MSB invoicing

MySchoolBucks

Invoicing App Guide

Table of Contents

General Overview

This document is designed for support users and describes how to set up and use the MySchoolBucks Invoicing (MSB Invoicing) application.
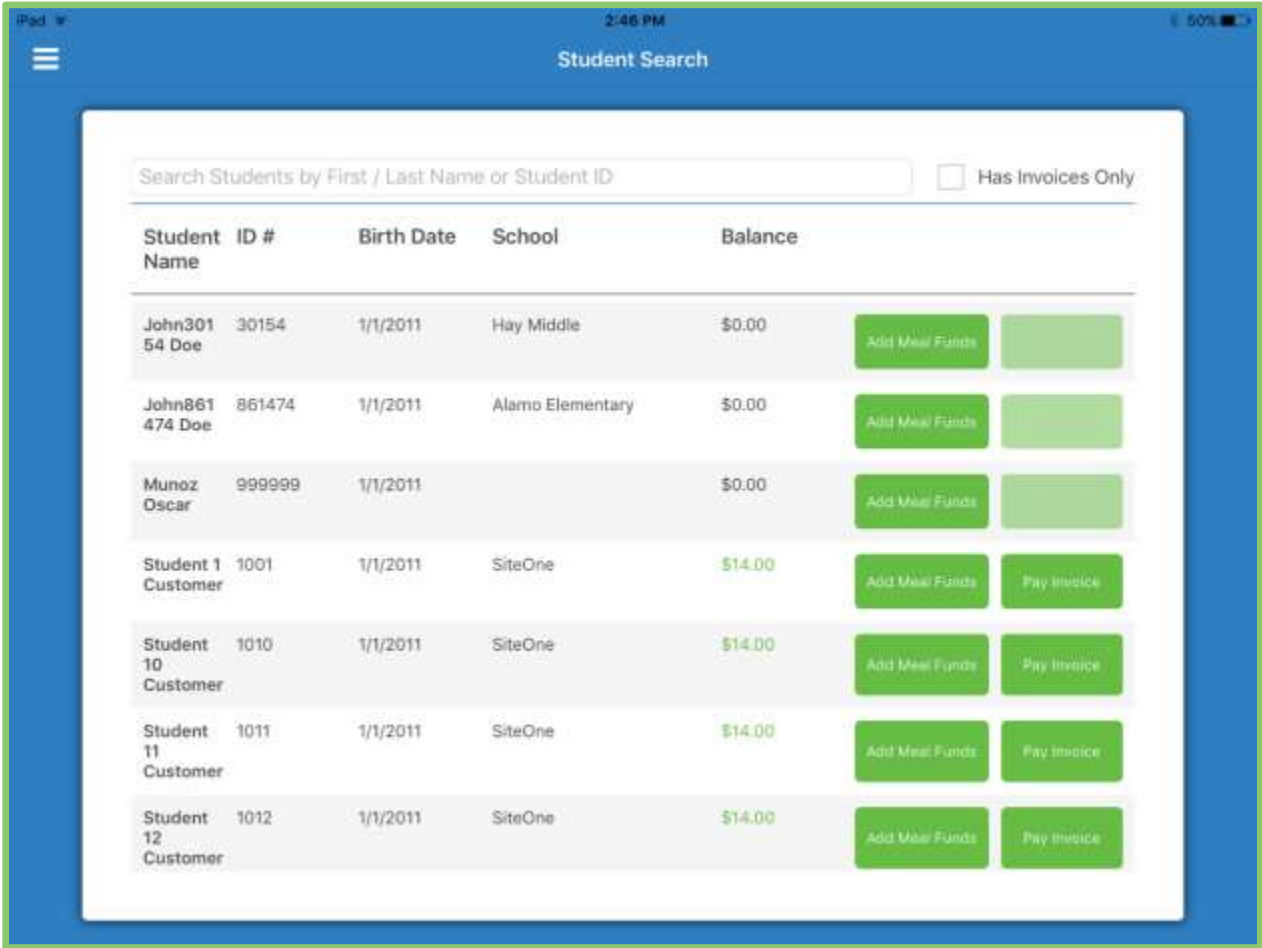
Getting Started

In order to log in to MSB Invoicing, use the same admin username and password as you would use to log in to the MySchoolBucks website.

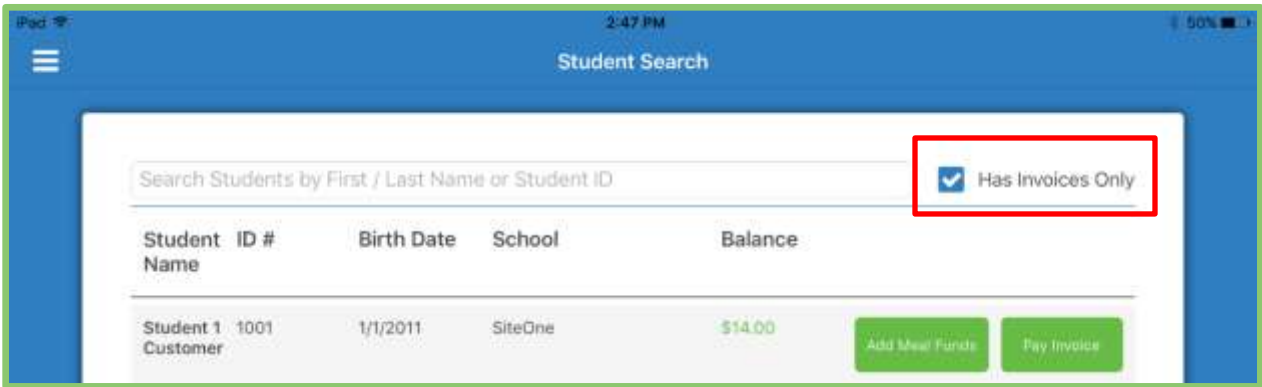Note that you may also access Settings from this screen by tapping the menu icon in the upper left corner.
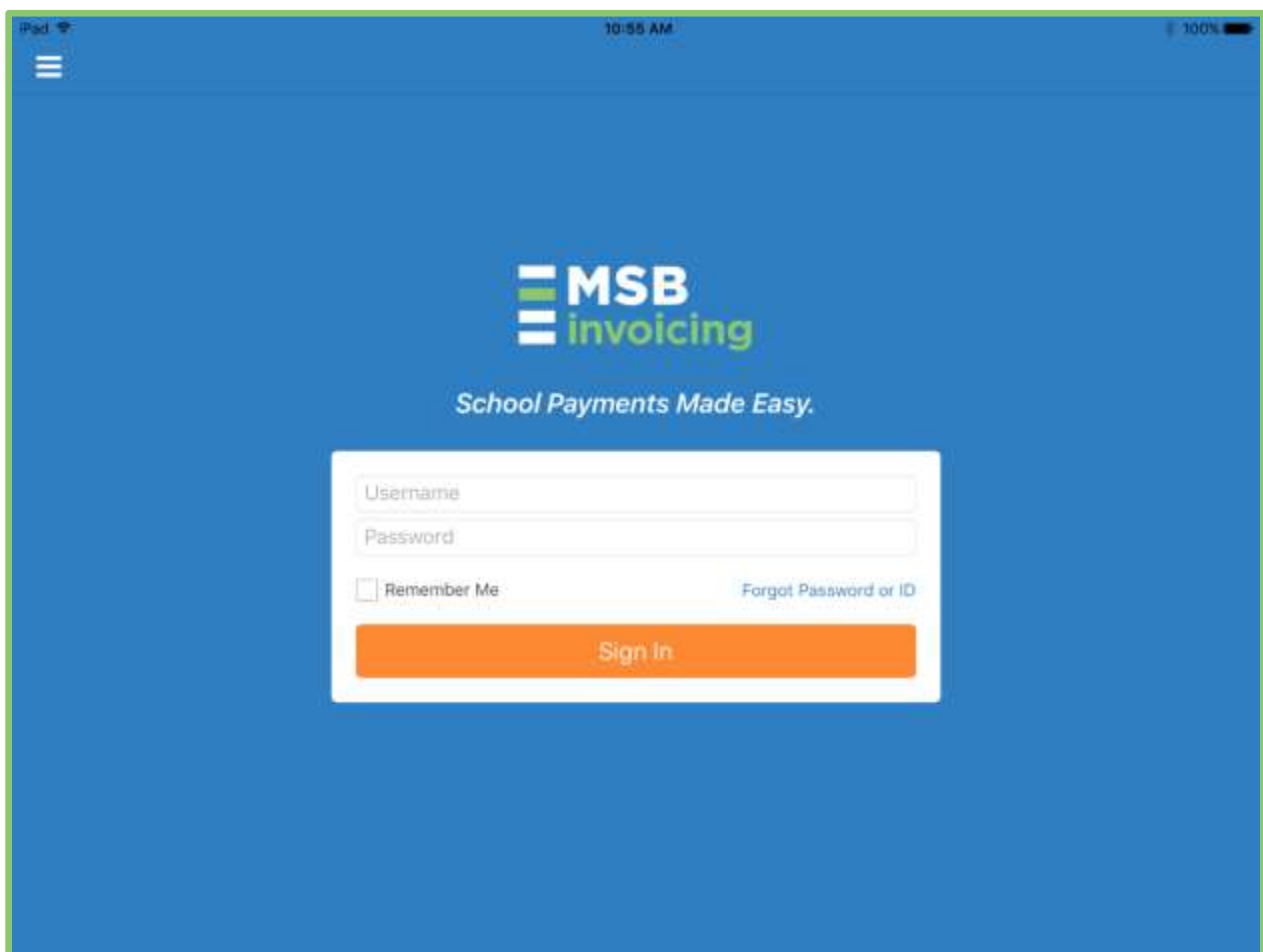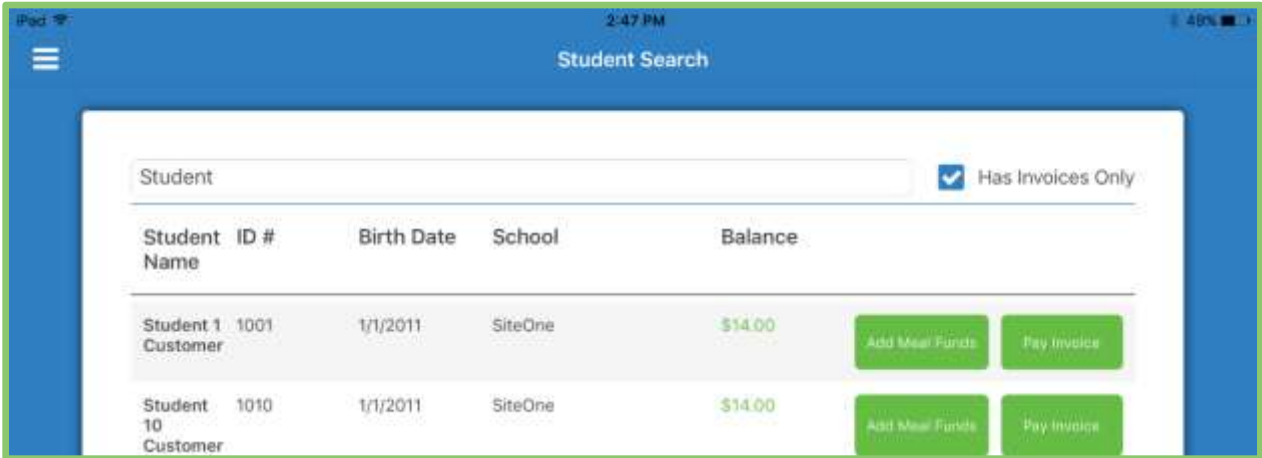
Student Search Screen

