



# ‘Spider’ Payment Portal V2 – What Caregivers see in Spider

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## Select how you would like your Caregivers to be able to pay their fees

Through the PCSchool Web Application – ‘Spider’ – caregivers can now pay school fees and sundry fees via a secure payment portal there is two options on how they can see the amounts owing:

### **Option 1: Via Payment Portal via Spider Login in**

Caregivers can each be issued with their own unique User Name and Password for logging on to PCSchool Spider - please see link for how to do this:

<http://help.pcschool.net/help-category/user-account-control/>



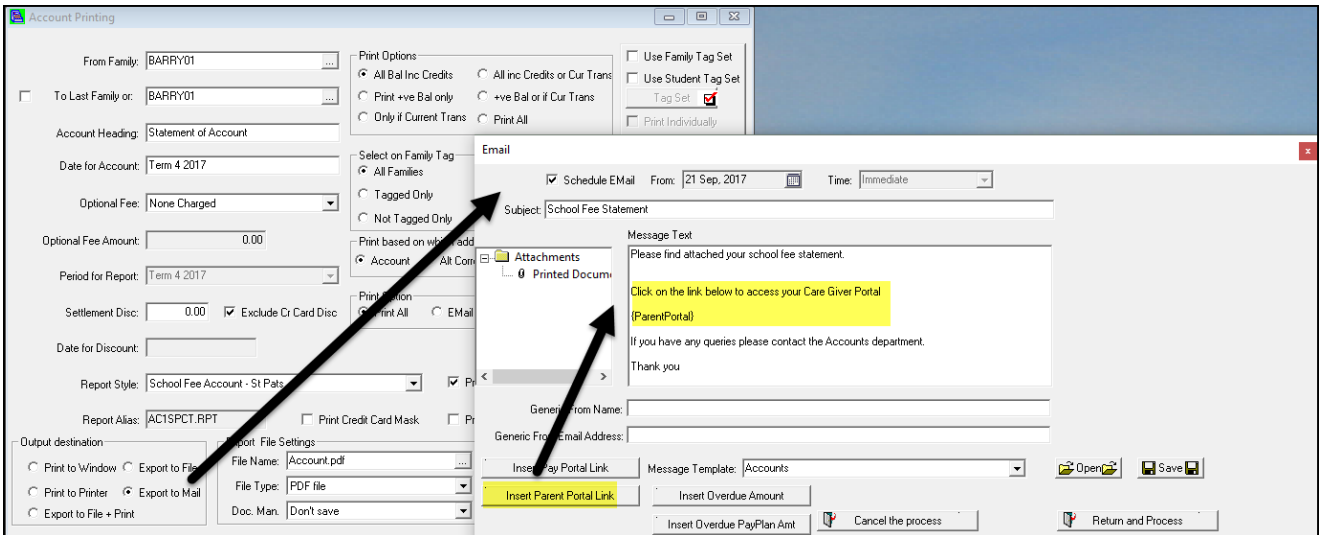
Once logged into the PCSchool the Caregivers will see the various controls they have access to.  
If they select **Pay Student Fee**



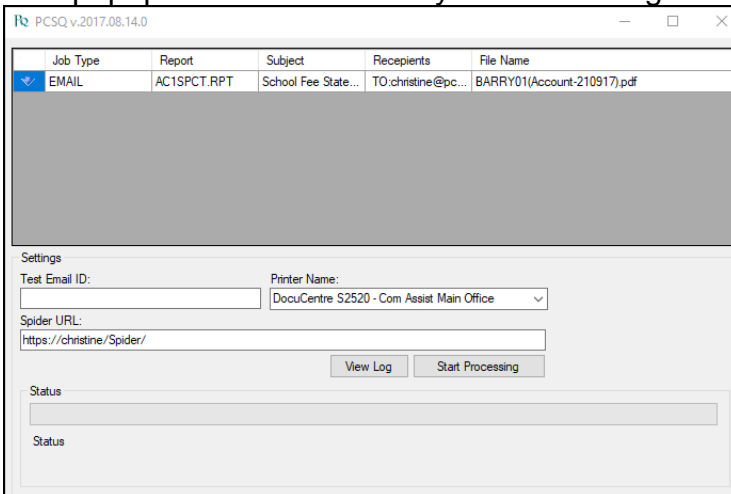
See below– the Caregiver will see the payment screen:

