



Schools Cash Office

INCOME ADMINISTRATION SOFTWARE

SESSION OVERVIEW

This session will provide you with an understanding of how to communicate with your parents by text and email and get your school ready to go live. The session will be delivered over the phone and will last up to 3 hours. We will guide you into a remote connection so we can view your screen.

COMMUNICATIONS TRAINING AGENDA

- Initial consultation
- Introduction to the communications module
- How to send emails/texts to chase for debts
- How to send other (non-debt related) email/texts
- How to send emails/texts via SCOPAY
- How to set up cohort groups
- Viewing the history log
- Account contact report
- How to amend templates

CUSTOMISATION AND SETUP

- Configure system options
- Import the parent contact data
- Import the staff contact data (if applicable)
- Update and create templates
- Send test messages