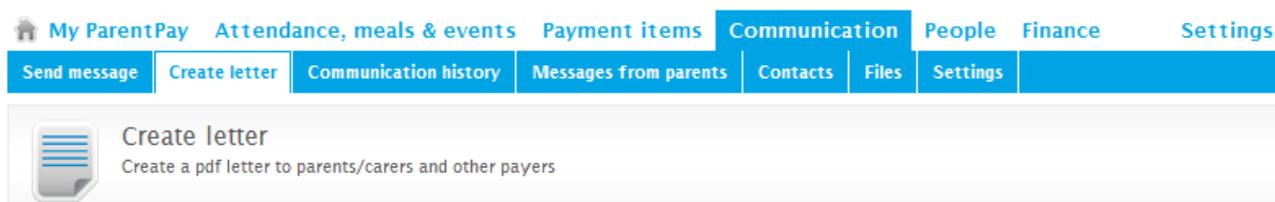


Creating Activation Letters

A selection of pre-prepared Activation Letter templates will have been added to your ParentPay site. You can either select to use and adapt one of the existing templates, or alternatively you can create your own Activation Letter from scratch.

We would recommend that schools only send out account activation information in letter form, we would never advise schools to send account activation information via email or text message.

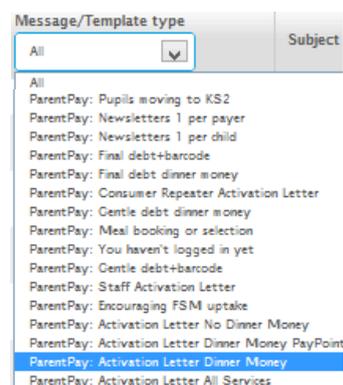
To produce Activation Letters you need to go to **Communication > Create Letter**



The screenshot shows the ParentPay navigation menu with 'Communication' selected. Below the menu, the 'Create letter' button is highlighted, with the subtext 'Create a pdf letter to parents/carers and other payers'.

You will need to choose the template that best suits your requirements.

If you are a school using ParentPay for school meals we would recommend using the **Activation Letter – Dinner Money** template

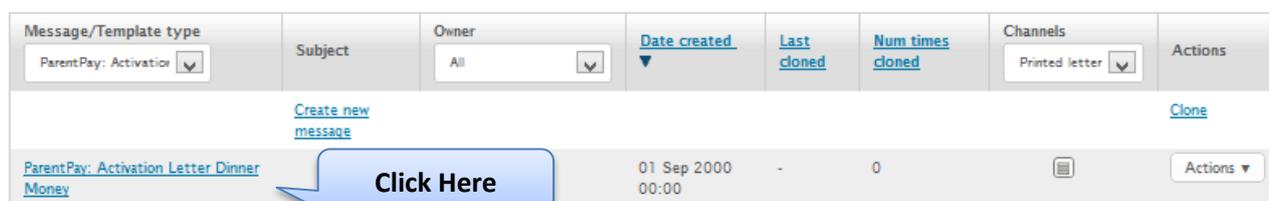


The screenshot shows a dropdown menu for 'Message/Template type'. The 'ParentPay: Activation Letter Dinner Money PayPoint' option is selected and highlighted in blue.

NOTE: We would not recommend sending out an Activation Letter with a barcode printed on it. This may discourage your payers from activating their online accounts and will result in schools failing to obtain a verified means of communication (emails and mobile telephone numbers).

It is suggested that you select an Activation Letter with no barcode initially and request within the activation letter that, any payers unable to pay online contact the school, request the option of paying via PayPoint, either by PayPoint card or barcoded letter. This option will ensure you can keep track of your PayPoint payers.

Once you have chosen your template you need to click on the template title to enter into the template setup screen.



The screenshot shows a table of templates. A blue callout bubble with the text 'Click Here' points to the 'ParentPay: Activation Letter Dinner Money' row.

