



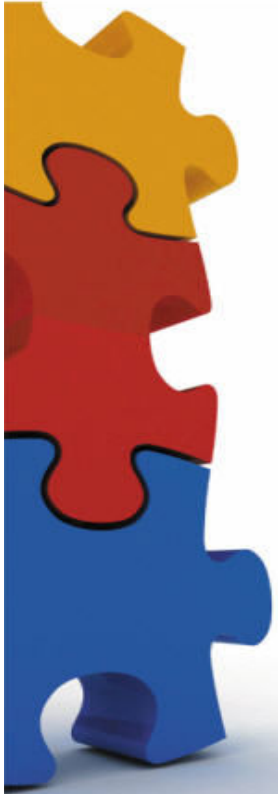
**SchoolBooks – S9**

# **eCommerce Manager for SchoolBooks**



# Agenda

- What's good about it?
- Overview – How it works
- New menu options
- Customers/Students
- Items
- Posting receipts in SchoolBooks
- Web Store Reconciliation
- Questions



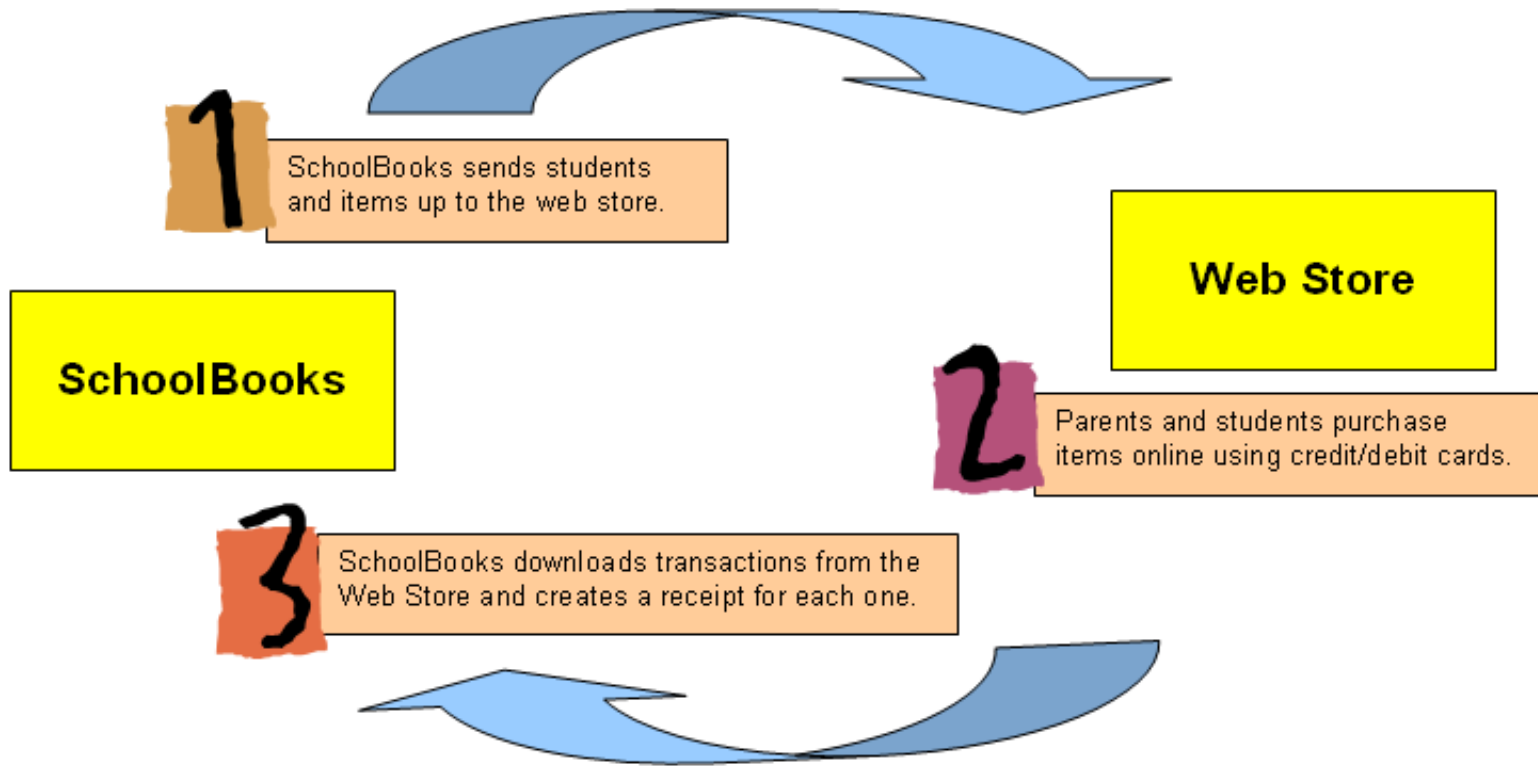


