



The New ParentPay for Parents Downloadable Guide

The New ParentPay for Parents

Guide to new interface and features

The screenshot displays the ParentPay user interface. At the top right, it shows a user profile for 'Hello, Anna Hendry (anna88)' with links for 'View / edit your profile' and 'Log out'. A shopping basket summary indicates 'Basket £10.00 (1 item)'. The main navigation bar includes links for 'Home', 'Pay for items', 'Alerts & communications', 'Transaction history', 'Menus & choices', and 'Communications'. A 'I want to...' sidebar on the left provides quick access to various features. The central area is divided into sections: 'Items due for payment' with a table of items, 'Recent payments' with a table of past transactions, and 'Alerts & communications' with a table of messages. A 'ParentPay support' link is located at the bottom left.

Items due for payment

Item description	Name	Amount	
Dinner money for Eastbury Comprehensive School Ball £30.55	Britany	-	Add to basket
7275801; Bourne Primary School meals - Pupils, Bal £10.00	Robert	£10.00	Add to basket
7275801; Bourne Primary School meals - Pupils, Bal £10.00	Robert	£10.00	Add to basket
9475801; To Pay £10.00	Britany		Add to basket
Trip to Les Miserables 02 April 2012	Britany	£15.00	Add to basket

Recent payments

Date	Amount	Type	Invoice
05 Mar 2012	£10.00	Card	Dinner Mon...
25 Feb 2012	£10.00	Card	Dinner Mon...

Alerts & communications

Date	Subject
01 Jan 2012	Activation Email



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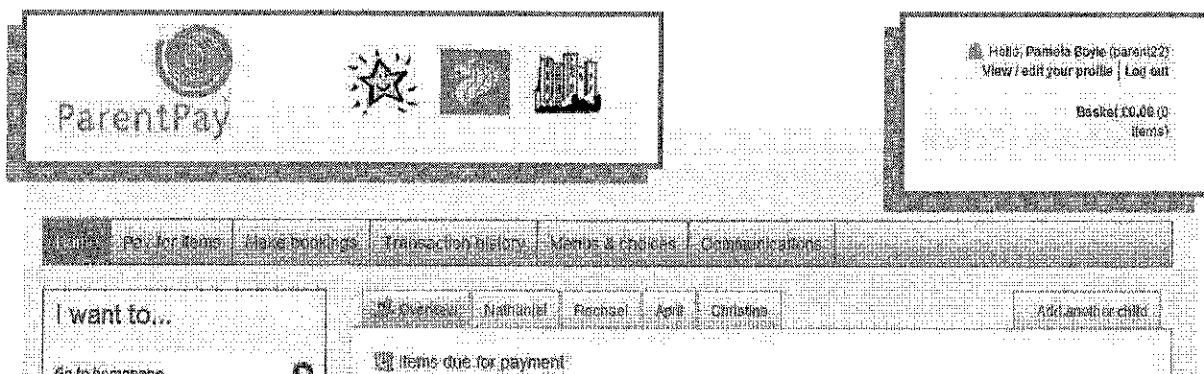
Make bookings	23
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The NEW ParentPay for parents

Following extensive customer research and independent usability studies we have developed a fresh, simple user-friendly site for the new ParentPay application.

Your home page

The logos of all schools your children attend will be visible at the top of the screen; clicking on a school logo allows you to view that school's individual ParentPay welcome page.



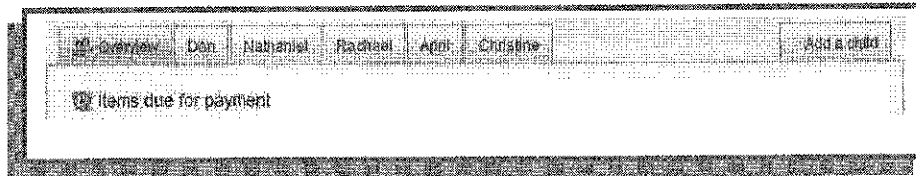
The top right of your home page will display your name (entered when you activated your account) and your username. You will also be able to use the quick links in this area to:

- **View/edit your profile**
- **Logout**
- **Basket:** add, edit and view items in your basket before proceeding to '**Checkout**'

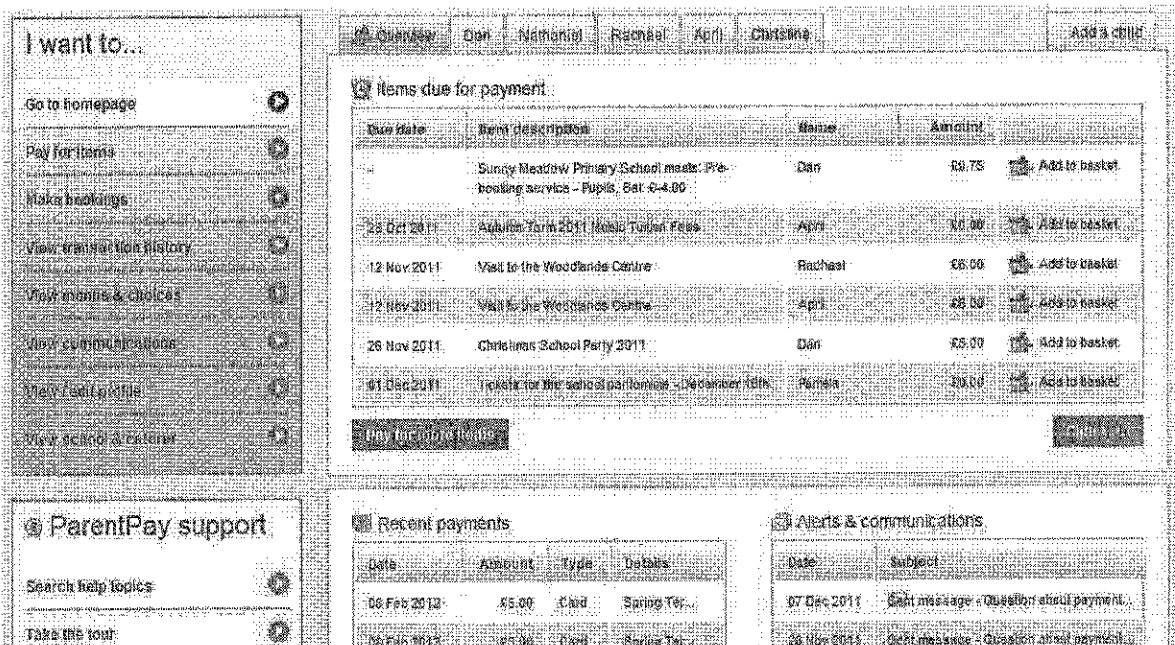
The '**Overview**' area of the page displays an overview of your children - If you have already added all your children to a single account you will also see tabs for your other children, clicking on these tabs shows information specific to that child. If you have not already created a single account for all your children using ParentPay and want to find out how to do so please goto the section: '**Single account / login for all your children**'

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In addition, you'll see another tab on the right side of your home page 'Add a child' – this is where you'll go to add more children to your account providing the school they attend is a ParentPay school.