The Student Search screen shows a list of student accounts in your district.
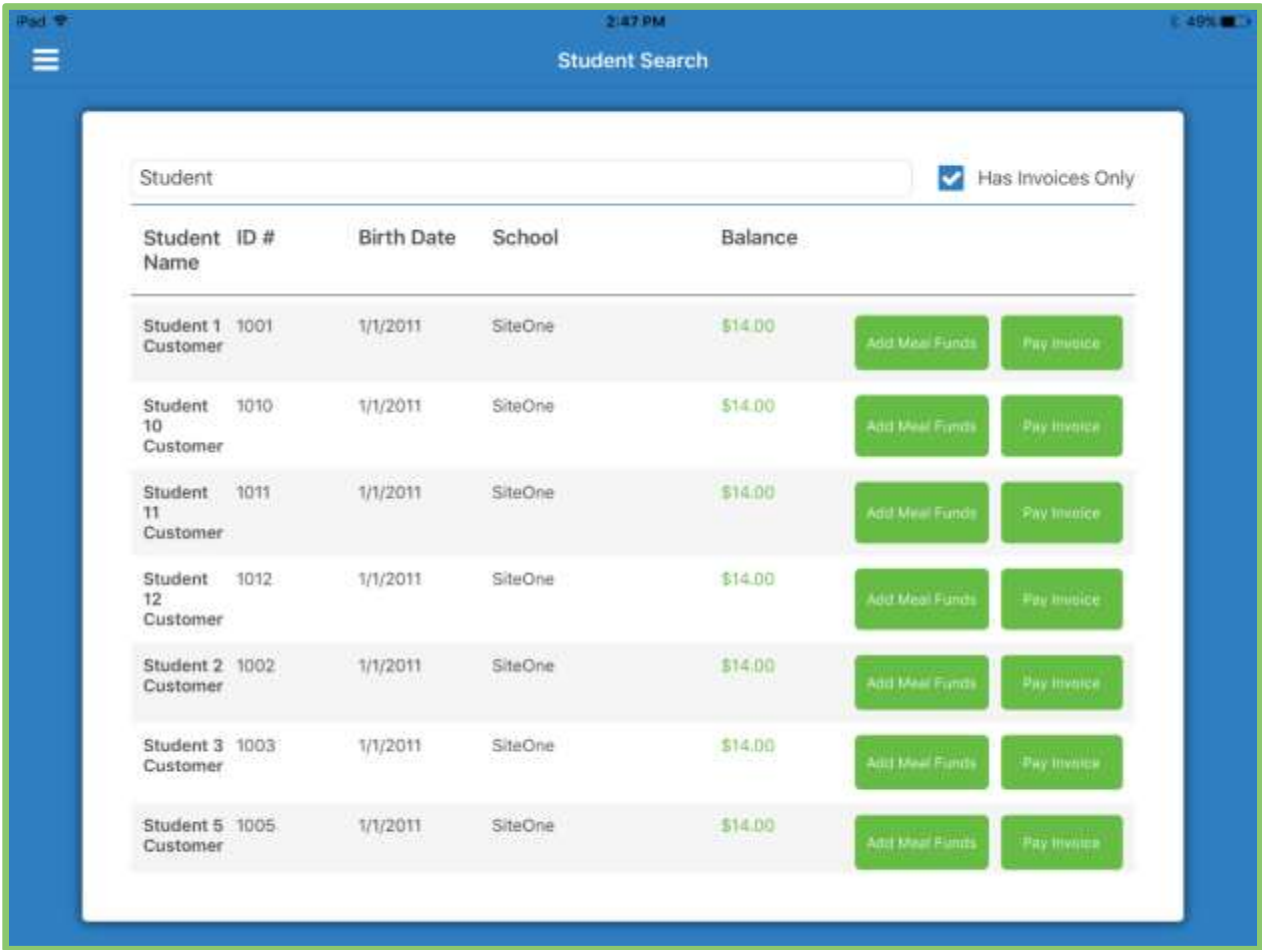

Check **Has Invoices Only** to filter this list to show only accounts with invoices to pay.

