

Collections

Whether you're collecting cash and check payments in the classroom, the athletic field or anywhere in-between, our Collections module allows you to quickly record student payments, print or email student receipts, and auto-submit deposit reports. Follow along with our step-by-step instructions for completing your most common collecting activities.




Homepage


The Collections homepage allows quick access to all your most common collecting activities:

- ❖ **Start a new Collection** – Select Collect by Item or Collect by Student links.
- ❖ **Resume unfinished work** – Follow links for unfinished items in the 'Things to Do' list.
- ❖ **View completed work** – View your most recent Collections and Deposits.

Hi Laura
Riverside High School ▾



Collect by Item




Collect by Student

Most recent:

Collections
Deposits

Date	Amount
C8 ROCK, TYLER <small>Completed: Sep 12 2020</small>	\$15.00
C7 ACKLIN, SARAH <small>Completed: Sep 12 2020</small>	\$30.00
C5 SMITH, JAMES <small>Completed: Sep 12 2020</small>	\$35.00
C4 Senior Class Fee <small>Completed: Sep 12 2020</small>	\$240.00
C3 ACCORIA, NEVAEH <small>Completed: Sep 12 2020</small>	\$30.00

[VIEW ALL](#)



Welcome

Don't know where to start? We have you covered. Learn more about this module's capabilities with these helpful tips.

[DOWNLOAD GUIDE](#)

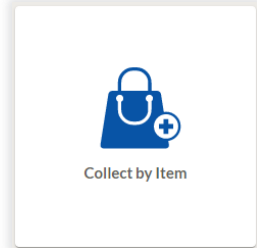
Things to do

1	Unfinished collection(s) <small>Last update: Sep 12 2020</small>	>
2	Collection(s) ready to deposit <small>Last update: Sep 12 2020</small>	>
0	Deposit(s) returned <small>Last update: NA</small>	>

- Click the COLLECTIONS link in your side menu to return to this page at any time.

Collect by Item

This collection method works best when collecting for a single Item from multiple students.





Follow these steps to **Collect by Item**:




1. Select an Item from your Item list by tapping the blue arrow icon.

Name	Due Date	Status	Cost	
YOUTH LEGISLATURE	Oct 03 2020		\$120.00	➔
Junior Class Fee	May 30 2021	Required	\$40.00	➔
Parking Pass	May 30 2021		\$15.00	➔
Senior Class Fee	May 30 2021	Required	\$20.00	➔
Whirlies Spirit Hoodie	Jun 04 2021		\$30.00	➔

2. Search or filter student list (optional):

- Search by student name 
- Filter by Grade, Group, or Homeroom 

3. Select student by tapping the blue arrow icon in the student record.

Senior Class Fee			Due: May 30 2021
\$20.00			
<div style="display: flex; justify-content: space-between; align-items: center;">  Smit   </div>			
Name	Date of Birth	Grade	
SMITH, KAITLYN	Jan 01 2004	Grade 12	➔
SMITH, SOPHIE	Jan 01 2004	Grade 12	➔
SMITH, JAMES	Jan 01 2002	Grade 12	➔

4. Choose payment method.
 - If payment contains a check, enter check # and Name on Check (optional).
5. Add/confirm email address(es) to receive electronic copy of payment receipt.
6. Click 'Record Payment' to post payment.

Senior Class Fee

\$20.00 Due: May 30 2021

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Name	Date of Birth	Grade
ROBERTS, CHRISTAN	Jan 01 2004	Grade 12 ⬆

Qty: 1

Payment Method

Cash Cheque Combo

Amount

\$ 20.00

Email receipts to:

✎ 🗑

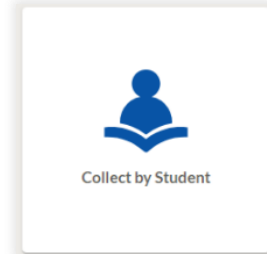
+ ADD EMAIL

CANCELRECORD PAYMENT

7. Continue recording payments for the selected Item.
8. Once done collecting, click 'Add \$ to Deposit' to complete the Collection.
9. Print payment receipts.
10. Click 'Collect more'' to start a new Collect-by-Item Collection or 'Home' to return to the homepage.

Collect by Student

This method of collection works best when collecting for *multiple Items* from a single student.



Follow these steps to **Collect by Student**:

1. Search for and select desired student.

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Collect by Student

Name	Date of Birth	Grade	
SMITH, BRAYDEN	Jan 01 2004	Grade 10	➤
SMITH, BRAYLAA	Jan 01 2004	Grade 9	➤

2. Select one or more Items from the Item list (Item records will expand upon selection if Item quantity is variable or if Item-options are present).

