 87	1111111	Tour to Dublin	Dec 18 2015	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.

Home	Profile	Fees	Payment Reports	Reminders	Clients	Classes	Accept Payment	Request Payment	Rewards	Help	Logout		
<p>Today's Totals Cards € 0</p> <p>Reward Points 525</p> <p>View Rewards</p> <p>Reward Partners </p>					<p>Client Details</p> <p>Clients owing money</p> <p>Clients due refunds</p> <p>Credit Notes</p> <p>Add New Name</p> <p>Deleted Names</p> <p>Pre-loaded names</p>		<p>Support - To request support o support@easypaymentsplus.co requests and handled in order.</p> <p>All recent changes are listed bel</p> <p>Class Report - We have introduced a new funct opposed to a Single Payment. T</p>			<p>s Plus please email s will be prioritised over phone 2015.</p> <p>t more information.</p> <p>specify fees as a Family Payment, as ; for a Family Payment fee, then the</p>		<p>Use EPP for...</p> <ul style="list-style-type: none"> Christmas Cards Fundraising Calend Musical Tickets 1st Year Deposit Christmas Staff Part Mock Exam Fees <p>Special Offers </p>	

Home	Profile	Fees	Payment Reports	Reminders	Clients	Classes	Accept Payment	Request Payment	Rewards	Help	Logout												
<p>Loaded Accounts: 1</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Address Line 1</th> <th>Phone</th> <th>Mobile</th> <th>useremail</th> </tr> </thead> <tbody> <tr> <td>Parent KELLY222</td> <td>Parent/Guardian</td> <td>24 TAYLOR HALL</td> <td>+353 46</td> <td>+353 86 9945726</td> <td>Activate via Email</td> </tr> </tbody> </table>												Name	Type	Address Line 1	Phone	Mobile	useremail	Parent KELLY222	Parent/Guardian	24 TAYLOR HALL	+353 46	+353 86 9945726	Activate via Email
Name	Type	Address Line 1	Phone	Mobile	useremail																		
Parent KELLY222	Parent/Guardian	24 TAYLOR HALL	+353 46	+353 86 9945726	Activate via Email																		

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**.

You are logged in as: Brenda Kilroy

Search by Receipt or Surname or Email

berry

Contact support: support@easypaymentsplus.com

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

Search - berry

Select appropriate name from list.

Allow text	Allow Email	Student ID:	Firstname	Surname	Address1	Mobile	Type	Status	VSWare	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	349562	Fiona	Berry	678 mmm	+353 87 7777777	Parent/Guardian	A	349562	<input type="button" value="Select"/> <input type="button" value="Delete"/>

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.

List of Names

Allow text	Allow Email	Firstname	Surname	Date of Birth	Mobile	Email	Type	Main Status	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Fiona	Berry	01/01/1900	+353 87 7777777	berry@epp.test	Parent/Guardian	Y A	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Henry	Fallon	01/01/2001	+353 87 7777777	berry@epp.test	1st Year	N A	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mark	Fallon	01/01/1997	+353 87 7777777	berry@epp.test	Transition Year	N A	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

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	fngfgh				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

 Status

County

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													
<input type="button" value="Return"/> <input type="button" value="Copy of Receipt"/> <input type="button" value="Refund Total Payment"/> <input type="button" value="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	<input type="button" value="Refund"/>
Receipt No	listno	Fee	First Name	Surname Name	Note								
249031048	365926	School Trip to Glendalough	Henry	Fallon		<input type="button" value="Edit Note"/>							

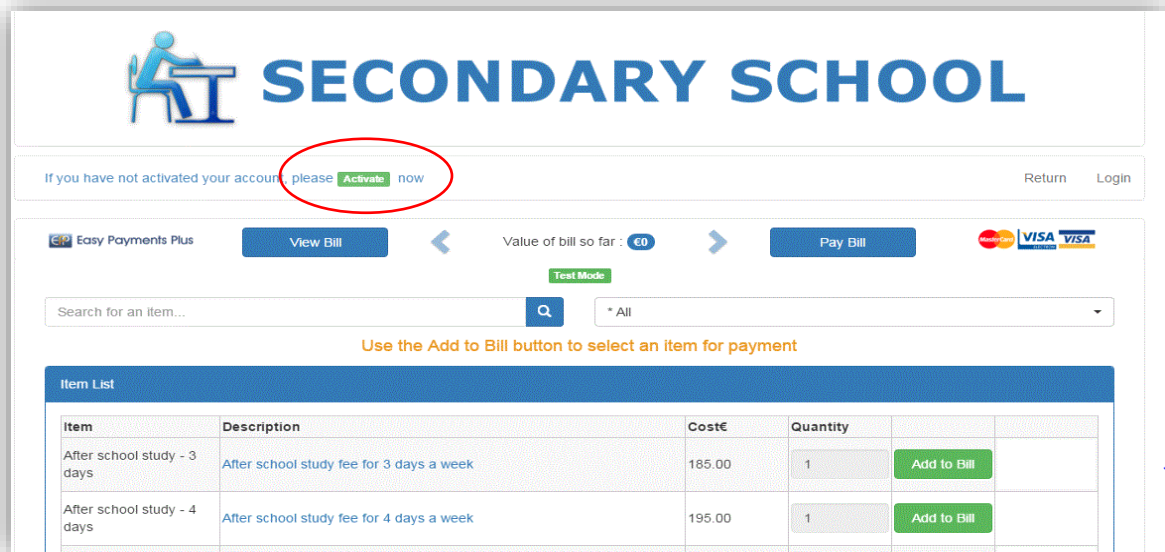
NOTES

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).

Please enter your mobile phone number and Surname below.

An activation code will be sent to your mobile phone.

Please use this code on the next screen to activate your account.

Mobile Number

Surname

Request Account Activation

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:

Mobile Number
0872856490

E-Mail Address

Activation Code

New Password

Retype New Password

ON
Tick if you want to receive text notifications from Demo Account Secondary Schools

ON
Tick if you want to receive email notifications from Demo Account Secondary Schools

ON
Select if you want to receive news and offers from Easy Payments Plus

Activate Account

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.

You are logged in as: Brenda Kilroy
 Contact support: support@easypaymentsplus.com

Search by receipt number or surname
 Test x Search

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

Search - test **Select - Aine Test**

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).

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

Search - test **Select - Aine Test**

Edit the details below or use the Add Additional Name button to add more names to this account.

Return Add Additional Name

Update Text/Email settings

List of Names

Allow text	Allow Email	Firstname	Surname	Date of Birth	Mobile	Email	Type	Main	Status		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Aine	Test		+353 87 2856490		2nd Year	Y	L	Edit	Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Brenda	Test		+353 87 2856490		Parent/Guardian	Y	L	Edit	Delete

Address Details

Address: 67m, mm

Status: L

County: Co. Dublin

Logon Email address

Update Detail

Update Email

Created: 27/01/2015 14:38:19 Changed: 08/12/2015

Display merge list

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

Name	Type	Address Line 1	Phone	Mobile	useremail	
Parent KELLY	Parent/Guardian	24 TAYLOR HALL	+353 46	+353 86 2075890		Activate via Email
Brenda Test	Parent/Guardian	67m	+353	+353 87 2856490		Activate via Email

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**.

Enter and email address and click Activate. An email will be sent containing a password and the account will be changed to Active

Name	Address	Email		
Parent KELLY	24 TAYLOR HALL	parentkelly@epp.test	Activate	Cancel

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.