Message/Template type	Subject	Owner	Date created	Last cloned	Num times cloned	Channels	Actions
ParentPay: Activation		All				Printed letter	
Create new message Clone							
ParentPay: Activation Letter Dinner Money			01 Sep 2000 00:00	-	0		Actions

Change the name of the message run to call it something that will be easily identifiable.

Message run name - Edit the Message/Template type

Type

Activation Letter - NEVERLAND SCHOOL

The message run name appears on the parent's home page

Ensure the only channel available is the **Use for print** option. (You do not want to send Activation Letters via Email or SMS)

Use for print

?

The letter template will be displayed on screen. Click **Edit** to amend the content of the letter.

Printed letter - [Get online support](#)

Use for print

?

Body

<miscontactname/>
<consumeraddress/>

Dear <miscontactname/>

Pupil: <consumerforename/> <consumersurname/> Class: <class/>

In an attempt to remove all cash and cheques from school we are asking all parents to only use our e-payment method to pay for dinner money. This can be done online using a very secure website called ParentPay or in cash at local stores where you see the PayPoint logo.

Already have a ParentPay account?

If you already have a ParentPay account, either with our school or another ParentPay school, you can simply login to that account and add your other children via the Add a child tab on your home page. You will need the below activation username and password to do this.

New to ParentPay?

You have a secure online account, activated using a unique activation username and password; you will be prompted to change these and to keep them safe and secure as your Username and Password for future logins.

If you have two or more children at a ParentPay school, you only need to activate one account to create your 'main account' and then add your other children via the Add a child on your home page.

Please visit www.parentpay.com and activate your account via the Account login area on the home page of the site.

Username: <loginname/> Password: <password/>

ParentPay holds an electronic record of your payments to view at a later date. Once you have activated your account you can make online payments straight away.

Those parents wishing to pay cash should contact the school office to request the option of paying via PayPoint.

Please do not hesitate to contact the school office if you need assistance. Your support in using ParentPay will help the school enormously, thank you.

Yours sincerely
<signature/>
Headteacher

Edit **Copy**

You need to update the letter to suit your requirements.

You will be able to add any additional mail merge fields you want to add, such as the signature instruction which will allow you to add a signature graphic or a letterhead to the template.

NOTE: A comprehensive list of the mail merge fields is available from the support site. All mail merge field codes must be prefixed by < and end with /> so the text editor knows it is a merge field not plain text.

Helpful Hint

To insert a mail merge field or a signature graphic in your message body, highlight the mail merge parameter you wish to use such as <signature/> in the List of field codes on the right of the screen, and either drag and drop or copy and paste the field into the appropriate place within the template!

You can only use one signature graphic. This could be a signature, or you may instead want to use the option to upload your letterhead graphic.

When uploading your signature graphic file please ensure it is not in a word document, it must be an image file (.jpg, .giff or similar).

When you have updated your template click **Save**

Edit Print text

Body text

<miscontactname/>
<consumeraddress/>

Dear <miscontactname/>

Pupil: <consumerforename/> <consumersurname/> Class: <class/>

In an attempt to remove all cash and cheques from school we are asking all parents to only use our e-payment method to pay for dinner money. This can be done online using a very secure website called ParentPay or in cash at local stores where you see the PayPoint logo.

Already have a ParentPay account?

If you already have a ParentPay account, either with our school or another ParentPay school, you can simply login to that account and add your other children via the 'Add a child' link on your homepage. You will need the following information:

List of field codes
Note that field codes are case sensitive and must be entered as <xxxx/>

- <reciptitle/>
- <recipforename/>
- <recipsurname/>
- <recipaddress/>
- <loginname/>
- <password/>
- <recipemail/>
- <consumerforename/>
- <consumersurname/>
- <consumeraddress/>
- <year/>
- <class/>
- <miscontactname/>
- <service/>
- <balance/>
- <totalpaid/>
- <date/>
- <suppliemame/>
- <paypointbarcode/>
- <mrn/>
- <signature/>
- <queueid/>
- <fsmexpiry/>

Cancel Save

If you have selected to add a signature or other graphic upload the file to the Signature area and tick the option to **Enable signature graphic**.

