MSB Stores

Resource Central

Video Scripts

August 2025

If you have any questions or need any assistance, please contact our Administrator Support team between 7:00 AM and 7:00 PM EST at 800-803-6755. Again, that number is 800-803-6755.

Reports and Reconciliation

E-Check Reconciliation

Purpose:

Provide an understanding of the processing timelines for the **funding of online eCheck payments** to your school or district bank account, as well as the **reports used to reconcile these amounts.**

Processing Timeline:
eCheck payments processed on Day 1 will batch out on Day 2 and then fund to your school or district bank account five business days later. For example: eCheck payments processed on Monday will batch out on Tuesday and then credit to your account on the next Tuesday (+1 week). Please note that we cannot fund your bank account on weekends or federal reserve holidays. As such, you may see multiple deposits credited to your account on Mondays or Tuesdays.

Batch Report Summary:

MySchoolBucks.com offers several different reports to help you reconcile online payments to deposits on your bank statement. We highly recommend that you use the Batch Report Summary as the first utility for completing reconciliation. Let's take a look at how to access the Batch Report Summary:

1. Navigate to www.myschoolbucks.com.
2. Click the **Log In** button.
3. Enter your username and password.
4. Click **Log In**.
5. On the left-hand navigation menu under Admin Tools, click **Reports**.
6. Click **Payments**.
7. Click **Batch Report (Summary)**.

Setting Filters on the Batch Report Summary:
Now that you have accessed the Batch Report Summary, you will be able to see a number of different filters available for this report. Due to the nature of the reconciliation process, please do not set any filters. There are only two areas that should be adjusted before running this report.

First, scroll down to the "Billed To" section and uncheck the Credit Card billing account types. Credit Card payments should be reconciled separately from eCheck payments.

Next, adjust the **Start Date** field. The Start Date should be the first day of the month being reconciled. Once the Start Date has been configured, change the **End Date** to the last day of the month you are reconciling.

Now, click either **View** or **Send to Excel** to generate the report.

Reconciling Batch Report Summary to Bank Statement:
Once the Batch Report Summary has been generated, you are ready to begin reconciling the batch amounts to your bank statement.

The Batch Report Summary will list batch amounts in chronological order, separated by Gateway. A gateway is indicative of the bank account that was funded. Find the appropriate gateway and then look for the first batch date and amount that appears on your bank statement.
While every financial institution is different, an eCheck deposit from Heartland should have a description of "Heartland ACH Funds" and then a number. The number is the Batch ID, which is also reported on the Batch Report Summary in MySchoolBucks.

Every Batch Date and Amount on the report from MySchoolBucks will correspond to a deposit on your bank statement. The deposit date on the bank statement will be the same as the Batch Date on the report. There are no deposits in transit with eCheck payments.
Proceed to match each batch date and deposit amount for the month.

Batch Report Detail:
If you need to break down the Batch Report Summary to show the individual payments in each daily batch, use the Batch Report Detail. To access the Batch Report Detail:

1. On the left-hand navigation menu, click **Reports**.
2. Click **Payments**.
3. Click **Batch Report (Detail)**.

The same filtering guidelines used for the Batch Report Summary should be used on this report.

The payments in each batch are totaled by day, which can be matched to the bank statement. For those users who need the general ledger account code associated with each payment in a batch, the Batch Report Detail must be sent to an Excel file.

Payment Reports

This document provides you with an understanding of the primary reports used to view payments made in MySchoolBucks.

Payment Report Summary:

MySchoolBucks.com offers several different reports to help you view payments that have been made. The Payment Report summary provides a high level overview of payments made. Including product's purchased and total payment volume for a specified date range. It does not provide any user or student details, and is not a report used for reconciling online payments to bank deposits. Let's take a look at how to access the Payment Report Summary.

Navigate to www.myschoolbucks.com.

1. On the left-hand navigation menu under Admin Tools, click **Reports**.
2. Click **Payments**.
3. Click **Payment Report (Summary).**

This report can be filtered a number of different ways, depending on the data you are trying to obtain. The most commonly used filters are Store and Product. For the purposes of viewing successful payment activity, do not change the "status" filter. It should be left as the default, which is "Approved".

Set whatever filters you need, select a start and end date, and then click View Report or Send to Excel.
Payment Report Detail:

The Payment Report Detail is more widely used, as it provides user and student specific information related to payments. Let's pull up the Payment Report Detail.

1. On the left-hand navigation menu under Admin Tools, click **Reports**.
2. Click **Payments**.
3. Click **Payment Report (Detail)**

Setting Filters on the Payment Report Detail:

This report can be filtered a number of different ways, depending on the data you are trying to obtain. The most commonly used filters are Store and Product. For the purposes of viewing successful payment activity, do not change the "status" filter. It should be left as the default, which is "Approved".

Set whatever filters you need, select a start and end date, and then click View Report or Send to Excel.

When you **View Report**, the payment data is displayed to you in chronological order. Each payment entry will display the **date of payment, order #, user who paid, product that was purchased, billing account used, and amount paid**. Student and webform information may also be displayed here as well, depending on how your store products are configured.

You may find the payment data easier to manage by using the option to Send to Excel, as it does so provides a spreadsheet that can be sorted and filtered as needed. This can be helpful when managing large volumes of data, especially web form data that was collected in conjunction with the purchase of a store product.

Store Reports

Purpose:

The Store reports in MySchoolBucks are accessed from the Reports menu under Store. The types of reports available are Order, Sales, Pricing & Inventory, Stock, Product, Web Forms, and Customized Payment reports. These reports are used to help track products being stocked and purchased from your school's store.

Order Report:
To access the Order report, click **Order Report** from the Reports menu. The Order report shows orders made for your store based on the input criteria. When you have entered all the necessary information, click **View Report** to see an HTML version of the report or click **Send To Excel** to download an Excel version of the report.

Sales Report:

To access the Sales report, click **Sales Report** from the Reports menu. The Sales report shows the sales figures of the products in your store based on the input criteria. When you have entered all the necessary information, click **View Report** to see an HTML version of the report or click **Send To Excel** to download an Excel version of the report.

Pricing & Inventory Report:

To access the Pricing & Inventory report, click **Pricing & Inventory Report** from the Reports menu. The Pricing & Inventory report shows a list of store products, their available inventory, their allocated inventory, and the unit price of the products. It also breaks down products by stock options when applicable. After entering any desired report filters, click **View Report** to see an HTML version of the report or click **Send to Excel** to download an Excel version.

Stock Report:

To access the Stock report, click **Stock Report** from the Reports menu. The Stock report shows the available stock of items in your store based on the input criteria. When you have entered all the necessary information, click **View Report** to see an HTML version of the report or click **Send To Excel** to download an Excel version of the report.

Product Report:

To access the Product report, click **Product Report** from the Reports menu. The Product report shows store product information based on the input criteria, and it includes a great deal of additional information, including Visibility, Standard Price, and whether the product requires approval. When you have entered all the necessary information, click **Send To Excel** to download an Excel version of the report.

Web Form Report:

To access the Web Form report, click **Web Form Report** from the Reports menu. The Web Form report shows web forms filled out and submitted within a selected date range. It can show all web forms or one selected web form. Use keywords to search for any web forms that may have specific information. After entering any desired report filters, click **View Report** to see an HTML version of the report.

Customized Payment Export:

To access the Customized Payment Export report, click **Customized Payment Export** from the Reports menu. The Customized Payment Export report shows a daily report for transactions that can be customized to show information relevant to your district’s needs.

There are two main types of Customized Payment Export reports: **Standard** and **CobraEAS**. Standard is for general transaction reports and allows for viewing Web Form filtering and viewing encrypted information. CobraEAS is meant specifically for ACH transactions with a Transaction Status of “Settled” and will not show encrypted information.

After selecting the type of Customized Payment Export report, use the filters to narrow down the scope of the report based on your needs. After entering criteria, click **Export** to download the report as an Excel file. Click **Reset** to reset the report filters.

Student Statement of Account (SOA)

Purpose:

The Statement of Account report or Student SOA, gives you a list of invoices that are charged to student accounts in a view friendly format. *If a student has an outstanding invoice, an administrator with the proper permissions in their role can send an email of the statement directly from MySchoolBucks to the email address attached to the student record.* This report can also be printed or saved as a PDF. There is also an option to export to Excel.

These reports can be generated from two different sections in the Admin Toolbar:

1. **Students Tab**.
    a. Navigate to Students and select Students. If you do not see a tab for Students, your role has not been given permission to see this function. After entering the filters based on the statements you wish to run,

    b. Select **With Invoices Only** in the Show field in the bottom left corner of the filters and **click Search**. A list of all *students with invoices will be generated.*

    c. Select the student or students by selecting the check box to the left of the action menu.
    d. If you wish to invoice all students in the list at one time, select the top box to the left of Student ID. Then scroll down to Selected Actions and SOA Preview. You will be routed to the Reports, Students/Users and Student SOA section of Reports.

The statements will be generated for all students who are part of the selected group. You may preview by selecting the drop down caret in the name field.

When ready, you may select the Email option and statements of account will be sent to the email address attached to the student record. If you have chosen multiple students, emails will be sent to all students selected.

2. **Navigating to the Reports tab**.
    a. Selecting **Students/Users** and **Student SOA**.
    b. Using the fields in the Filter section, select a group of students or **enter a single name in the Search bar**.
    Make sure that the toggle for With Invoices Only is on.

c. You may choose an individual student or Select All to incorporate all students from your filter list. Scroll down and press continue.
d. Using the second set of filters, you can enter a district message, include payments and paid invoices in the statement, and show other details such as the school, grade and meal balance.
e. If you do not want parents or guardians sending in cash or check payments, please toggle this feature off in the Cash/Check Payments box.
f. Then select **Continue**.
The statements will be generated for all students who are part of the selected group. You may preview by selecting the drop down caret in the name field. When ready, you may select the Email option and statements of account will be sent to the email address attached to the student record. If you have chosen multiple students, emails will be sent to all students selected.

Note: Email option may not be available for everyone as it is dependent on that information being provided by your MySchoolBucks student data sync.

Parent Portal

Customize Your Parent Portal

Purpose:

This new portal gives your parents an easier way to hear from you and quickly make payments. When parents log in to the website they will now see a brand new page that displays your district's logo and a custom district announcement, student meal balances, and custom cards.

Admins the ability to display up to six custom cards for parents that can link to other areas of MySchoolbucks; such as meal payments, your school store, specific store products, your district's website, or any other important web pages you may have in mind. Here is how to easily update your district logo, announcements and custom cards in the parent portal:

1. On the Admin Tools sidebar, click **Configuration**
2. Click **District Settings**
3. Click **Edit**
4. Type your message to users in the Announcement section
5. To add your district logo, click **Select** under District Logo
6. Browse to your logo and click **Open**
7. Click **Update** to save your changes

To add or update custom cards:

1. On the Admin Tools sidebar, click **Configuration**
2. Click Edit Landing Page
3. Click the drop down arrow under Homepage policy select **Default**
4. Click the **plus sign**

5. Select from the options what you would like your first card to link to. For this example, select the **School Store** Page. You can also link to product groups and URLs.
6. Enter the text you would like to display on the card. **Click Here for School Store**
7. Click the drop down arrow to search our graphic library or add a new graphic by clicking on Add Graphic.
8. Click the number under Tile Position of where you would like this tile to appear
9. Click **Save**
10. Let's add a second card for Donations. Click the **plus sign**
11. Select Donations
12. Enter the text you would like to display on the card. **Click Here for Donations**
13. Click the drop down arrow to search our graphic library or add a new graphic by clicking on Add Graphic.
14. Click the number under Tile Position of where you would like this tile to appear
15. Click **Save**

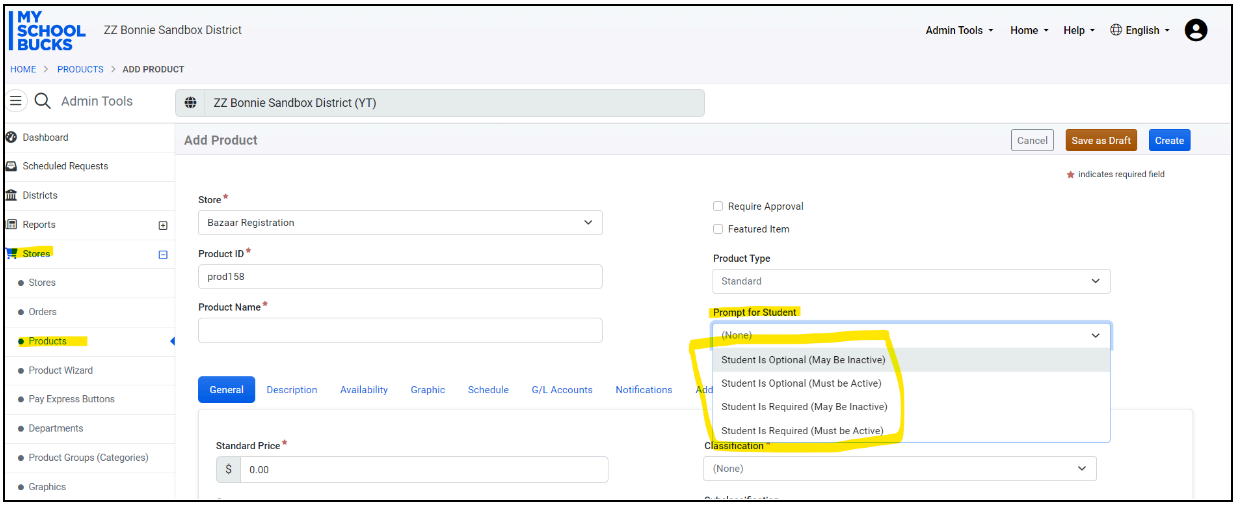
You can now log in as a parent and view the custom portal. Parents will see the logo we updated, the announcement that was added, and the cards for School Store and Donations.

