

# mySchoolBucks®

<https://www.myschoolbucks.com>

# District Training Manual

Version – 03052013



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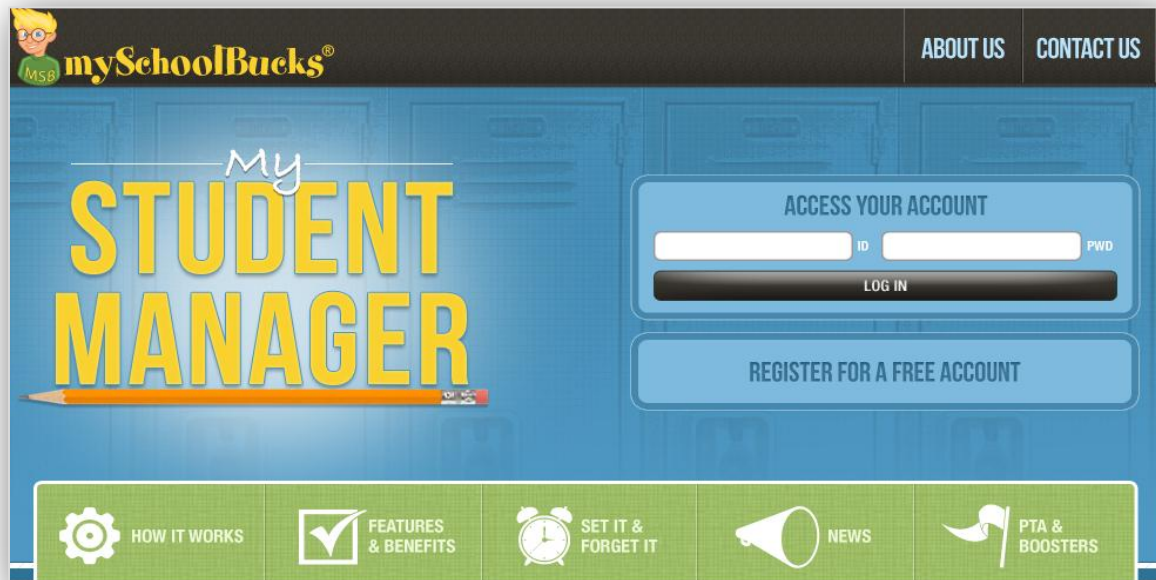
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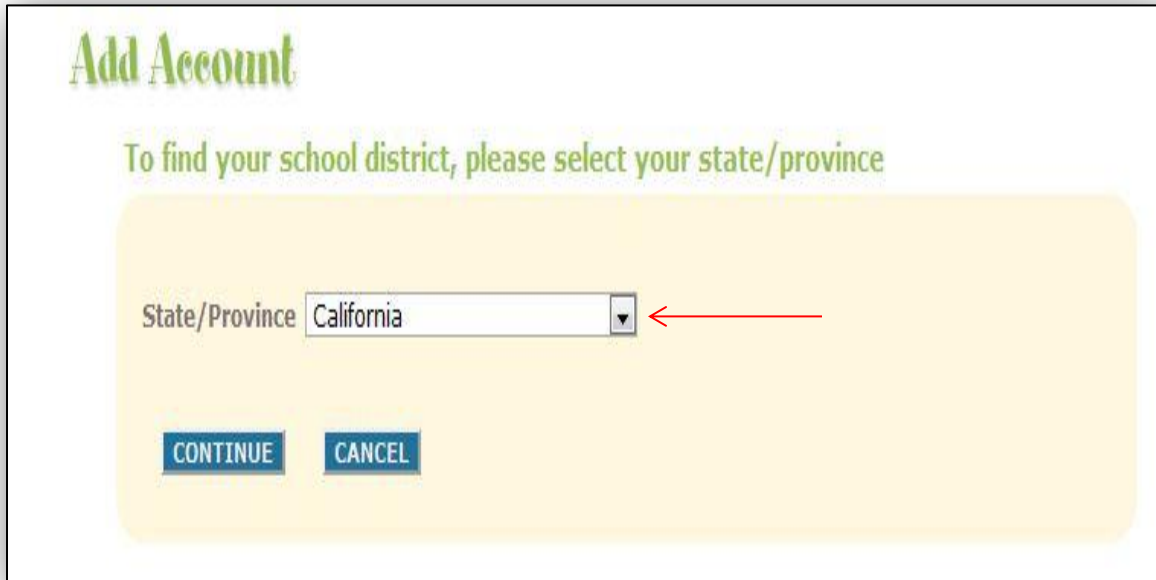
## myschoolbucks PARENT ACCOUNT SETUP



