Schools Configuration Checklist

The checklist below will enable us to configure your account before your training session. This will ensure both your account configuration and training is completed effectively according to your clubs requirements.

Please answer the questions below and return by email before your training session. If you need any help please let us know.

Please review this document carefully and provide as much information as possible.

Note: Any significant alteration of this information after the configuration is complete will incur additional charges.

Contents

Checklist – please tick completed items

☐ Step 1 - General Configuration complete

☐ Step 2 - School Fees/Expenses details added

☐ Step 3 - Student data exported and Returned

Step 1 - General Configuration

Email Address for Receipts

What email address do you want to receive all copies of payment receipts?

Please indicate **one** email address below. We recommend that you allocate a separate email address to receive all copies of receipts:

> Example: accounts@epp.test

1. Email Address for Billing

What email address do you want to receive our monthly billing invoices? Please indicate **one or two** email addresses below:

> Example: accounts@epp.test

2. Processing Fees

Do you want to pass an administration fee to your parents when they make online payments using Easy Payments Plus? (**Note**: The FSSU recommends that schools absorb the banking charges)

Please indicate the amount to pass on or N/A:

3. Retail payments

Do you want to allow parents to make payments in cash at any Payzone outlet?

Please indicate Y to enable this facility.

A representative from Payzone finance team will be in touch to verify your bank account details.

4. Website button

Have you added our button(s) to your website? These would have been emailed to you wheyou initially completed your registration.

5. Terms and Conditions

Have you approved the sample terms and conditions file? This would also have been included in the email we sent when you initially completed your registration.

Step 2 - School Fees/Expenses

Please supply a list of the items for which the school will be taking payments.   See the red example in the first row of the table below… Please fill in this table or attach a separate sheet.

Fee Category (Fee Type)	Fee Name	Brief Description	Fee Cost	Instalments allowed Y/N	If Instalments Y, number & frequency
School Trips	4th Years trip to Delphi	4 days at Delphi Adventure Centre 1st to 5th May 2019	€300	Yes	3 instalments, monthly

Step 3 - Student data

This EPP account will be configured for general school expenses only and therefore it should be restricted for use by **current parents of the school**.   An Extra account will be provided for enabling payments from outside of the school community.

Please follow the guidelines below to ensure your school's data can be automatically populated correctly.

FORMAT TO EXPORT DATA TO AN EXCEL SHEET FOR UPLOADING TO EPP:

Please export your student data into **SEPARATE** columns as follows....

A. **Student ID/Account Code** (** MANDATORY**) – must be numeric only. Not alpha numeric. This is the <u>unique</u> student ID that will stay with the student throughout their time in school. It is extremely important that the same ID format / database is used for the following year and that any child entered onto the system in the middle of a year for example is entered on to the EPP system using their unique ID number in sequential order per your database.
B. **Student First Name** (e.g., Seán) (Mandatory)
C. **Student Surname** (e.g., Kelly) (Mandatory)
D. **Year** (e.g., 1st year, 2nd year, etc.) (Mandatory)
E. **Class** (e.g. 1a, 1b, 1c, 2a, etc.) (Mandatory)
F. **Mobile** (Operator Code PLUS number e.g., 0872111111) (** MANDATORY **)
G. **Parent/Guardian 1 First name** (e.g., Mary) (Mandatory)
H. **Parent/Guardian 1 Surname** (e.g., Kelly) (Mandatory)

   OPTIONAL ADDITIONAL INFORMATION WHICH CAN BE INCLUDED:
I. **Parent/Guardian email**
J. **Date of birth**
K. **Male/Female**
L. **Address Line 1**
M. **Address Line 2**
N. **Address Line 3**
O. **County**
P. **Eircode**
Q. **Parent/Guardian 2 Mobile**
R. **Parent/Guardian 2 first name**
S. **Parent/Guardian 2 surname**

Sample of Data required …

Student ID	Student First Name	Student Surname	Year	Class	Mobile	1st Parent/Guardian First name	1st Parent/Guardian Surname
16-123	John	Smith	1st	1A	0871234567	Mary	Smith
16-124	Jack	Murphy	2nd	2B	0867654321	Pat	Murphy

NOTE: Please ensure the data provided is accurate. Students will be placed together in a family based on the parent's mobile phone number. Invalid mobile phone numbers can cause issues and can cause students to be placed in the wrong family.

Please take note of the following rules when exporting the data....

- The data must be produced in **ONE** spreadsheet only. Please do not have the data in separate tabs in a workbook.
- The data must be produced in **SEPARATE** columns according to the format above.
- Each column must only have the data specified – no other data should be there (e.g., the mobile column should only have mobile numbers, no extra data such as RIP)
- If a mobile number is not known for a parent/guardian they will not receive an activation text. However, you should arrange to send an activation email to them instead.
- Families will be grouped together based on either the Student ID/Account Code or Mobile phone number.

IMPORTANT - PLEASE NOTE: **For data protection purposes, all files sent must be password encrypted using the organisation id found on the contacts page of the EPP profile.   PLEASE SEE DETAILS ON THE FOLLOWING PAGE…**

IF OUR ON-BOARDING TEAM HAVE ALREADY PROVIDED YOU WITH A PASSWORD – YOU CAN IGNORE PAGE 5.

How to find your Org ID and encrypt your file

To find your organisation id:

1. Open your Easy Payments Plus account using your general administrator login.   For new organisations you can get this login information from your on-boarding team member in EPP.
2. Once logged in, select Profile and then Update Profile.
3. Click on Contact Details.
4. Your organisation id number is the second item visible on this page.

Follow these steps to encrypt an Excel file:

1. Click **File** > **Info** > **Protect Workbook** > **Encrypt with Password**.
2. Enter a password (your organisation id), and click **OK**.
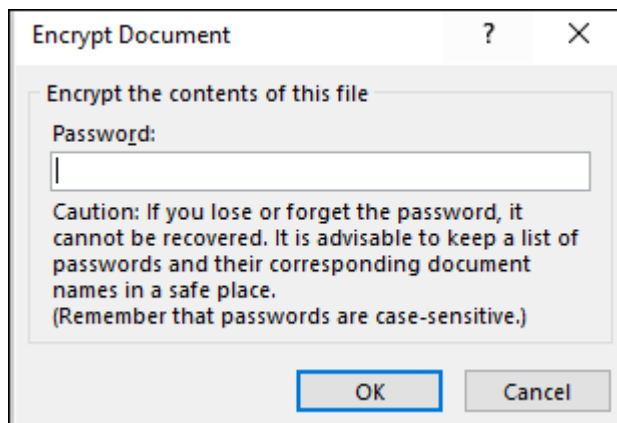
3. In the **Confirm Password** dialog box, re-enter the password you entered in the previous step.

PLEASE DON'T SEND YOUR ORG ID NUMBER OR PASSWORD IN THE BODY OF YOUR EMAIL. WE WILL KNOW WHICH PASSWORD TO USE TO UNLOCK YOUR DATA FILE FOR UPLOADING.