

Online Payments Setup - Study Guide

Last Modified on 10/22/2022 10:45 am CDT

The Payments Setup Study Guide provides documentation and videos for setting up Online Payments. Topics include adding bank accounts, managing district level and school level settings, creating fund accounts for district or school level payments, understanding how parents and students make payments, and reviewing payment transactions in the Payments Reporter tool.

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Online Payments Setup

This section shows how to set up payment vendor information, bank accounts, fund accounts, and district and school settings.

Vendor Information

The Vendor Information editor is used to identify your district's credentials with the payment vendor and determine which payment methods your district accepts.

+ [Documentation](#)

+ [Video](#)

Bank Accounts

The Bank Accounts area allows you to establish which bank accounts are available for district or school use. This information is crucial for informing the payment vendor and Campus Payments which transactions apply to which bank account.

+ [Documentation](#)

+ [Video](#)

Fund Accounts

Fund Accounts identify which bank account is used for each fee and/or service and they can be set up for the district or a school. Fund accounts are used with School Store and Activity Registration.

+ [Documentation](#)

+ [Video](#)

Settings

There are two sets of settings: 1) District Settings allow you to establish payment features for the entire district. 2) Each school can set the School Portal Settings based on their needs.

+ [Documentation](#)

+ [Video](#)

Payments Notifications

The Payments Notifications tool allows staff to have the Deposit Request Report emailed to them as a PDF document.

+ [Documentation](#)

+ [Video](#)

Portal Payments Use

Learn how parents/guardians and students manage payment methods, select optional payments to pay, set up recurring payments, add money to your food service account, and view payment history.

My Accounts

The My Accounts is the tool where parents/guardians and students manage payment methods, select optional payments to pay, set up recurring payments, and view payment history.

+ [Documentation](#)

My Cart - Checkout View

My Cart is where parents/guardians and students pay fees and add money to their food service account. Items can be added to My Cart from any of the following areas: Food Service, Fees, and Optional Payments.

+ [Documentation](#)

My Cart - Food Service

The Food Service tool allows parents/guardians and students to see what meals and food items were purchased as well as add money to their Food Service account.

+ [Documentation](#)

My Cart - Fees

The Fees tool provides a list of all fees assigned to the parent/guardian and student. Fees may include things like a lab fee for a photography course or the cost of an athletic activity. Fees that are still owed and fees that were paid appear in this list, followed by the ongoing balance for all fees. This tool lets parents/guardians or students select fees for payment.

+ [Documentation](#)

Remove Access to Online Payments

Access to Online Payments can be removed for an individual or several household members.

An Individual

The Payments tool provides the option to remove a person's access to online payments. When this option is set, the individual does not see the Payments area on the portal.

+ [Documentation](#)

+ [Video](#)

Household Members

The Payments tool provides the option to remove access to online payments for one or more household members. When this option is set, the household member does not see the Payments area on the portal.

+ [Documentation](#)

+ [Video](#)

Manage Online Payments

Staff can check the status of online payments by using the Payments Reporter tool.

Payments Reporter

The Payments Reporter tool lets office staff view any payments that were made, perform refunds, export transactions, and modify which column to display in the report.

+ [Documentation](#)

+ [Video](#)

Payments Tool

The Census > People > Payments tool provides details of all transactions processed online, at a POS terminal, or in the office for an individual student. With this tool, you can check the status of payments based on a date range.

+ [Documentation](#)

+ [Video](#)