Overview > Items due for payment: Payment items across all your children.



I want to...

- Go to homepage
- Pay for items
- Make bookings
- View transaction history
- View income & charges
- View communications
- View my profile
- View schools & centres

ParentPay support

- Search help topics
- Take the tour

Items due for payment

Due date	Item description	Name	Amount	
	Sunny Meadow Primary School meals: Pre-booking services - Pupils, Sat. 6-4:00	Dan	£5.75	Add to basket
26 Oct 2011	Autumn Term 2011 (Basic) Tutor Fees	April	£1.00	Add to basket
12 Nov 2011	Visit to the Woodlands Centre	Rachael	£5.00	Add to basket
12 Nov 2011	Visit to the Woodlands Centre	April	£5.00	Add to basket
26 Nov 2011	Christmas School Party 2011	Dan	£5.00	Add to basket
01 Dec 2011	ticket for the school performance - December 10th	Nathaniel	£3.00	Add to basket

Recent payments

Date	Amount	Type	Details
06 Feb 2012	£5.00	Card	Spring Ter...
06 Feb 2012	£5.00	Card	Spring Ter...

Alerts & communications

Date	Subject
07 Dec 2011	Text message - Question about payment
26 Nov 2011	Text message - Question about payment

Recent payments: A breakdown of the most recent payments you have made across all of your children.

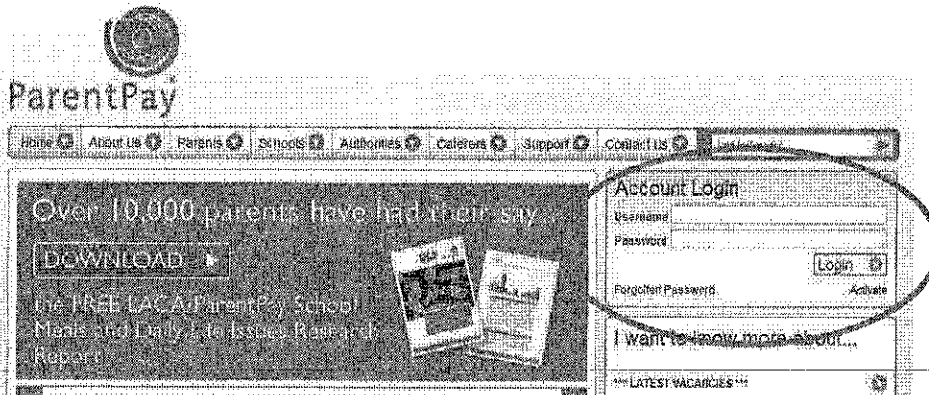
Alerts & Communications: A list of the most recent messages across all your children that you have received from your child/children's schools or those you've sent to school from within ParentPay and any automated alerts you have received.

The left side of your screen has clear, concise 'I want to...' navigation and a 'ParentPay support' area should you need any assistance.



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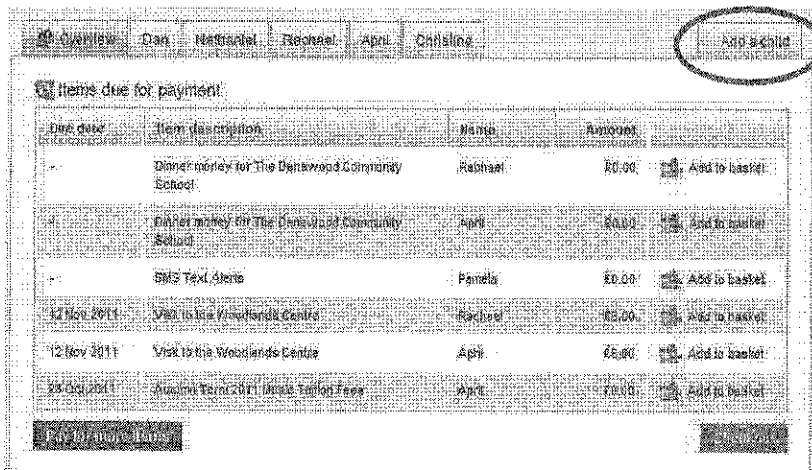
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Next: See the 'Adding children to your single account/login' section below for information on how to 'add children' to your account.

Adding children to your single account/login

- Click on **Add a child**



- Enter the **username and password** for your other child
- Click **Search**

The school, pupil name, year group and class will show on screen.



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Adding from account: iZeitgitz (Paris Foster)

School	Pupil	Year	Reg. group
Sunnyside School	Nathaniel Norman	1	1DC

Add child to your account

Logout

After you confirm the add, these pupils will be transferred to the account you are logged into and the old account will be disabled.

Click **Add child to your account** to confirm this is the child you wish to add to your account. You can repeat the above process to add more children to your account.

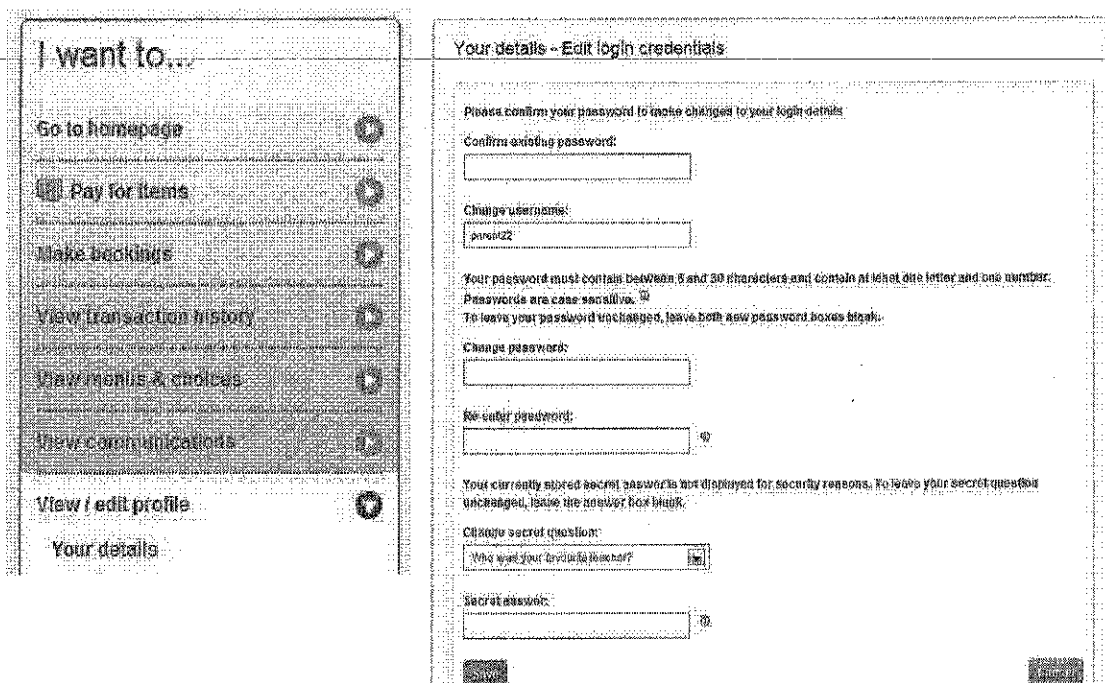
You will then be directed back to your home page which will have changed slightly.

