

# Installation Guide for MySchoolBucks Core and Data Plugins

Compatible with any PowerSchool version

## MySchoolBucks Core Plugin Install instructions

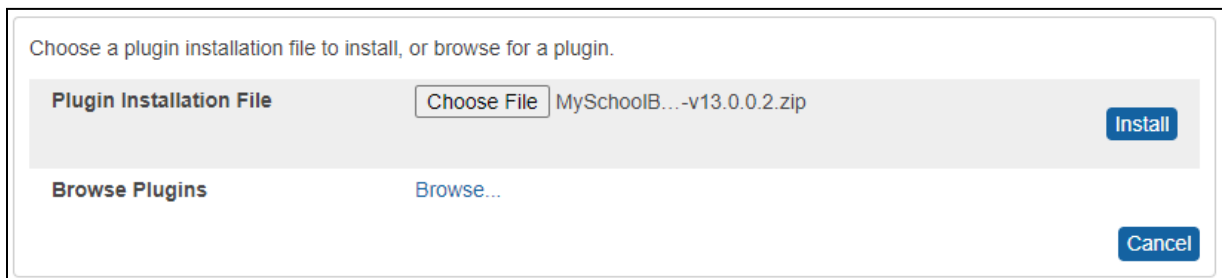
### 1. Download the MySchoolBucks Core Plugin file

- From the PowerSchool Self-Service webpage, download the zipped Core plugin file. **Do NOT expand or unzip the file.**
- Once the zip file has been downloaded, locate the file named similar to:  
**MySchoolBucks\_Core\_version.zip**

### 2. Install Core Plugin

Navigate to [System Management > Server > Plugin Configuration](#) from the [Plugin Configuration](#) page, select the Install button located at the top of the page.

- Plugin Install screen will appear. Select the Choose File option and select your downloaded plugin zip file. From the upload page, users will select the **ZIPPED** file and Install. (note: the image below may have a different version from your download.)



Choose a plugin installation file to install, or browse for a plugin.

Plugin Installation File	Choose File	MySchoolB...-v13.0.0.2.zip	Install
Browse Plugins	Browse...		Cancel

### 3. Enable Plugin

- From the [Plugin Management](#) dashboard, enable the MySchoolBucks Data Integration plugin.

3	<a href="#">MySchoolBucks Core Plugin</a>	14.6.0	06/03/2025	<input checked="" type="checkbox"/>
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- Once enabled, a pop up window will appear and the User must select "Enable" to provide access permissions to MySchoolBucks. Once enabled, the plugin will take a moment to load.

## MySchoolBucks Data Plugin Install instructions

Please note, prior to installing or updating Data plugins, the MySchoolBucks Core plugin **MUST** be installed.

### 1. Download the MySchoolBucks Data Plugin file

- a. From the [PowerSchool Self-Service webpage](#), download the zipped Data plugin file. **Do NOT expand or unzip the file.**
- b. Once zip file has been downloaded, locate the file named similar to:  
**MySchoolBucks\_Data\_Sync-version.zip**

### 2. Check for existing Heartland or MySchoolBucks Data Plugins

Navigate to [System Management > Server > Plugin Configuration](#) page. From this screen, check for installed Data plugins for Heartland or MySchoolBucks.

- a. If you have a plugin installed named **Heartland Data Plugin**, select the Delete button to remove this plugin. Once deleted, [go to Step 3](#) of this guide.
- b. If you have a plugin installed named **MySchoolBucks Data Integration**, [go to Step 4](#) of this guide.

### 3. Install Most Recent Data Plugin

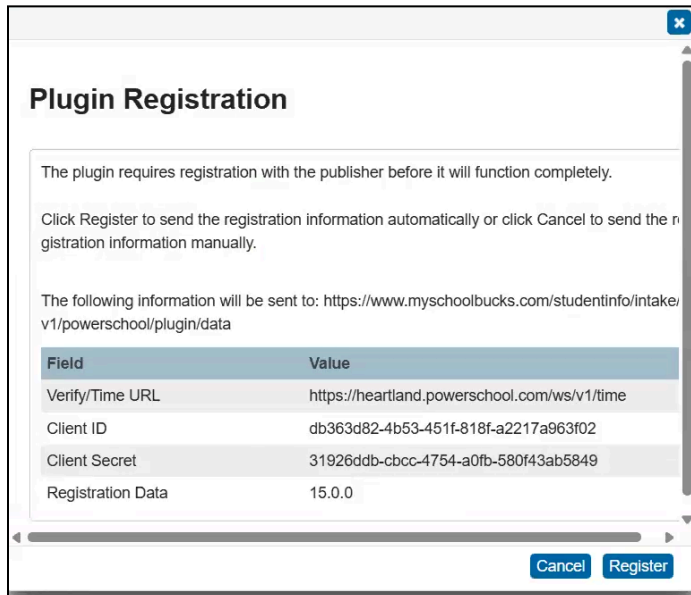
From the [Plugin Configuration](#) page, select the Install button located at the top of the page.

- a. Plugin Install screen will appear. Select the Choose File option and select your downloaded plugin zip file. From the upload page, users will select the **ZIPPED** file and click the Install button. (Note: the image below may show a different version from your download.)

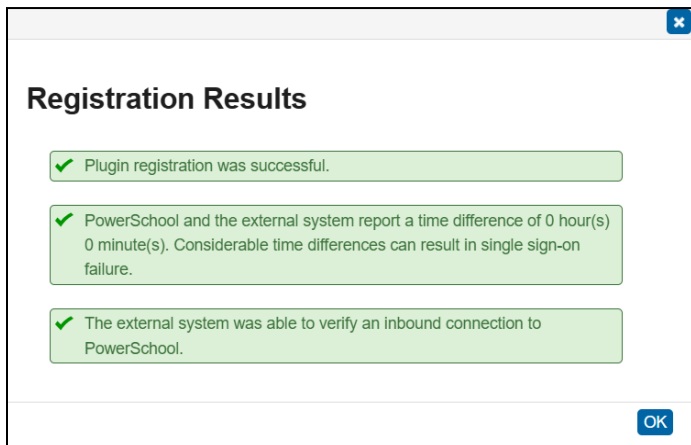
Choose a plugin installation file to install, or browse for a plugin.