# What's good about it?

- No merchant account required.
- No monthly fees.
- No additional software required.
- Completely integrated w/SchoolBooks.
- Easy to reconcile.
- Great reports.

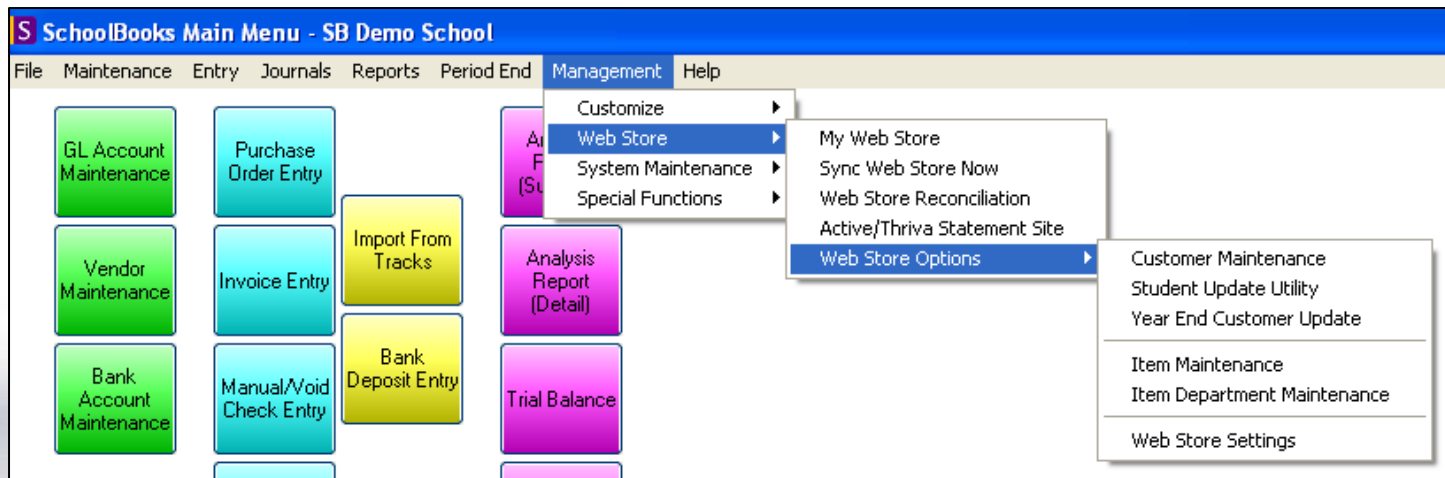


# How does it work?



# New menu options

- Web store options on Management menu.
- Same Menu Security as always.