MSB Products

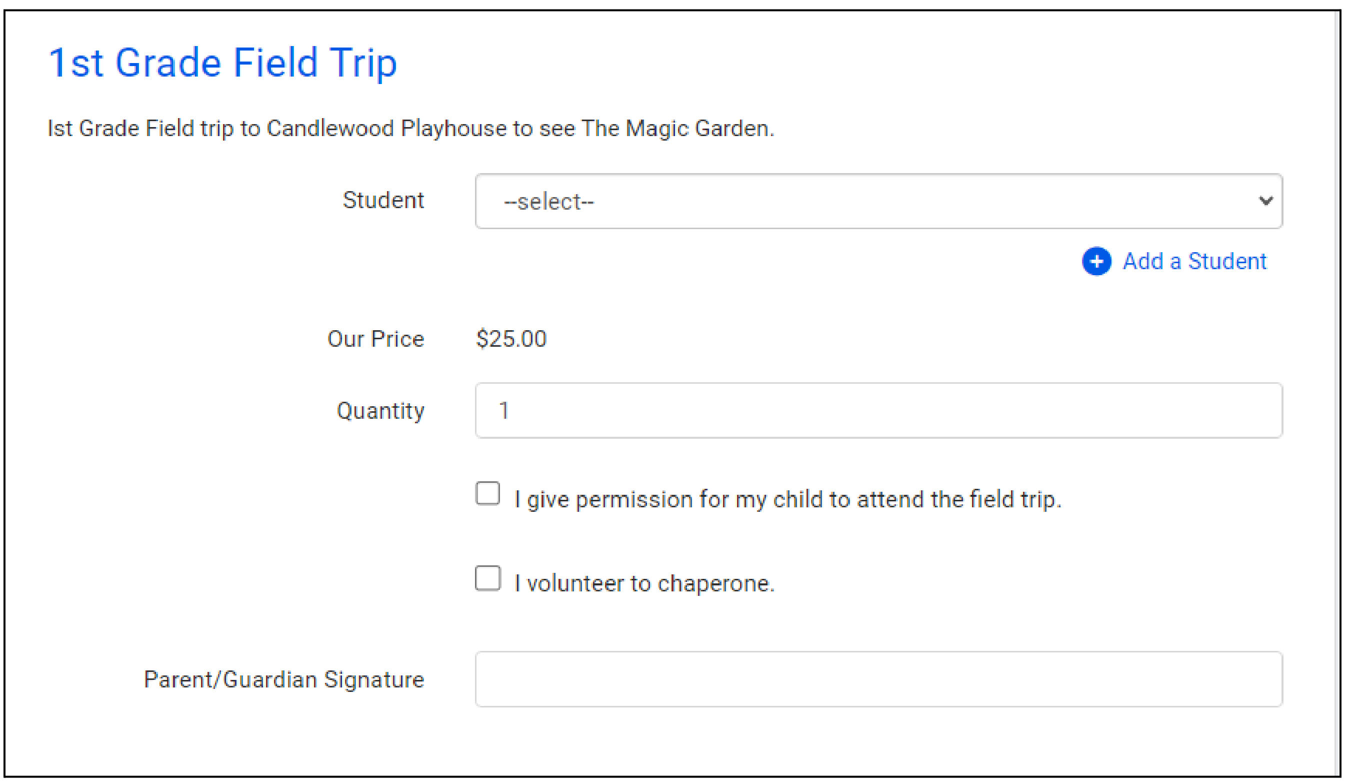
Background:

There are many components to building a product in MSB however this intro is designed to help you understand the 8 most important features of a product. Two of these features (Webform and General Ledger or GL Codes) can be a part of the purchasing process, but they must be created prior to beginning the product creation process. After this introduction, there are more specific and detailed videos to watch on how to use these functions.

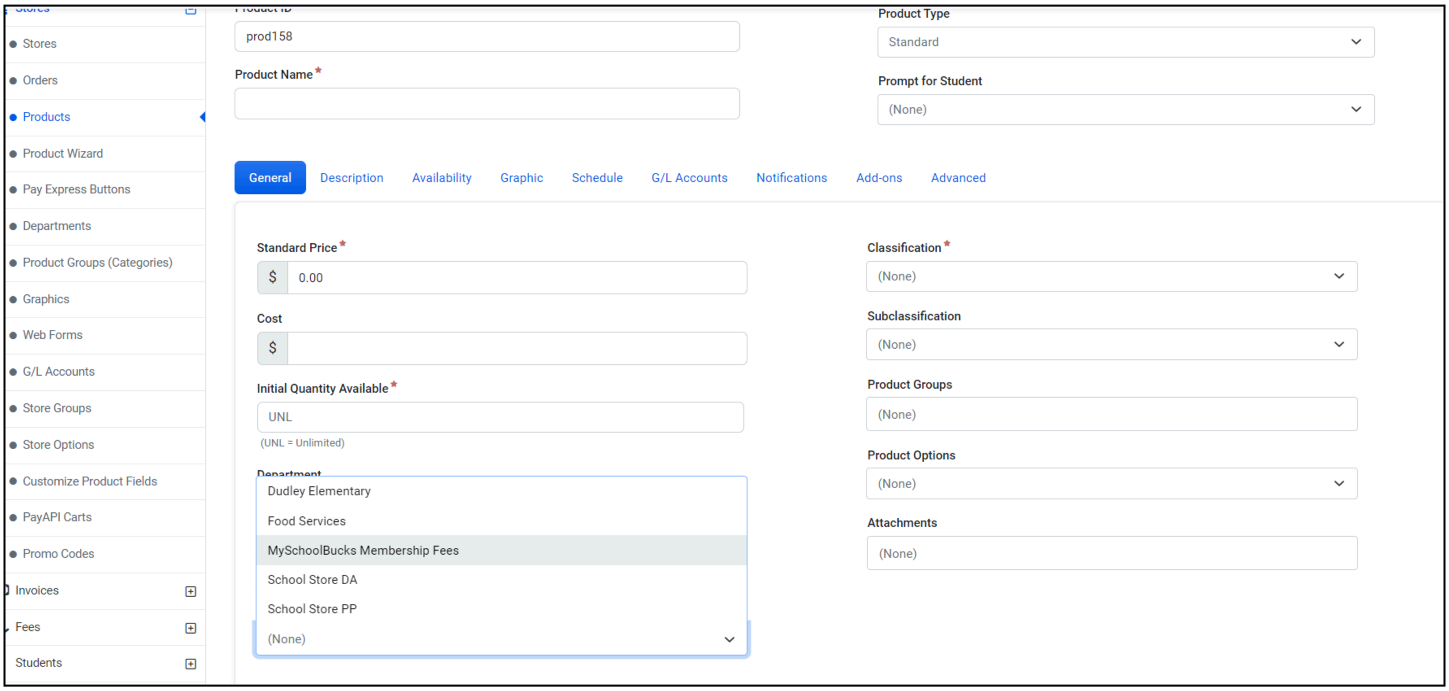
1. **Prompt for Student.** By setting this to any of the 4 items in the drop down menu, this will allow the parent to select their student when purchasing the product. It is highly recommended to use Student is Required (Must be Active) so that the Payment Reports reflect both the parent and student names on the transaction. There is also an option to not select anything and not require a student name. When might this be used? Selecting NONE in this field would be appropriate if the item is a donation where the student name is not necessary or if you wish to have this product available for Guest Checkout. Guest Checkout will allow anyone with access to the product link or QR code to be able to purchase this product without having a MySchoolBucks account. Examples of this might be Spiritwear, Camps, Donations, and any product that members of the community might want to purchase. By having an item for Guest Checkout, Prompt for Student cannot be used. If any student information does need to be collected, it is recommended to add that in the webform.



2. **Webforms**. A webform is used to collect information from the user as a product is being purchased. The webform can be configured so that the user is unable to purchase the product until the required fields are filled in. The goal of the MSB Webform is to reduce the amount of paper collected like permission slips and registrations. They can be as long or as short as needed and can include verbiage only like a Liability Waiver for a field trip. Each field on the webform will account for its own column on the payment reports. Webform can be created at the time the product is being created or in advance from the Webform tab in the admin toolbar. Here is an example of a short webform for a field trip.

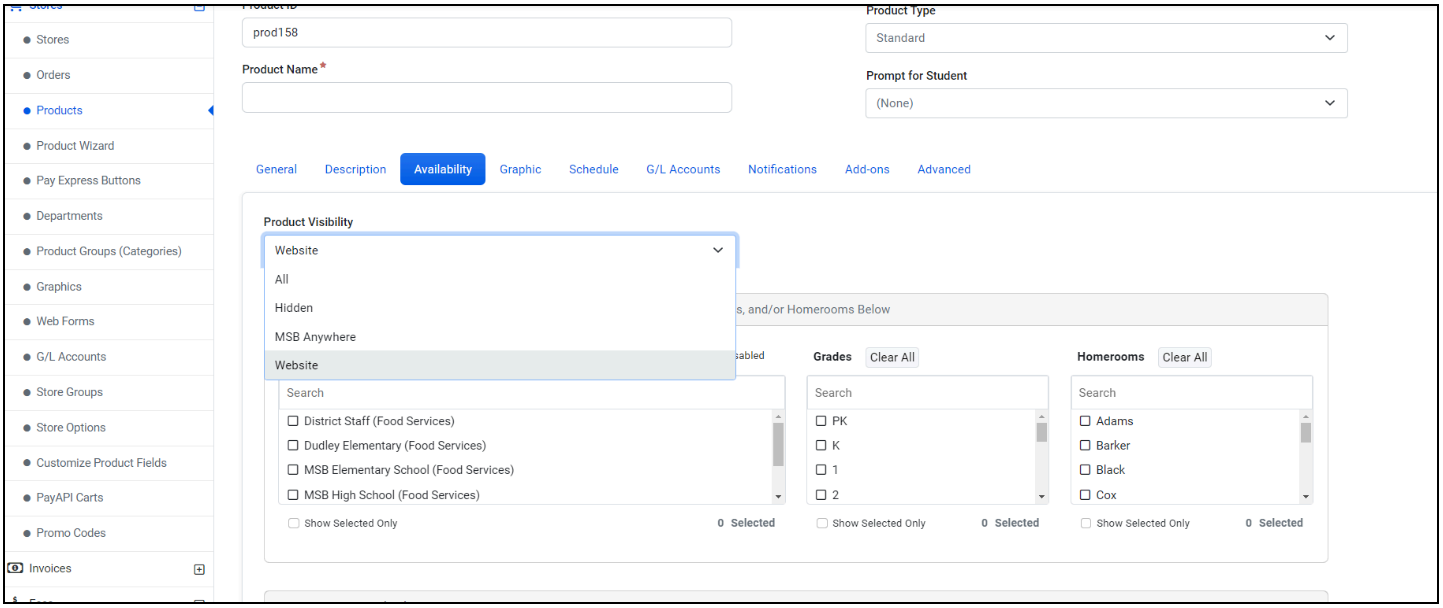


3. **Selecting a Payment Method (a.k.a. Bank Account**). MSB uses the term Payment Method to describe the bank account for the district or the school. There will be no account number or bank name listed in MSB for security purposes but a generic name such as MSB High School Store if the schools have separate bank accounts or MSB District General Fund where all funds regardless of the school are deposited. By selecting the menu in Payment Method, the system will present the options available according to the permissions of the role. Payment Methods must be set up first by Heartland School Solutions.



4. **Product Groups**, allows for greater organization of store items by placing them in user defined groupings. These product groups are used as Categories in the parent portal Store to help filter products. The product groups or categories are also helpful for those Admins using MSB Anywhere by filtering store items in the app. An example of this might be separating out concession food and drinks into groupings to find the product more efficiently. Or if there are many items in the school store, filtering products into categories such as Apparel, Athletics, Field trips, Donations, and Student Fees will ease and expedite the parent purchase and checkout experience. Product Groups or Categories must be created BEFORE the product is added. This can be done by navigating to the Admin Toolbar and selecting Product Groups.

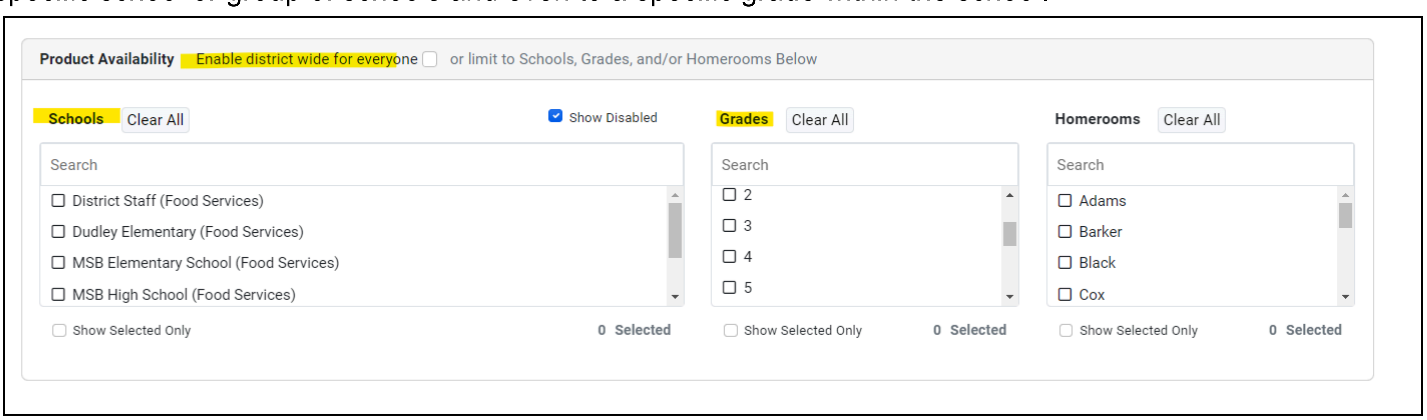
5. **Availability and Visibility**, this allows you to determine WHO you want to see a product and WHERE this product can be seen.



The **Product Visibility** menu provides 4 options for WHERE the product can be seen.

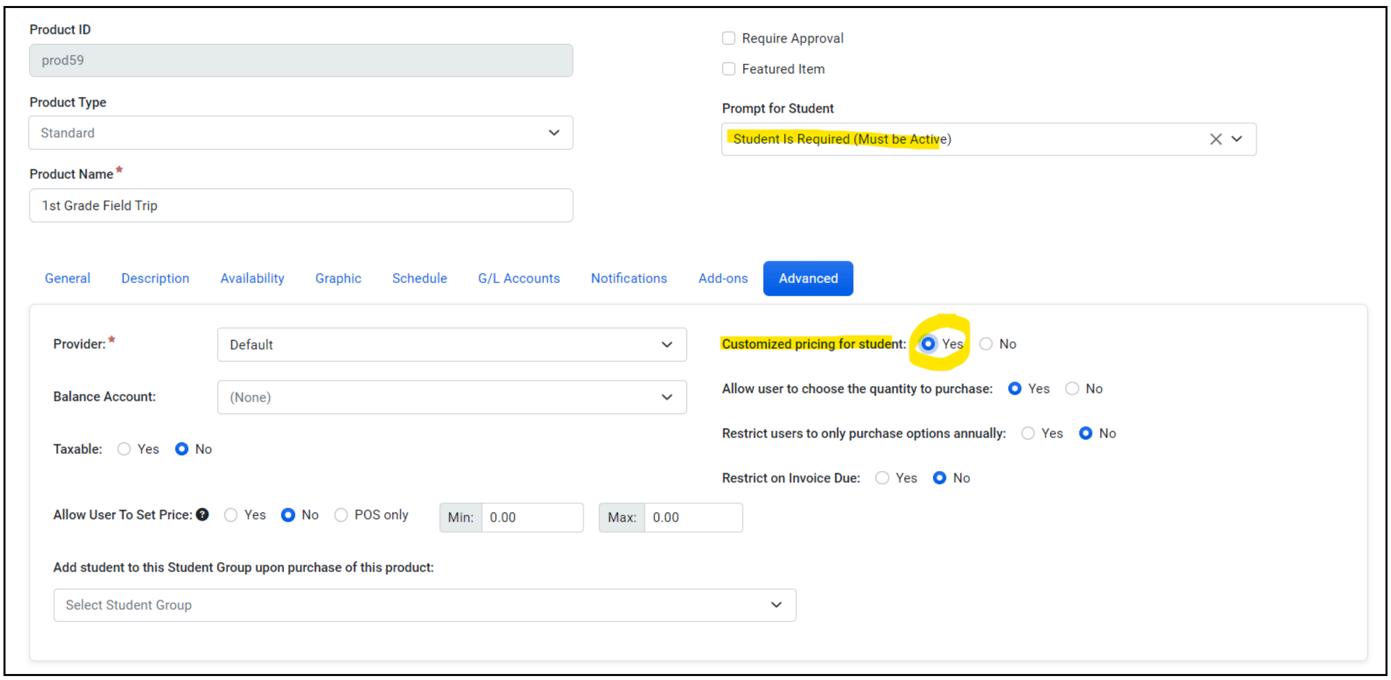
a. By selecting All, the product can be seen both on the website and through MSB Anywhere which facilitates in person card payment. .
b. Hidden allows a product to be created in MSB for payment but prevents it from displaying to parents. A product that is teacher facing only such as a Sunshine Fund or Social Dues will allow the funds to be collected through MSB but not show in the parent portal.
c. Selecting MSB Anywhere will present the product only in the Anywhere app and the product cannot be seen on the online website.
d. Lastly, the default setting Website displays the product online only and cannot be seen in the Anywhere app for in person payment.