<b>Plugin Installation File</b>	<input type="button" value="Choose File"/> MySchoolB...-v13.0.0.2.zip	<input type="button" value="Install"/>
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- b. Upon install, a Plugin registration window will appear. The Client ID and Secret can be collected at this time in the event that you may need to share this with Heartland. From this page, click “Register”



- c. A Registration Results confirmation will appear once registered. Your PowerSchool data plugin credentials will automatically be sent to the Heartland team for configuration. Please, [go to Step 5](#) of this guide.



#### 4. Update Existing Data Plugin

From the [Plugin Configuration](#) page, click “MySchoolBucks Data Integration” which will load the [MySchoolBucks Data Integration Setup](#) page. From this page, click the Update Button.

General Information	
Plugin Name	MySchoolBucks Data Integration
Plugin Description	Heartland MySchoolBucks plugin for syncing schools, students, contacts, fees, and roster via PowerQuery.
Plugin Version	14.6.7
Publisher	MySchoolBucks
Publisher Email	msbdeveloperserviceteam@e-hps.com
Installed By	partner, Heartland MSB
Installed/Updated On	06/03/2025
Enabled	True
Update Plugin	<a href="#">Update</a>

- a. Plugin Update screen will appear. Select the Choose File option and select your downloaded plugin zip file. From the upload page, users will select the **ZIPPED** file and click Submit. Once the plugin has been updated, [go to Step 5](#) of this guide.

### Plugin Update

Choose a new plugin version to install, or browse for a new plugin version.

Plugin Installation File  MySchoolB... Sync-14.7.zip

#### 5. Enable Plugin and Update Settings

- a. From the [Plugin Management](#) dashboard, enable the MySchoolBucks Data Integration plugin.

4	<a href="#">MySchoolBucks Data Integration</a>	14.6.7	06/03/2025	<input checked="" type="checkbox"/>	<a href="#">Delete</a>
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- b. Once enabled, a pop up window will appear and the User must select “Enable” to provide access permissions to MySchoolBucks. Once enabled, the plugin will take a moment to load.
- c. From the [Plugin Configuration page](#), click “MySchoolBucks Data Integration” and then click “Data Provider Configuration” in the Function column:

Function	Description
<a href="#">Data Provider Configuration</a>	Data Provider configuration

- d. From the [Data Provider Configuration for MySchoolBucks Data Integration](#) page:
- i. For PowerSchool versions 25.2.0.0 and later, set the Access level to Full Access
  - ii. Set Page Size to 1000 and Click Submit

## 6. Configure Data Filters

With the MySchoolBucks Data plugin version 14.6 and higher, data filters can be configured by a PowerSchool administrator. This will limit the data syncing to MySchoolBucks. This page can be found by navigating to [System Management > Security > MySchoolBucks Data Sync Settings](#).

When setting filters on this page, select the filter from the dropdown menu and add desired values in the respective “Filter Value” textbox. The filter value textbox will accept a single value or comma delimited values for multiple filter values (for Schools and Enrollment Status Codes). **Once filters are set, any non-matching data will be removed during the next full sync with MySchoolBucks.**


- a. **School Filters:** MySchoolBucks will sync all schools by default. Two school filters are available from this page, titled Include School List and Exclude School List. It is highly recommended to only set ONE of these filters. By setting school filters, the student population will also be limited to only the schools synced to MySchoolBucks.
  - i. Include Schools - using this filter will sync **only** the schools specified for this filter.
  - ii. Exclude Schools - using this filter will sync **all** schools **except** for the schools specified for this filter.

*In the example below, only schools 100 and 200 will sync to MySchoolBucks.*

Filter Name	Filter Value	Delete
Include Schools List	100,200	

- b. Enrollment Status Filters:** MySchoolBucks will sync students with enrollment status code of 0 by default. To allow additional enrollment status codes, specify them using this filter. Important: You must include enrollment status code of 0 **as well as** additional codes.


*In the example below, students with Active enrollments and Pre-enrollments will sync to MySchoolBucks.*

Filter Name	Filter Value	Delete
Student Enrollment Status List ▾	0,-1	



- c. Student Contact Filters:** All active contacts sync to MySchoolBucks by default. Four Contact filters are available from this page and accept a Filter Value of 1.

- i. Contact Has Custody - Contacts with Has Custody option enabled
- ii. Contact Lives With - Contacts with Lives With option enabled
- iii. Contact Receives Mail - Contacts with Receives Mail option enabled
- iv. Contacts Match All Filters - When using multiple contact filters, use this to enforce matching on ALL contact filter conditions



*In the example below, **only** contacts flagged as Has Custody will sync to MySchoolBucks.*

Filter Name	Filter Value	Delete
Contact Has Custody ▾	1	

*In the example below, **any** contacts flagged as Has Custody **OR** Lives With will sync to MySchoolBucks.*

Filter Name	Filter Value	Delete
Contact Has Custody ▾	1	
Contact Lives With ▾	1	

*In the example below, only contacts flagged as **BOTH** Has Custody **AND** Lives With will sync to MySchoolBucks*

Filter Name	Filter Value	Delete
Contact Has Custody ▾	1	
Contact Lives With ▾	1	
Contacts Match All Filters ▾	1	