This screen will be used by both new and returning users.


- A returning user will complete the “**ACCESS YOUR ACCOUNT**” and click the “**LOG IN**” button.
- All new parent users will click the “**REGISTER FOR A FREE ACCOUNT**” button.

**NEW PARENT ACCOUNT SETUP**



**Add Account**

To find your school district, please select your state/province

State/Province   ←

Select the state where the school district is located and click the **“CONTINUE”** button.



**Add Account**

Please select your school district

School District   ←

Select the **“School District”** from the drop down box, and then click the **“CONTINUE”** button.

## Add Account

■ indicates required field

**Note:** Please enter your name here rather than your child's name. You'll be asked to add your children later.

First Name ■

Last Name ■

Street Address ■

City ■

State/Province ■

ZIP/Postal code ■

Daytime phone ■

 (###-###-####)

Evening phone ■

 (###-###-####)

Email Address ■

(Note: Your email address is held confidential. We will not send you unsolicited emails. A valid email address is required to receive payment confirmations.)

CONTINUE

CANCEL

Complete all areas denoted with the RED box and then click the **“CONTINUE”** button.

## Add Account

■ indicates required field

**Login ID** ■  ←  
(Must be at least 4 characters and may only contain letters, numbers, underscores, dashes, periods, or at signs.)

**Password** ■  ←  
(Must be at least 4 characters - case sensitive)

**Confirm Password** ■  ←

If you forget your password, we'll ask you for the answer to the security question. To protect your user profile, please choose a question that is memorable for you but difficult for others to guess.

**Security Question**  ▼ ←

**Security Answer** ■  ←  
(Must be at least 4 characters - case sensitive)

I am 18 years of age or older and I agree to the [Terms of Service](#)

Complete the **“Login ID”** and **“Password”** fields, and then click on the **“Security Question”** drop down. Select a question then enter the answer in the **“Security Answer”** field. Before moving forward, a NOTICE disclaimer alerts new users of the convenience fee that may be imposed for payments/deposits to student accounts. The user will then click the box and **“REGISTER”**.

## Add Account

Registration completed. Thank you! We've sent an email to confirm your registration.

Upon successful creation of the user account, the **“FINISH”** button will appear. Click this button to complete the mySchoolBucks user account setup.

## DISTRICT SETUP FEATURES IN MYSCHOOLBUCKS

The screenshot displays the mySchoolBucks Student Manager interface. At the top left is the mySchoolBucks logo with a cartoon character. To the right are links for 'ABOUT US' and 'CONTACT US'. The main header area features the text 'My STUDENT MANAGER' with a pencil graphic. Below this, a blue banner contains the text 'NOTE: TEST-ONLY MODE IS ON. Payments will not be posted.' and 'Welcome to mySchoolBucks - Happy 2013!'. The main content area is divided into several sections: 'District Setup', 'Configuration', 'Subscriptions', 'Payments', and 'Schools'. The 'Configuration' section includes 'District Settings', which is highlighted with a red arrow. Other sections include 'Users', 'Stores', 'Web Forms', and 'Messaging'. A left-hand navigation menu lists various options, with 'Admin Tools' highlighted and a red arrow pointing to it.