Making changes to your account

Changing your username and/or password

If at any time you want/need to change your username or password you can do so as follows:

Go to the 'I want to...' area of your home page **View/edit profile>Your details**



The image shows two screenshots from the ParentPay website. The left screenshot shows the 'I want to...' menu with options: Go to homepage, Pay for items, Make bookings, View transaction history, View menus & choices, View communications, and View / edit profile. The right screenshot shows the 'Your details - Edit login credentials' form. It includes fields for 'Confirm existing password', 'Change username', 'Change password', 'Re-enter password', 'Change secret question', and 'Secret answer'. There are also 'Save' and 'Cancel' buttons at the bottom.

First, you'll need to confirm your existing password – then you can make any changes required.

Don't forget to click **Save**.

Managing your phone numbers and email addresses

Providing your mobile number in ParentPay not only allows your school/s to send you SMS text message communications but also allows you to opt in to receiving our automated SMS text alerts for things such as a low dinner money balance for your child/each of your children.

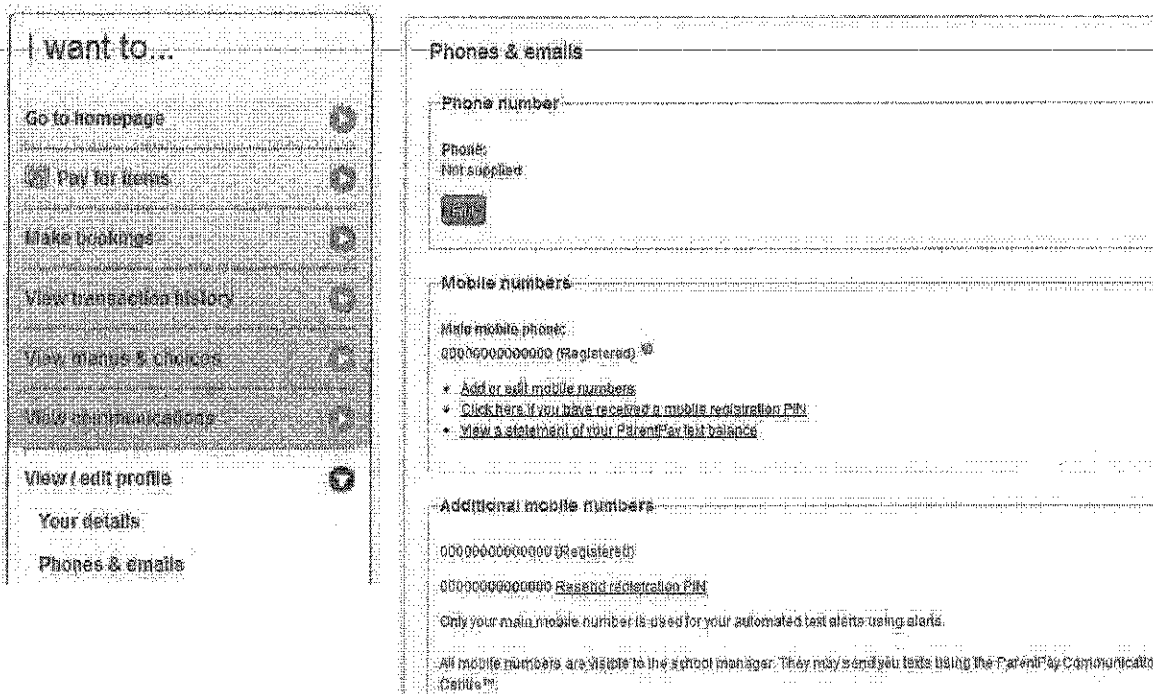
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Automated text message alerts that you request are payable by you at 0.06p per message sent.

Text messages sent to you from your child's school are at NO charge to you.

Entering your mobile number

Go to the 'I want to...' area of your home page **View/edit profile>Phones & Emails**



- **Phone number:** your home, office or other number
- **Mobile numbers:** this area contains your 'main mobile number' – this will be the number your school uses to send you SMS text messages and will also be the mobile number that any automated alerts you request are sent to.

When you provide your mobile number you will automatically receive a registration PIN in order to 'register' your mobile – If you do not 'register' your mobile you will be unable to receive automated SMS text alerts from ParentPay.

You do not need to 'register' your mobile number in order for your child/children's school to send you SMS text messages.

Three easy steps to enable automated SMS text alerts in your account

Step 1: Registering your mobile number

If you wish to subscribe to our automated SMS text alerts and you have received your registration PIN, you must log back into your ParentPay account, go to the '**I want to...**' area **View/edit profile>Phones & emails** and click on the [Click here if you have received a mobile registration PIN](#) link to register your mobile. Your registration PIN is valid for 7 days.

Step 2: Top up your SMS text balance

Automated SMS text alerts that you request are paid for by you at a charge of 0.06p per message sent – as such you must ensure that you maintain a SMS text balance of at least £2.40.

Topping up is easy, simply go to **Pay for items** via the '**I want to...**' area of your home page and click on the '**Other**' tab.

Step 3: Choosing the alerts you want to receive

Go to the '**I want to...**' area of your home page **View/edit profile>Alert settings**

Choose which alerts you wish to receive for your child/each of your children and set the threshold (balance) at which you wish to receive alerts. For more guidance please see our 'Alert settings' area later in this guide.