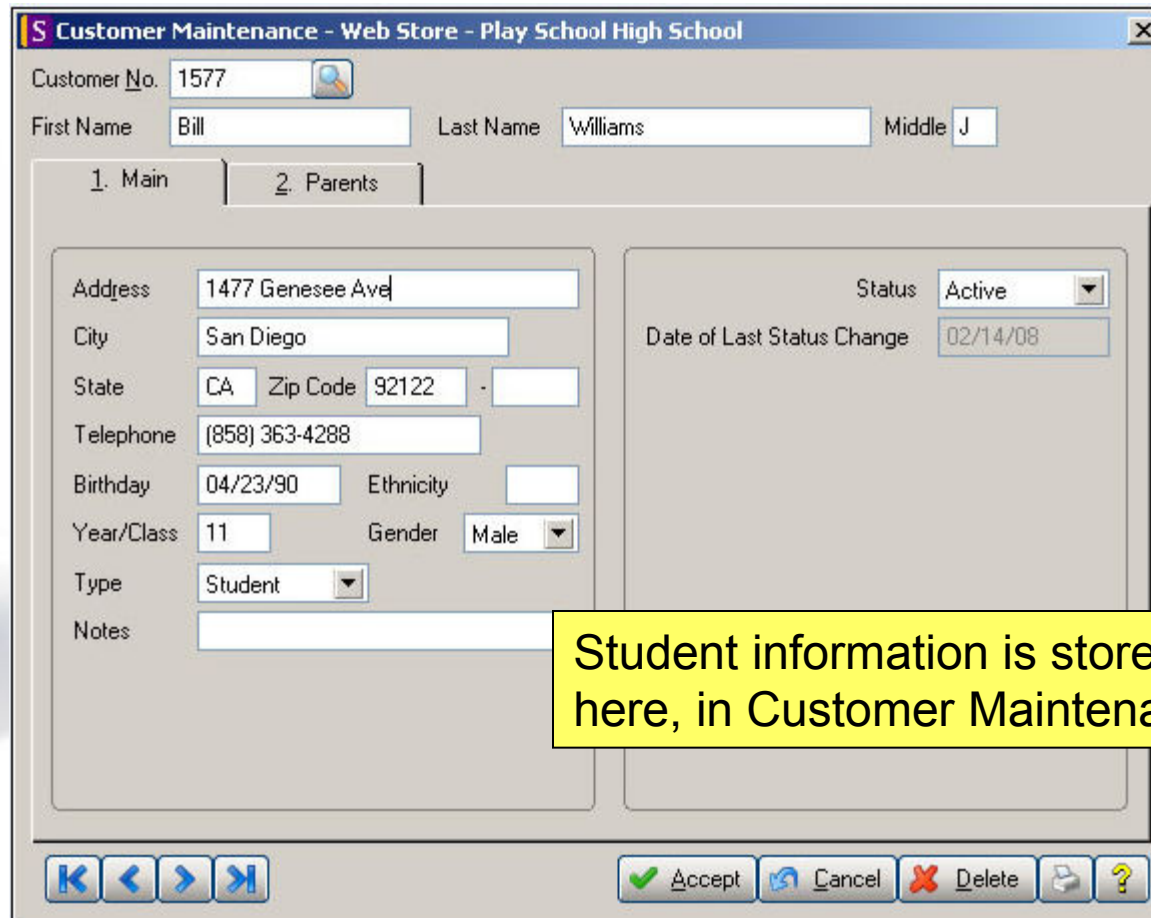


# Selling to students or not!

- You can import students from SIS – just like Tracks.
- You can choose to load students or just make sales to general public.
  - Sales to students -> detail reports



# Customer Maintenance



Customer Maintenance - Web Store - Play School High School

Customer No. 1577

First Name Bill Last Name Williams Middle J

1. Main 2. Parents

Address 1477 Genesee Ave

City San Diego

State CA Zip Code 92122

Telephone (858) 363-4288

Birthday 04/23/90 Ethnicity

Year/Class 11 Gender Male

Type Student

Status Active

Date of Last Status Change 02/14/08

Notes

Accept Cancel Delete Print Help

Student information is stored here, in Customer Maintenance.



# Setting up an Item to Sell

Item No. FT1

Description Field Trip - Museum - 10/31/07 Last Activity

1. Main 2. Web Store

Cust Reqd

Taxable

Department FT

Field Trips

Price 15.00

GL Account

521

Mrs. Danson - 3rd Grade

Category

Accept Cancel Delete Help

- Simplified Item Mntce.
- Sell anything - field trips, donations, fundraisers, tickets, sweatshirts.
- Specify Price & GL Account.



# Enable Item in Web Store

Item No. FT1

Description Field Trip - Museum - 10/31/07 Last Activity

1. Main 2. Web Store

Description

Enable in Web Store

Long Description

Field Trip - Museum - 10/31/07. This will be an all day trip to the Natural History Museum in Balboa Park. Students will be transported by bus and a sack lunch will be provided.