**Admin Resources**

- Getting Started
- My User Profile
- Email Preferences
- Downloads
- Cafeteria Purchases
- My Household

**Payment Center**

- My Basket
- Make A Payment
- School Store
- My Billing Accts
- My Order History
- My Payment History

**Admin Tools**

- District Setup
- Training
- Reports

**More Info**

**Configuration**

- District Settings

**Subscriptions**

- Membership Options

**Payments**

- Payment Options
- Payment Gateways
- Manage Payment Methods
- Manage Providers
- Manage G/L Accts
- Manage Departments
- Manage Balance Accts

**Schools**

**Users**

- Manage Users
- Customize User Fields

**Stores**

- Store Options
- Manage Stores
- Product Categories
- Shipping Options
- Customize Product Fields
- Store Setup

**Web Forms**

- Manage Web Forms

**Messaging**

Once a user account has been assigned administrative rights, all resources on the left hand side of the screen mirror those of parent user accounts. However, one feature (**Admin Tools**) differentiates administrative accounts from those of parents.

These three options give the administrative user the ability to perform system functions for the district, access training material and view reports.

The first feature (**District Settings**) houses all primary district contact information.

## School District

District ID: test\_lunchbox  
**Test-Only**

District Name: test

Street Address:

City:

State/Province: Rhode Island

ZIP Code:

Contact Name:

Contact Phone:

Email Address:

Language/Country: English (United States)

Currency: US Dollar

Timezone: US/Eastern (EST)

Send low balance email notifications: Yes

Send email to district when new user profile is created: No

Send student ID request emails to:

Display account balances: Yes

Add Student Policy: Require name, plus birthdate AND student #

Allow parent to add new student enrollment information to database: No

Announcement:

Health-E URL:

[Edit District](#)

[Disable District](#)

[Disable Test-Only](#)

This screen houses all district contact information, ranging from the school name and address to contact information, as well as the ability to create announcement banners.

The district admin user has the ability to update this resource screen by selecting the option, **“Edit District”**.



**School District**

■ indicates required field

District ID	test_lunchbox
District Name ■	test
Street Address	<input type="text"/>
	<input type="text"/>
City	<input type="text"/>
State/Province	Rhode Island
ZIP Code	<input type="text"/>
Contact Name	<input type="text"/>
Contact Phone	<input type="text"/>
Email Address	<input type="text"/>
Language/Country	English (United States)
Currency	US Dollar
Timezone	US/Eastern (EST)
Send low balance email notifications	<input checked="" type="checkbox"/>
Send email to district when new user profile is created	<input type="checkbox"/>
Send student ID request emails to	<input type="text"/>
Display account balances	<input checked="" type="checkbox"/>
Add Student Policy	Require name, plus birthdate AND student #
Allow parent to add new student enrollment information to database	<input type="checkbox"/>
Announcement	Now offering online deposits for your convenience.
Health-E URL	<input type="text"/>

One particular feature which districts can utilize for disseminating information to parents is the **“Announcement”** field.

This allows the district to create a specific banner, which will be displayed to all new and returning users to the district’s mySchoolBucks webpage.

## MANAGE USERS

mySchoolBucks®

ABOUT US CONTACT US

My STUDENT MANAGER

NOTE: TEST-ONLY MODE IS ON. Payments will not be posted.

Welcome to mySchoolBucks - Happy 2013!

**District Setup**

**Configuration**  
District Settings

**Subscriptions**  
Membership Options

**Payments**  
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Payment Gateways  
Manage Payment Methods  
Manage Providers  
Manage G/L Accts  
Manage Departments  
Manage Balance Accts

**Schools**

**Users**  
Manage Users ←  
Customize User Fields

**Stores**  
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My Payment History

**Admin Tools**  
District Setup  
Training  
Reports

**More Info**

The next feature for administrative users is the ability to view all user accounts within the district by clicking on the “**Mange Users**” button.