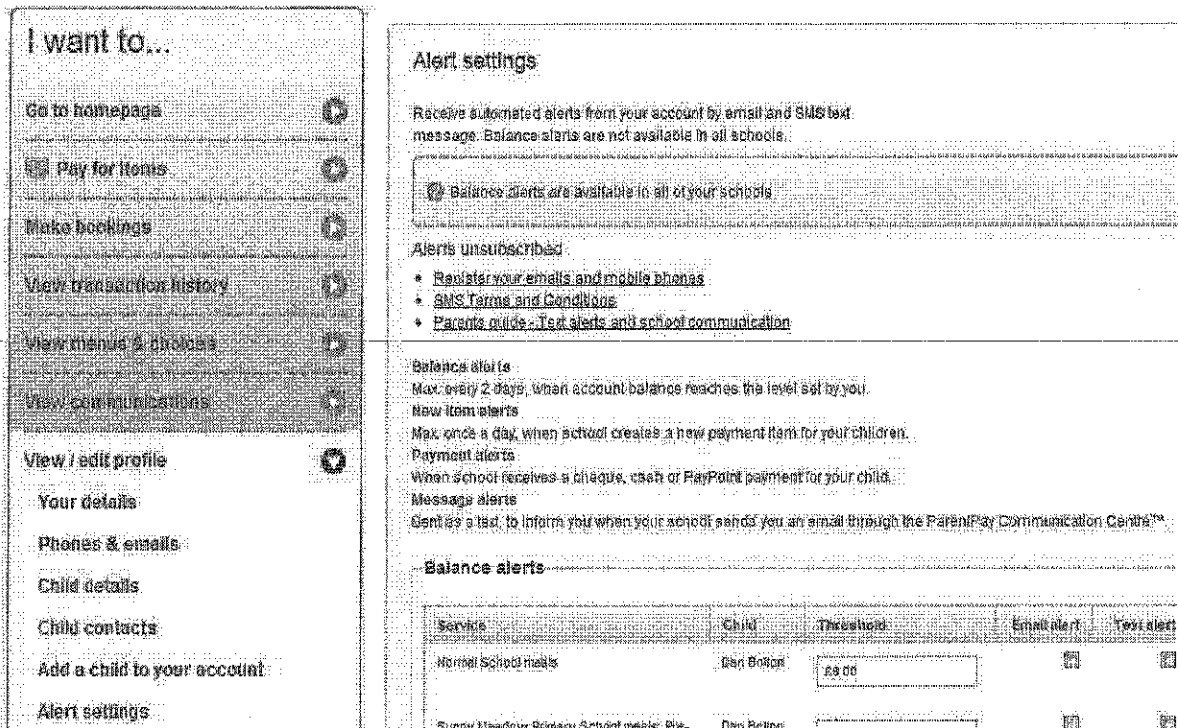
- **Additional mobile numbers:** you are able to provide a number of mobile numbers to enable the school to send you text messages – schools can choose to 'send to all mobile numbers' in the event of an emergency.
- **Email addresses:** it's likely that you provided an email address and verified it during the activation of your ParentPay account and this will show as your 'main email address' – you are able to provide an alternative email address if you wish.
- **Preferred communication channel:** you can indicate which method you wish your school to use when contacting you for urgent and normal communications – your school can disregard these settings if they choose.

Alert settings

A great feature of ParentPay that allows you to set and receive automated alerts from ParentPay for low balances and other purposes! It's quick and easy to setup giving you peace of mind that your child/children will never be refused a meal due to lack of funds.

Go to the '**I want to...**' area of your home page **View/edit profile>Alert settings**

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The 'Alert settings' screen will confirm if you are able to set 'balance' alerts for all of your children – this feature is not available to all schools and is dependent on the type of subscription they have with ParentPay. In the event that you are not able to set automated low balance SMS alerts, a list of the children you are unable to do this for will show on screen.

Balance alerts: simply choose the type of alert you wish to receive (Email or SMS text) and set the 'Threshold' for each child. We recommend that this is set to cover the cost of meals for 3 days in order that you have time to top up before your child may be refused a meal.

New item alerts: you can choose to receive an alert when your child's school sets up a new payment item for your child

Payment alerts – cheques and cash: you can set up alerts to tell you when a cash/cheque payment has been recorded against your child's account in school ensuring you know the payment has been received safely.

Payment alerts – PayPoint: in the event that you are a cash based payer and are using either a PayPoint card for school meal top ups and/or barcoded letters to pay for trips, you

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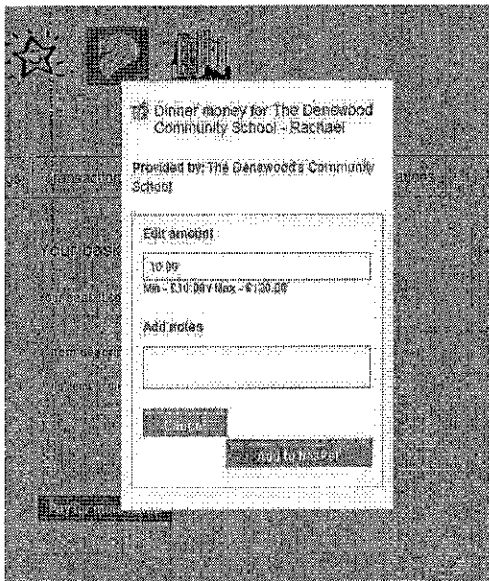
are able to set alerts to notify you once the payment shows in your child's account in school.

Message alerts: a great way to know that your school has sent you a message in ParentPay.

Selecting items and making payments

Using your basket: Quick add items

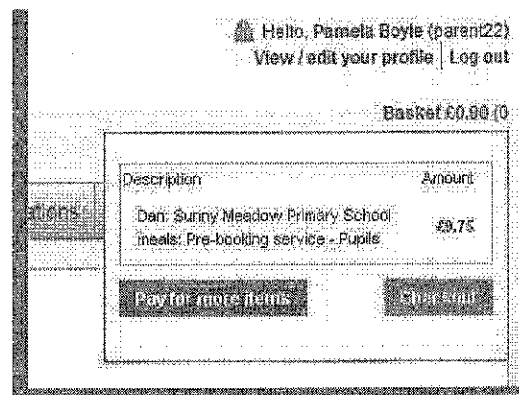
Pay for all your children in one easy place with our quick add basket! The **'Overview tab'** on your home page shows items due for payment across all of your children.



Locate the item you'd like to pay for and click on **Add to basket**.

Edit the **'Amount'** to pay and provide any **'Notes'** and **'Consent'** if appropriate in the pop-up window.

Click **Add to basket** and keep repeating the process until you're ready to **'Checkout'**.

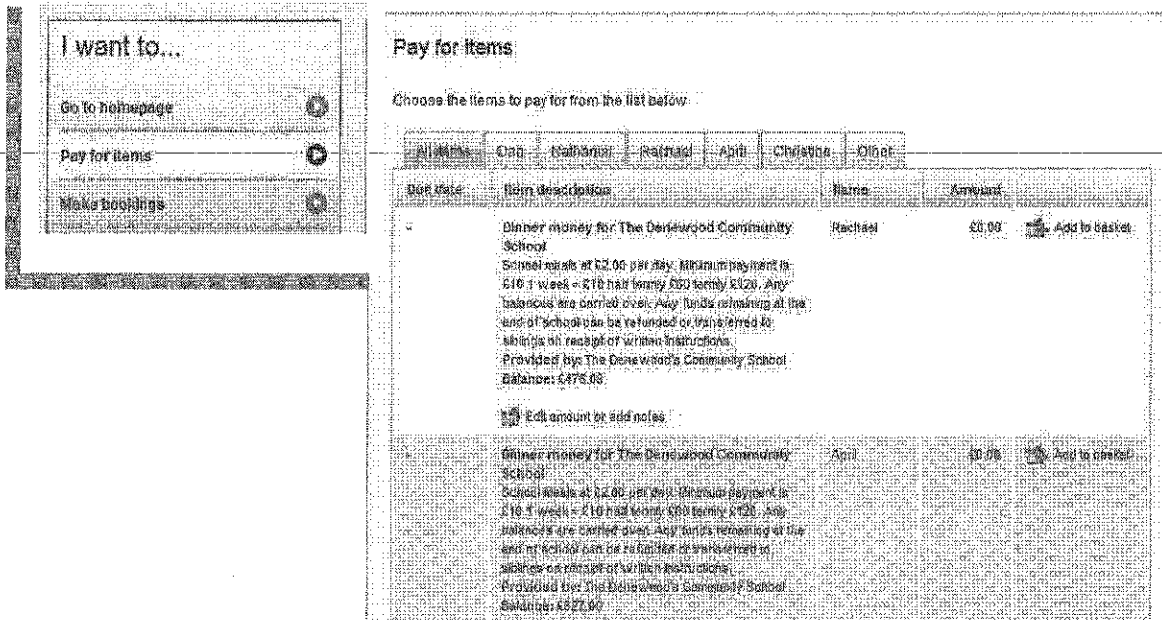


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Viewing more details about your payment items before adding them

Go to **Pay for items** in the **'I want to...'** area on the left of your screen.