Convenience Fee Settings

Conv Fee Type Use Global Defaults

Conv Fee 0

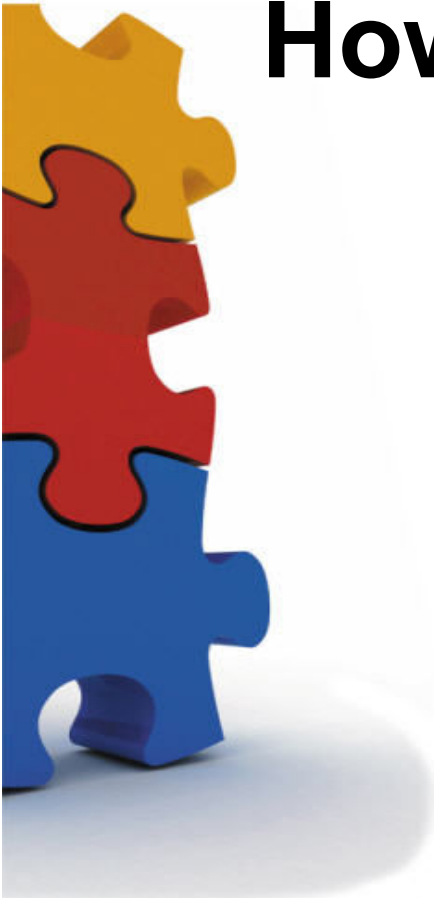
Conv Fee GL Account

Accept Cancel Delete ?

- Click the checkbox to turn it on!
- There is lot's of room to describe your item.



# How does Web Store work?



Cust No	Customer name	CI	Phone	Address
901250	Fields, Carrie	10	(619) 457-7877	363 Streeter Drive
901264	Gomez, Andy	9	(619) 555-0200	740 Maple Drive
901259	Gonzalez, Richard	10	(858) 555-2000	5000 Lighthouse Way
901245	Hall, Victor	11	(619) 965-2835	721 Sheridan Ave
901239	Hamlin, Harold	12	(858) 586-3945	416 Hickory Rd
901252	Hartman, Regis	12	(619) 555-4000	505 Waynecrest Avenu
901263	Hernandez, Ronaldo	12	(619) 555-7500	240 Amber Way
9658	Hightower, Joel			
901254	Jones, Rocky	9	(619) 555-2100	200 Apple Lane
901243	Madison, Marjie	12	(619) 990-4659	2509 W. 35th St.

Sort: Last Name

Select Cancel ?

- Student Regis Hartman wants to make a purchase.
- He will login using his Student number plus “shartman.”



# Web Store Login

## Web Store

### Web Store Login

This screen allows you to login to either the Online Store or your Online Account. To make a new purchase at the Online Store, enter your Student ID Number and Password below.

Do NOT enter leading zeros. If the number on your student ID card is 0001234, don't enter the zeros. Just enter 1234.

#### Student or Customer Login

Student/Customer ID:

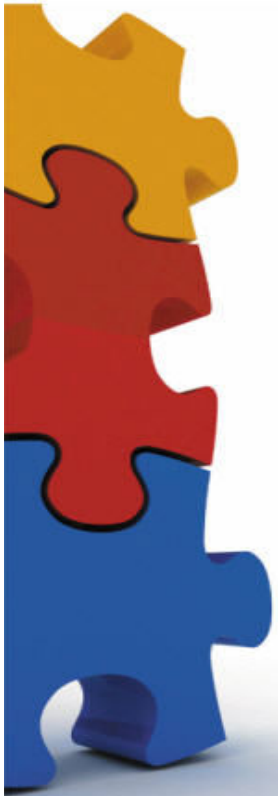
Password:

Unsure if you have an account? [Click here](#)