Click **Change** to upload it to your template

Your signature or graphic will appear on screen for you to preview

Signature

Add a signature graphic to the message. This will appear on all html emails and printed letters.

Enable signature graphic

Current signature

George Orwell

Change signature graphic

Browse... No file selected.

Click **Continue** to move forward to the next stage

IMPORTANT: Your template will not be saved until you have completed your message run, if you cancel out of the process now any changes you have made to the template will be lost!

The next step is to select your message priority options.

For activation letters the Priority remains as Normal and the Send to priority is Primary payer only: one message/child.

NOTE: If either now, or in the future, you have created Secondary Payers on your system you will need to set the Send to priority to Each payer to ensure communication is produced for both payers. In this instance you will need to use the field codes <consumerrepeater> and </consumerrepeater> at the start and end of your letter template to ensure the separate communication is created.

Click **Continue** to move forward to the next stage.

Choose message options - [Get online support](#)

You can set or change options for sending your message.



How to send

Enabled channels

Priority
Normal

Send to
Primary payer only: one message/child

Send options
 Verified email address only
 Registered mobile number only
 Allow SMS size to exceed one text per mobile

You will need to use the drop down menu within the **Add recipients section** to select your recipients for the activation letters – individual year group, all pupils, all pupils and staff, individual pupil etc.

Click **Add** to add the selected recipients to the Recipient group

Recipient groups

No groups specified

Category	Group	Add/exclude	Number in group	Recipients	Actions
					Total: 0 <input type="button" value="Delete all"/>

Add recipients

Add group
Year group

Year 3



2. Click Add

1. Select recipient group

Your selected recipient group will be added to the Recipient Group section.

Recipient groups

Category	Group	Add/exclude	Number in group	Recipients	Actions
Year/reg group	Year 3		23	23	Delete

Total: 23

The summary at the top of the screen will display an overview of the communication you are about to create.

Once you have selected your recipients click **Continue** to move forward to the next step.

Choose the recipients for your message

Enabled channels

Message run name
Activation Letter - NEVERLAND SCHOOL

Subject

Priority
Normal

Number of recipients
23 (0 SMS - 0 email - 23 printed)

Potential delivery problems
None

SMS messages
0 exceed one SMS message in length

A final breakdown of your message run will appear on screen showing the channel/s you have elected to send the message via, the priority of the message, total number of recipients with a breakdown of each channel type and the total number of chargeable SMS messages you are sending where appropriate. Click **Confirm send**.

Confirm messaging run - [Get online support](#)

Review details of message run and confirm to send

Enabled channels

Message run name
Activation Letter - NEVERLAND SCHOOL

Subject

Priority
Normal

Total recipients
23 (0 SMS - 0 email - 23 print)

SMS messages
Confirming will cost 0 SMSes

Letter available via Parent/Carer login
 If ticked, Parent/Carer will be able to download this letter via their login

IMPORTANT: Do not tick the 'Letter available via Parent/Carer login' tick box. This is an activation letter and therefore, until parents/carers have received this letter, they will be unable to view the letter in their online account.

Click **Open pdfs** to print your letters

Messaging run ID	1671518-3902985
Time sent	26 Aug 2015 11:46:33
Message run name	Activation Letter - NEVERLAND SCHOOL
Subject	
Priority	Normal
Total recipients	23
SMS messages sent	0
SMS delivery	0 / 0 delivered - 0 failed
Email delivery	0 / 0 delivered
Printed letters	23
Letter available via Parent/Carer login	No
	View recipient exception report Repeat message run

Open pdfs

Show to Parent/Carer

Your activation letters will be created and your activation letter template will be saved.