The screen will default to the **'All items'** tab displaying each item available by child with a full Description of the item, Due date and Amount.

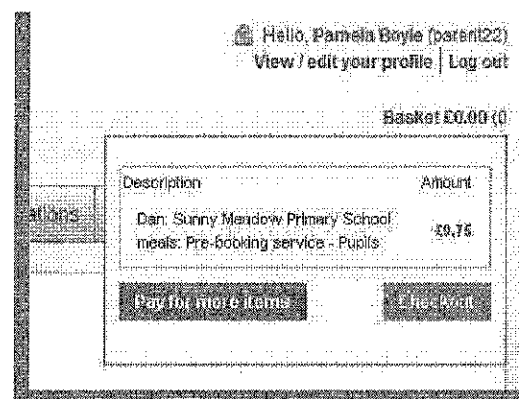


Click on **Edit amount or add notes/Add to basket** alongside the item you wish to select.

Select which items you wish to pay for at that time by clicking **Edit amount or add notes/Add to basket**.

Each time you add an item to your basket, you will be directed to the top right of the screen and a preview of your 'Basket' will pop up. Once ready to make payment go to your 'Basket' and click **Checkout**.

You will have the opportunity to review your purchases, remove any you did not intend to make or edit those you did before proceeding to make your payment as normal by clicking **Pay securely now**.



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View and pay by child

Click on the child's name tab from your home page or via **Pay for items** in the 'I want to...' area on the left of your screen.

Pay for items

Choose the items to pay for from the list below

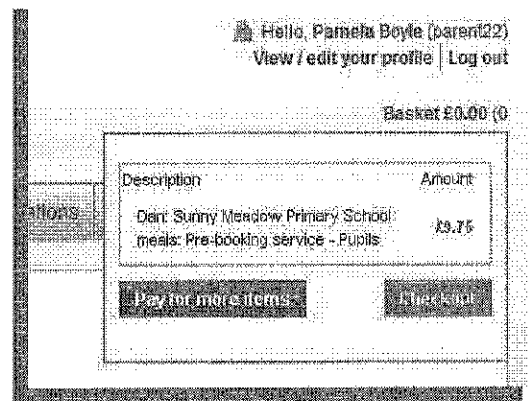
Item description	Name	Amount	
<p>School Meals for WIDEK Test School</p> <p>The minimum amount payable is £10. Please ensure you keep your school meal account in credit.</p> <p>Provided by: Sunnyside School</p> <p>Balance: £2.30</p> <p>Edit amount or add notes</p>	Nathaniel	£0.00	Add to basket
<p>Tuck shop topup</p> <p>Minimum payment: £5</p> <p>Provided by: Caterer's Delight</p> <p>Balance: £0.50</p> <p>Edit amount or add notes</p>	Nathaniel	£5.00	Add to basket

You will see all items available to that child and can proceed to select which items you wish to pay for by clicking **Edit amount or add notes/Add to basket**.

Each time you add an item to your basket, you will be directed to the top right of the screen and a preview of your 'Basket' will pop up.

Once ready to make payment go to your 'Basket' and click **Checkout**.

You will have the opportunity to review your purchases, remove any you did not intend to make or edit those you did before proceeding to make your payment as normal by clicking **Pay securely now**.



Paying for 'other' items

The 'Other' tab will display items not necessarily associated with your child such as the SMS text alert top-up for those parents that subscribe to our automated SMS text alerts.

Each time you add an item to your basket, you will be directed to the top right of the screen and a preview of your 'Basket' will pop up.

Once ready to make payment go to your 'Basket' and click **Checkout**.

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You will have the opportunity to review your purchases, remove any you did not intend to make or edit those you did before proceeding to make your payment as normal by clicking **Pay securely now**.

Transaction history

Quick view your most recent payments

The '**Recent payments**' area, towards the bottom of your home page, shows the most recent payments you have made across all your children.

To view more transactions, click on the **View payment history** button. You'll be able to run historical reports across all your children or choose an individual child to view your payment history for.



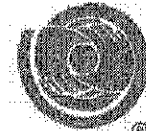
Date	Amount	Type	Details
26 Feb 2012	£75.00	Card	Greenhires
27 Feb 2012	£76.00	Card	Christmas
27 Feb 2012	£21.00	Card	Christmas
27 Feb 2012	£61.00	Card	Christmas
27 Feb 2012	£16.00	Card	Christmas
22 Feb 2012	£45.00	Card	Music Top

View payment history

View payments made between dates you choose

Go to **View transaction history** in the '**I want to...**' area on the left of your screen.

- **Name:** Choose the child you want to view payments for or leave as 'All' to report on payments across all your children
- **Payment item:** Narrow your report down to the item you paid for or leave as 'All' services for a complete history of payments across all items in that period
- **Start date:** Enter your start date (DD/MM/YYYY) or use the pop-up calendar to select the date
- **End date:** Enter your start date (DD/MM/YYYY) or use the pop-up calendar to select the date
- Click **Search**



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I want to...

- [Go to homepage](#)
- [Pay for items](#)
- [Make bookings](#)
- [View transaction history](#)
- [Payments](#)
- [Account statements](#)

Payments

Please select the child, item(s) paid for and dates you would like to search.

Name:
Rachel Boyle

Payment item:
All services

Start date:
01/11/2011

End date:
31/01/2012

A comprehensive list of all payments you have made and any refunds the school may have made to you will show on screen.

Selected period: 01 Nov 2011 - 31 Jan 2012
 Number of records: 74
 Total: £1613.60

Child	Payment made for	Payment method	Amount	Date paid	Period	Notes
Rachel	Greenhorea visit to London 2012	NA	-15.00	20 Dec 2011	The Greenwood Community School	
Rachel	Greenhorea visit to London 2012 07010 541350	ParentPay online	15.00	20 Dec 2011	The Greenwood Community School	07010 541350
Rachel	Cherry Brook Primary visit to Slaverby	ParentPay online	75.00	14 Dec 2011	The Greenwood Community School	
Rachel	Visit to the Visitation Centre	ParentPay online	5.00	14 Dec 2011	The Greenwood Community School	
Rachel	Direct money for the Greenwood Community School	ParentPay online	25.00	05 Dec 2011	The Greenwood Community School	

View statement of transactions for a selected month

Please note balances are only available to parents whose children attend schools who have opted for daily balances to be sent from the school canteen to ParentPay.