The **Product Availability** section provides you with the opportunity to direct a product to the entire district, a specific school or group of schools and even to a specific grade within the school.

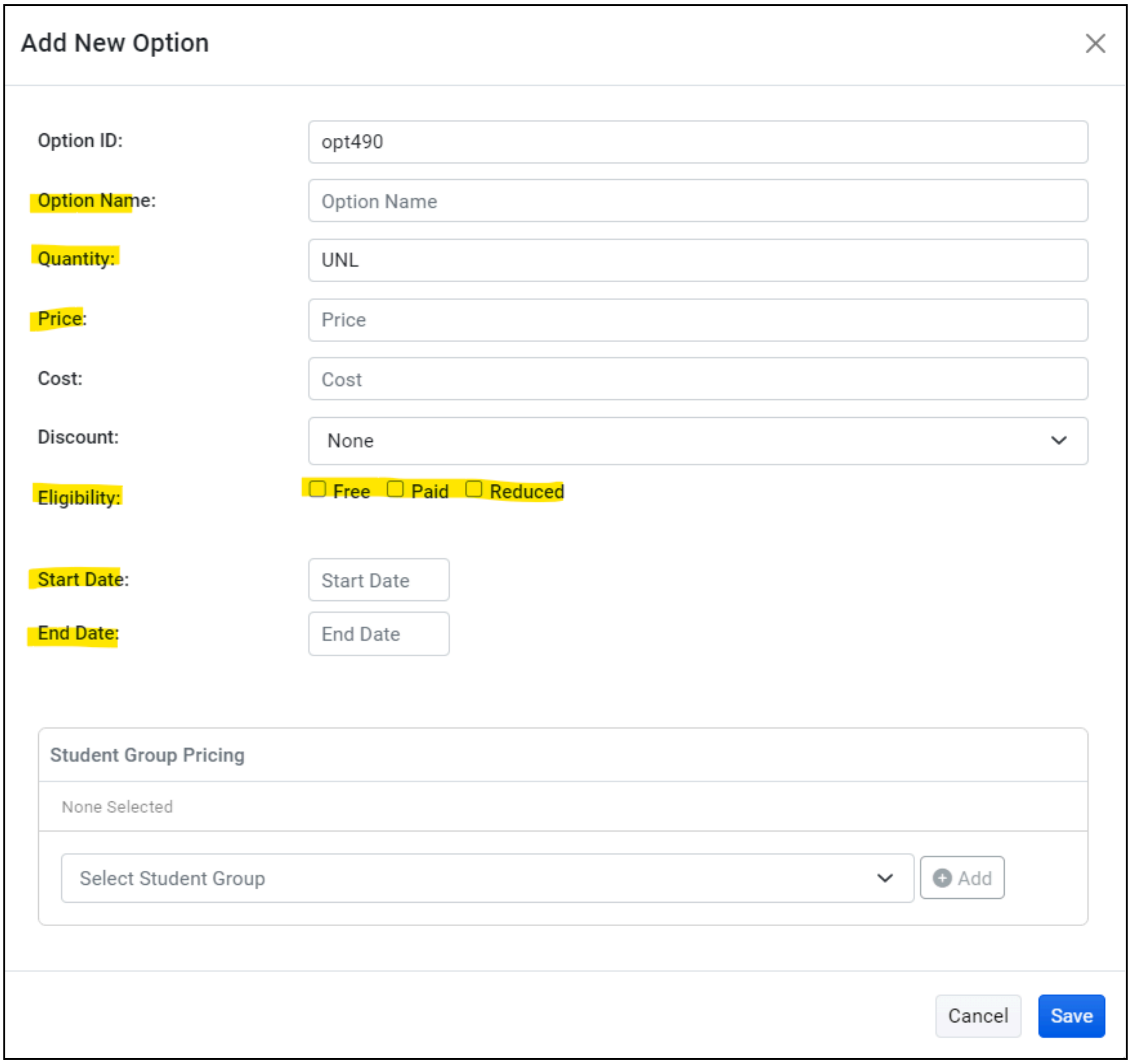


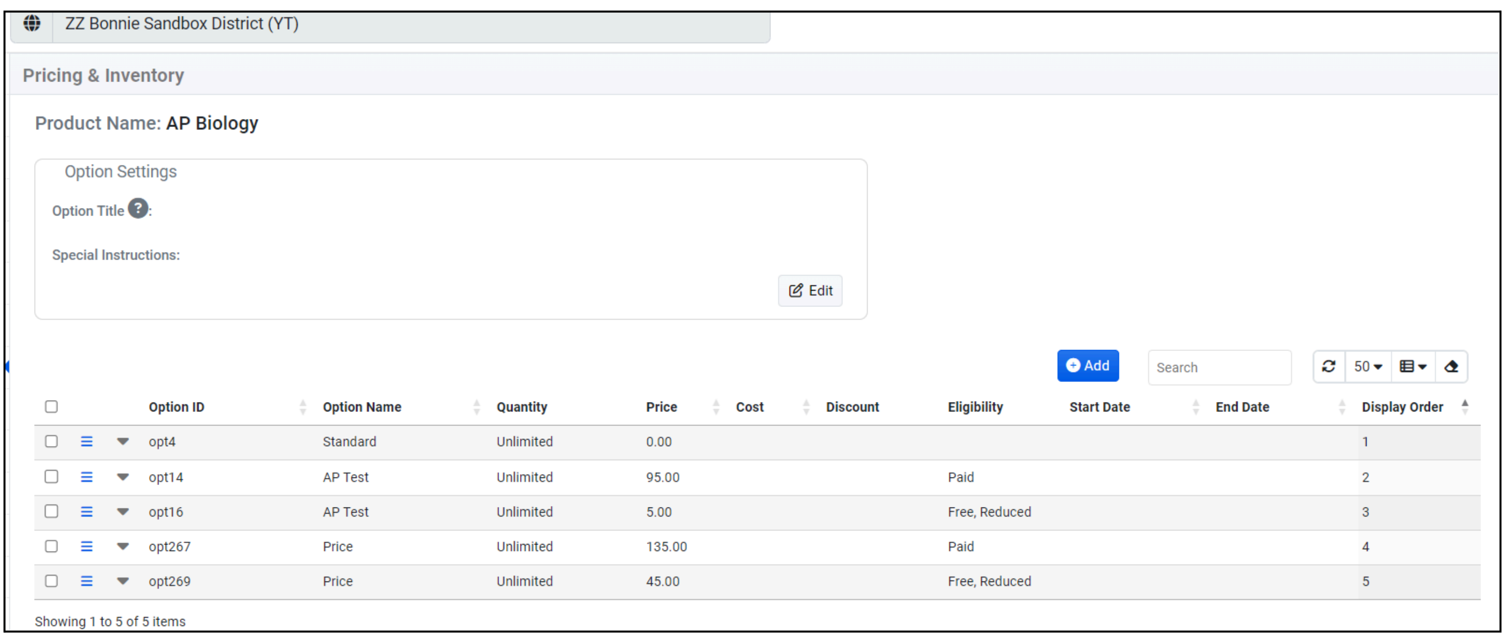
6. **General Ledger Codes or GL codes**. GL codes are unique identification codes that allow schools to classify and track financial activity. It helps record information on transactions to create more accurate accounting records.
   Not all districts use them and this is not a mandatory requirement when building a product, however, if you are a district whose financial office uses GL codes, you will want to ensure there is always a code attached to the product. The codes must be entered before the product is created and then will appear in a drop down menu on the GL tab of the product. If a GL code is required on every product, MSB offers a feature that will prevent the user from creating a live product if a GL code is not added.

   MSB has a very unique feature where pricing on products can change based on the eligibility status of the student. If eligibility is imported into MySchoolBucks via one of our Nutrition systems or by a 3rd party software such as your student information system, the product can be configured to include pricing for Paid, Reduced and Free statuses. When Prompt for Student is selected and Yes is chosen for Customize Pricing per Student on the Advanced tab of the product, the system will project the relevant price to the parent during the purchase process. The price may be set so that students with Paid eligibility have full price, for example $50. Those who are reduced may only pay $25 and those who are free pay nothing. Upon checkout, when the parent chooses the student name, the system will automatically reflect the price that matches the eligibility status from the imported student data.



7. **Pricing and Inventory.** This is where the admin can set the price of the product, add in an inventory amount that is available for purchase and set dates for when the product is available and at what price.There are options to add in one price or multiple options if there is variable pricing involved. For example, there can be an AP test which costs $95 for students with paid eligibility status but students with reduced or free statutes only pay $5. In addition, if that fee is not paid by a certain date, the price will increase by $40 so now the same paid student must pay $135 and the reduced/free student pays $45.

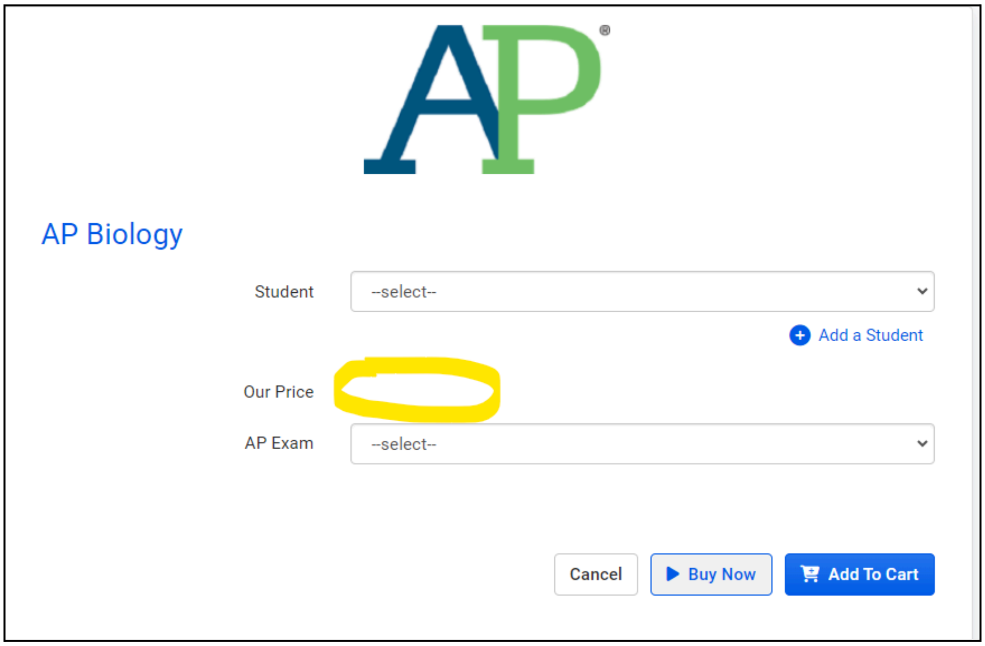




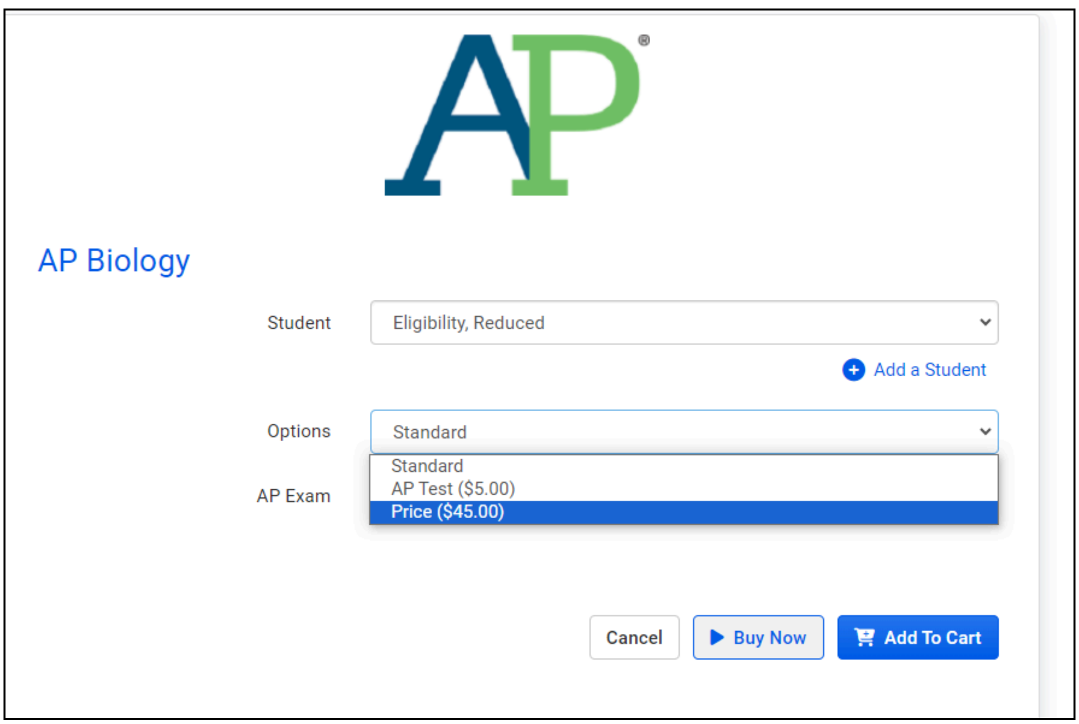
Option ID	Option Name	Quantity	Price	Cost	Discount	Eligibility	Start Date	End Date	Display Order
opt4	Standard	Unlimited	0.00						1
opt14	AP Test	Unlimited	95.00			Paid			2
opt16	AP Test	Unlimited	5.00			Free, Reduced			3
opt267	Price	Unlimited	135.00			Paid			4
opt269	Price	Unlimited	45.00			Free, Reduced			5

Showing 1 to 5 of 5 items

Notice how the price does not appear until the student's name is chosen:



But once a student with a Reduced eligibility is selected, the price will be modified:



Quantity Field = Inventory Tracker. If an amount other than unlimited (UNL) is set, that amount will decrease each time the product is purchased and once it hits zero, the system will reflect an Out of Stock message. This is perfect for classes or camps with caps, parking passes or T-shirts.

Product Setup

Adding a product is necessary when running a school store, but not every product needs to be something like a textbook or spiritwear. MSB products are flexible enough to include entries for school events (such as sporting event tickets or senior trips), additional supplies for an optional class (such as for an art class), and a way to make a donation to the school.

Navigate to myschoolbucks.com

Creating a Product:

Administrators may create products through the **Products** page.

1. From the Admin Tools sidebar, click **Stores**.
2. Click **Products**.
3. Click **Add**.
4. Select the Store where the product will be sold.
5. The Product ID is populated automatically. Enter a Product Name.
6. Check **Featured Item** if you would like to have the item appear on the main store page under the Featured Items section.

The next field is **Prompt for Student**. One of the most important features in the product is the Prompt for Student field. By setting this to any of the 4 items in the drop down menu, this will allow the parent to select their student when purchasing the product. It is highly recommended to use **Student is Required (Must be Active)** so that the Payment Reports reflect both the parent and student names on the transaction.