SMITH, JAMES

Grade 12 Jan 01 2002

2 selected Total: \$35.00

	Name	Due Date	Status	Cost	
<input type="checkbox"/>	YOUTH LEGISLATURE	Oct 03 2020		\$120.00	
<input checked="" type="checkbox"/>	Parking Pass	May 30 2021		\$15.00	
<input checked="" type="checkbox"/>	Senior Class Fee	May 30 2021	Required	\$20.00	
<input type="checkbox"/>	Whirlies Spirit Hoodie	Jun 04 2021		\$30.00	☰



COLLECT \$35.00

3. Click 'Collect \$' button when Item selections are complete.
4. From the Collect by Student checkout page,
 - a. Review Item selections and checkout Total, making edits if necessary.
 - b. Select Payment method. (Enter check # and Name on Check if collecting check payment)

SMITH, JAMES

Grade 12 Jan 01 2002

2 selected Total: \$35.00

Name	Selected Qty.	Status	Cost	
Parking Pass	1		\$15.00	
Senior Class Fee	1	Required	\$20.00	



Payment Method


Cash Cheque Combo

Amount

\$ 35.00

Email receipts to:

guardian@kevmail.com  

 ADD EMAIL

5. Add/confirm email address(es) to receive electronic copy of payment receipt.
6. Click 'Post Payment' to complete the Collection.
7. Print payment receipt (optional).
8. Click 'Collect more' to start a new Collect-by-Student Collection or 'Home' to return to the homepage.

Make a Deposit

When ready to deliver collected funds to the school office, access the *Make a Deposit* page by clicking the side menu link or by clicking the 'Collections Ready to Deposit' link under the homepage's 'Things to Do' list.

Follow these 6 steps to *Make a Deposit*:

1. Select one or more Collections to be deposited.
2. Review/validate 'Total Cash' and 'Total Check' amounts.
3. Enter 'Note to Office' (optional)
4. Click 'Deposit \$' to submit deposit records to the school office.
5. Print Deposit Summary report, if desired. An electronic copy will be shared with your office administrator.
6. Deliver funds to your school office.



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Make a Deposit

Deposit: D61

Deposit Date: Sep 12 2020

<input checked="" type="checkbox"/>	Collection	Student/Item	Completed	Amount
<input checked="" type="checkbox"/>	C7	ACKLIN, SARAH	Sep 12 2020	\$30.00
<input checked="" type="checkbox"/>	C8	ROCK, TYLER	Sep 12 2020	\$15.00

Total Cash: \$15.00
Total Check: \$30.00

Total: \$45.00

Note to Office

On my way!

DEPOSIT \$45.00

My Collections

The following activities can be completed from the *My Collections* page:



- ❖ Resume an unfinished Collect-By-Item Collection.
 - Select a Collection under the ‘Unfinished Collections’ heading to open the Collection and resume your work.
- ❖ Review Collections completed within the past week or within the past 30 days.

Search for Collections by:

- Collection # (‘C22’),
- Student Name (‘Smit’)
- Item Name (‘Yearbo’)
- Amount (‘48’)

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My Collections

🕒 **Unfinished**

Collection	Student/Item	Started	Amount	
C6	Senior Class Fee	Sep 12 2020	\$20.00	➤

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This Week
Last 30 days

Collection	Student/Item	Completed	Amount	
C8	ROCK, TYLER	Sep 12 2020	\$15.00	➤
C7	ACKLIN, SARAH	Sep 12 2020	\$30.00	➤
C5	SMITH, JAMES	Sep 12 2020	\$35.00	➤

- ❖ Print, email, or cancel individual student payment receipts.

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My Collections






C5
SMITH, JAMES
Receipt#: 251

Jan 01 2002

Total: \$35.00

Item	Price	Qty	Cost
Parking Pass	\$15.00	1	\$15.00
Senior Class Fee	\$20.00	1	\$20.00
			Total: \$35.00
			Cash: \$35.00

Once the student payment is located,



- Print a copy of the student payment receipt.



- Email a copy of the student payment receipt.



- Cancel student payment (for eligible payment receipts only).

- **CAUTION:** Once confirmed, this action cannot be undone.
- A cancellation receipt may be printed and will be emailed to any recipients of the original payment receipt.

My Deposits

The following activities can be completed from the *My Deposits* page:

- ❖ Review Deposits submitted with the past week or within the past 30 days.
 - Search for Deposits by:**
 - Deposit # ('D54')
 - Date ('Sep 12')
 - Amount ('105')
- ❖ Print Deposit Summary report for the selected Deposit
- ❖ View or inspect Collections within the selected Deposit

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My Deposits

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This Week
Last 30 days

Deposit	Status	Date	Amount	
D61	🕒 Pending	Sep 12 2020	\$45.00	▼
D60	⚠️ Returned	Sep 12 2020	\$275.00	▲
Office note: Funds turned in contained an extra \$15 in cash.				
2 collection(s)			Cash: \$55.00 Check: \$220.00	
C4 Senior Class Fee		Sep 12 2020	\$240.00	▶
C5 SMITH, JAMES		Sep 12 2020	\$35.00	▶

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