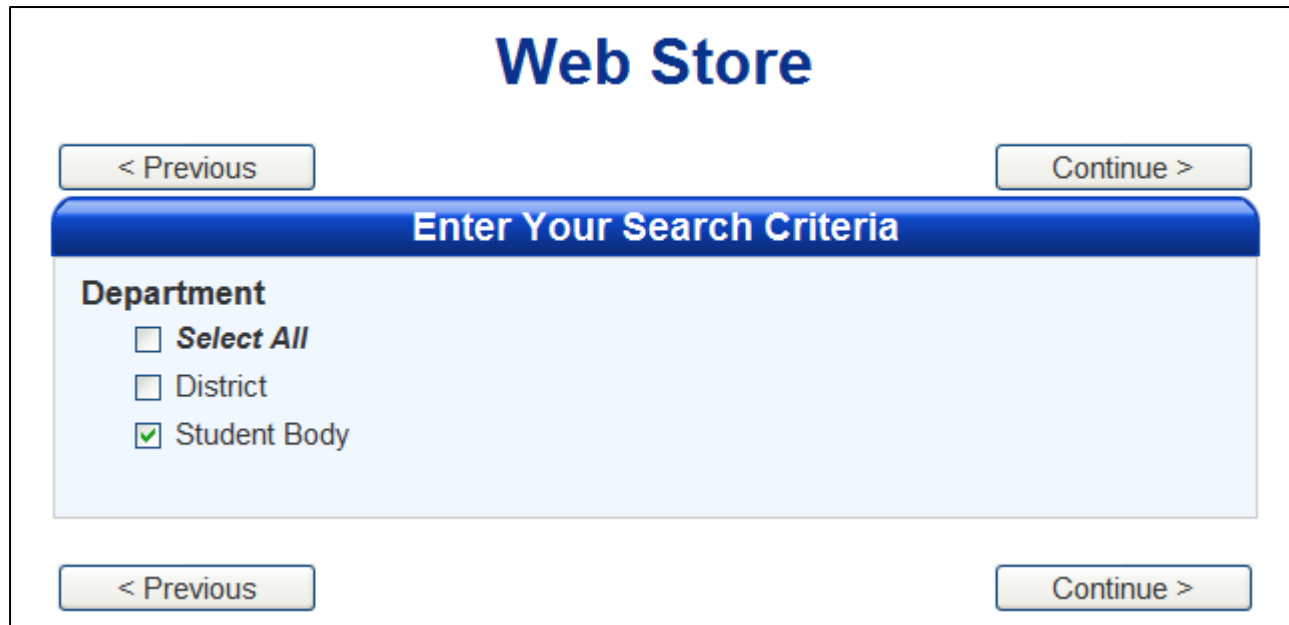
Don't know your password? [Click here](#)

#### Non-Student Related Purchases

Click here to make a purchase that is NOT related to a student at this school.



# Group your items by Dept.



**Web Store**

< Previous Continue >

**Enter Your Search Criteria**

**Department**

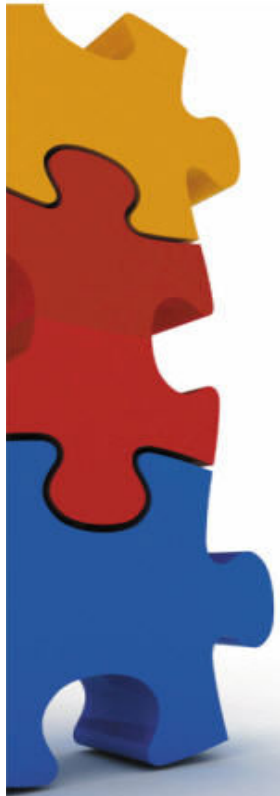
- Select All*
- District
- Student Body

< Previous Continue >

This example shows two Departments – District and Student Body. You can have as many as you want.



# Choosing your Items



## Web Store

[< Previous](#) [Continue >](#)

Make Your Selection

<input checked="" type="checkbox"/>	<b>Field Trip - Museum - 10/31/07</b> Description Field Trip - Museum - 10/31/07. This will be an all day trip to the Natural History Museum in Balboa Park. Students will be transported by bus and a sack lunch will be provided.	\$15.00
<input type="checkbox"/>	<b>Yearbook</b> Description Yearbook - a great value	

[< Previous](#) [Continue >](#)

Make descriptions long or short!

The Web Store will display all items or just the items from the selected Departments.



# Shopping Cart

## Web Store

### Shopping Cart

Please verify your selected items before proceeding to Checkout.