### Option 2: Access Payment Portal via Embedded Link in School Fee Account Email

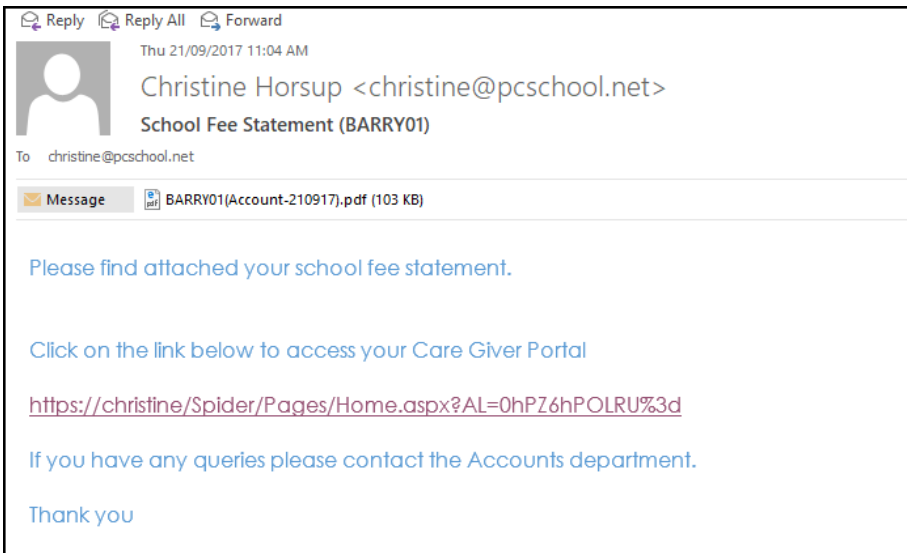
You will need to have **PCSQ** (formerly PCSchool Print Tray) for emailing out school fee accounts to caregivers they can use the [Insert Parent Portal Link] button in the email screen as shown below.



This popup box will show who you are sending the emails too.



[Start Processing] - emails are sent with attached statement and a link via email



When the caregivers open the link it will show the screen below so they can make their payments.

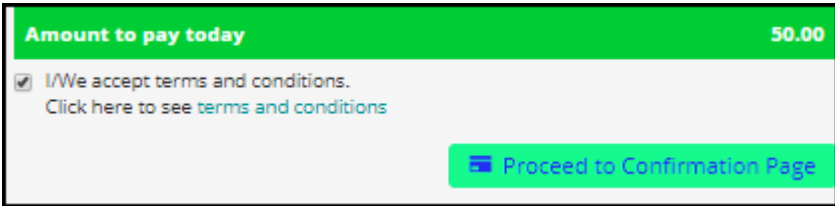
**Both Options – the Caregiver will see the payment screen:**

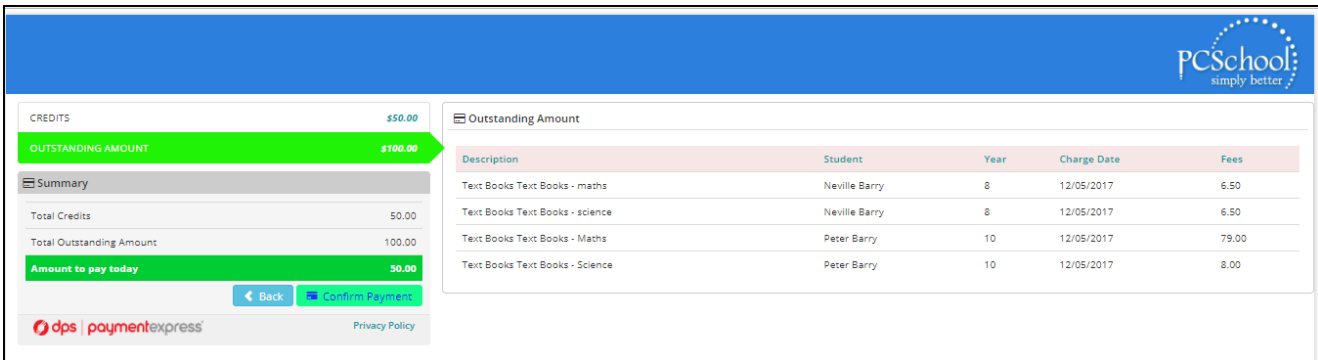
Note your headings may have been changed see *Changing payment headings*



Click on the left hand headings (1 to 4) to show the transactions on the right:

1.	<b>[General Credits]</b>	Shows any credits attached to the student/s in the family. These may include discounts, rebates or refunds applied to the students account. Or overpayments usually relating to Cost centre 1 Credit
2.	<b>[Overdue Amount]</b>	Shows any overdue charges from <b>prior year</b> applied to the student/s through Debtors or Sundries in PCSchool.
3.	<b>[Outstanding Amount]</b>	Shows any <b>current</b> charges applied to the student/s through Debtors or Sundries in PCSchool.
4.	<b>[Other Payments]</b>	Shows any charges e.g. eForms, school trips, uniform deposits or donations. See Setting up Other Payments on how to create.
5.	<b>[Select to pay all outstanding amounts]</b>	Press this button and all transactions that are outstanding will be selected to pay