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Your 'Account statements' are monthly reports on items where there may be 'transactions/charges' against the payments you have made such as for a school meal account. Go to **View transaction history>Account statements** in the '**I want to...**' area on the left of your screen.

Name:

Account:

Statement month:

Total paid in during period: £29.25

Total paid out during period: £4.00

Service provider: Sunny Meadow Primary

Date	Description	Paid out	Paid in	Balance
01 Feb 2012	Opening balance			-4.00
20 Feb 2012	ParentPay	0.00	9.75	5.75
20 Feb 2012	ParentPay	0.00	9.75	15.50
21 Feb 2012	Lunch time Pupil lunch from 21 Feb 2012 charged	2.00	0.00	13.50
21 Feb 2012	ParentPay	0.00	9.75	23.25
22 Feb 2012	Lunch time Pupil lunch from 22 Feb 2012 charged	2.00	0.00	21.25
29 Feb 2012	Closing balance			21.25

- **Name:** Choose the child you want to view transactions for or leave as 'All' to report on all payments for all your children
- **Account:** Narrow your report down to the item you paid for or leave as 'All' services for a complete history of all transactions

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- **Statement month:** Select the month and year using the drop down menus
- Click **Search**

Alerts and communications

Another great new feature enabling you to view a history of all automated alerts, messages sent to you by your children/s' school/s and any messages you have sent to school via ParentPay. You can even access copies of letters, emails and texts!

Parents can receive alerts for a range of different reasons; when a new item is added by the school to ParentPay, when a cash or cheque payment has been recorded by the school on your account and where available alerts to low balances on your account. You can receive these alerts by email and / or SMS text to your mobile.

Quick view your most recent Alerts & communications

The '**Alerts & communications**' area, available bottom right of your home page, enables you to view the most recent history, across all your children.

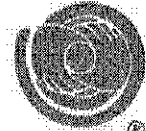
The breakdown shows automated alerts, messages sent to you by your child/children's school/s and any messages you may have sent to school using our 'Contact schools' feature in your account.

Click the **View all alerts & communications** button to see further history.

Alerts & communications

Date	Subject
29 Feb 2012	<input type="checkbox"/> Letter - Rachael trip zoo
27 Feb 2012	<input type="checkbox"/> Letter - April
27 Feb 2012	<input type="checkbox"/> Letter - Rachael
27 Feb 2012	<input checked="" type="checkbox"/> Email - Payment reminder for trip
27 Feb 2012	<input checked="" type="checkbox"/> Email - Payment reminder for trip
27 Feb 2012	<input checked="" type="checkbox"/> Email - Payment reminder for trip

[View all Alerts & communications](#)



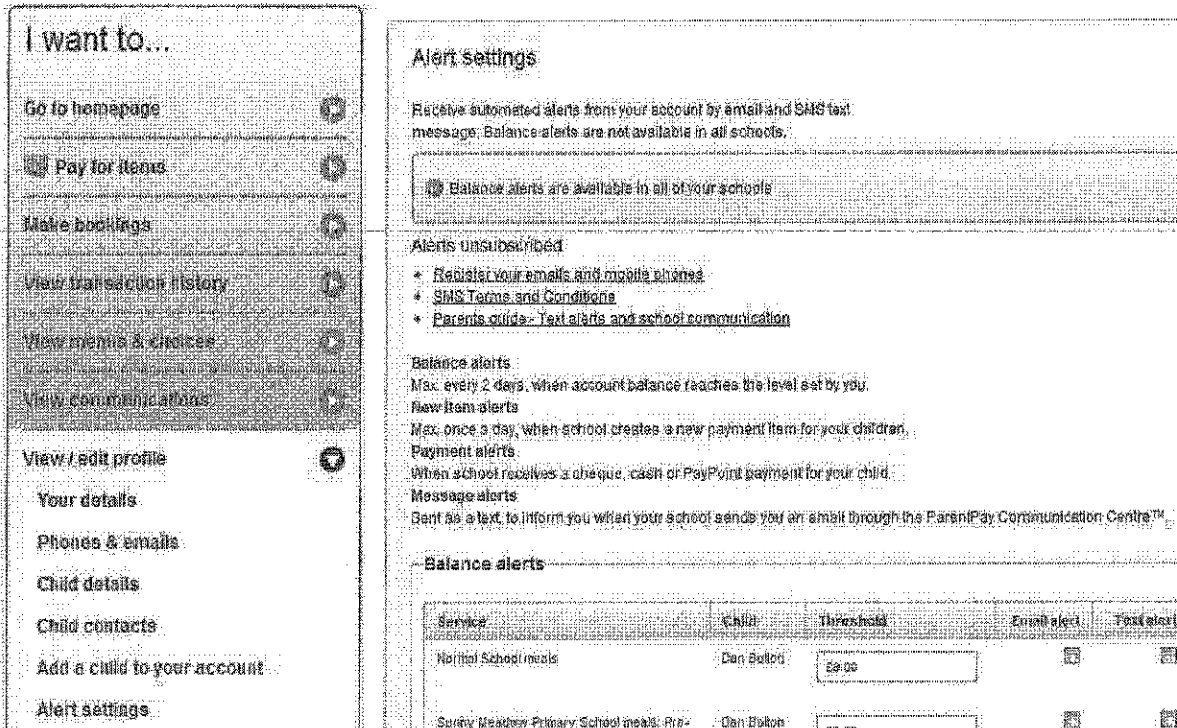
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The screenshot shows a web interface with a sidebar on the left and a main content area on the right. The sidebar, titled 'I want to...', contains several menu items: 'Go to homepage', 'Pay for items', 'Make bookings', 'View transaction history', 'View profile & account', 'View communications', 'Communication history', and 'Contact schools'. The 'Contact schools' item is highlighted. The main content area is titled 'Contact schools' and contains a message: 'Your school has opted out of this ParentPay feature. Please contact your school in the usual way e.g. by telephone or email.' Below this is an 'IMPORTANT!' notice: 'Please note that this message is sent directly to your child's school not to ParentPay. Do not send a message here if it contains important information that could affect your child's well being. Please contact the school directly.' At the bottom, there is a form with three fields: 'Name:' with a dropdown menu showing 'Dan', 'Message category:' with a dropdown menu showing 'Please select category...', and 'Enter message:' with a text input box.

- **Name:** Select the child the message is in relation to
- **Message category:** Use the drop down menu to select
- **Enter message:** Type your message in the box
- Click **Send message**

Setting up Alerts

Go to the '**I want to...**' area of your home page **View/edit profile>Alert settings**



I want to...

- Go to homepage
- Pay for items
- Make bookings
- View transaction history
- View menus & choices
- View communications
- View / edit profile**
 - Your details
 - Phones & emails
 - Child details
 - Child contacts
 - Add a child to your account
 - Alert settings**

Alert settings

Receive automated alerts from your account by email and SMS text message. Balance alerts are not available in all schools.

