



## Online School Payments: OSP Products in Summary

We're very excited to announce that **OSMS Version 4.0** is complete! The largest part of this upgrade is **OSP Products** – a faster, more powerful way to create items in your **school store** and **OTR Receipting Page**. This document will go do an **overview** of **OSP Products** only – if you need additional information, please review the **OSP Products - Detailed version**.

Please note: **certain OSP Product features or options are premium access only** and/or limited to those in **pilot programs only**.

As always, if you have any questions or any comments please contact the **OSMS Support Desk** by email [support@osmsinc.com](mailto:support@osmsinc.com) or by phone at 703-378-8299 x204. Have a great Back-To-School season!

### -The OSMS Support Desk



## Table of Contents

1) OSP Products – Summary.....	2
a) OSP Products Overview .....	2
b) Create or Edit a New OSP Product .....	2
i) Tab 1 – Required Fields .....	2
ii) Tabs 2 to 4 – Select Features .....	4
2) Reports.....	5
3) Statements.....	6

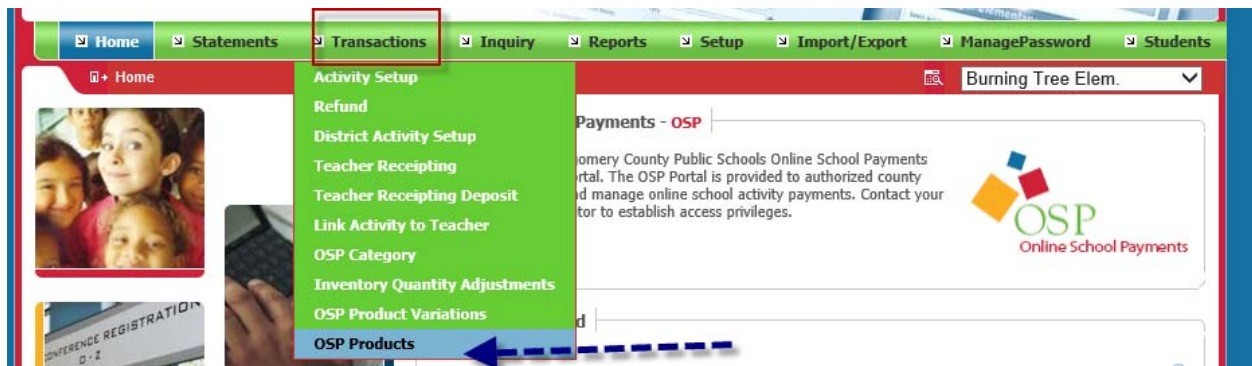
# 1) OSP Products – Summary

## a) OSP Products Overview

This section is a **summary only** of how to create an OSP Product and a summary of the features. (You may need to refer to the **Detailed Sections** for additional information).

OSP Products is a new way to create items in your school store. To find the OSP Products page, go to the **Transactions tab** → **OSP Products page**. This will take you to the OSP Product setup page.

**\*\*Please note\*\***: Any previously made Activities will automatically be copied into the new OSP Products type. You **DO NOT** to recreate any previously made Activities or Summary Obligations.



## b) Create or Edit a New OSP Product

To create a **new OSP Product**, go to the **Add New button** in to the right corner. To **edit a previously created OSP Product**, select the corresponding **Edit button**. This will open up the specific **OSP Product page**.

You'll notice there are 4 tabs: **Required Fields**, **Additional Options**, **Additional Text Fields** and **Product Image**.

**\*\*Please note\*\***: For those who are brand new to OSP Products or want to keep it simple, please only use the 1<sup>st</sup> tab, Required Fields. The other 3 tabs are reserved for our advanced users and/or users who have access to premium features.

### i) Tab 1 – Required Fields

**Tab 1 Required Fields** contains **only the minimum required information** to save an OSP Product. All fields indicated by a red arrow must be filled out.

- **Activity Number**
  - The database number (SKU) for your OSP Product. It is auto assigned after the OSP Product has been saved. This field cannot be edited. You can disregard it.

- **Activity Name**
  - The title of the OSP Product. It will be displayed as the bolded names on the main **School Store page**.
  
- **Short Description**
  - Field where bookkeepers can type additional information about an item. There is space for up to 522 characters. It will be displayed under the **Activity Name** on the main **School Store page**.
  
- **Sponsor/Teacher Information**
  - OSP Products require 3 pieces of information for Sponsor Teachers: email address, last name and first name. This info can be typed in directly or it can be found using the **Search Sponsor/Teacher page** by selecting the **Magnifying Glass button**. The Sponsor Teacher info will appear on the **Teacher/Sponsor column** in the main **School Store page**.
  
- **Sales Dates**
  - OSP Products require 2 specific dates: the **date to go online for sale** and the **date to go offline for sale**. Simply type in the field or select the **Calendar button** to open a calendar to pick dates.
  
- **Price Fields**
  - OSP Products require 2 pieces of information for price: **Price Type** and **Price Amount** (if applicable).
  - The **Price Type** field indicates what kind of item this is. There 3x options. **If in doubt, please always defer to the Fixed option.**
    - **Fixed:** 1 price only, payment in full. In most cases, should be the majority of your OSP Products. Selecting the **Fixed option** will open up the Price field so you can type in a number.
    - **Variable\*\*:** Allow the parent or cardholder to type in the amount they want to pay. Great for donations or lost library books.
    - **Obligation\*\*:** For student debt invoices, also called a Detailed Obligation. This is covered in other instruction manuals.
      - **\*\*Please note\*\*:** Obligation is a premium feature. It is not available for schools without student obligations.
  