Use the search bar at the top of the list to filter students by a certain first name, last name, or student ID.
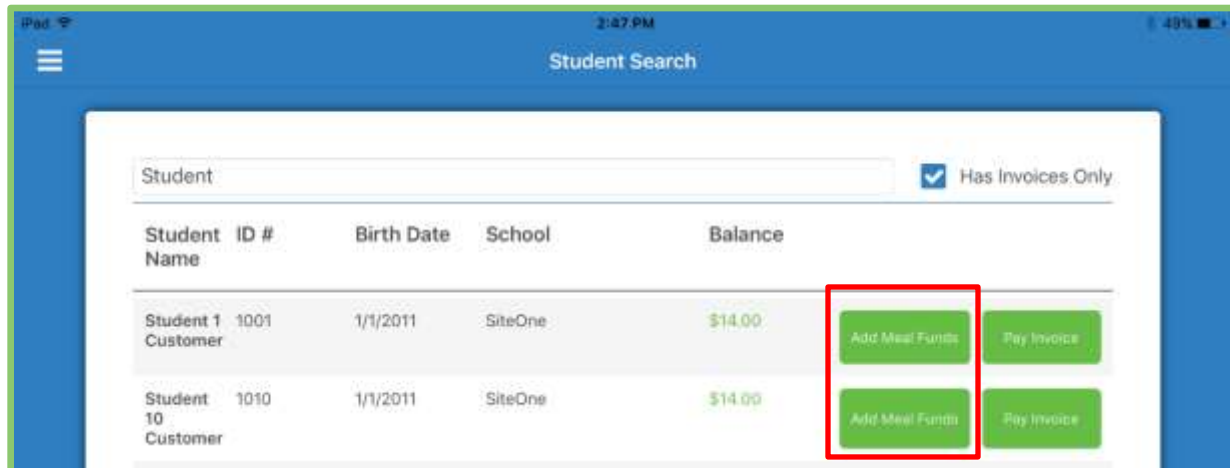

The list will refresh and filter based on the entered search criteria.

Add Meal Funds

Student accounts on the Student Search screen show the amount of money in their account under Balance. If you would like to add money to a student's account, tap **Add Meal Funds**.
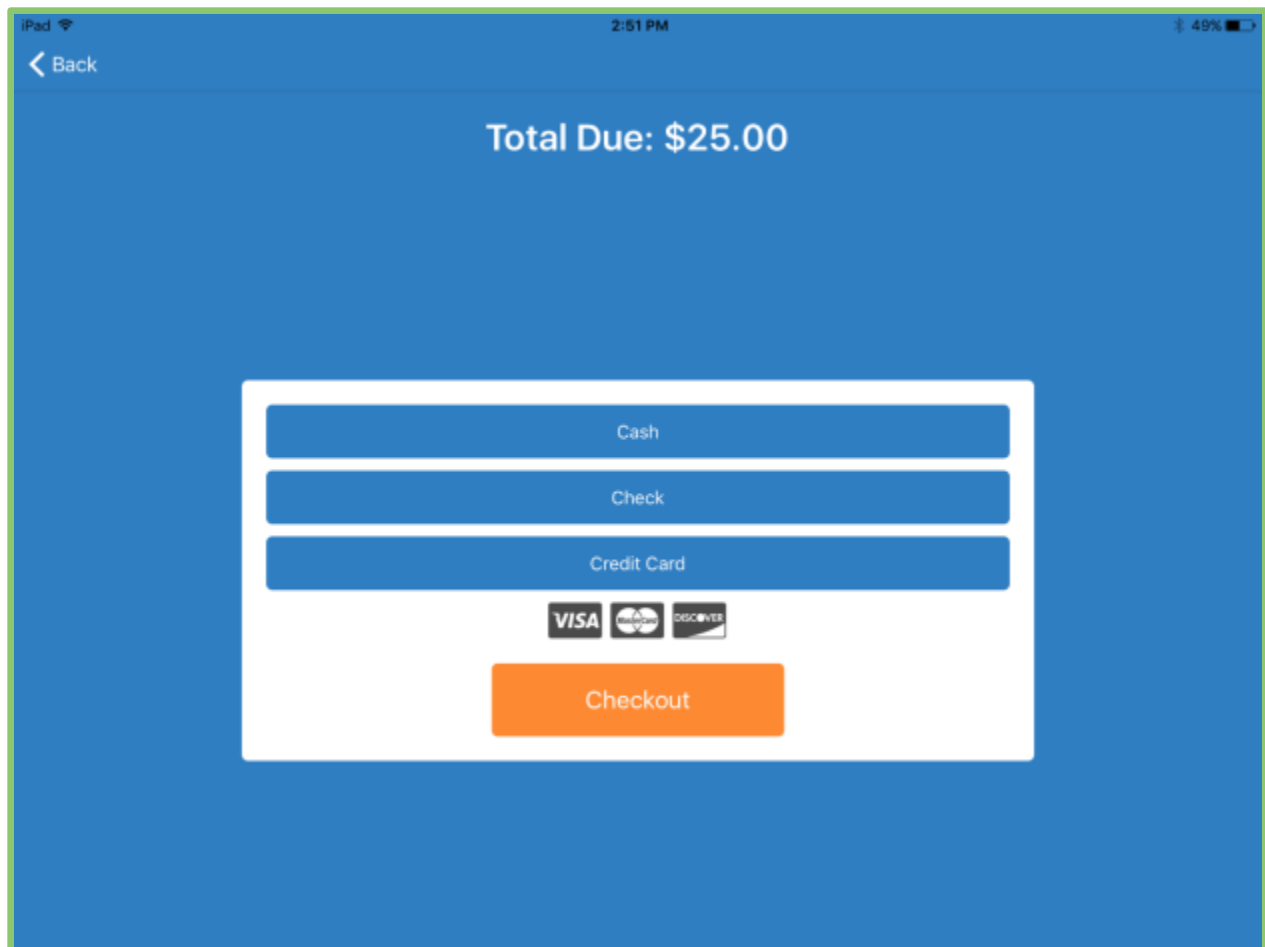
Note: The Add Meal Funds button will not appear if the setting is not enabled under Settings.

Information will appear showing the student's name, site, and ID. The page also shows the current account balance and pending amounts that have not been paid to the account. Tap the amount being added, or enter an amount after tapping **Other**, and click **Add Funds**.
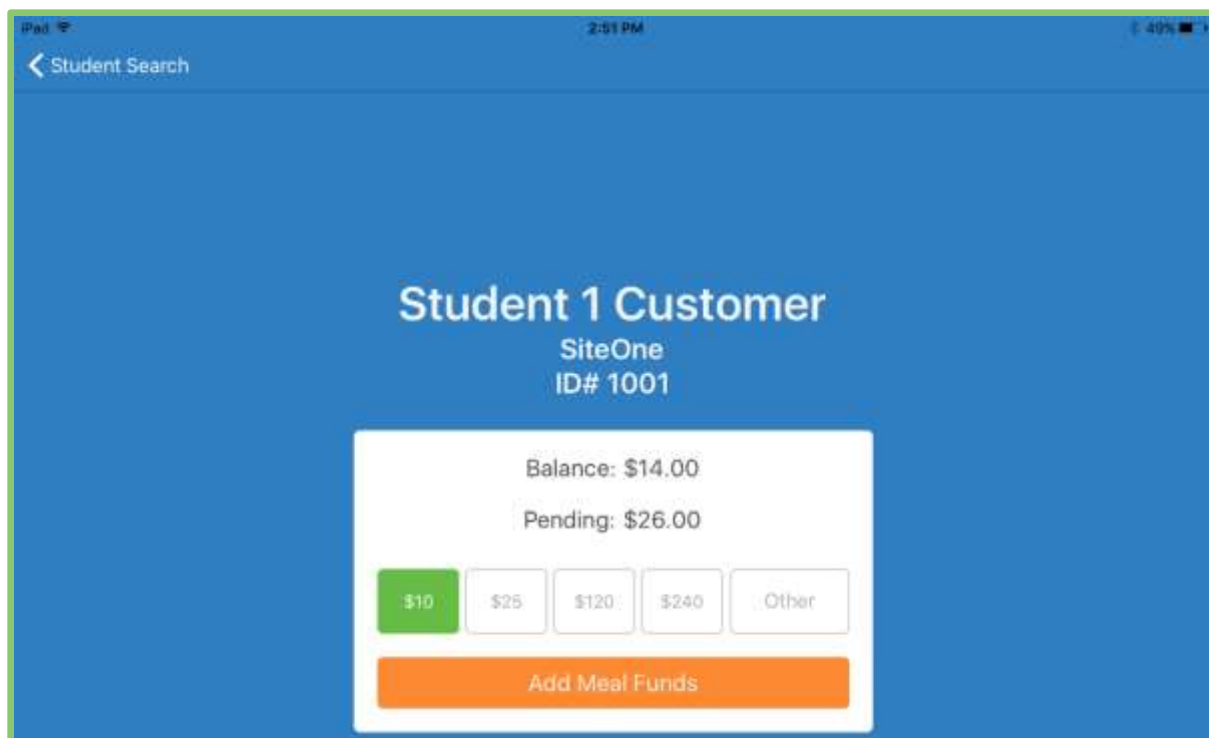
After entering an amount, select how the amount is being paid. If it is being paid using a credit card, tap **Credit Card** and use the card reader to enter the payment information. Then, tap **Checkout**.