Balance alerts are available in all of your schools

Alerts unsubscribed

- Register your email and mobile phones
- SMS Terms and Conditions
- Parents guide: Text alerts and school communication

Balance alerts
Max. every 2 days, when account balance reaches the level set by you.

New item alerts
Max. once a day, when school creates a new payment item for your children.

Payment alerts
When school receives a cheque, cash or PayPoint payment for your child.

Message alerts
Sent as a text, to inform you when your school sends you an email through the ParentPay Communication Centre™.

Balance alerts

Service	Child	Threshold	Email alert	Text alert
Northol School meals	Dan Bolton	£9.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sunley Weathers Primary School meals: Pri	Dan Bolton	£9.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The 'Alert settings' screen will confirm if you are able to set 'balance' alerts for all of your children – this feature is not available to all schools and is dependent on the type of subscription they have with ParentPay. In the event that you are not able to set automated low balance SMS alerts, a list of the children you are unable to do this for will show on screen.

Balance alerts: simply choose the type of alert you wish to receive (Email or SMS text) and set the 'Threshold' for each child. We recommend that this is set to cover the cost of meals for 3 days in order that you have time to top up before your child may be refused a meal.

New item alerts: you can choose to receive an alert when your child's school sets up a new payment item for your child

Payment alerts – cheques and cash: you can set up alerts to tell you when a cash/cheque payment has been recorded against your child's account in school ensuring you know the payment has been received safely.

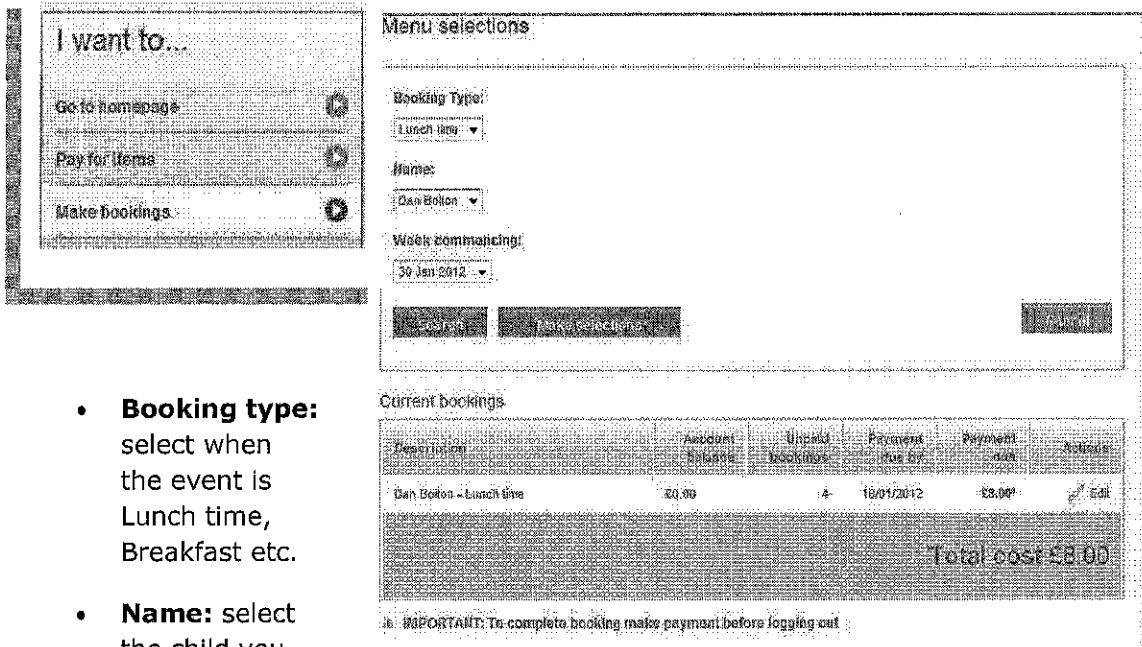
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Payment alerts – PayPoint: In the event that you are a cash based payer and are using either a PayPoint card for school meal top ups and/or barcoded letters to pay for trips , you are able to set alerts to notify you once the payment shows in your child’s account in school.

Message alerts: a great way to know that your school has sent you a message in ParentPay.

Make bookings

If the school is using our 'bookings/selections' module, you may be able to pre-book meals or sessions for certain types of payment items such as school meals and before/after school clubs. Go to **Make bookings** in the 'I want to...' area to the left of their screen.



I want to...

- Go to homepage
- Pay for items
- Make bookings

Menu selections

Booking Type: Lunch time

Name: Dan Bolton

Week commencing: 30 Jan 2012

Current bookings

Item Name	Amount	Unpaid bookings	Payment due by	Payment made	Actions
Dan Bolton - Lunch time	£8.00	4	18/01/2012	£8.00	Edit
Total cost: £8.00					

IMPORTANT: To complete booking make payment before logging out

- **Booking type:** select when the event is Lunch time, Breakfast etc.
- **Name:** select the child you want to make a booking for
- **Week commencing:** use the drop down menu to select the week you wish to make bookings for
- Click **Search**

You can then view 'current bookings' for that 'booking type' on screen (as per the Current bookings area shown in the above screenshot).

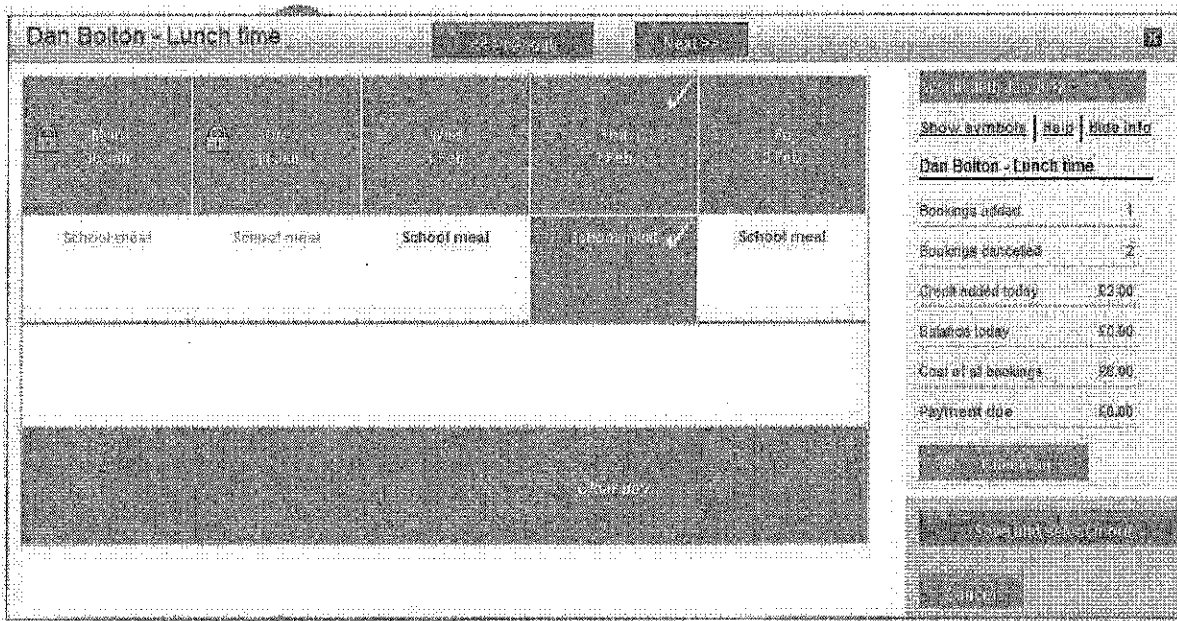
- Click **Make selections** to proceed to make your bookings

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Booking a meal/session – no menu selection

This feature is not available to all parents only those that have children at schools that have subscribed to our bookings module.