There is also an option to not select anything and not require a student name.
When might this be used? Selecting NONE in this field would be appropriate if the item is a donation where the student name is not necessary or if you wish to have this product available for Guest Checkout. Guest Checkout will allow anyone with access to the product link or QR code to be able to purchase this product without having a MySchoolBucks account. Examples of this might be Spiritwear, Camps, Donations, and any product that members of the community might want to purchase. By having an item for Guest Checkout, **Prompt for Student cannot be used**. If any student information does need to be collected, it is recommended to add that in the webform.

General Tab, the required fields are Standard Price, Quantity Available, Payment Method and Classification.

Start by setting the **Standard Price** of the item.

Enter the **Initial Quantity Available** of the item.

Enter the cost feature if you wish to track profitability. This is not a mandatory field. It will simply allow you to track the profitability of your product. If you know the cost, you may add it to this field. There is a sales report that can be created to calculate the profit based on all quantities sold.

Select the correct **Payment Method (bank account)**

Select the **Classification** of the item, which is how the item will be organized within the school store and the site.

Enter information in the optional fields as necessary.

9. Click the **Description** tab.

Under **Description**, enter the long description of the item. This field holds several thousand characters of text. The text can be modified or enhanced using the tools

Under **Other Info**, enter additional information about the product.

10. Click the **Availability** tab.

Using the **Product Visibility** drop-down menu, select where the product will be available to customers.

a. **All** will display the product on the Website and in MSB Anywhere.
b. **Hidden** will hide the product from stores.
c. **MSB Anywhere** will make the product only visible when purchased directly from the school on the MSB Anywhere app.
d. **Website** will make the product only visible on the MySchoolBucks website.

11. Use the **Product Availability** table to limit the product to certain schools, grades, or homerooms, or check **Enable district wide for everyone** to have it available to everyone.

12. Graphics Tab

Click on the Graphic tab*. We highly recommend that every product have a graphic associated with it. It allows the product to be found more easily and is more visually pleasing during the checkout process. You may select any image from our list of stock images when clicking on Graphic Name. To add new images to this list for anyone in the district to use, you may upload graphics under the Graphics tab in the Admin ToolBar. There is a separate video in the learning path on how to do this. To add an image to your product that will be for use only in this particular store, you may select*

Add A New Graphic, Browse, select the image from where you have it saved locally, and select open. This will upload the graphic to your product. If you are selling a tangible good like spiritwear, we recommend taking a physical photo of it, uploading it to your computer and then adding it either to the district graphics page or to the individual product.

On the **Advanced** tab, there are several settings that you may need to change depending on the item you are creating.

- On the left hand side, you have the option to make this item taxable, yes or no. If you need to collect sales tax in conjunction with the purchase of the product you are creating, you would click the radio button next to Yes so that the appropriate sales tax added in your store set up is applied. If this item does not require sales tax, please leave the radio button default to No.
- The second setting you may need to change on this page is the **Customized Pricing for Student** default. If you wish to leverage the eligibility status to provide variable pricing for Paid, Reduced and Free statuses, please select the Yes radio button. By doing this, the system will be

able to read the eligibility status from your student data and apply the appropriate option during checkout. If the price will be the same regardless of lunch status, please leave the default as No.

- The third setting is **Allow User to Choose the Quantity to Purchase**. If you leave the default as Yes, the parent is able to purchase an unlimited amount of this item. Please use your best judgment when making the decision to allow the user to choose the quantity. If the product is something that should be purchased only once per student, we highly recommend you update the setting to No.
- The last setting you may need to change on the Advanced tab is **Allow User to Enter a Payment Amount**. The setting defaults to No and should always remain No if the district is determining the price of the item.
  However if the product is a donation or a fundraiser and the user is determining how much they want to give, you may update the setting to Yes which will allow the user to type in the amount they are willing to spend during the purchase process.

  Once your item is completed, you may either **Save as Draft** if there are still updates or approvals to be made before publishing to a school store or **click Create.** By clicking create, the item will be generated and made available immediately to parents in the school store.

Create a General Ledger (G/L) Account

Purpose:

General Ledger accounts are used to help you differentiate incoming revenue based on what was purchased on MySchoolBucks. The daily deposit you receive from MySchoolBucks is a batch of payments that could be divided into any number of products that have been sold. GL Accounts provide an easy system to allocate portions of that batch to different programs, products, or activities at your school or district. Generally, GL Account codes are generated by an accounting software - but possessing an accounting software is not a prerequisite for their usage.

In addition to tracking revenue, MyschoolBucks supports the use of general ledger accounts to track other portions of payments, such as expenditure (used by districts that absorb the Program Fees), sales tax, and cash (debits that correspond to the posting of revenue to the revenue GL account codes).

1. **Creating a G/L Accounts:**
2. To create a G/L Accounts:
3. Navigate to www.myschoolbucks.com.
4. Click the **Log In** button.
5. Enter your username and password.
6. Click **Log In**.
7. On the left-hand navigation menu under Admin Tools, click **Stores**
8. Click **G/L Account**
9. Select **+Add**

- Once you select **+Add,** there will be a few options that will need to be filled in. Let's take a look at the different options and when you would use them.
- **G/L Account ID** is automatically created by MySchoolBucks to keep track of the accounts you have created, you can leave this.
- **G/L Account Code -** This can match the numbers in your accounting software or you can create a name to reference for your report.
- **Name -** If you are using a code from your accounting software, you can name the code.
- **Type-**
  - Cash- Cash is used in correlation with Sales, specifically to track debits in correlation with revenue posted.
  - Expenditure- Using an Expenditure G/L Code will allow you to track your program fee, if you are district absorbed.
  - Sales- This is the most common setting for basic products. Sales type is for tracking revenue. This is the default when creating a G/L code.
  - Sales Tax- Sales Tax tracks all Sales Tax collected.

Once these options are reviewed and configured, you would select **Create**.

Attaching G/L Code to a Product:

Once required G/L codes are entered, they can be attached to products.

1. On the left-hand navigation menu under Admin Tools, click **Stores**
2. Click **Products**
3. Search for the product.
4. Click on the 3 blue lines to the left of the product and select Edit.
5. From the Edit screen, select the 6th tab G/L Accounts.

The default Sales G/L Account would be the top left option.
Click the arrow pointing down on the preferred option and select from the G/L codes that were created.

Creating Product Groups

Purpose:

Product Groups (also called "Categories") allow for greater organization of store items by placing them in user-defined groupings. Product Groups are used as Categories in the school store, where they can help filter products.

Creating a Product Group:

1. On the Admin Tools sidebar, click **Stores**.
2. Click **Product Groups (Categories)**.
3. Click **Add Group**.

4. A Group ID is generated automatically. You may edit the Group ID as long as it does not match an already existing ID.
5. Enter a Name for the group.
6. On the Products tab, place a check next to every item that is part of the product group.
7. Check **Use Custom Product Fields** if you would like to only show certain information of the products in the group (for example, you may want certain products to not show the Options). After checking this field, you will need to edit the product group custom fields after the group is created.
8. Click **Create** to finish and create the product group.

Creating Departments and Adding Products to Departments

Purpose:
Creating Departments adds an additional layer for reporting purposes and limits the reports an admin can run.

For Example, if a Music Department is added to the High School Store, Admins can assign “Music Department” to applicable products or invoices. This will create an opportunity to filter reports and see sales for departments.

If an admin only needs to see reports for a specific department, such as the Music Department, that can be added to the admin’s MySchoolBucks account. When the admin runs reports, the reports will automatically be filtered to only see products and invoices assigned to the Music Department.

Additionally, adding a department allows you to provide a contact number for each department within your district. This provides parents a direct contact for questions. Parents can access this information under the Help option in the upper right hand corner of their log in page.

Dedicated department email addresses can be added. This allows admins to receive a Daily Status email, giving a summary count of the products sold for that department on the given day.

How to Create a Department:

1. From the Admin Tools sidebar, select Store.
2. Select **Department.**
   Here you will see a list of existing departments.
3. Click **Add** to create a new Department.
4. Fill in the fields that you would like to use. If you are only using departments for a restricted view, you would only need to enter the Name.
5. Click **Create.**

How to Add Department to a User:

1. On the left-hand navigation menu under Admin Tools, click **Users**.
2. Select **Users**.
3.Utilize the **Filters** to search for the **User**.
4. Click on the **3 lines** to the left of the User info.
5. Select **Edit**.

There will be an option on the left hand side for “**Department**.” Select the desired department from the drop-down menu. Click **Update**.

How to add Department to products:

Now let's add the department to the appropriate products.

1. On the left-hand navigation menu under Admin Tools, click **Stores**.
2. Select **Products**.
3. Use the **Filters** to find the product you need.
4. Click on the **3 lines** to the left of the product.
5. Select **Edit**.

The first tab, the **General Tab**, has the spot for **Department**. Select the correct one from the drop down. Click **Update**.

You can also add a **Department** to an **Invoice** or **Invoice Template** by using the **more options** section below the fee.

Requiring Department on Products or Invoices:

You can require a department to be added on a product or an invoice. To do this:
On the left-hand navigation menu under Admin Tools, click **Stores**.

1. Select **Stores**.
2. Find the Store that you need to require the Department.
3. Click on the **3 lines** to the left of the store.
4. Select **Edit**.
5. Click on the third tab called **Product Defaults.**
6. Check that box under the drop down for **Department** labeled **Required**.
7. Click on the fourth tab called **Invoice Defaults.**
8. Check that box under the drop down for **Department** labeled **Required**.
9. Select **Update**.

Now a product or invoice cannot be created until a Department is added. This will ensure that all products and invoices have an attached department.

Uploading Graphics

Purpose:

Graphics may be used to show a product or as a tile on a district's landing page. Rather than have administrators upload individual graphics every time, you may save and manage graphics in MySchoolBucks and make them available to certain schools that would use them.

Accessing and Using the Graphics Page:

To access graphics, from the Admin Tools sidebar, click **Stores**. Then, click **Graphics**.

To add a new image, click **Add Graphic(s)**.

To search for an existing image to edit, use the Search field next to the Add Graphic(s) button. Further options to narrow down the list are available under the **Show Filters** checkbox. With this checked, you can filter images by what store they are available as well as the date they were updated. Click **Reset** to restore the filters to their default values.

To edit an existing image, click the orange **Edit** button. To delete an existing image, click the red **Delete** button.

Adding Graphics - Single Graphic:

1. After clicking **Add Graphic(s)**, if you are adding one new graphic, select the tab **Single Graphic**.
2. Under Availability and Store, select which stores will have access to this image.
3. Enter the name you would like to use for the graphic under Graphic Name. Under File Name, click **Browse** to select an image from your computer you would like to use as a graphic. Under Description, enter a description of the graphic. Select **Enable link to View Larger Image** if you would like the user to be able to see a larger version of the image, such as for store products.
4. When you have finished, click **Save**. The graphic will appear in your district's graphics library as well as on the Manage Graphics page.

Adding Graphics - Multiple Graphics:

1. After clicking **Add Graphic(s)**, if you would like to upload multiple graphics, select the tab **Multiple Graphics**.
2. Under Availability and Store, select which stores will have access to the uploaded images.
3. Click **Select Files** and choose a file that you would like to use as a graphic. You can also select files by dragging them from their folder to the File Upload/Drop Area. You can even drag and drop multiple files at once.
   Names will automatically be generated based on the file names, but you can change a graphic's name by typing a new one in the Graphic Name window. You will be notified if a Graphic Name is already being used for another graphic.
4. Click **Save (Upload)** to save the graphics in the File Upload/Drop Area to your graphic library. Click **Clear** to remove all the items from the list and cancel the upload.

Product Customization

Web Forms

Purpose:

A web form is used to collect information from the user as a product is being purchased. The web form can be configured so that a user is unable to purchase the product until all required fields on the form are completed. The Web Form information captured will display on MySchoolBucks reports.

Web forms may be created in Form Designer, uploaded as a PDF, or be linked to a URL.

Adding a Web Form - Form Designer:

The Form Designer in MySchoolBucks allows you to create a basic web form with selectable fields and descriptions for users.

1. From the Admin Tools sidebar, click **Stores**.
2. Click **Web Forms**.
3. Click **Add Web Form**.
4. The option **Form Designer** is selected by default. Click **Continue** to proceed to the Web Form setup screen.
5. On the Details tab, enter the **Web Form ID**. Use underscores instead of spaces as needed.
6. Enter the **Name** of the Web Form. Use spaces instead of underscores.
7. Leave the option “Require review and approval of submitted forms” set to “No”.
8. Under **Description**, provide a short description of what the form is going to be used for.
9. Under **User Instructions**, enter instructions or other information pertinent to completing the web form.
10. Click the **Availability** tab.
11. If you would like to restrict this web form to certain schools, uncheck **Enable district wide for everyone**. Use the checkboxes to select which schools will have this web form available.
    If you would like the web form to be enabled at all schools, leave **Enable district wide for everyone** checked.
12. Click the **Form Fields** tab. This tab is where you add fields in order to create the web form.
13. Click **Add Field**.
14. Select a field **Type** and enter a **Label**. The Label is the title of the field on the Web Form as the user sees it. Use **Response** to determine when the field is available to the parent. Use the **Star icon** to determine whether the field is required. A filled star means the field is required.
    Example: The below setup generates an editable text field that users will see as Parent Name, is always shown, and is not required.

Here is a list of different field Types:

- **Blank Line**: acts as a space with no Options or Label. This may be used to space out fields on the form.
- **Check Box**: places a check box to the right of the Label.
- **Check Box (left)**: places a check box to the left of the Label.
- **Check Box (Multi-Select)**: places a series of check boxes to the right of the Label. Enter the options available in the series under **Options**, with one selectable option per line.
- **Combo Box**: provides a drop-down menu with selectable options. Enter the options available in the combo box under **Options**, with one selectable option per line.
- **Date**: provides a drop-down menu that allows the user to select the date.
- **HTML**: allows for free-form entering of HTML on the web form.
- **Label**: places a text field on the web form to the right of the Label. Enter the information you would like to display next to the Label in the **Value** field.
- **Label (Wide)**: places a wider text field on the web form for longer areas of text. Enter the information you would like to display in the **Value** field.
- **List Box**: provides a drop-down menu with selectable options. Enter the options available in the list box under **Options**, with one selectable option per line.
- **List Box (Multi-Select)**: provides a scrollable list with multiple options the user may highlight. Enter the options available in the list box under **Options**, with one selectable option per line.
- **Numeric Field**: places a text field that only allows for numbers to be entered.
- **Phone Number**: places a text field that only allows for numbers, specifically for phone numbers.

- **Radio Button List**: provides a list of options with radio buttons that allow for the selection of one of the options. Enter the options available in the list under **Options**, with one selectable option per line.
- **Signature**: places a line for the parent to sign and date the form.
- **Text Area**: provides a text area that parents may use to enter information. The text area allows for 60 characters.
- **Text Field**: provides a text field that parents may use to enter information. The text field allows for 60 characters.
- **Text Field (Short)**: provides a text field that parents may use to enter information. The text field (short) allows for 60 characters.

15. Use the **Up Arrow** to move a field up the list, and use the **Down Arrow** to move a field down the list. Click the **Trash icon** to remove a field from the list. The Preview window above the field list allows you to get an idea of what the web form will look like when it is created.
16. When you have finished, click **Create**.
17. After the Web Form is created, you can preview how it will look to a user by clicking **Test Web Form**.
18. If anything on the Web Form needs to be changed or updated, click **Edit** to go to the Web Form setup screen.