Add User Profile			
Last Name, First Name	Login ID		
admin, webinar	webinar_admin	District Admin	edit
Blanton, Kristina	KristinaBlanton	District Admin	edit
Coppola, Karleen	Talia8	Report Admin	edit
Kissik, Michelle	michkissik (Disabled)	Parent	edit
Lopez, Allen	alopez2012	Store Admin	edit
Smith, John	John2012	District Admin	edit
Tucker, Shawn	stucker12345	District Admin	edit
user, webinar	webinar_user	Parent	edit
w, Danelle	apple123456	Parent	edit
Wolcott, Danelle	dwolcott2	District Admin	edit

The district administrative user will see a list of users by last name, first name and Login ID. To the right of the Login ID, the administrative level is listed. All District Admin users will be denoted as such. All users who are NOT District Admin users will be denoted as a Parent.

The Parent user account has limited rights, which only allow the Parent user to locate their child (children), view purchases and make a payment. Parent users do not have access to view confidential mySchoolBucks information.

**NOTE: A parent user MUST be assigned Administrative Rights, by a District Admin user, before the Parent user account will have the ability to view confidential mySchoolBucks related information.**

## MANAGE STORES

The screenshot shows the mySchoolBucks Student Manager interface. At the top left is the mySchoolBucks logo. To the right are links for 'ABOUT US' and 'CONTACT US'. Below the header is a blue banner with the text 'My STUDENT MANAGER' and a pencil graphic. The main content area is divided into a left sidebar with navigation links and a main content area with a grid of menu items. A red arrow points to the 'Manage Stores' link under the 'Stores' category.

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**Admin Tools**  
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**More Info**

**NOTE: TEST-ONLY MODE IS ON. Payments will not be posted.**

Welcome to mySchoolBucks - Happy 2013!

**District Setup**

**Configuration**  
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Manage Users  
Customize User Fields

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**Web Forms**  
Manage Web Forms

**Messaging**

The final District Admin feature (within the District Setup page) is the “**Manage Stores**” function. This will allow the District Admin user to enable and disable communications between the K-12 software and the district’s mySchoolBucks website.

This is an optional feature of mySchoolBucks. If you wish to accept payments for any items outside of the lunch room, please contact our sales team for assistance.

## Manage Stores

School District: Test LunchBox v8

[Add Store](#) ←

Store ID	Name	
food_services_store	Food Services Store (Disabled)	edit
system	mySchoolBucks	edit

To **enable** and **disable** communications, the District Admin user clicks on either of the user names, **Food Services Store**.

## Store

Store ID: food\_services\_store  
 Store Name: Food Services Store (Disabled)

Street Address:  
 City:  
 State/Province:  
 ZIP Code:  
 Contact Name:  
 Contact Phone:  
 Email Address:  
 Send email to store when new order is posted: No  
 Tax Exempt: Yes  
 G/L Acct:  
 Sales Acct:  
 System Store: No

In-Store Pickup Instructions:

[Add Store](#)  
[Edit Store](#)  
[Enable Store](#)  
[Delete Store](#)  
  
[Manage Products](#)  
[Manage Graphics](#)  
[Manage Discounts](#)  
  
[Manage Stock](#)  
[Pending Orders](#)

→

“Disabled” will disappear when store enabled

To **enable** communications, between the district’s K-12 software and mySchoolBucks, the District Admin user simply clicks on the function (to the right) called **“Enable Store.”** This will immediately re-enable communications between the K-12 software and the mySchoolBucks website.

## ACCESSING REPORTS IN MYSCHOOLBUCKS

**mySchoolBucks** ABOUT US CONTACT US

### My STUDENT MANAGER

NOTE: TEST-ONLY MODE IS ON. Payments will not be posted.

Welcome to mySchoolBucks - Happy 2013!