6.	<b>[Summary]</b>	Summary of the total amounts outstanding – and after selecting the invoices you want to pay - it will put the total under <b>Selected to Pay</b>
7.	<p><b>[Individually select outstanding amounts]</b> – Place a tick in you can now select the payments you wish to pay</p> <p><b>[Pay all outstanding amounts]</b></p> <p><b>[Make a partial payment of amount]</b> – If you wish to make a payment of e.g. \$50 type the amount here it will automatically select invoices to pay and take up any credits but you can select the invoice you wish to pay.</p>	
8.		<p>After you have selected the amount to pay put a tick in the Terms and conditions A popup box to [Proceed to Confirmation Page] select this.</p>



e.g. elected to pay \$50.00 then have accepted terms and conditions - this screen pops up to show what you are electing to pay – once you are happy with this press [Confirm Payment] or back to fix

### Secure Payment Gateway

After selecting to Confirm Payment the secure payment gateway will open (eg Using your Provider). Caregivers enter their credit card details and select [Submit]

Caregivers will receive a message stating if the transaction has been approved.

paymentexpress®

PCSchool  
simply a better team

Merchant Reference: BARRY01  
Test1: Christine's College  
Amount: \$50.00 (AUD)

Card Number:\*

Name On Card:\*

Expiry Date:\* 09 ▾ 17 ▾

CVC:

[Submit](#)

[Cancel Payment](#)

The Finish Payment screen will then open giving the opportunity to print the payment details and advising the payment will be applied to their account within 24 hours.

**Backoffice and where the payments come from:**

Invoices and Sundries are listed under **Outstanding Payments**

**Account Master File Information**

Family Key: BARRY01  
 Acc Title: Mr D and Mrs S Barry  
 Acc Address: 240 Mary Road  
 Acc Town: SOMEWHERE  
 Family Members This School: 2  
 Family Members at Assoc Schools: 0

Receives Accounts: Both Parents  
 Father: David  
 Mother: Suzanna

Yr O Bal: 7513.00  
 Acct Rend: 3734.00  
 Curr Inv: 275.00  
 Receipt: 3784.00  
 Balance: 225.00

Sundry Bal: 221.00  
 Held Deposit: 149.60  
 Vol Donation: 0.00  
 Payment Freq: [Dropdown]  
 Last Receipt: 21/09/2017  
 Family Disc %: 0.00  
 Message: 0 Status: Z

**Invoice \$225.00 + Sundries \$221 = \$446 total owing**

Buttons: Constrain Families by: All, Debtors, Save and Clear F2, Save and Retain, New Family, Exit View

**General Credits**

**GENERAL CREDITS** \$50.00  
 OVERDUE AMOUNT \$50.00  
 OUTSTANDING AMOUNT \$446.00  
 OTHER PAYMENTS

Select to pay all outstanding amounts \$496.00

Description	Student	Year	Credits
Credit Balance credit	Neville Barry	8	50.00

Summary	Current amounts	Selected to pay
Total Credits	50.00	50.00
Total Outstanding Amount	496.00	0.00
Total Other Payments	0.00	
Net Amount	446.00	(50.00)
<b>Amount to pay today</b>		<b>0.00</b>

Studkey	Item	Desc	Date	Value	Balance	Last paid	Period	Batch#
BARRY N	208	Tuition Fees	21/09/2017	-250.00	0.00		5	
BARRY N	13	General Levy	21/09/2017	-25.00	0.00		5	
BARRY N	1	Credit Balance	21/09/2017	0.00	-50.00	21/09/2017	5	1
BARRY N	208	Tuition Fees	13/09/2017	500.00	250.00		5	
BARRY N	13	General Levy	13/09/2017	50.00	25.00		5	

### Overdue Amount

Any overdue amount from prior year – this example is a sundry transaction:

GENERAL CREDITS \$50.00

**OVERDUE AMOUNT** \$496.00

OUTSTANDING AMOUNT \$446.00

OTHER PAYMENTS

Select to pay all outstanding amounts \$496.00

**Overdue Amount**

Individually select outstanding amounts OR Pay all outstanding amounts OR Make a partial payment of amount 0.00

Description	Student	Year	Charge Date	Amount	Amount to Pay
<input type="checkbox"/> Sports Hat Swimming	Neville Barry	8	13/10/2016	50.00	0.00