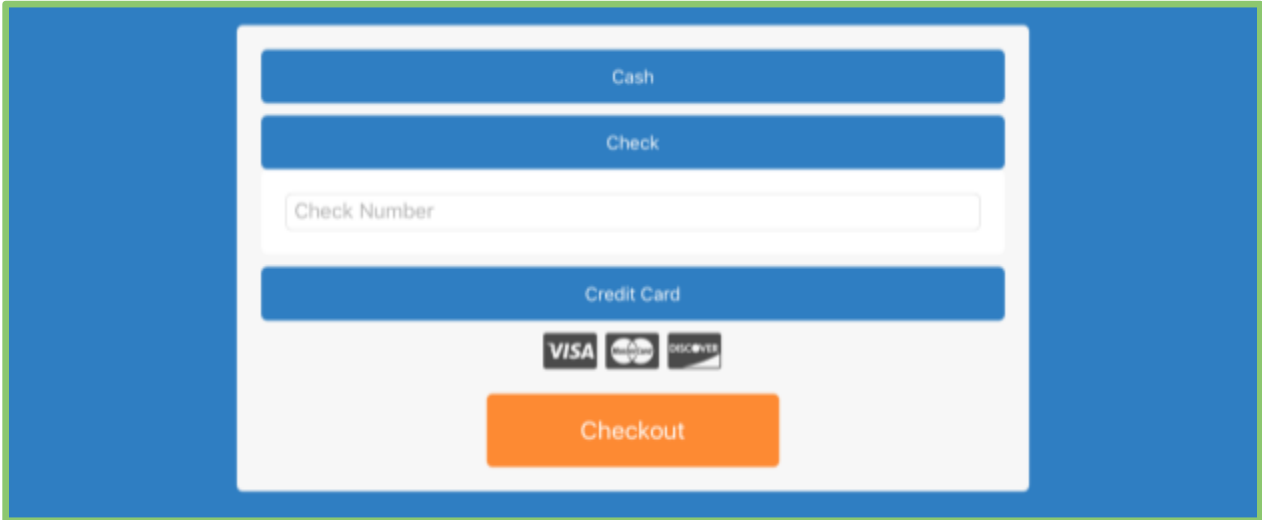If it is being paid using cash, tap **Cash**. Then, select the amount being paid. If exact change is given, tap **Exact Amount**. Tap **Clear** to clear the Amount Tendered if a mistake was made in entering the payment amount. Then, tap **Checkout**.
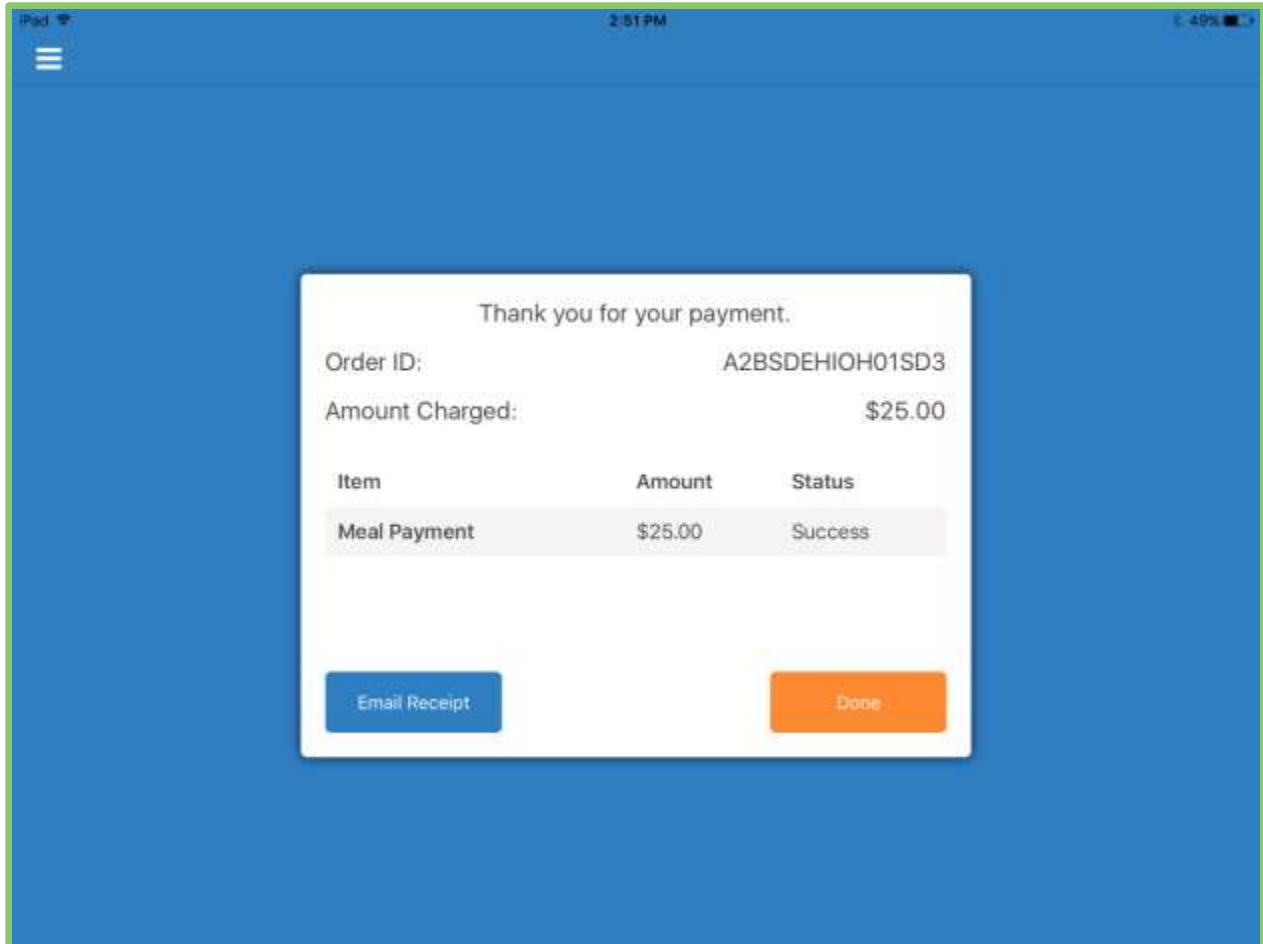

If it is being paid using a check, tap **Check**. Then, enter the Check Number and tap **Checkout**.

After tapping Checkout, the payment is processed and a summary of the transaction appears on the screen. Tap **Email Receipt** if the customer would like to have a digital copy of the receipt. Tap **Done** to return to the Student Search screen.

