



Online School Payments: Organize Activities into Store Categories

This document is the instructions for how to use the new Categories feature. This allows for OSP Activities (items for sale) to be sorted into different categories or sections in the eStore, making it easier for Parents.

If you have any questions or any comments, please contact **Lauren Ziegler** at the Online School Payments support desk either by emailing lziegler@osmsinc.com or by calling 703-378-8299 ext. 209.

-The OSMS Support Desk

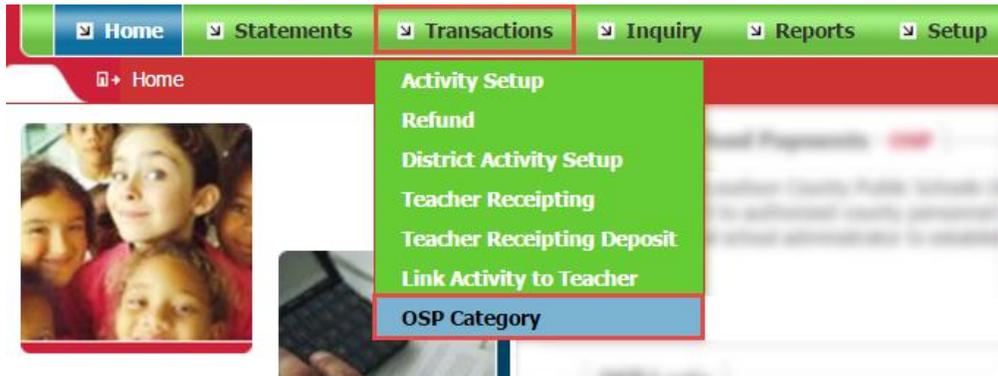
Contents

1) Categorize OSP Activities.....	1
2) Uncategorized OSP Activities.....	6
3) Other Notes.....	7

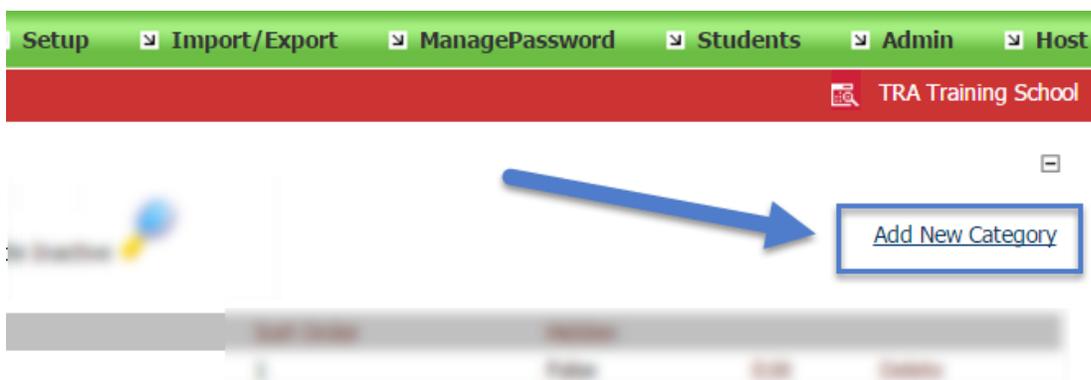
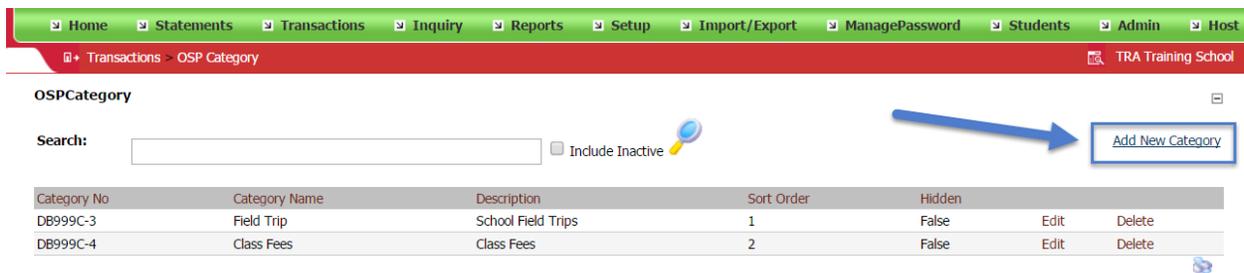
1) Categorize OSP Activities

1. **Login with your user credentials** to the OSP Management Portal website. Select **school location**.
2. Go to the **Activity tab → Activity Setup page**. Take a moment and check that all your items for sale have been **saved and are Active** (currently available for purchase). Items that are **Inactive** (not available for purchase) **cannot be categorized**. Make changes as necessary.