- **Book a meal/session:** simply click on the day that they want to book the meal for and that day will turn green with a tick
- **Cancel a previously booked meal/session:** click on Clear day in the column of the day the meal is booked for
- **Past event:** past bookings/sessions will show with a 'Padlock' sign as they are not editable after the event
- **Bookings breakdown:** the right of their screen will show a breakdown of meals/sessions booked or cancelled during this login session, credit to be added before they logout, current balance of that account (school meal account or similar) and total cost of all bookings they have made during this session



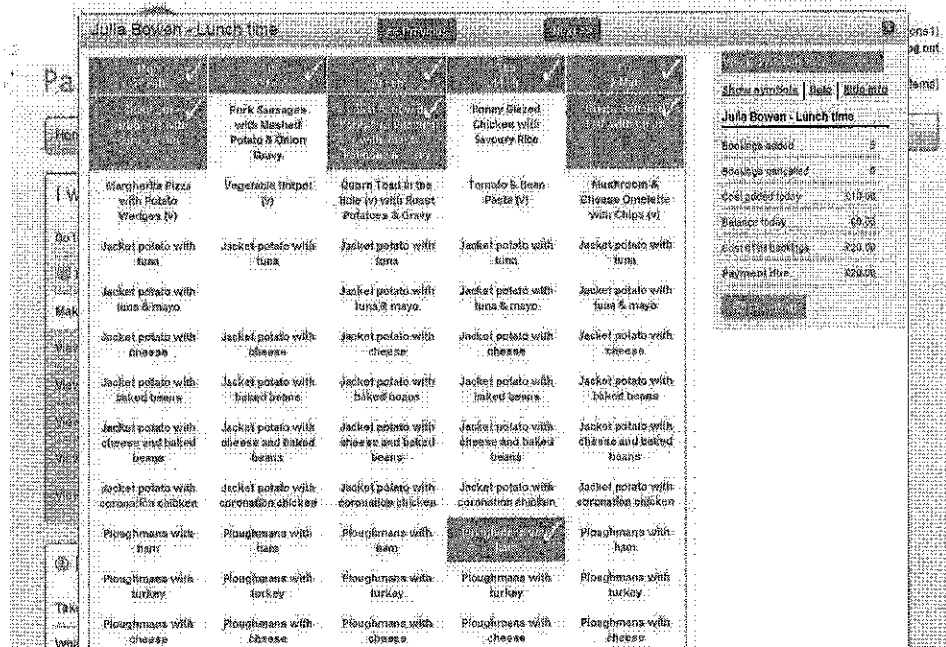
- **<<Previous or Next>>:** use these buttons to go to the previous or following week to make more bookings at this time
- **Save and select more:** click to save the bookings on this screen and make bookings for another child before paying
- **Checkout:** click to go to the basket and confirm that they wish to **Pay securely now**

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Booking a meal – menu selection

This feature is not available to all parents only those that have children at schools that have subscribed to our 'bookings selections' module.

- **Book a meal:** simply click on the menu item you want to book for your child and that item will turn green with a tick
- **Cancel a previously booked meal/session:** click on 'Clear day' at the bottom of the column of the day the meal is booked for
- **Past event:** past bookings/sessions will show with a 'Padlock' sign as they are not editable after the event
- **Bookings breakdown:** the right of your screen will show a breakdown of meals/sessions booked or cancelled during this login session, credit to be added before you logout, current balance of that account (school meal account or similar) and total cost of all bookings you have made during this session.



- **<<Previous or Next>>:** use these buttons to go to the previous or following week to make more bookings at this time
- **Save and select more:** click to save the bookings on this screen and make bookings for another child before paying
- **Checkout:** click to go to your basket and confirm you wish to **Pay securely now**

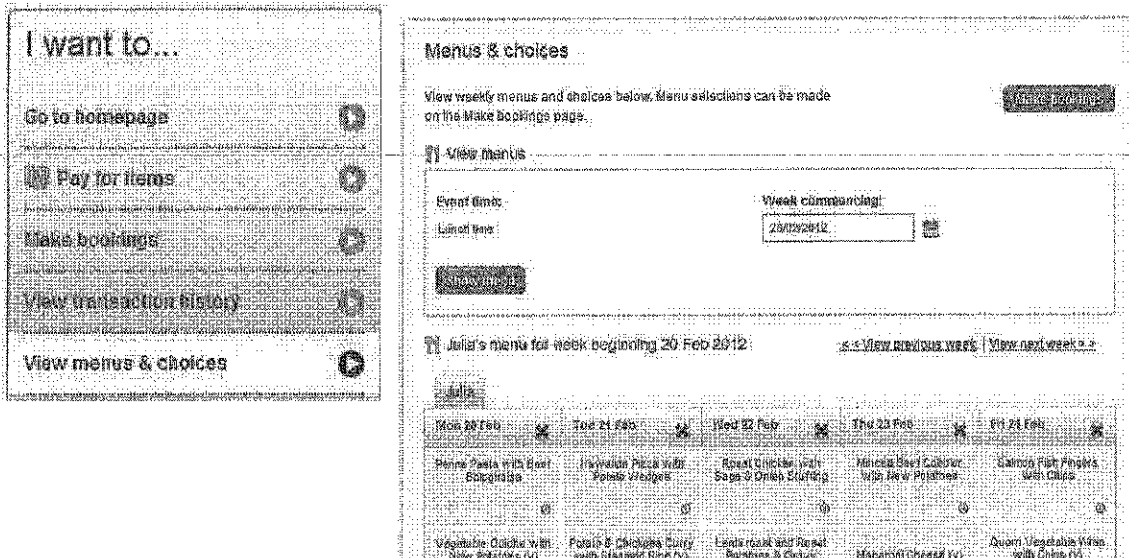


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Viewing menus & choices

Please note this feature is only available to parents whose children attend schools which have opted to send meal information from the school canteen to ParentPay

Go to **View menus & choices** in the 'I want to...' area to the left of your screen.



View menus

- **Event time:** defaults to lunch time
- **Week commencing:** choose the week to view the child's school menu
- Click **Show menu**
- Click on the **Make bookings** button to make bookings at this time

Viewing existing/past/future bookings for a child

The 'Dan's menu for the week beginning 20 Feb 2012' area in the screen shot opposite shows Dan's booked meals that week.

Click '**View previous week**' or '**View next week**' to go to the date you wish to view