Pay Invoice

Student accounts with outstanding invoices have the Pay Invoice button enabled next to their account information. Likewise, accounts without invoices to pay have this button disabled. To make payments to an outstanding invoice, tap **Pay Invoice**.
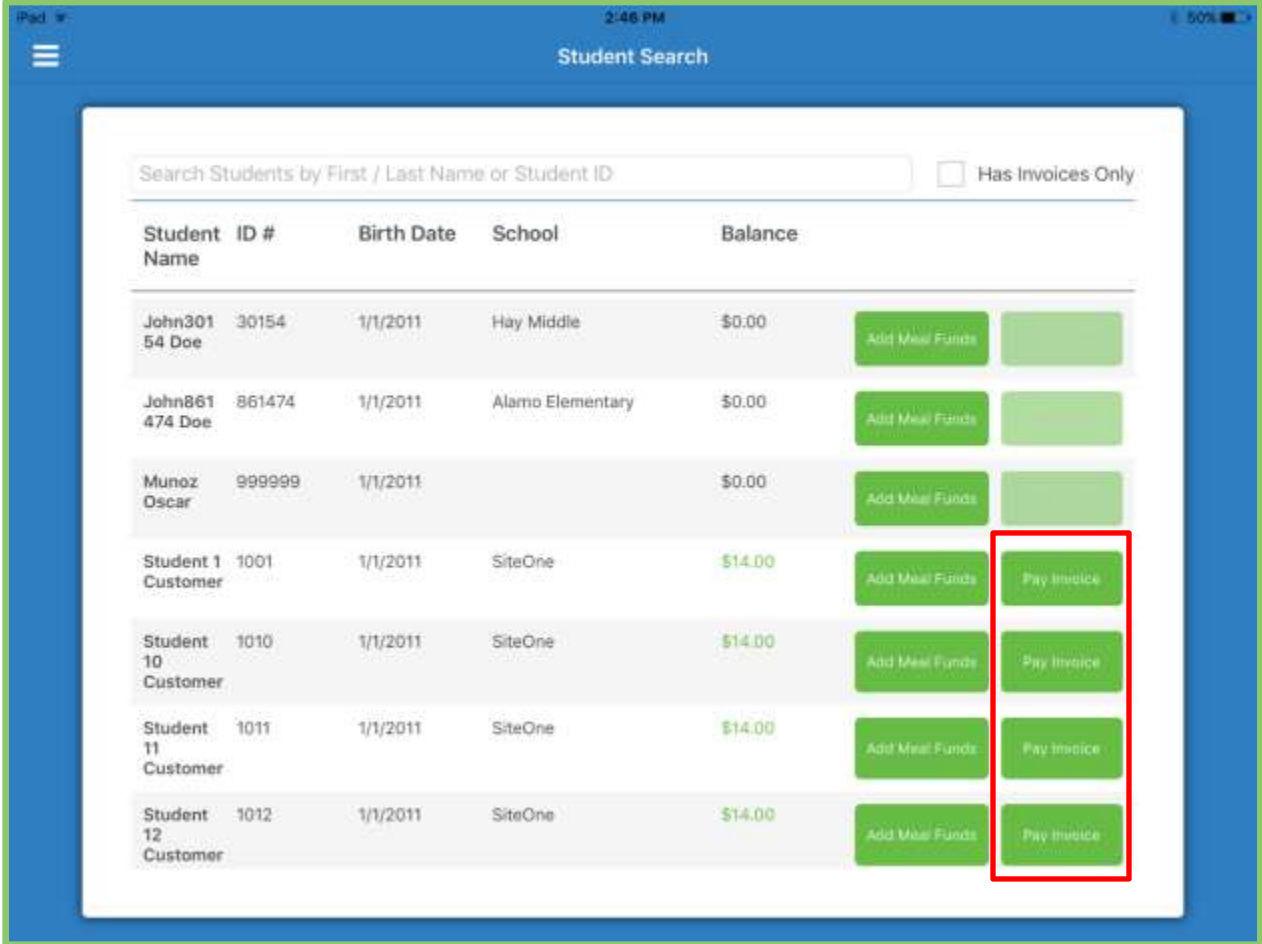
On the Select Invoice screen, if multiple invoices are associated with the account, they will appear in a list, separated by Invoice ID. After each invoice entry is a Select Payment field. Tap **Select Payment** under any invoice that is being paid.
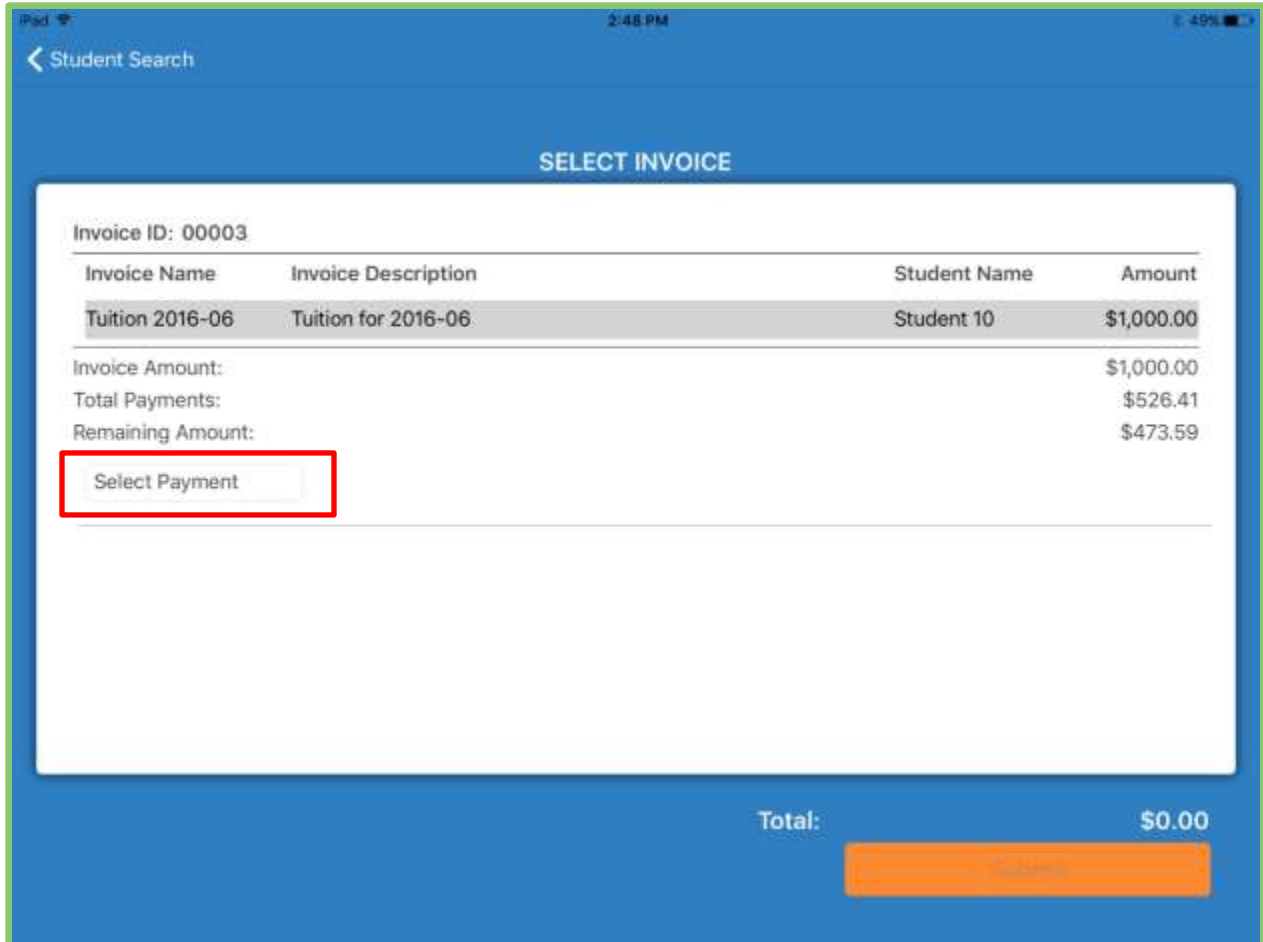
Select **Full Payment** if the full Remaining Amount is being paid. Then, tap **Submit**.

SELECT INVOICE

Invoice ID: 00003

Invoice Name	Invoice Description	Student Name	Amount
Tuition 2016-06	Tuition for 2016-06	Student 10	$1,000.00

Invoice Amount: $1,000.00
Total Payments: $526.41
Remaining Amount: $473.59

Full Payment

Total: $473.59

Submit

Select **Partial Payment** if only some of the Remaining Amount is being paid. Then, enter the amount being paid in the field next to Partial Payment. After entering the payment, tap **Submit**.