Note: The Web Form ID cannot be modified.

Adding a Web Form - PDF:

In addition to product Web Forms, MySchoolBucks supports the upload of PDF Web Forms for users to access, print, and complete. There are no stipulations as to what a PDF Web Form must contain, and it is generally used to provide users online access to forms such as field trip permission slips. Perform the following steps to upload a PDF Web Form.

1. From the Admin Tools sidebar, click **Stores**.
2. Click **Web Forms**.
3. Click **Add Web Form**.
4. Select **Adobe Acrobat (PDF)** and click **Continue**.
5. On the Details tab, enter a **Web Form ID**. Use underscores instead of spaces.
6. Enter a **Name** for the Web Form. Use spaces instead of underscores. This field will display the name as seen by the parent user.
7. Next to Filename, click **Browse** or **Choose File**, depending on your internet browser.
8. In the pop-up window, select the document you would like to upload and click **Open**.
9. Select whether submitted forms need approval.
10. Under **Description**, provide a short description of what the form is going to be used for.
11. Under **User Instructions**, enter instructions or other information pertinent to completing the web form.
12. Click the **Availability** tab. If you would like to restrict this web form to certain schools, uncheck **Enable district wide for everyone**. Use the checkboxes to select which schools will have this web form available.
    If you would like the web form to be enabled at all schools, leave **Enable district wide for everyone** checked.
13. When finished, click **Create** to upload the PDF.
14. Click **Test Web Form** to preview the PDF.

Adding a Web Form - URL:

If the information or form necessary for a product is available on a website outside of MySchoolBucks, you may use a web form to attach a URL to a product.

1. From the Admin Tools sidebar, click **Stores**.
2. Click **Web Forms**.
3. Click **Add Web Form**.
4. Select **Web Link (URL)** and click **Continue**.
5. On the Details tab, enter a **Web Form ID**. Use underscores instead of spaces as needed.

6. Enter a **Name** for the Web Form. Use spaces instead of underscores. This field will display the name as seen by the parent user.
7. Enter the **URL** for the Web Form.
8. Select whether submitted forms need approval.
9. Under **Description**, provide a short description of what the form is going to be used for. This may also be used to describe where the link goes.
10. Under **User Instructions**, enter instructions or other information pertinent to completing the web form.
11. Click the **Availability** tab. If you would like to restrict this web form to certain schools, uncheck **Enable district wide for everyone**. Use the checkboxes to select which schools will have this web form available.
    If you would like the web form to be enabled at all schools, leave **Enable district wide for everyone** checked.
12. When finished, click **Create** to attach the web link.
13. Click **Test Web Form** to preview the web link.

Assigning a Web Form to a Product:

Web forms may be assigned individually to products when creating or editing them by using the **Web Form** drop-down menu on the General tab.
Assigning a Web Form to Multiple Products:

To assign a Web Form to multiple products at once, perform the following steps.

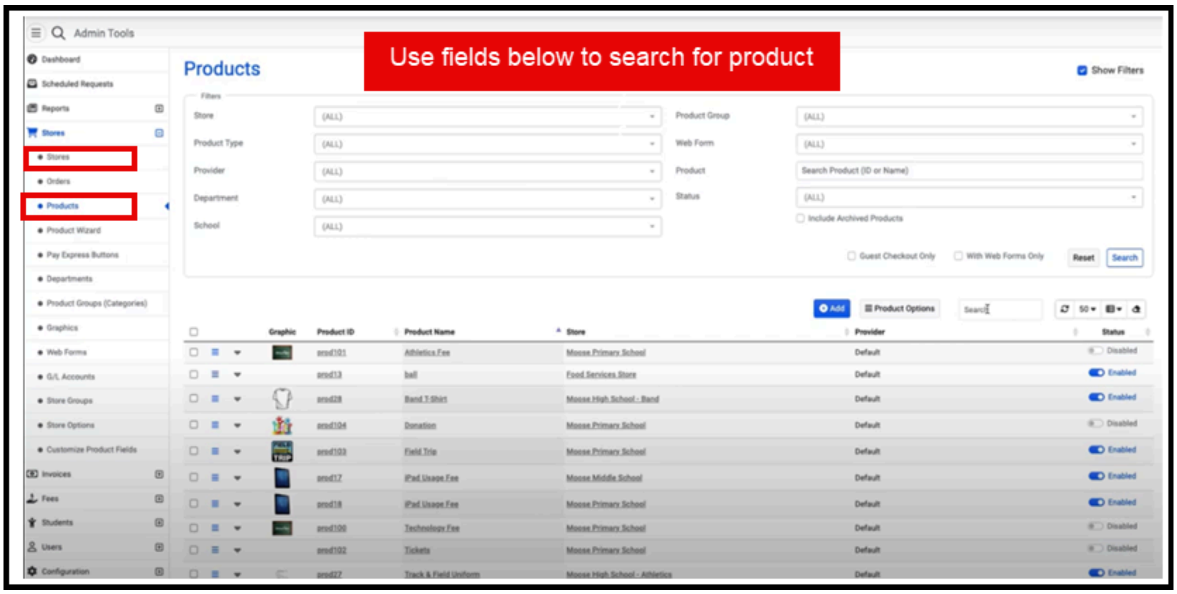
1. From the Admin Tools sidebar, click **Stores**.
2. Click **Web Forms**.
3. Click the Name or ID of the web form you would like to assign.
4. Click **Assign to Products**.
5. A list of available products appears on the Assign to Products page. You may use the search filters to narrow the list to specific products.
6. Use the checkboxes on the left to select which products will be assigned this web form.
7. Click **Assign**.
8. On the confirmation screen, click **Confirm**.

Pricing and Inventory

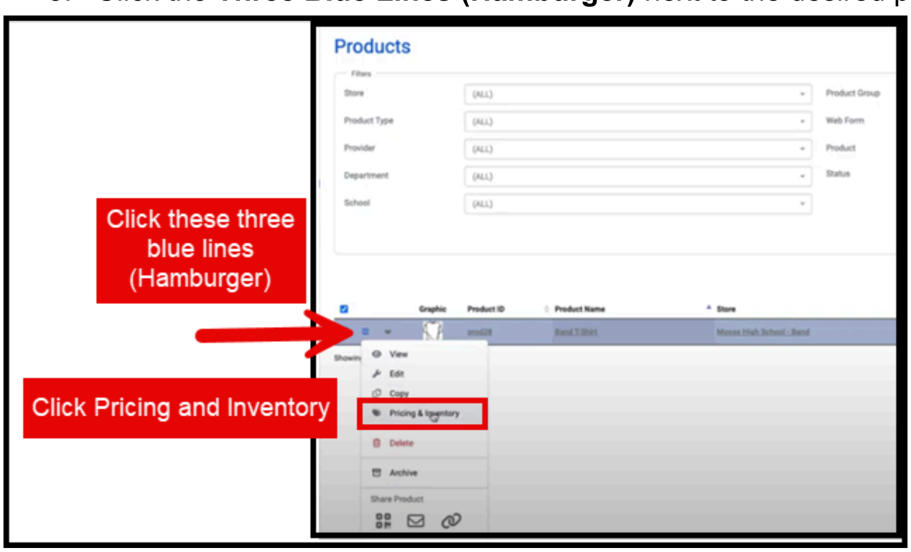
Purpose:

Provide an understanding of how to use the different features in MSB Stores: *Pricing and Inventory*. *Pricing and Inventory* allows users to establish multiple parameters for a product. For example, if you have created a Yearbook Product in your School Store, there may be a base price and additional price points for various add-ons, like name embossment, additional signature pages, etc. *Pricing and Inventory* also provides a Start and End Date feature that allows you to control when a product or option is available for purchase.

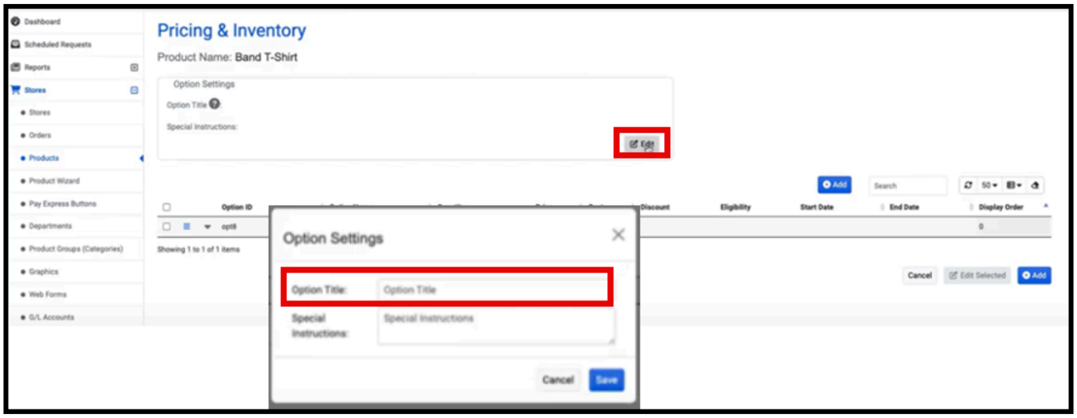
Accessing Products



1. Go to the **Admin Tool** panel
2. Click **Stores**
3. Click **Products**
4. **Search** for the product using the filters.
5. Click the **Three Blue Lines (Hamburger)** next to the desired product.

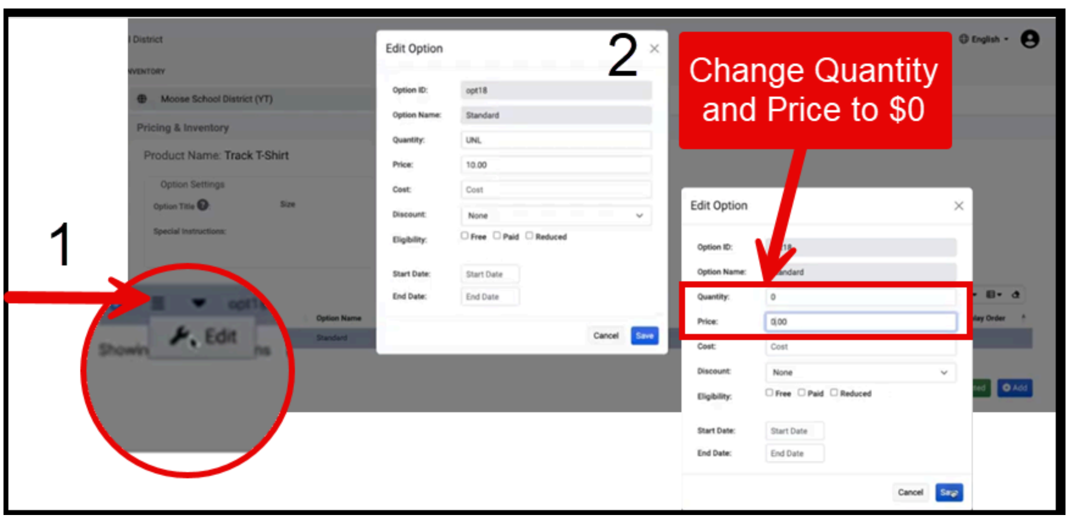


1. Click **Edit**
2. Complete **Option Title** - Indicate what the customer is selecting when purchasing. For example, for a t-shirt purchase, the Option Title might read, “Size.”
3. Click **Save**



Important: The Standard Option Quantity and Price must be set to zero (0). This setting prevents the customer from selecting a $0 option and proceeding to checkout.

1. Click on the **“Hamburger”**
2. Click **Edit**
3. Set the Option Name to Standard
4. Set Quantity to zero (0)
5. Set Cost to zero (0)
6. Click **Save**



Adding Sizes to Products

*Some products may have higher or lower prices based on the size. For example, a small t-shirt may cost

1. Click **Add**
2. Enter the *Option Name* - remember this was set to “Size”
3. Enter a *Quantity* - UNL for Unlimited
4. Enter the *Price*
5. Enter *Stock Cost* - Stock Options allows MSB to automatically calculate profits on the Sales Report.
6. *Discounts* - these can be selected AFTER being created at the Store level.

7. Select *Start* and *End Dates*
8. Click **Save**

*Repeat these steps for each size option for this product.

Start/End Dates - Special Dates

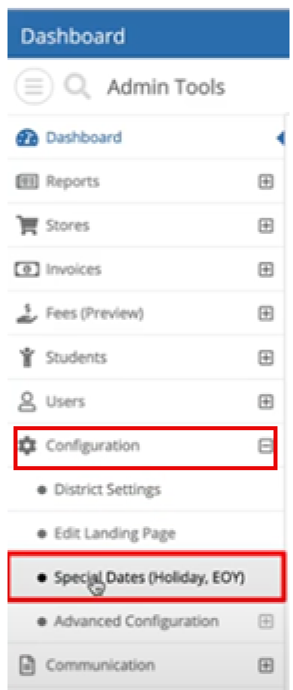
Purpose

Special Dates is the section used for setting up the MySchoolBucks website for periods of inactivity, particularly the end of the school year or over extended breaks. When special dates are added, payments will stop and start automatically based on pre-selected date ranges.

To assist admin users during the start of the school year, MSB may automatically ask for the date of the first day of school for your district.

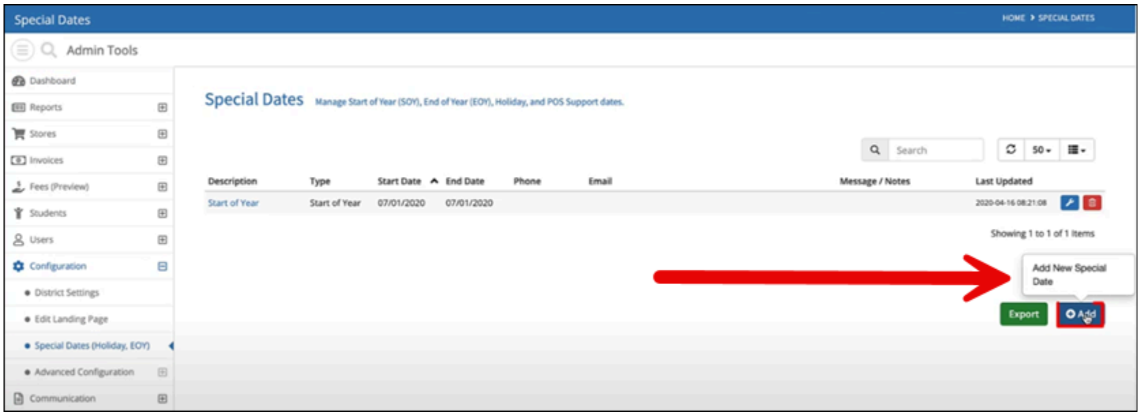
<u>Special Dates - Navigation</u>

Go to the admin tools panel on the left side of the page.
Select **Configuration**,
and then Select **Special Dates**.