- **Fund Account Fields**
  - The next two fields deal with Fund Accounts: the **Fund Account field** and the **Fund Account Description field**. Simply type in the fund account number before the blank line and the description. The system will alert you if you're creating a brand-new fund account.
  - You can also use the **Magnifying Glass button** to bring up your **List of Fund Accounts** that were previously saved. Find the **Fund Account** you wish to use and click on the **Select button** to insert it into the OSP Product.
  
- **Grade Level (not recommended)**

- The last required field is **Grade Level**. It will be pre-selected to N/A but you can click on the drop-down menu and select another grade or option if you like.
- **Save**
  - Once all the **Required Fields** are filled out, you can now select the **Save button** to update your changes.

## ii) Tabs 2 to 4 – Select Features

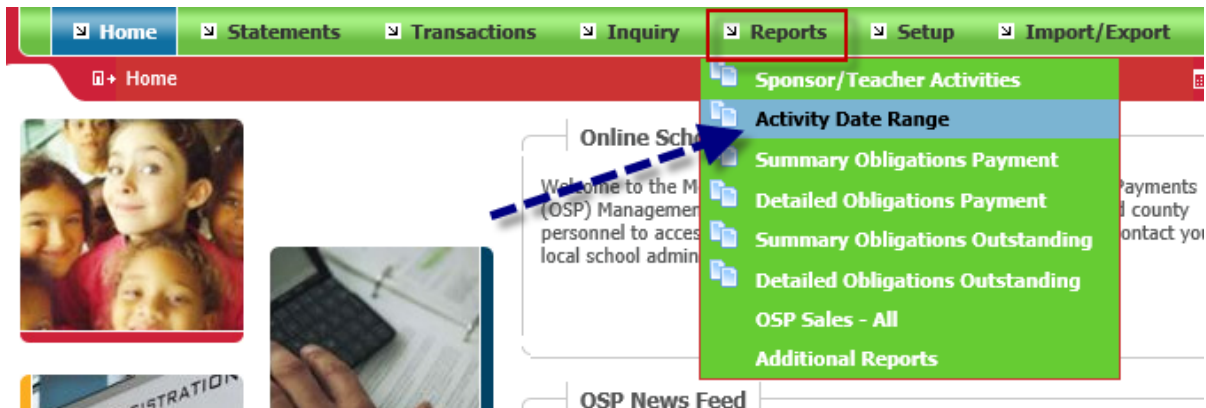
**Tabs 2 -4 (Additional Options, Additional Text Fields and Product Images)** contains fields that are **completely optional**. You **DO NOT** need to use them. However, there are certain features that are highly recommended:

- **No Student ID Required field**
  - This will bypass adding Student IDs and Names to items during checkout. It is recommended items for things like School Donations or certain school events, including athletic tickets or drama tickets. To use, simply **checkmark the box** and **save**. This will cause the item to **display a “No Profile Required” message** during checkout, bypassing the need to put in student info.
- **Taxable Items field (Not applicable to MCPS)**
  - Price field should be built with the tax amount.
- **Maximum Units Allowed Per Student c**
  - This will create a total number a single student may purchase. For example, a student may only buy up to two (2x) prom tickets or one (1x) yearbook.
  - To use, you’ll need to **both checkmark the box** and **type in the maximum number** a student may buy. If a purchaser attempts to buy above the maximum, the system will **display an error message** during check out.
- **Obligations (premium feature)**
  - This section is for use for OSP Products’ 3<sup>rd</sup> type of price type called **Obligations**. They are essentially for invoices, assigned to one student at a time.
  - Detailed instructions for Obligations sales can be found in a separate document. (This section is only a brief overview and should not serve as your primary source of info regarding this feature).
- **Online School (Teacher) Receipting Only (OSR/OTR) Use Only (2<sup>nd</sup> )( premium feature)**
  - Any OSP Products that are reserved for **Online School Receipting (OSR)** use only. These products **will only appear for in person purchasing** and **will not appear in the standard OSP web store**.
  - These features are currently limited to our OSR Pilot program. **Do not** use if you are not part of the pilot program.
- **Limited Quantity Item (premium feature)**
  - Any OSP Products with strict amounts available for purchase. Once the amount goes to zero (0x), these items will show as **out of stock**.


- Please see the Limited Quantity/Inventory Instructions for full details on how to use this feature.
- **Event Codes**
  - A way to flag products are being used for fundraisers. That is, you need to know additional profit vs loss details. To use, simply type in the **Event Code ID** from SFO into the **Event Code field**. This will update in the **Event Code column** in your corresponding **SFO receipt**.
  - Detailed instructions for Event Codes can be found in a separate document. (This section is only a brief overview and should not serve as your primary source of info regarding this feature).
- **Product Image**
  - Upload pictures to your product. Consider using this feature to help advertise or market your items, like a picture of the yearbook or class t-shirt you're selling. To use, simply go to the **Choose File button**. Select the JPEG (file ending in .jpg) on your PC to upload. After saving your OSP Product, the page will display the image on the **Product Page** in the store.
  - Files should be a **JPEG** (file ending in .jpg) and approximately **200 to 300 pixels**.

## 2) Reports

The report is under **Reports tab**. Most used is the **Activity Date Range**. The detail instruction is **OSP Quick Start Guide**.



## Instructions

- [Quick Start Guide](#) 
- [On-demand Training Documentation and Videos](#)
- [Recording Electronic OSP Deposits \(posting OSP Receipts in SFO\)](#) 
- [Linking From School Home Page to OSP Portal](#) 
- [Setting Up Payment Options for Student Obligations](#) 
- [Frequently Asked Questions](#) 

## Contact Us

For setup and configuration questions, please contact the Division of Controller at [OSP@mcpsmd.org](mailto:OSP@mcpsmd.org).

### 3) Statements

The detail instruction is **OSP Quick Start Guide**.