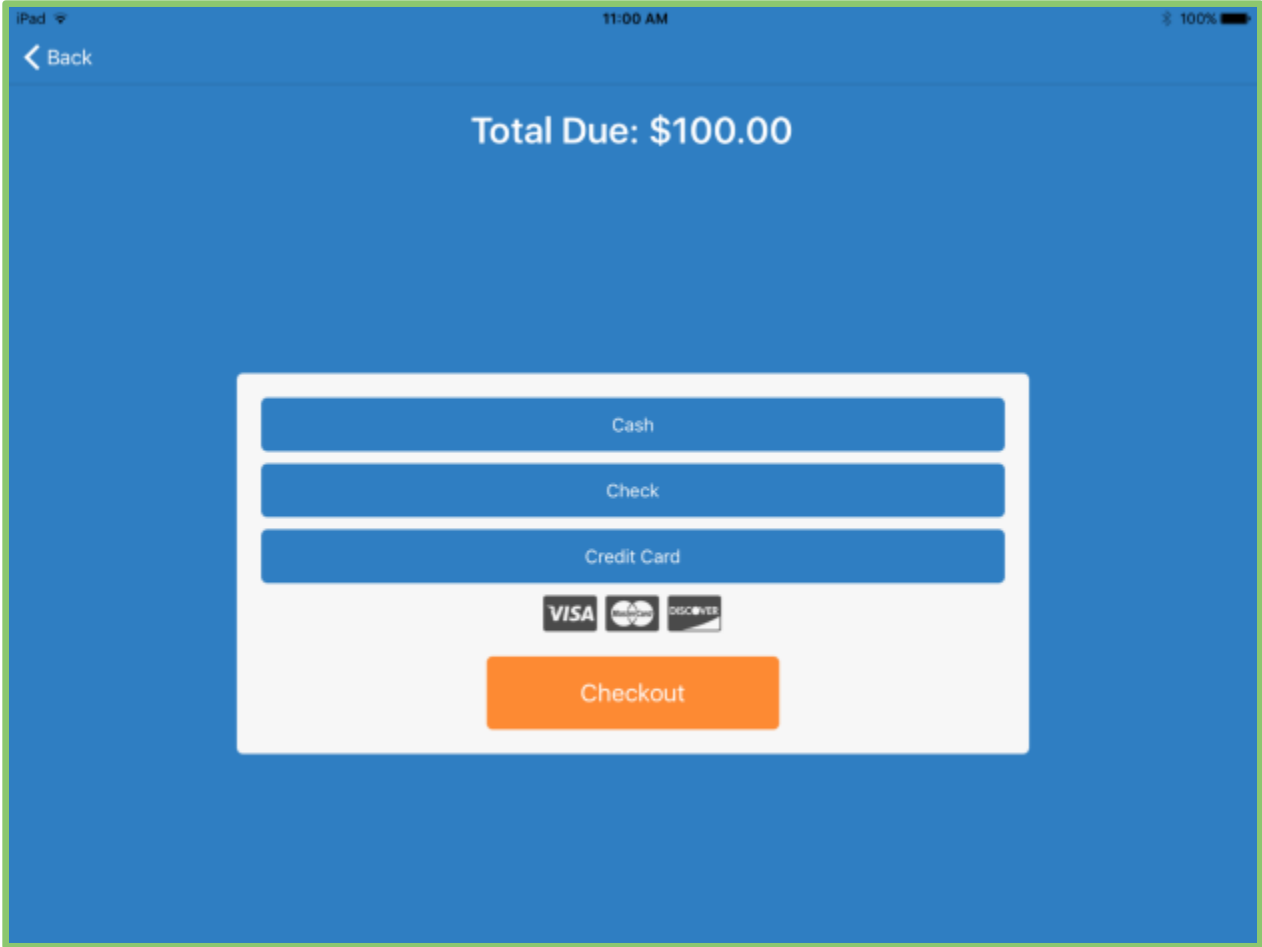**SELECT INVOICE**

Invoice ID: 00003

Invoice Name	Invoice Description	Student Name	Amount
Tuition 2016-06	Tuition for 2016-06	Student 10	$1,000.00

Invoice Amount: $1,000.00
Total Payments: $526.41
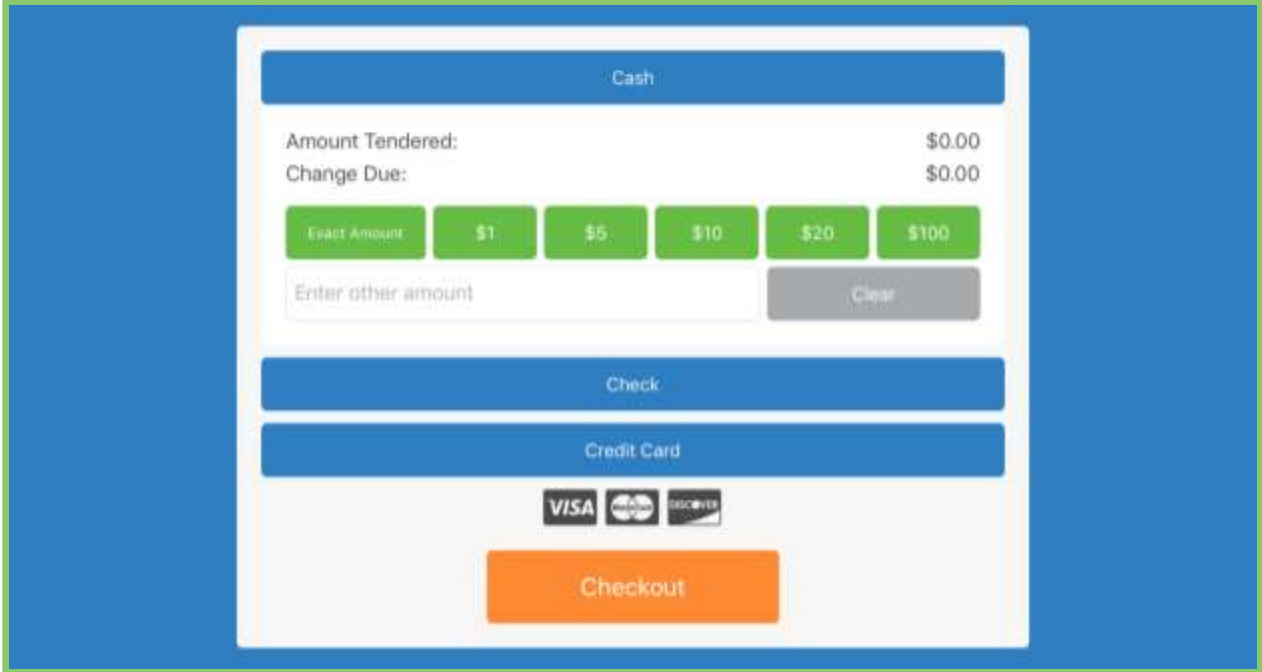Remaining Amount: $473.59