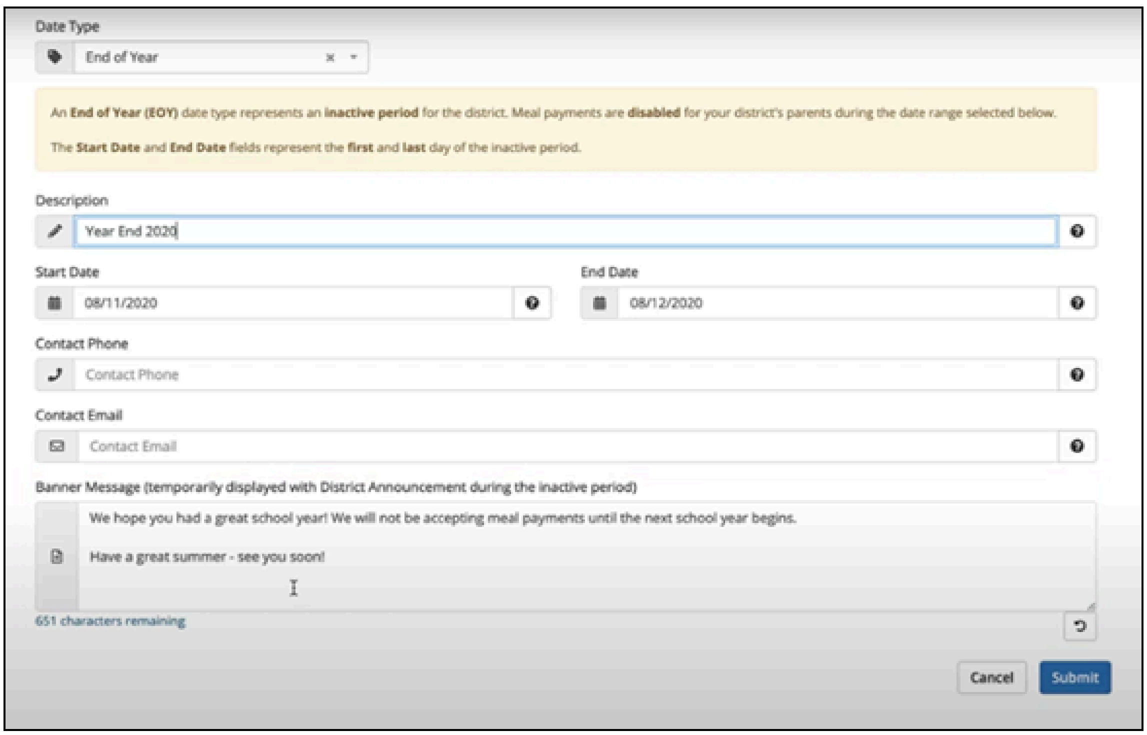


Adding a Special Date

On the Special Dates page, Click the **blue Add button**.



Select the appropriate date type of special date, such as *End-of-Year*.
Under *Description*, enter a short description for the inactive period, such as, “Year End 2020” or “2020 Winter Break.”



Under the *Start Date*, enter the first day that MySchoolBucks payments will be turned OFF.
Under the *End Date*, enter the first day that MySchoolBucks will be turned back ON.

OPTIONAL FIELDS
Contact Phone - This is typically the Food Service Representative for your district.
Contact Email - The email listed here will receive automated emails and reminders related to the special date setup.
Banner Message - This message will appear as a district announcement during the inactive period.
Click **Submit**
The newly added special date will appear on the special dates page.

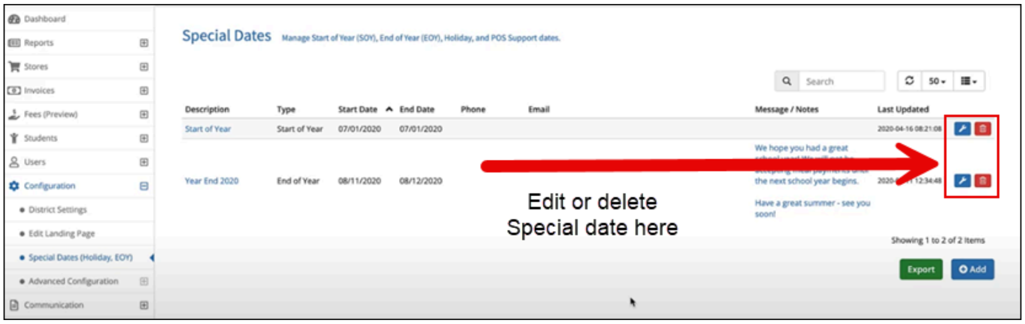
Note:

You may only have one special date with the date type, "End of Year."
If a special date for "End of Year" is already created, users cannot select this option again.

Changing an existing Special Date

If changes must be made to an existing Special Date, the existing settings must be edited or deleted. If deleted, a new End of Year Special Date can be added.

Editing or Deleting Existing



Navigate to Special Dates page
Locate the Special Date to be changed
To Edit: Click the **blue wrench** icon next to the applicable special date
Click **Submit** to save any edits made
To Delete: Click the **red trash can** icon next to the entry you would wish to delete.
A pop-up will appear. Click **YES Delete** to confirm.

Recurring Payments

Purpose:

Recurring Payments allow parents to pay a large fee in installments of the districts choosing. Parents can select from as many options as the school district provides. Recurring Payments will start the day the parent checkouts with the product. For example, if a parent chooses 8 weekly payments on a Monday, the following payments will be taken out every Monday. Admins will need to set recurring payment options on each product.

Adding Recurring Payment to a Product.

1. Navigate to www.myschoolbucks.com.
2. Click the **Log In** button.
3. Enter your username and password.
4. Click **Log In**.
5. On the left-hand navigation menu under Admin Tools, click **Stores**.
6. Click **Products**.
7. Use the **Filters** to find the product you need.
8. Click on the Hamburger stack to the left of the product and select **Edit**.
9. Click on the 5th tab labeled **Schedule**.

Under **Schedules**, use the first field (**Send Payments**) to select how often recurring payments will be made (for example, Daily or Monthly) and use the second field (**until a total of**) to enter how many payments will be made toward the purchase of the item. Then, click **Add Schedule** to add this payment schedule to available recurring payment options for the customer.

Use the first checkbox to allow customers to set their own payment schedule. Use the second checkbox to allow for automatic low balance payments.

Once you select your payment options, select **Update.**

Pay Express Buttons

Purpose:

MSB Pay Express payment buttons allow you to collect payments through your own website or emails using buttons created from easy to copy and paste HTML.

Adding a Pay Express Button:

To create a Pay Express button, under Stores on the Admin Tools left-hand panel, click **Pay Express Buttons**.

1. Click **Add**.
2. Enter a Button Name, associate the button with an existing Store, and select a Product. Style selections can be made for the button text, icon, and color using the Button Style and Theme dropdowns.
3. The Action dropdown defaults to “Go to product page.” If this is selected, the button will direct a customer to the associated product page on the MySchoolBucks website.

   Action can be changed to “Add to cart and go directly to the order checkout page”, which will bypass the product page and initiate a customer login page when the customer clicks the Pay Express button. Once logged in (Guest Checkout is optional), the customer will go to the Checkout page, where a payment method can be entered and the order can be processed.

   Two JavaScript codes are generated (<head> and <body>) that can be copied and pasted for website integration. A URL is also generated that can be used to insert into an email. This link can also be used to test button functionality.

4. Click **Create** to save the Pay Express button.

Promotional Emails:

In addition to being hosted on websites, Pay Express Buttons may be used in promotional emails. You may create an email from an existing Pay Express Button by clicking the **Email** icon to the right of the desired Pay Express Button.

The promotional email is generated from a ***MySchoolBucks*** template. Select the school, and then select who will be receiving promotional emails. Recipients can be selected among students, student groups, or parent user accounts.

After selecting student recipients, you may save them as a Student Group by entering a Group Name below the recipient list. This is useful if the group of students will likely receive similar promotional emails in the future.

Before sending the promotional email, you may preview it by clicking the **Preview** tab in the Send Promotional Email window.

When recipients have been selected, click **Send** to send the promotional emails.

Requiring Approval and Pending Orders

Purpose:

The Require Approval product feature provides you with the ability to review orders for a product before a parent or user is charged. This feature forces the creation of a pending order, which must be approved or canceled. The parent/user will see an authorization hold on their billing account, which is good for five days. Orders approved within the five day window are guaranteed to process successfully. If orders are approved outside of the five day window, we cannot guarantee that the approval will be successful. If the order is canceled, the authorization on the parent or user's billing account will be removed. Please note that the removal may not be processed until shortly after midnight on the day after the order has been canceled.

Setting Up Product to Require Approval:

How to set up a product to require approval and then we will go over the different ways admins can view the pending orders.

1. Navigate to www.myschoolbucks.com.
2. Click the **Log In** button.
3. Enter your username and password.
4. Click **Log In**.
5. On the left-hand navigation menu under Admin Tools, click **Stores**.
6. Click **Products.**
7. Use your filters to find the product you would like to require approval.
8. Select the 3 blue lines to the left of the product and select **Edit**.

To the right of the Product ID you will see Require Approval. Check the box and then select Update.

Viewing the Pending Order:

There are two ways that admins can approve the order.

First, we can set up an automatic email to be sent once a day for products that require approval. The second is to manually go into MySchoolBucks.com to check.

Setting up Automatic Emails:

1. On the left-hand navigation menu under Admin Tools, click **Stores**.
2. Then click **Stores.**
3. Select the 3 blue lines to the left of the store that has the product that requires approval.
4. Click **Edit**.

On the second tab labeled **Contact Information**, you can enter the emails that you would like to receive a notice on the **Email Address** line. You can have more than one email listed. They would need to be separated by a semicolon.

Once the emails are entered, click on **Update**.

How to manually view products that require approval.

1. On the left-hand navigation menu under Admin Tools, click **Stores**.
2. Click **Orders.**
3. Under **Filters**, select the **Store, then click on the** dropdown from the **Status** option.
4. Select **Review**, then Search.

From a glance, each order will show the date and time it was placed, the Order ID, the User that placed the order, the payment method they used, the Status, and the amount that will be charged if the order is approved.

The 3 lines to the left of the order, gives you a few options:

- If you need to review the additional information that the purchaser filled out, you can select **View**. The first tab **Order Details** will show you what they filled out as well as the payment amount they choose. From this screen you can Approve or Cancel the Order.
- The Next option **Edit**, allows you to view and make changes to the student that was selected or the amount of the order. Once you make changes, select **Update**. Please note, after updating, you will still need to Approve the order.
- From the 3 lines, you can **Approve or Reject** the order as well.

Once you select to **Approve the Order**, you will see “Order was Approved Successfully” with the ID listed on the top of your screen. When you cancel the order, a similar message saying, the Order was Canceled successfully with the ID listed, will appear just under the Filter options.

Upon successful completion of either Approve or Cancel, the parent or user will receive an email notification containing the results.

Order Refunds

Purpose:

MySchoolBucks offers many options for refunding a store order. An order can be refunded fully, only have some of its items refunded, or have items refunded by a partial amount.

Refunding an Order:

On the Admin Tools sidebar, expand **Stores** and click **Orders**.
The Orders screen shows all orders made within the last 30 days. You may search for older or specific orders by using the search filters above the order list and clicking **Search**.

Click the **blue menu** icon and then select **Set Up Refund** for the order that has items you would like to refund.

You can choose to refund every item in the order by clicking the checkbox next to **Refund**. If you only want to refund some of the items, click each checkbox next to the items you would like to refund.

If you want to enter a partial amount instead of refunding the full amount, enter the amount being refunded.

For items bought in discrete quantities, enter the quantity being refunded. If that quantity should be restocked, check the box under **Re-stock**.

When finished, click **Submit**.

Invoicing

Background - Product vs. Invoice

MSB Store - Products and Invoices. Terminology is different with every district and every platform. When using MySchoolBucks, you may wonder, “What is the difference between a product and an invoice? Why would I make something a product and not an invoice?” Or conversely, “Why should I make this an invoice instead of a product?”

Simply, **a product is something that a parent or guardian is wanting to purchase**, a field trip, camp, a yearbook, a parking pass and maybe even a club or sports fee. With a product, you track who has **purchased** it, not who still **owes** for that item. Products are usually created when the majority of the students will be purchasing it.

An **invoice is for a cost OWED to a school** like a broken chromebook, a lost library fee or even child care tuition. Invoices can also be used for items that are not necessarily available for all students. Rather than having a product in the store where it can be seen according to the availability selected, the individual or group of students can be invoiced that amount. An example of this might be a Cheer fee where only 30 students in the school need to be charged the fee so a product does not need to be available for the entire school and an invoice can be sent to those 30 students.

Assessing Invoices

Purpose

This video will walk you through how to use our invoicing feature to send out invoices to User Accounts or email addresses. It can also invoice students with an invoice amount that is determined by the student record's eligibility status.

Create Invoice

1. Go to the **Admin Tools** sidebar and click **Invoices**
2. Click **Invoices**
3. Click **Add Invoice(s) or click** the down arrow next to **Add Invoice(s) if present** and choose **Add Invoice(s) (New)**
4. If prompted, choose your Default Store. This will be the Store that your Invoices are associated with when you run reports.

Recipients:

1. Click **Recipients**
2. You can use the left side to add students to the Invoice.
3. You can filter the student list by enrollment criteria and choose if you want to include inactive students or adults.

4. On the right side you will see the list of selected students and can add a user account or email address by typing an email address in the Add user or emails field and pressing enter.
5. When you have added your recipients, click **Save**

Invoice Date: The Invoice Date will default to the current date, but you can choose a date in the future and the invoice will not become available for the parent or customer to see until then. If emails will be sent out to alert the parent or customer about the invoice, the email will not be sent until this date.

Due on Date: Select the due date for your invoice or if the invoice will have multiple due dates, select your schedule.

The Schedules are set up from the **Admin Tools** menu **Invoices** > **Schedules**.

Add a fee:

1. Choose your already created **Fee** from the list or click **Create fee…** Please note that the ability to create a fee is not available to all users. Please reach out to your district administrator if you believe you should have access to this feature.
2. **Create a Fee** allows you to Create a Fee on the fly and will save you time when sending out quick invoices that will not be repeated. For example, invoicing a student for a lost library book where you would like to include the name of the book in the **Name** or **Description**.
3. If you have chosen **Create a Fee,** fill in the **Name**, **Amount**, and **Payment Method**.
4. Click **More Options** if you would like to fill in the Description, use Free & Reduced pricing, or associate a General Ledger code with the invoice.

Once you have added a **Fee**, click **More Options** to explore additional settings.

The More options area contains options that may be skipped if their default values work for the invoice you will be creating. This is what each option does or how it should be set.

Provider: Set the Provider to Invoices unless otherwise instructed.

Store: This will be the Store that your Invoices are associated with when you run reports.

Department: The Department option is used to group store products or invoices together and is an option you can filter your reports by.

Allow Partial Payments: This option will let the invoice recipient pay less than the amount due, and in any number of payments until the total invoice amount is satisfied. The default setting is determined by each individual **Store's** setup.

End Date: The End Date will close out your invoice on this date. Use this option if you no longer need the invoice paid after a certain date.

Waffle Menu: Use **Save as Template** if you think you will be sending out this type of invoice often. You can also load a previously saved **Invoice Template** from this menu. Finally, you can also Preview what the invoice will look like to your parents or customers.
Create: Once you are happy with your settings, click **Create** to create the invoices.

Creating Fees

Purpose:

Fees are required to create Invoice Templates, which are used for our Smart Invoicing features. Fees can also be used to send out invoices to individual students, but it works as a timesaver rather than a requirement.

