



MySchoolBucks

End of Year/Start of Year Process

Last Updated: January 2016

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Special Dates

Special Dates is the section used for easily setting up the MySchoolBucks website for periods of inactivity, such as Winter Break or the end of the school year. This way, payments will stop and start up again automatically based on a pre-selected date range.

To access the Special Dates feature, click **Special Dates (Holiday, EOY)**.

The screenshot shows a sidebar menu titled "District Setup" with the following categories and items:

- Configuration**
 - District Settings
 - Manage Providers
 - Manage Departments
 - Manage Graphics
 - Edit Landing Page
 - Special Dates (Holiday, EOY)** (highlighted)
- Payments**
 - Payment Options
 - Payment Gateways
 - Manage Payment Methods
 - Manage G/L Accounts
 - Manage Balance Accounts
- Obligations**
 - Cashier
 - Manage Obligations
- Subscriptions**
 - Membership Options
- Users**
 - Manage Users
 - Customize User Fields
- Stores**
 - Store Options
 - Manage Stores
 - Manage Product Groups
 - Product Wizard**
 - Customize Product Fields
- Web Forms**
 - Manage Web Forms
- Messaging**
 - Manage News
 - Manage Website Links
- Reports**
 - Reports

Adding an EOY Special Date

1. On the District Setup page, click **Special Dates (Holiday, EOY)**.
2. Click **Add**.

Special Dates HOME > DISTRICT SETUP > SPECIAL DATES

Special Dates Manage End of Year (EOY), Holiday, and POS Support dates.

Search: [] [] 50 []

Description	Type	Start Date	End Date	Phone	E-mail	Message / Notes	Last Updated
None Found							

Showing 1 to -1 of -1 Items

CANCEL EXPORT **ADD**

3. Under Date Type, select **End of Year**.

Add Special Date Manage End of Year (EOY), Holiday, and POS Support dates.

Date Type

End of Year

An **End of Year (EOY)** date type represents an **inactive period** for the district. Meal payments are **not** accepted during an **inactive period** and a banner message is displayed to users (if defined).

The **Start Date** and **End Date** fields below represent the **first** and **last** day of the inactive period.

4. Under **Description**, enter a short description for the inactive period such as “Year End 2016” or “2016 Summer Break”.
5. Under **Start Date**, enter the first day that payments through MySchoolBucks will be turned off. This likely comes after the last day of school.
6. Under **End Date**, enter the first day that payments through MySchoolBucks will be turned back on. This should coincide with the earliest date your district is able to accept online payments for the next school year.
7. Under **Contact Phone**, enter the phone number for the food service representative. This step is optional.
8. Under **Contact Email**, enter the email address of the food service representative. The email listed here will receive automated emails and reminders related to this special date setup. This step is optional.
9. Under **Banner Message**, enter the message you would like to appear for users logging in to MySchoolBucks during this inactive period.
NOTE: There is a maximum of 200 characters.
10. When you have finished entering the necessary information, click **Submit**.

The screenshot shows a web form for configuring an inactive period. The form is enclosed in a blue border and contains the following fields:

- Description:** A text input field containing "Summer 2016".
- Start Date:** A date picker field set to "06/18/2016".
- End Date:** A date picker field set to "08/07/2016".
- Contact Phone:** A text input field containing "(888) 555-5555".
- Contact Email:** A text input field containing "foodrep@example.com".
- Banner Message (replaces District Announcement during the inactive period) Notes (optional):** A text area containing two lines of text: "We hope you had a great school year! We will not be accepting payments until the next school year begins." and "Have a great summer - see you soon!".

At the bottom right of the form, there are two buttons: a white "CANCEL" button and an orange "SUBMIT" button.

11. The newly added special date will appear on the Special Dates page.

Special Dates HOME > DISTRICT SETUP > SPECIAL DATES

Special Dates Manage End of Year (EOY), Holiday, and POS Support dates.

Search: Refresh: 50

Description	Type	Start Date	End Date	Phone	E-mail	Message / Notes	Last Updated	
Summer 2016	End of Year	06/18/2016	08/07/2016	(888) 555-5555...	foodrep@example.com	We hope you had a gr...	2015-12-17 17:06:30	<input type="button" value="✎"/> <input type="button" value="🗑"/>

« < 1 > » Showing 1 to 1 of 1 Items

Editing a Special Date

To edit an entry on the Special Dates page, click the **yellow icon** next to the special date you wish to edit.

Special Dates HOME > DISTRICT SETUP > SPECIAL DATES

Special Dates Manage End of Year (EOY), Holiday, and POS Support dates.

Search: Refresh: 50

Description	Type	Start Date	End Date	Phone	E-mail	Message / Notes	Last Updated	
Summer 2016	End of Year	06/18/2016	08/07/2016	(888) 555-5555...	foodrep@example.com	We hope you had a gr...	2015-12-17 17:06:30	<input type="button" value="✎"/> <input type="button" value="🗑"/>

« < 1 > » Showing 1 to 1 of 1 Items

From here, editing an existing special date is virtually identical to the process of adding a new one with the exception of the Date Type, which cannot be changed after first adding the special date. Note that the email address listed under **Contact Email** will receive automated messages and reminders related to this special date setup Click **Submit** to save any edits made, or click **Cancel** to return to the Special Dates page and discard any changes.

Edit Special Date

Manage End of Year (EOY), Holiday, and POS Support dates.

Date Type: End of Year

An **End of Year (EOY)** date type represents an **inactive period** for the district. Meal payments are **not** accepted during an **inactive period** and a banner message is displayed to users (if defined).

The **Start Date** and **End Date** fields below represent the **first** and **last** day of the inactive period.

Description

Start Date End Date

Contact Phone

Contact Email

Banner Message (replaces District Announcement during the inactive period) Notes (optional)

Deleting a Special Date

To delete an entry on the Special Dates page, click the **red icon** next to the entry you wish to delete.

Description	Type	Start Date	End Date	Phone	E-mail	Message / Notes	Last Updated
Summer 2016	End of Year	06/18/2016	08/07/2016	(888) 555-5555...	foodrep@example.com	We hope you had a gr...	2015-12-17 17:06:30

Information for the special date will appear. Click **Yes, Delete** to confirm deleting the entry.

This can be useful for removing older date periods that have already passed.

Confirm Delete Are you sure you want to delete this Special Date?

Description: Summer 2016
Type: End of Year
Start Date: 06/18/2016
End Date: 08/07/2016

NO, CANCEL YES, DELETE

Refund Student Balances

Provide refunds for students in accordance with your district's refund policy, especially for graduating seniors and students leaving the district. Please do not refer parents to contact the MySchoolBucks support team for refunds. MySchoolBucks does not retain any funds on behalf of the district.

Support

For additional support, please contact Technical Support between the hours of 8 AM EST and 5 PM EST at 1-800-803-6755.

You may also contact customer technical support by using our [support request form](#).

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