Partial Payment $100.00
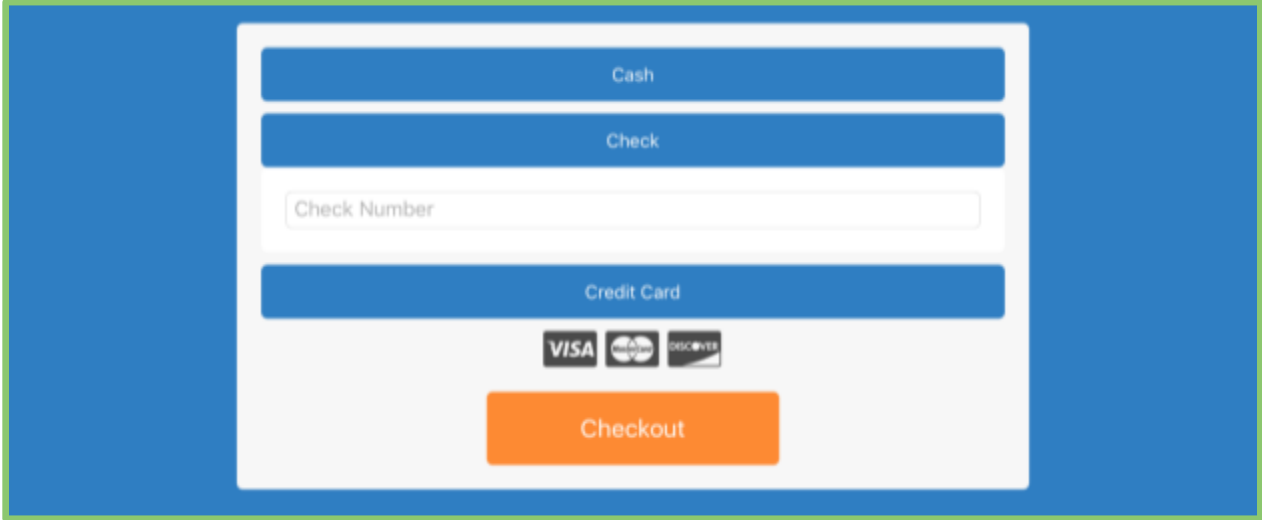
Total: $100.00

Submit

After tapping submit, select how the amount is being paid. If it is being paid using a credit card, tap **Credit Card** and use the card reader to enter the payment information. Then, tap **Checkout**.
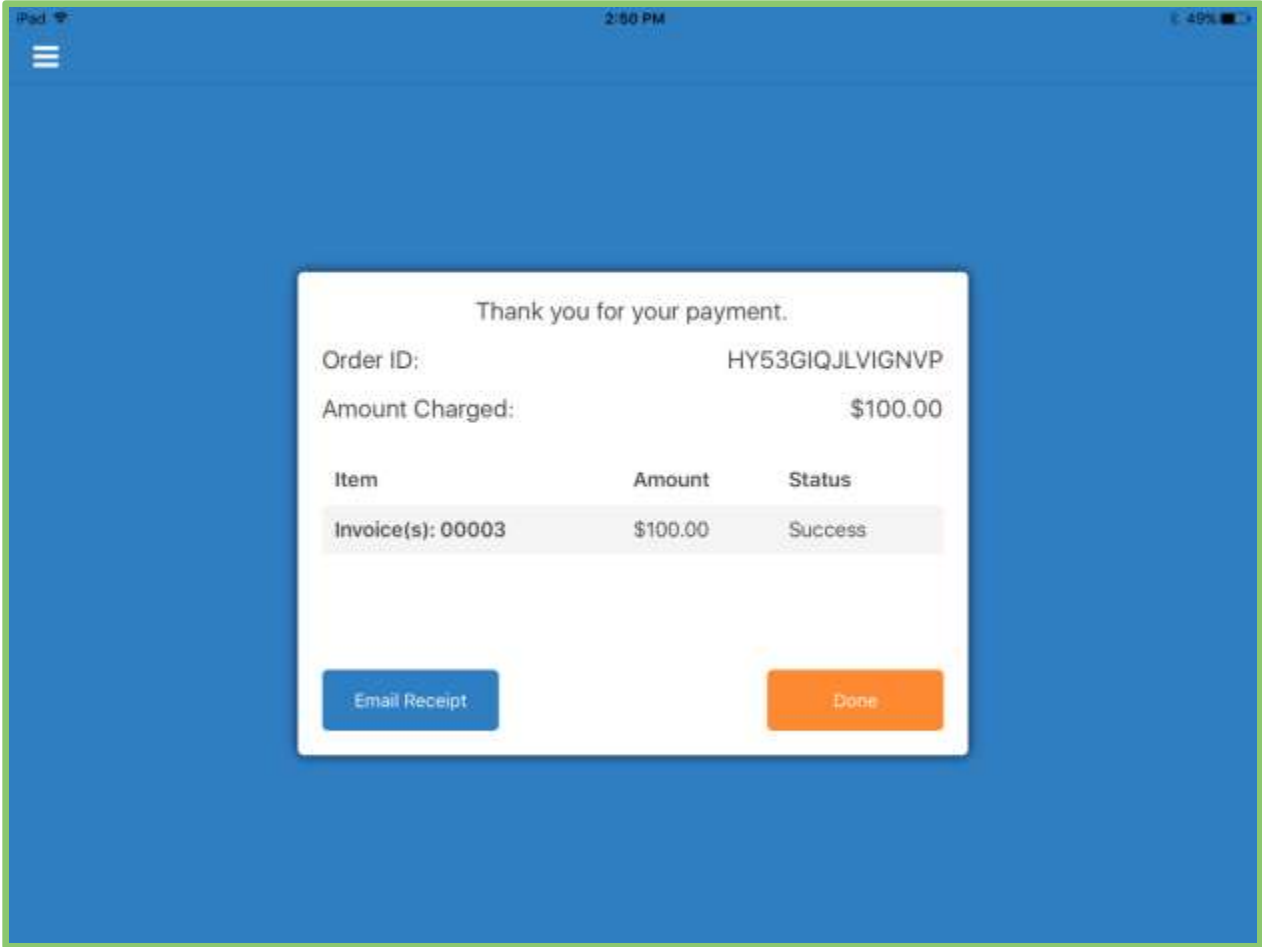
Heartland

If it is being paid using cash, tap **Cash**. Then, select the amount being paid. If exact change is given, tap **Exact Amount**. Tap **Clear** to clear the Amount Tendered if a mistake was made in entering the payment amount. Then, tap **Checkout**.

If it is being paid using a check, tap **Check**. Then, enter the Check Number and tap **Checkout**.
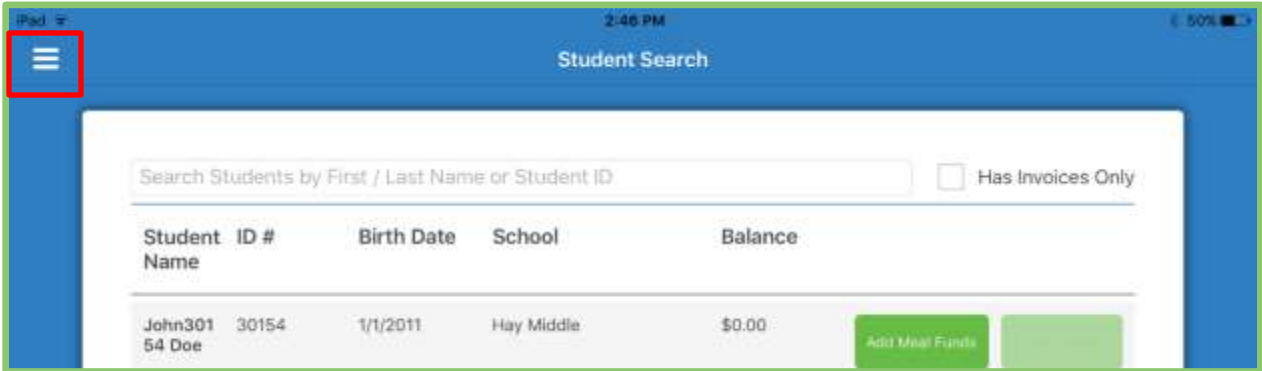
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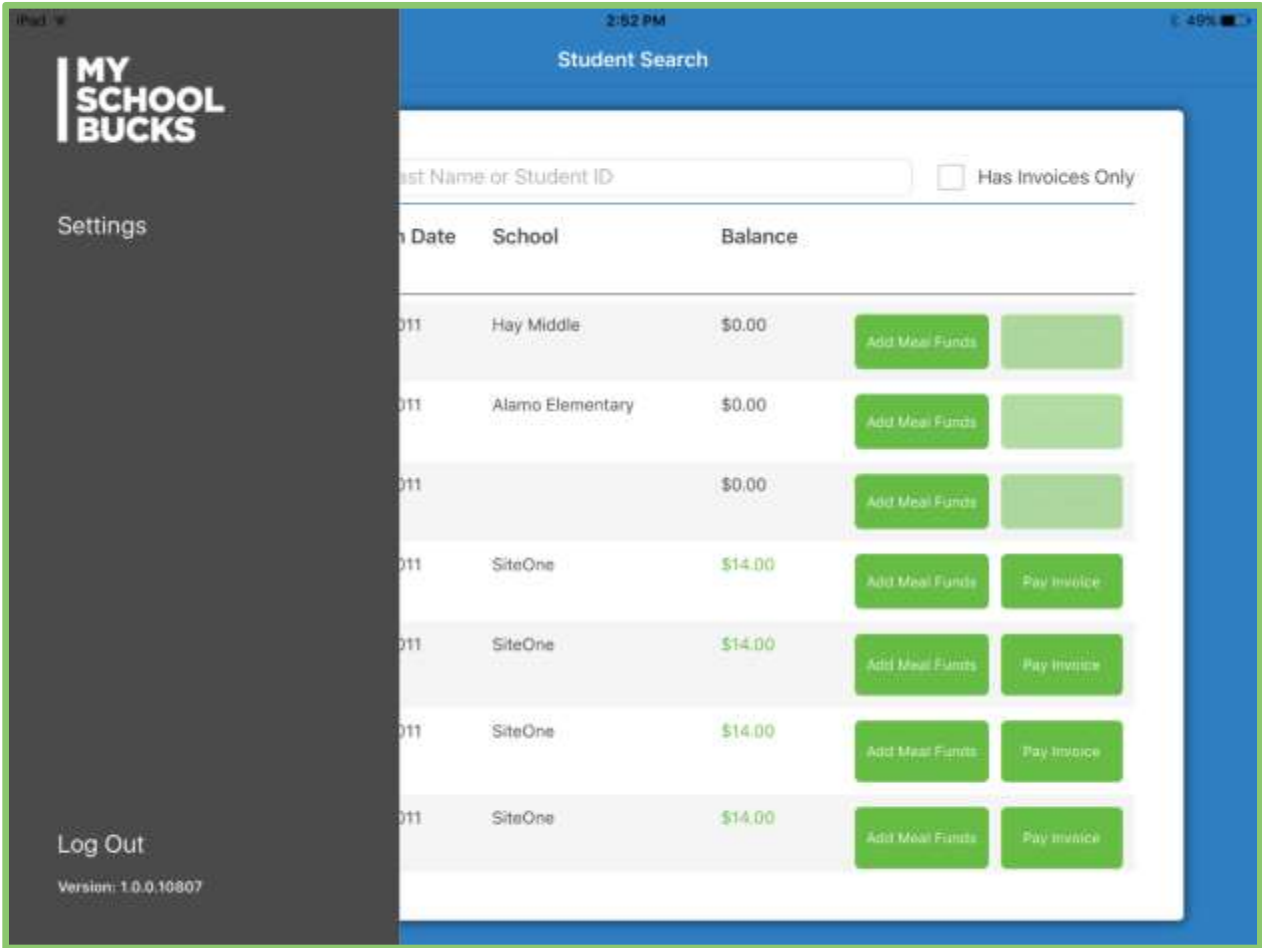
Menu