Creating Fees

1. To create a fee, Go to the Admin Tools sidebar and click **Fees**
2. Click **Fees**
3. Click **Add**

Name: The name will be what the parents see when they receive the invoice and what you will see on your reports. Example: Annual Tech Fee
Description: Use the description field to provide additional information about the fee to the parent or end user. This is the yearly fee to cover technology fees
Payment Method: The Payment Method is your bank account.
Amounts: Standard is the regular price of the invoice and the only price amount that is required. If you are invoicing students, you can also fill in an amount for **Reduced** and **Free.** The students with this eligibility will receive an invoice for this amount instead of the Standard Amount.
Waive Remaining Amount: If you fill in either **Free** or **Reduced** you can use **Waive Remaining Amount.** This option shows parents the original amount of the invoice and that the price was reduced because of their student's eligibility.
Parents do not receive an email notification for an invoice if the amount owed was waived to $0.00.
Allow change amount(s) on Invoice: Check this box if you would like to allow for the ability to update this amount at the time of invoice assessment.
G/L Account Information: To associate a General Ledger code with your invoice, please select the appropriate code from the drop-down menu.

New G/L codes can be added by going to the **Admin Tools** menu and then **Stores** and **G/L Accounts**.
Availability: The Availability tab controls which admins will be able to use the Fee. When you create a new Fee it will default to **Enable district wide for everyone**. This makes the Fee available for all admins to use. To limit the fee to one or more stores, uncheck **Enable district wide for everyone** and select the appropriate Stores in the area below.
Please consider if the bank account and GL codes you use for the fee will pertain to everyone or just one store when you set the availability for your Fee.
Create: Click **Create** to save your **Fee**.

Creating an Invoice Template

Purpose

The information below provides an understanding of the complete process for **creating invoice templates** in MySchoolBucks.

Invoice templates allow you to simplify the creation of invoices at the cashier level. MySchoolBucks does this by saving a generic fee to a template that can then be used in the invoice creation process.

In the left hand navigation menu under **Admin Tools**, click **Invoices** and then **Invoice Templates.**
At the top of the invoice template section, click on the **Blue "Add" button**, and you'll be directed to the add invoice template screen.

1. **Provide the invoice template a name**. The template name is internal only and is not displayed to the end user or the parent. We recommend that the template name be something that all district administrators will be able to recognize during the course of the invoice creation process.
2. **Define the fee name**. The fee name is parent- facing so be sure that the fee name is descriptive of the invoice or fee that is being created.
3. Once the fee name is entered, click **Add**.
4. After the template and fee have been named, enter a dollar amount, so the invoices created using this template will have a fixed amount.
    a. You can key in the fee amount to ensure that anytime this invoice template is selected during the invoice creation process that the fee amount is the dollar amount that is entered. The fee amount may be left blank. This will prompt users to enter a fee amount during the invoice creation process when using this template.
    b. Once the fee amount is entered, there is an option to provide a description. This is a parent-facing description.
5. Select the "Show More Options" link. This link provides additional configuration pieces that are associated with the invoice template. Scrolling down, the provider defaults to "Invoices." ***It is important that this is left untouched.***
6. The invoice template must be assigned to the applicable Store. This ensures that district and school users have access to the desired template.
7. Once the store has been selected, the Payment Method must be selected. In MySchoolBucks, *payment method is synonymous with "bank account"*. This selection determines where funds used during the purchase process will be deposited.

8. Select the correct account from the drop-down menu. Optionally, “Department” can be selected. The department is used as a layer of reporting filters. This option is not needed if the district is not using departments.
9. Continuing to scroll down the page to *view the GL account information section*. Like MySchoolBucks stores products, invoices can have various General Ledger account codes associated with them. If a general ledger account code is needed for this invoice, select the applicable account code in the appropriate fields, as needed.

10. After configuring the GL account information, scroll down to select options for **Available to which Schools.** Please note that the Available to which Schools will control which students can have this fee associated with them.
11. Once the invoice template is created, I can use it when creating invoices.

Assessing School Fees

Purpose:

How to assess invoices using School Fees to quickly and easily send invoices to your student population. . *Before assigning School Fees, you will need to create a Fee and Invoice Template*.

School Fees

1. Go to the **Admin Tools** sidebar and Select **Fees**
2. Select **School Fees**
3. Select **Assess**
4. Select the **Provider** from the drop-down menu
5. Select the **Invoice Template** from the drop-down menu. Templates need to be created in advance of this step.
6. Use the filters to designate the group of students you would like to assign a fee to, such as the students in 12th grade at your high school.
7. Select **Next**
8. You can **Preview** or **Export** this list.
9. Select **Assess Fees** to assign the invoices.

When assessing invoices using School Fees, the system keeps track of previously assigned invoices and will only assign invoices to students who have not yet received this fee.

School Fees Report

1. Go to the **Admin Tools** sidebar and Select **Fees**
2. Select **School Fees**
3. Select **Report**
4. Select **Provider** and **Invoice Template or Templates** if reviewing several at once
5. Use the filters to designate the group of students you would like to include on the report

6. You may also filter to only include student that have already been assessed this fee, Student who have not been assessed this fee yet, and by students that have been assessed this fee but are no longer enrolled.
7. Select **View Report** or **Send to Excel**

Student Groups

The Student Groups page allows you to create or edit groups of students, which can be used to organize students in your district.

To create a new student group:

1. On the Admin Tools sidebar, expand **Students**.
2. Click **Student Groups**.
3. Click **Add**.
4. Select whether the Group Type will be Standard or Responsive.
   - Standard: creates a group with a manually selected set of students that won't change until the group is updated.
   - Responsive: allows you to set desired filters that will let MySchoolBucks automatically generate a set of applicable students whenever the group is used.
5. Enter a Group Name.
6. Under Description, enter a description of the student group.
7. If you have set up custom grouping properties, they will appear under the Description. If applicable, enter text that briefly describes how the property relates to the group.
8. Next, select which students are going to be part of the group. You can narrow the list of students by filtering by School(s), Grade(s), or Homeroom(s). Use the checkmarks on the left to select each individual student, or use the top-most checkbox to select all students on the page.
9. After entering information and selecting all applicable students, click **Create** to create the student group.

Finding and Editing Student Groups:

You may find or edit student groups from the Student Groups page. By default, it lists every available student group. You can use the search criteria under Filters to filter student groups by their Group Type (Standard or Responsive), school, grade, and homeroom. If you have custom properties, they will also appear as filters. Click **Search** to apply the filters.

The list of student groups allows you to edit or delete groups on the list. To see the student group details, including a list of students in the group, click the **Group Name**, **Group ID**, or the **Details** icon on the right. To edit the group, click the **Edit** icon. To delete a group, click the **Delete** icon.

Custom Properties:

Custom Properties are properties created by district users that allow for customized searches and greater flexibility in defining student groups. To add custom properties, on the Student Groups page, click **Custom Properties**.

The Student Group Properties page allows you to add, edit, and delete student group properties. To create a new property, click **Add**. To edit a property, click the **Edit** icon. To delete a property, click the **Delete** icon.

Note: If you delete a group property, it will be *permanently removed* from any associated student groups. For this reason, it may be better to just disable discontinued properties.

To add a custom property, enter a name, leave the checkbox Enabled, and click **Create**.

Custom Properties are free-form text fields that are defined when creating a student group. These can allow for new possibilities when searching through student groups. For example, an “Allergies” property can list multiple allergies present within the student group, or an “Honor Roll” property can show “yes” or “true” for a group that is part of their school’s honor roll.

The student group properties appear on the search screen, and entering text in the properties will bring up all groups that have that same text in their custom properties.

Managing Invoices

Purpose:

The Invoices page provides a list of invoices (fees) and allows you to add new invoices, edit pending invoices, and delete invoices in the event erroneous fees are charged. For this video, we’ll go over how to manage existing invoices.

Accessing and Using the Invoices Page:

To access the Invoices page, from the Admin Tools sidebar, select **Invoices**, and then select **Invoices**.

The Invoices screen shows the Invoice Dashboard, and below that are search filters. Use the **Show Filters** and **Show Dashboard** checkboxes to toggle the visibility of the search filters and the invoice dashboard respectively.

The Invoice Dashboard gives a summary of invoice data for the district, and it includes the total money issued in invoices, the invoice payments that are still outstanding, the total money issued in late fees, and the late fees that are still outstanding.

Below the Dashboard are filters that may be used to search for specific invoices. These filters are divided into three tabs: Invoice Filters, Enrollment Filters, and Payment Filters.

Invoice Filters include Invoice ID and Status filters and are associated with the invoices themselves.

Enrollment Filters include Student and School filters and are associated with the students assigned to the invoices.

Payment Filters include Payment Date and Refund filters and are associated with invoices that have received payments.

If filters are added or modified from the default search, an orange symbol appears to indicate which tabs have set filters. The orange symbols are also visible even when Show Filters is not checked. This makes it easier to see whether the invoice list is being filtered.

Below the Dashboard and the Filters is a list of invoices. Any multi-line invoices are grouped together in the list. If no filters are set, by default, the list shows all **Pending** invoices created within the last 30 days.

Click the **down arrow** to see more information related to the invoice, including payment information.

When viewing the additional information, clicking the hyperlinked items, such as an Invoice ID or the Student Name, opens a Quick View pop-up that displays more information while keeping you on the Invoices page. For example, clicking an Student name will open a pop-up showing the student''s information. Click the **eye icon** on the Quick View pop-up to open the full page of the Quick View in a new tab.

Click the three **blue lines** icon to open a list of Invoice Actions. The available actions are **View Invoice**, **Edit Invoice**, **Print Invoice**, **Waive Invoice**, and **Delete Invoice**.

Viewing an Invoice:
There are multiple ways to view invoice information. Click the **down arrow** to see more information related to the invoice, including payment information.

When viewing the additional information, clicking the hyperlinked items, such as an Order # or the Student Name, opens a Quick View pop-up that displays more information while keeping you on the Invoices page. For example, clicking an Order # will open a pop-up showing the order's information. Click the **eye icon** on the Quick View pop-up to open the full page of the Quick View in a new tab.

You may also skip the Quick View and go straight to viewing an invoice in detail by clicking the **blue menu** icon and selecting **View Invoice**.

Editing an Invoice:
To edit an invoice from the list of invoices, click the three **blue lines** and select **Edit Invoice**. Please note that not all users will have this ability.

After clicking Edit Invoice, you will see the Edit Invoice page.

- **Click on the Fee** to make changes to the name, fee amount, or payment method.
- **Select More Options** to edit the description or GL information. You can also add or remove fees while editing.

IMPORTANT: *You can only edit invoices that do not have an associated order*. Orders are created when a payment is attempted, scheduled, or processed. For this reason, make sure to catch and correct any errors quickly.

You may also edit an invoice from the View Invoice page by clicking **Edit Invoice**.

Printing an Invoice:
To **print** an invoice while you are seeing it in the list of invoices, click the **blue menu** icon and select **Print Invoice**.

After clicking Print Invoice, a new tab opens. The message on the invoice is the same throughout your district. To have this message changed, contact MySchoolBucks support.
You may also print an invoice from the View Invoice page by clicking **Print Invoice**.

Waiving an Invoice:
To waive an invoice, on the invoice list, click the **blue menu** icon and select **Waive Invoice**. Then, click **Waive** to confirm.
Deleting an Invoice:
To delete an invoice while you are seeing it in the list of invoices, click the **blue menu** icon and select **Delete Invoice**.

You may also delete an invoice from the View Invoice page by clicking **Delete Invoice**.

Printing, Waiving, or Deleting Multiple Invoices:
To print, waive, or delete multiple invoices at once, click the checkbox next to each invoice you wish to print, waive, or delete. You can also check all invoices on the page by clicking the uppermost check box.

After selecting invoices, click **Selected Actions**. Then, click **Print Invoices** to print the invoice information, click **Waive Invoices** to waive all of the selected invoices, or click **Delete Invoices** to delete all of the selected invoices.

Invoicing Cashier

Purpose:

How to take in-person and non-payments

How to Get to Invoicing Cashier:

1. Under Admin Tools, click **Invoices**.
2. Select **Invoicing (Cashier).**

Here, the user can search for invoices to process. At the top of the page, there are search filters that can be used to narrow the search for invoices. After entering criteria in the filters and clicking **Search**, the results are displayed in the **Select Invoices pane**.

When recording a single invoice, select the **green icon** to the right of the invoice.

To process multiple invoices at once, click the **checkboxes** to the left of the invoices you need to record, scroll to the bottom of the page and click **Continue**.

Under **Payment Amount**, if the invoice allows partial payments, you would be able to enter the amount that is being paid. If not, the remaining amount owed will already be entered for you. Clicking on the down arrow under **Payment Option** will allow you to choose the payment method.

- Select between the different payment options, either **Cash, Check, Money Order, Voucher**, or **Credit**. If you select **Check, Money Order,** or **Voucher**, you must enter an appropriate ID number. If you select **Credit**, you may also enter a note to describe the nature of the credit being used.
- Select a Non-Payment option for fees being paid, removed, or changed by an admin, instead of a traditional payment.
- Select **Waived** if the fee is being dropped for not applying to the customer, such as a book fee for a book that is found or returned.
- Select **Admin Change** if the fee amount needs to be altered without canceling the invoice altogether, using the Payment Amount as a way to deduct from the initial amount in order to make the correction.
- Select **Fee Refused** if the fee was disputed by the customer and is not being paid.
- Select **Fee Not Correct** if the fee was charged to the customer in error.
- Select **Not Participating** if the fee is related to a program, such as PE, that the customer does not wish to participate in.
- Select **Other** if the nonpayment reason does not fit with any of the other options.

After entering payment information, click **Record Payment**.

This confirmation page allows you to review the payments or non-payments you are about to record. If all information is accurate, click **Confirm.** If the invoice was a payment, you will **have an option to print a receipt**. If the invoice was a nonpayment, you will be taken back to the Invoicing Cashier main page.

Daily Deposit Report

Purpose:
Provide an understanding of the process for running a deposit report in MySchoolBucks. The deposit report shows a summary of invoice payment activity within the last thirty days.

Running a Deposit Report

1. Under Admin Tools, click **Invoices**
2. Select **Invoicing Cashier**
3. Click **Deposit Report**

By default, the Deposit Report shows a summary of invoice payments on the current day.
To see previous invoice payment history, select a date range from within the last thirty days

Filtering Payments

1. Click **Generate** to run a report within these filters
2. Click **Export** to export the report and keep the file for your records

By default, the Deposit Report shows a summary of payment activity and breaks it down by payment type.
You may print a receipt of each invoice payment. The receipt will open in a separate tab.

Refunding Same Day Payments
Click on **Refund** next to the payment.

Waive Refunded Amount Option
Yes - Waive the invoice and keep it closed. to keep it closed.
No - If you would like to reopen the invoice and select a new payment.
You can also enter a refund reason

By default, nonpayments are listed at the bottom of the report

Invoice Reports

Purpose:

This information provides you with an understanding of the complete process of **running Invoice reports** in MySchoolBucks.

The invoice reports can be accessed in the
Reports section of the **Admin Toolbar**.

1. Select **Reports**
2. Select **Invoices.**

The types of reports available are:

- Invoice Summary report
- Detailed Report and
- Aging report.

Summary Report
The invoice report (summary) will provide you with a list of fees summarized by fee name and the total amount invoiced, the collected amount, any non-payment amount and what is still outstanding for payment. Using the filters, **select your criteria and your start and end date** of your report and select **Search.** Then **click Export.** This will print the report in an Excel format for easy data manipulation.

Detail Report
The invoice report detail will provide you with the details of each invoice including creation date, payment date, student data information, the invoice amount, remaining amount and any payment made towards this invoice. Any notes collected when using Invoice Cashier will appear on this report. To print to Excel, select **Export.** Depending on the amount of invoices you have, you are given the option to select just the invoices on the current page or all. You may also select the option to include the email address associated with each invoice on the report. This can be a way to double check that the invoice was sent to an email attached to the student record.