**Regis Hartman**

[Select More Items To Add To Cart](#)

**Field Trip - Museum - 10/31/07** [Remove Selection](#)

Option	Quantity	Amount
Field Trip - Museum - 10/31/07	1	\$15.00
<b>Amount</b>		<b>\$15.00</b>

**Customer Subtotal \$15.00**

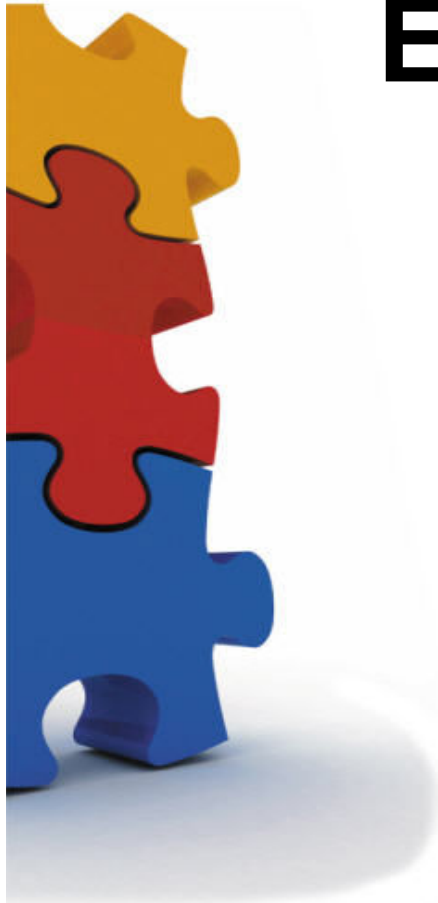
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**Grand Total \$15.00**

Checkout



# Enter Billing Information



## Web Store

### Billing Information

\*First Name

\*Last Name

\*Billing Address

Address Line 2

\*City

\*State

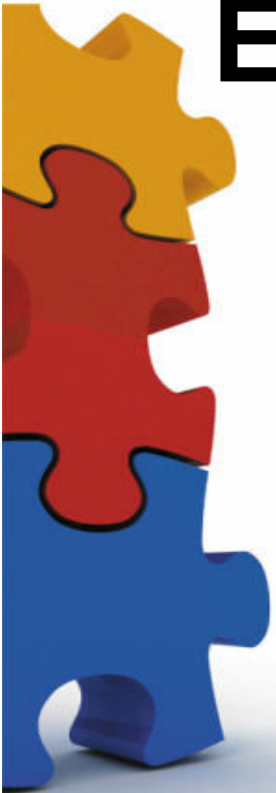
\*Zip

\*Contact Phone --  
(xxx-xxx-xxxx)

\*Email



# Enter Payment Information




**Payment Information**

Pay the full amount of \$15.00


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Credit Card

Card Type   [learn more](#)

Card Number

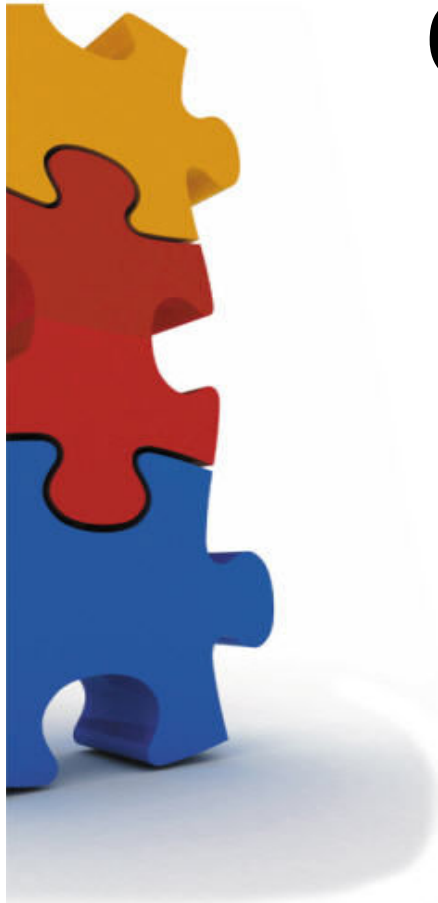
Exp. Date

Cardholder Name   [learn more](#)

All sensitive credit card data is handled by Active and no credit card numbers are downloaded to SchoolBooks.