**District Setup**

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District Settings

**Subscriptions**  
Membership Options

**Payments**  
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**Users**  
Manage Users  
Customize User Fields

**Stores**  
Store Options  
Manage Stores  
Product Categories  
Shipping Options  
Customize Product Fields  
Store Setup

**Web Forms**  
Manage Web Forms

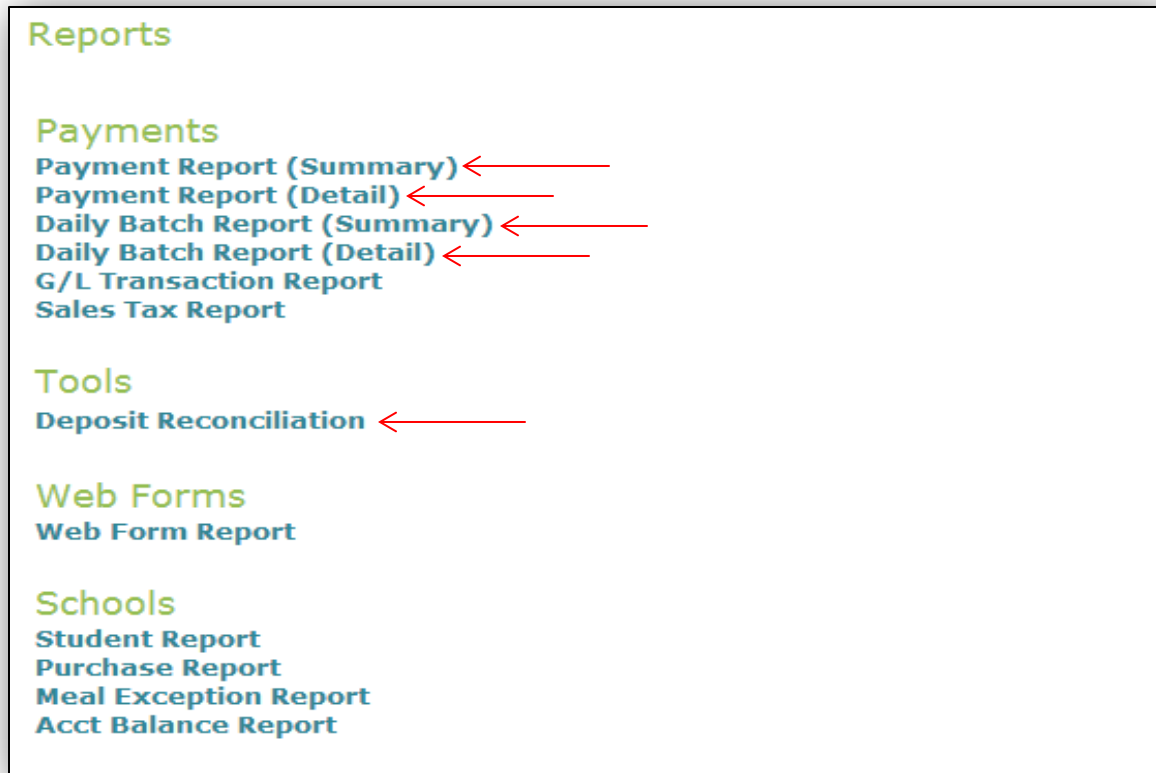
**Messaging**

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My Order History  
My Payment History

**Admin Tools**  
District Setup  
Training  
Reports  
More Info

The District Admin user has the ability to both view mySchoolBucks payment activity, as well as the necessary reports to reconcile the district's bank account. In order to access these reports, the District Admin user selects the **"Reports"** function, listed under **"Admin Tools"**.



The reports screen offers a variety of reports. For activity and reconciliation purposes, districts will primarily use the following:

- Payment Report (Summary)
- Payment Report (Detail)
- Daily Batch Report (Summary)
- Daily Batch Report (Detail)
- Deposit Reconciliation

For additional information please review the Reports & Reconciliation Training Manual as well as the Reconciliation video located within the training section on [www.myschoolbucks.com](http://www.myschoolbucks.com).

## **SUPPORT CONTACT INFORMATION**

### **School Districts**

**Email:** AdminSupport@MySchoolBucks.com

**Phone:** 800-803-6755

### **Parents**

**Email:** Before contacting technical support please read our [FAQ](#) for assistance with many common questions and concerns. For other issues please complete this form to submit your support request:

<https://www.myschoolbucks.com/etc/getsupportrequest.do>

**Phone:** 855-832-5226