Aging Report
The aging report will let you know how many current or past due invoices in a certain date range you have. In the invoice due period field, select your choice of Past Due or Current. Enter in your date range and select **View Report or Send to Excel** if you want to be able to edit any formatting.

Admin Navigation

User Profiles

Purpose:

The features on the User Profile page allow you to edit user data, such as their role, their email address, and their household.

Accessing User Profiles:

To access a User Profile, you find the user on the Users page, which you may access from the Admin Tools sidebar by expanding **Users** and then clicking the **Users** sub-option.

The **Users** page lets an administrative user view all user accounts within the district.

Use the search criteria to filter users by their security role, login ID, email address, and name. You can also use the Status selection to filter by Enabled or Disabled accounts. The page automatically defaults to show all available user accounts in the district.

The administrative user will see a list of users by last name, first name, and Login ID.

Parent user accounts have limited rights, which only allow Parents to locate their child (children), view cafeteria purchases, and make a payment. Parents do not have the sufficient rights to view confidential MySchoolBucks information.

Click the blue **Actions** icon and select **View** to view a user's User Profile.

Viewing the User Profile:

The User Profile shows all available information associated with the user. This includes Login information, contact information, and associated schools and households.

Under Contact Information, you can see whether an email address has been validated for the account and when the validation occurred.

Under Membership, you can see any households that the user belongs to. You may hover your cursor over the number of students in the household to see the names of the students. Click **View Household** to see the payment and account balance information for that household.

Editing the User:

- To edit a user while you are seeing their User Profile, click **Edit User**.
- While editing, you may change nearly every part of the user's information, including the user's security role (such as changing a Store Admin to a District Admin), their login ID, and their email address.
- When editing users (except Parent users), you may use the Departments and Stores fields to assign a user to multiple stores and/or departments.

- While editing an existing user, be sure to click **Update** to save your changes.

Email History:

- To view a user's email history, from the User Profile, click **Email History**.
- This page shows a list of emails sent out in the last 90 days, such as invoice emails or password change emails.

User Log:

While viewing a User Profile, you can check the activity occurring on an account by clicking **User Log**.

The User Log screen shows the most recent account activity for the account. This can be used to track what actions have been made on the account. The User Log can also be used to help detect the presence of suspicious activity on an account.

Reset Password:
If a user is having trouble logging into their account, you may reset their password from their User Profile by clicking **Reset Password**. This sends a password reset email to the email address saved on their User Profile.

Custom User Roles:

Purpose:

Provide an understanding of the complete process for creating custom user roles that best suit the needs of your school staff. **MSB provides 15 default roles** that can be assigned to individual users however there may be times that the permissions of that default role do not correlate with the responsibilities of the staff member. When this occurs, MSB allows for a custom role to be created with permissions of what this particular role entails.

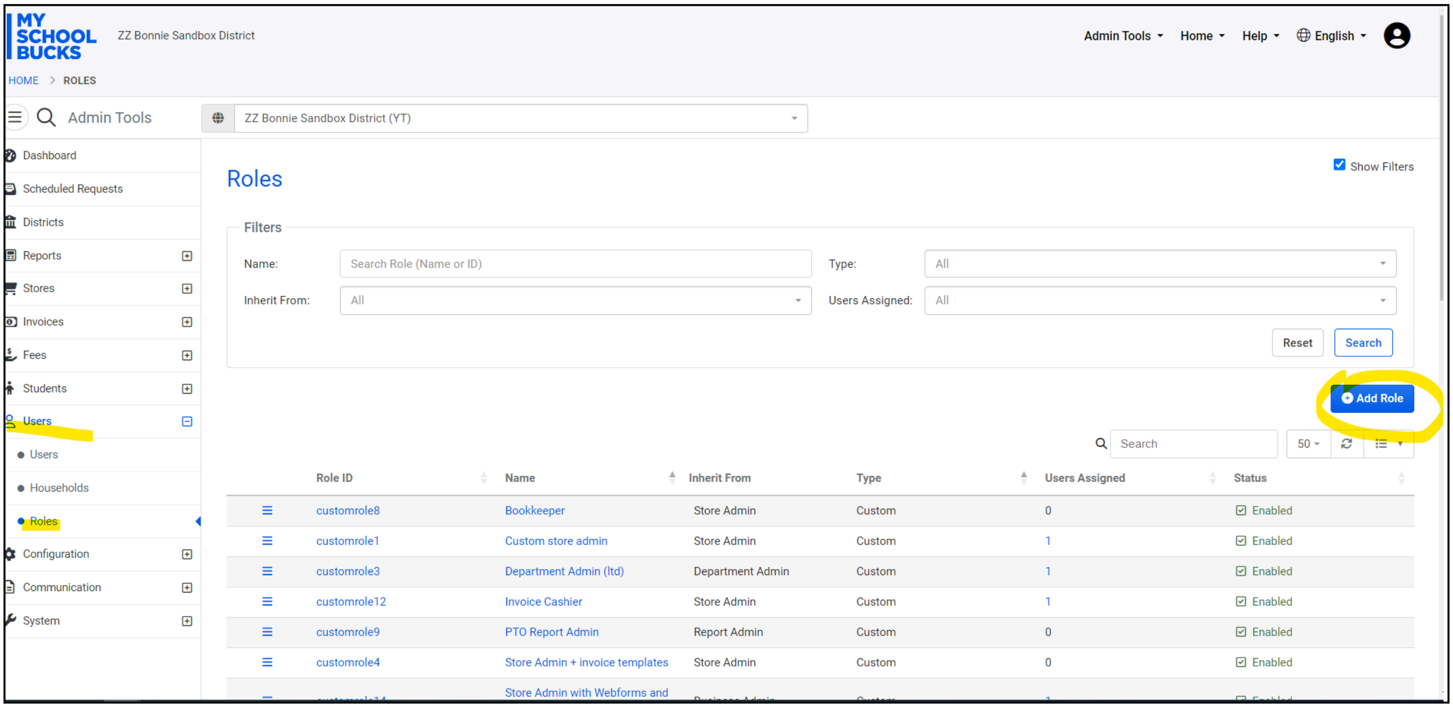
It is important to note that only the District Security Admin has the authority and permission to create a custom role. We recommend that every district have at least 2 District Security Admins. This will be set up at the time of your implementation.

When creating a custom role, it is recommended to start with a higher level role and remove unnecessary permissions rather than add permissions on to a lower role. To create a new role,

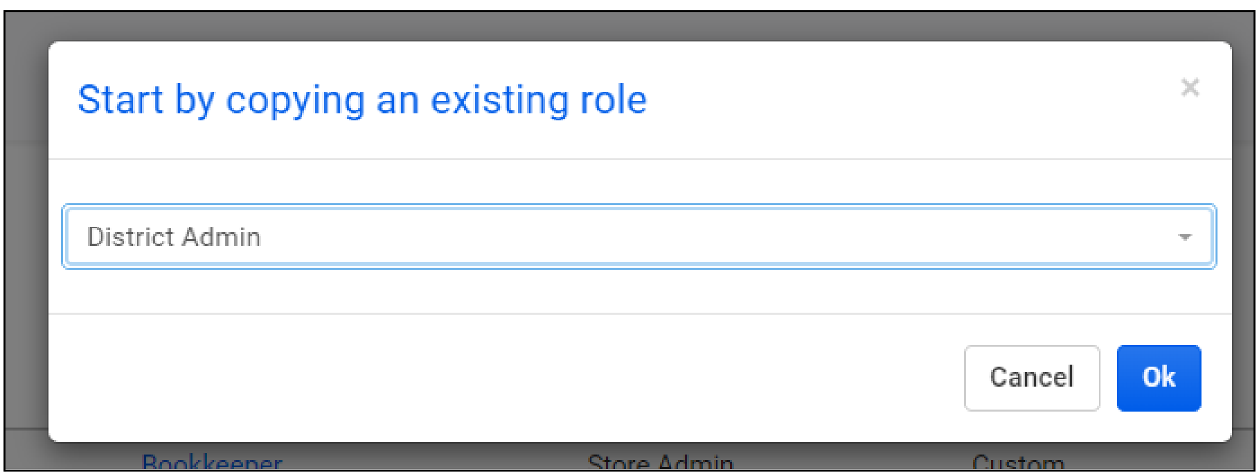
Navigate to the Admin ToolBar, scroll down to Users and Select Roles. If you do not see this tab, it is because you have not been given this access.

You may select the action menu on the left side of the Role ID and select view role to see what permissions each role has. If this does not meet the needs of what the staff member is responsible for, then a custom role can be added. You are unable to edit any default roles.

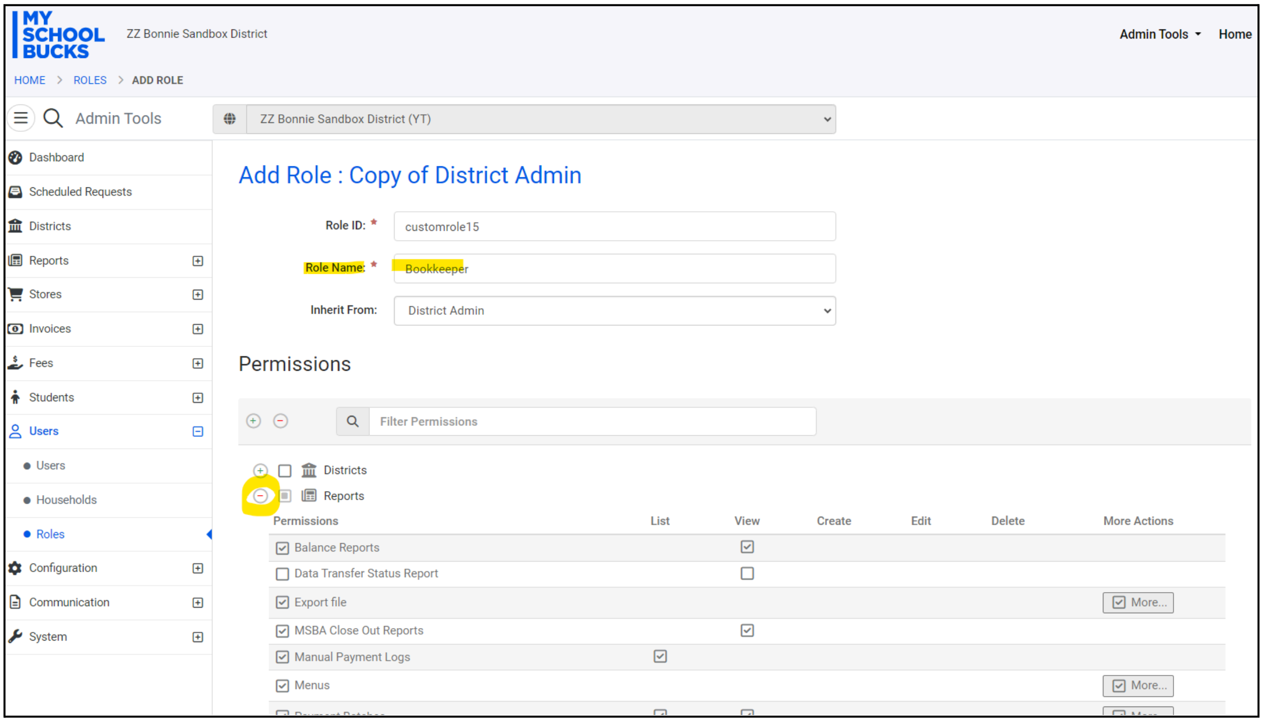
To create a custom role, **click Add Role:**



Choose the role you would like to copy from the drop down box. Remember, starting with a higher role is recommended as the system may not honor higher permissions on lower roles. We highly recommend choosing either District Admin or Business Admin and select Ok.



Add the Role Name of your choice and expand each section by selecting the plus button to choose the functionalities necessary for this particular role.



When all permissions are updated by either adding or removing check marks in each box, scroll down to the bottom and **select Create**.

Once this role has been added, you may navigate to the user profile, **click on the 3 line action menu** to the left of the login ID, **select Edit and Update** the security role to the newly created custom role.

MSB Tools and Dashboard

Purpose:

Once a user account has been assigned administrative rights, all resources available to the admin mirror those of parent user accounts. However, the **Admin Tools** features differentiate administrative accounts from those of parents. The **Dashboard** is the first feature listed under Admin Tools and shows graphs of recent MySchoolBucks activity.

Admin Tools:

All of the main features available to admin users, including district settings, school editing, and reporting, are located on the Admin Tools sidebar on the left of the page.

The Admin Tools sidebar allows quick and easy navigation of all of the administrative functions available in MySchoolBucks.

To access any feature, click the heading to expand it, and then click the feature you would like to use under that heading. This sidebar is visible from any admin page, so you can go straight from one page to another without having to back out multiple times or use breadcrumbs to return to a main page.

To search the available features within Admin Tools, **click the magnifying glass** and type in the search field.

At the top of each page, breadcrumbs are available as an option to return to previous pages.

Dashboard:

The **Dashboard** feature is normally the first page an admin will see upon logging in to MySchoolBucks. This page shows graphs of recent orders, emails, and text (SMS) messages so that you can know at a glance the recent activity on MySchoolBucks. If you would like to change what information is displayed on each graph, click **Options** next to the desired graph.

All of the graphs have the option to change the number of days shown, from 30 days to 90 days before the current date, as well as the option to refresh the graph, by clicking **Apply**, so that the graph will show new or updated information since the graph was last generated.

The Options available for Orders are: Canceled, Declined, Pending Review, and Scheduled. The Option available for Email Stats is Errors. The Options for SMS Stats are Errors, Queued, Sent, and Undelivered.

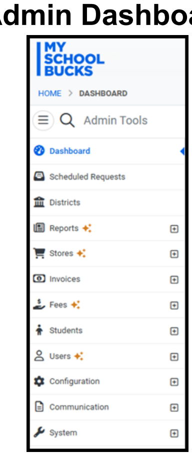
Logging In and Logging Out

Purpose:

The information below provides the steps for accessing MySchoolBucks and the Admin Tool Dashboard. Users can login and logout on the MSB main page.

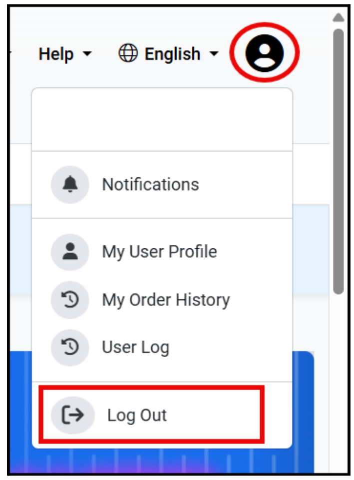
Steps for Logging In:

1. Navigate to www.myschoolbucks.com
2. **Click the "Login" button** on the top right of the screen.
3. **Enter your username and password** and Click the blue **Login button**.
   You are now logged into the MySchoolBucks website.
4. View the Admin Tools Dashboard on the left side of the page.

Log In 	**Admin Dashboard** 

Logging Out of MySchoolBucks:

1. Click on **the icon** on the top right of the screen.
2. Click **Log Out**



If you have any questions or need any assistance, please contact our Administrator Support team between 7:00 AM and 7:00 PM EST at 800-803-6755. Again, that number is 800-803-6755.