# Order Confirmation



Transaction Summary		
Confirmation of Order		
<a href="#">Print Confirmation</a>		
<b>Regis Hartman</b>		
<b>Field Trip - Museum - 10/31/07</b>		
Financial Option	Quantity	Amount
Field Trip - Museum - 10/31/07	1	\$15.00
		Program Subtotal: \$15.00
		Subtotal for Regis: \$15.00
		<hr/>
		Grand Total: \$15.00
		Amount Paid: <del>(\$15.00)</del>
		Balance Remaining: \$0.00
<hr/>		
Order Confirmation Number: 7654310		

Parents can print their Order Confirmation, but they will also receive a payment confirmation via email.



# Transactions = Receipts

- When transactions are downloaded, SchoolBooks turns each one into a receipt.
  - Different receipt # series.
- Web store receipts for the day become a bank deposit with a ZERO amount.

Online transactions	1500.00
A/R due from Active	-1410.00
Transaction fees	-90.00
Total deposit	0.00

When remittance is received from Active, SchoolBooks applies it against the A/R due.



# Web Store Reconciliation

**Web Store Reconciliation - Play School High School**

All Starting Ending

Date Range  07/01/07 03/03/08

Show Only Uncleared Entries

Rec #	Date	WS ID	Customer	Amount	Tax	Payor	Item	Trans Fee	Clrd	C	Total
8000001	02/28	1711915872	Non-Customer Purchase	50.00	.00	Carol Quinn	KING	2.63	x3		.00
8000001	02/28	1711915872	Non-Customer Purchase	2.50	.00	Carol Quinn	CONVFEE	.00	x3		.00
8000002	02/28	1711915780	102-Wells, Mary	35.00	.00	Ted Wells	SBCARD	1.84	x3		.00
8000002	02/28	1711915780	102-Wells, Mary	10.00	.00	Ted Wells	SHIRT	.53	x3		.00
8000002	02/28	1711915780	102-Wells, Mary	1.75	.00	Ted Wells	CONVFEE	.00	x3		.00
8000002	02/28	1711915780	102-Wells, Mary	.50	.00	Ted Wells	CONVFEE	.00	x3		.00
8000003	02/28	1711915933	Non-Customer Purchase	50.00	.00	Carol Quinn	KING	2.63	x3		.00
8000003	02/28	1711915933	Non-Customer Purchase	2.50	.00	Carol Quinn	CONVFEE	.00	x3		.00

Check #

Journal prints all the detail.

**WEB STORE RECONCILIATION JOURNAL**  
Date Range : 07/01/06 to 02/14/08

Date	Tracks Rec #	Web Store ID	Cust #	Name	Payor	Tracks Item #	Card #	Amount	Trans Fee
07/20/07		17 0808 3930	90 1242	Myers, Mark	Yancy Wells	DONFA	X2268	30.00	1.50
07/20/07		17 0808 3930	90 1242	Myers, Mark	Yancy Wells		X2268	75.00	3.83
07/24/07		17 0808 3958	P1488	Cio, Stephanie	Paul Cio		X2268	80.00	4.16
07/24/07		17 0808 3928	90 1240	Davis, Heidi	Rick Davis		X6970	80.00	4.16
07/24/07		17 0808 3946	90 1258	Danson, Clark	Fred Danson		X5043	80.00	4.16
07/17/07	800008 1	17 0808 3946	90 1258	Danson, Clark	Betty Danson	DONFA	X6970	50.00	2.50
07/17/07	800008 1	17 0808 3946	90 1258	Danson, Clark	Betty Danson	ART15	X6970	15.00	0.75
07/17/07	800008 2	17 0808 3953	90 1265	Myers, Sally	Tha Myers	DONFA	X5043	25.00	1.25
07/17/07	800008 2	17 0808 3953	90 1265	Myers, Sally	Tha Myers	APBIO	X5043	75.00	3.75
07/17/07	800008 2	17 0808 3953	90 1265	Myers, Sally	Tha Myers	ART3	X5043	3.00	0.16





# Questions & Answers