1	General	2	Bursary	3	Inv.	4	Rec.	5	Sundries	6	Hold Dep.	7	Vol P/ments	8	Stud Disc.	9	Comments	0	Rebates	1	Split Bill	2	Pay Plan	3	Banking	4	Ledg.Trans
Date >>	Refere...	Student >>	Stock ...	Description	Value	Payment	Pay Date >>	Balance																			
13/10/2016		BARRY N	8	Tuition Fees - Year 8	500.00	500.00	21/09/2017	0.00																			
13/10/2016		BARRY N	9	Tuition Fees - Year 9	500.00	500.00	21/09/2017	0.00																			
13/10/2016		BARRY N	514	Swimming	50.00	0.00		50.00																			
12/05/2017		BARRY N	47115	Text Books - science	6.50	0.00		6.50																			
12/05/2017		BARRY N	47115	Text Books - maths	6.50	0.00		6.50																			
13/10/2016		BARRY P	5	Tuition Fees - Year 5	55.00	55.00	21/09/2017	0.00																			
13/10/2016		BARRY P	5	Tuition Fees - Year 5	55.00	55.00	21/09/2017	0.00																			
13/12/2010		BARRY P	16	Building Fund	120.00	120.00	21/09/2017	0.00																			
15/01/2015		BARRY P	16	Building Fund	75.00	75.00	21/09/2017	0.00																			
01/10/2010		BARRY P	502	Wineries	110.00	110.00	21/09/2017	0.00																			
28/05/2013		BARRY P	520	Year 10 Careers Camp	125.00	125.00	21/09/2017	0.00																			
10/11/2010		BARRY P	1000	Family Deposit	10.00	10.00	21/09/2017	0.00																			
12/05/2017		BARRY P	47115	Text Books - Science	79.00	0.00		79.00																			
12/05/2017		BARRY P	47115	Text Books - Maths	79.00	0.00		79.00																			

### Outstanding Amount

Any overdue amount in either invoices or sundries:

GENERAL CREDITS \$50.00

**OVERDUE AMOUNT** \$50.00

**OUTSTANDING AMOUNT** \$446.00

OTHER PAYMENTS

Select to pay all outstanding amounts \$496.00

**Outstanding Amount**

Individually select outstanding amounts OR Pay all outstanding amounts OR Make a partial payment of amount 0.00

Description	Student	Year	Charge Date	Amount	Amount to Pay
<input type="checkbox"/> Text Books Text Books - maths	Neville Barry	8	12/05/2017	6.50	0.00
<input type="checkbox"/> Text Books Text Books - science	Neville Barry	8	12/05/2017	6.50	0.00
<input type="checkbox"/> Text Books Text Books - Maths	Peter Barry	10	12/05/2017	79.00	0.00
<input type="checkbox"/> Text Books Text Books - Science	Peter Barry	10	12/05/2017	79.00	0.00
<input type="checkbox"/> Tuition Fees Split Pay Adj \$ 250	Neville Barry	8	13/09/2017	250.00	0.00
<input type="checkbox"/> General Levy Split Pay Adj \$ 25	Neville Barry	8	13/09/2017	25.00	0.00

1	General	2	Bursary	3	Inv.	4	Rec.	5	Sundries	6	Hold Dep.	7	Vol P/ments	8	Stud Disc.	9	Comments	0	Rebates	1	Split Bill	2	Pay Plan	3	Banking	4	Ledg.Trans
Date >>	Refere...	Student >>	Stock ...	Description	Value	Payment	Pay Date >>	Balance																			
13/10/2016		BARRY N	8	Tuition Fees - Year 8	500.00	500.00	21/09/2017	0.00																			
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13/10/2016		BARRY N	514	Swimming	50.00	0.00		50.00																			
12/05/2017		BARRY N	47115	Text Books - science	6.50	0.00		6.50																			
12/05/2017		BARRY N	47115	Text Books - maths	6.50	0.00		6.50																			
13/10/2016		BARRY P	5	Tuition Fees - Year 5	55.00	55.00	21/09/2017	0.00																			
13/10/2016		BARRY P	5	Tuition Fees - Year 5	55.00	55.00	21/09/2017	0.00																			
13/12/2010		BARRY P	16	Building Fund	120.00	120.00	21/09/2017	0.00																			
15/01/2015		BARRY P	16	Building Fund	75.00	75.00	21/09/2017	0.00																			
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BARRY N	13	General Levy	13/09/2017	50.00	25.00		5																				
BARRY P	47115	Text Books	12/05/2017	79.00	0.00	21/09/2017	2																				
BARRY N	47115	Text Books	12/05/2017	6.50	0.00	21/09/2017	2																				

### Other Payments

These are generated from your Payments see "Setting up" manual - setting up Other Payments