To access various features in MSB Invoicing, tap the Menu icon in the upper left.

The available options in this menu are Settings and Log Out.

Settings

On the Settings screen, there are a few options that can be set up with MSB Invoicing.

Demo Mode: Tap the slider to toggle this setting, and you must restart the app before this setting takes effect. When the slider is green, Demo Mode is active. Demo Mode lets you simulate adding funds, paying invoices, and testing hardware functionality without affecting production data or charging customers.

To log in during Demo Mode, use the username "admin" and any password (except a blank one).

IMPORTANT: Remember to turn off Demo Mode before using the app for real purchases. Otherwise, transactions will not be recorded and updated in MySchoolBucks.

Environment: This setting is used to change where the app gets its student data.

Printer Type: This setting is used to specify the type of printer being used to print receipts, if applicable.
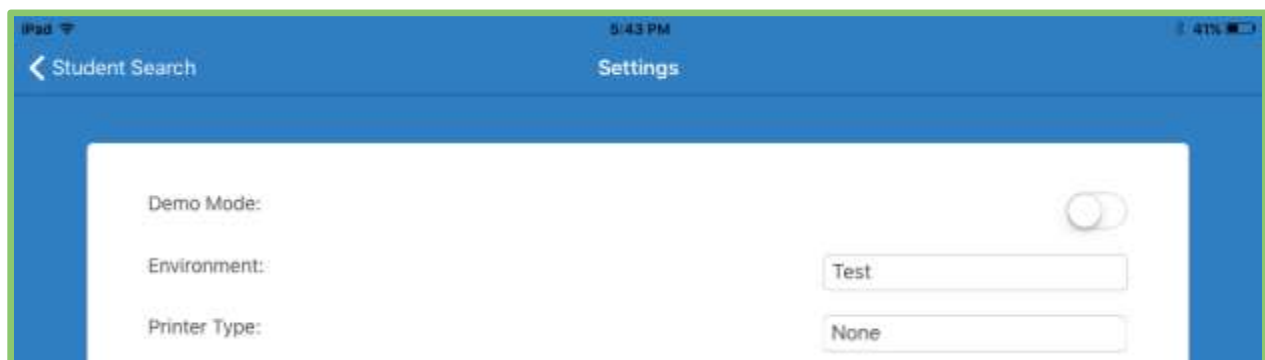
Card Reader Type: This setting is used to specify the type of card reader being used for credit card transactions.

Card Reader IP Address: This setting is used to connect the card reader if "PAX Reader" was selected as the Card Reader Type.

Card Reader Port: This setting is used to connect the card reader if "PAX Reader" was selected as the Card Reader Type.

Enable Meal Payments: Tap the slider to toggle this setting. When the slider is green, the Add Funds button is available, which allows meal funds to be added using the app. When the slider is white, the Add Funds button is removed from the Student Search page. A change to this setting does not require restarting the app to take effect.
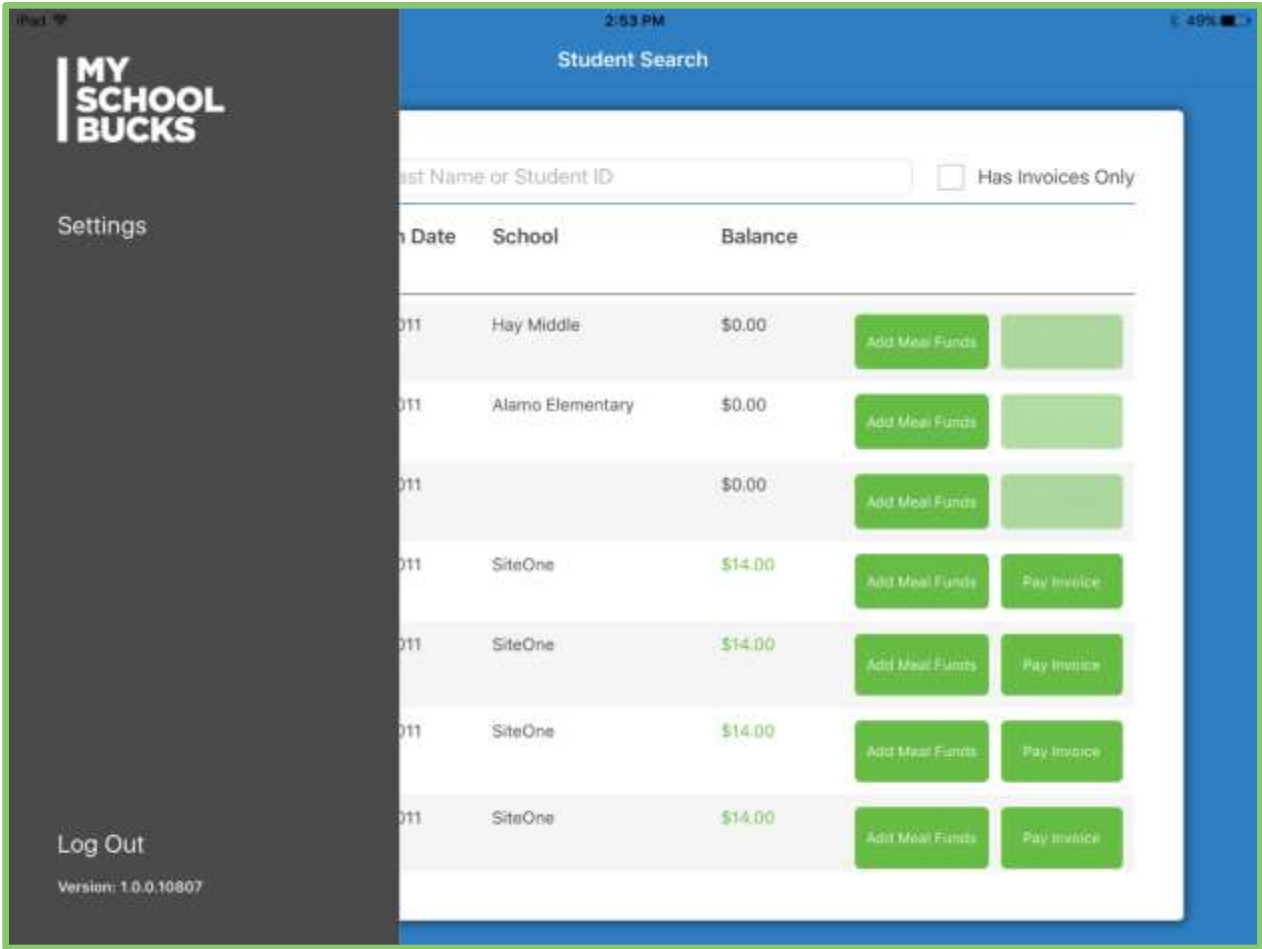
After changing any of these, tap **Save** to save your changes.

Log Out

Log Out is located in the menu. Tap the menu icon in the upper left, and then tap **Log Out**.

Support

For additional support, please contact Technical Support between the hours of 8 AM EST and 7 PM EST at 1-800-803-6755, Option 2.

You may also contact customer technical support by using our support request form.