3. Go to the **Activity tab** → **OSP Category page**



4. This will take you to the OSP Category page. To create a new Category, go to the top right corner and select the **Add New Category button**.



5. The **Add New/Edit Category page** will now open. There are 6x steps on this page that must be completed.

The screenshot shows the 'OSP Category' form with the following elements and callouts:

- 1** Category Name: [Empty text field]
- 2** Category Description: [Empty text field]
- 3** Available Activities: [List box containing: STEMmer Camp, Yearbook Sales, Girls Basketball Fees - 2016, Boys Basketball Fees - 2016, Vollyball Fees - 2016]
- 4** Insert >> and << Remove buttons between the activity lists.
- 5** Displayed Activities: [Empty list box]
- 6** Save and Cancel buttons at the bottom.

Other form fields include: Category Number: DB999C-7, Active:

6. In the 1st field called **Category Name**, type in the title of this particular category.

The screenshot shows the 'OSP Category' form with the following elements:

- 1** Category Name: [Sports]
- Category Description: [Empty text field]

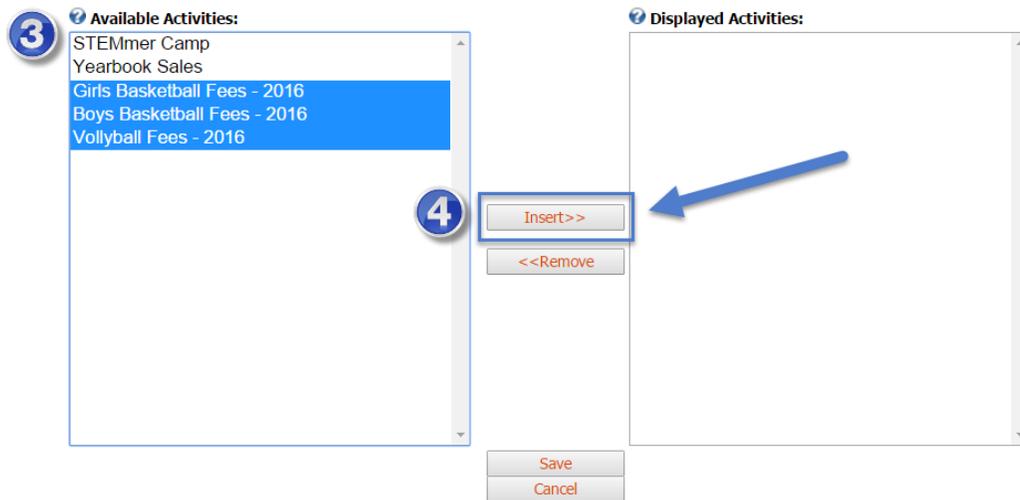
7. In the 2nd field called **Category Description**, type in a description or comment for this category.

The screenshot shows the 'OSP Category' form with the following elements:

- Category Name: [Sports]
- 2** Category Description: [All sports related fees]

- Below there are 2 columns. The left column is called **Available Activities** that lists the items for sale that can be categorized.

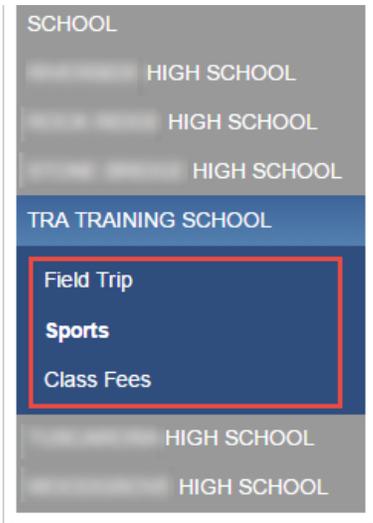
You can **click** on them and they will **highlight blue**. Select **CTRL** on your keyboard and you can **highlight multiple Activities** at one time. Select the **Insert button** in the middle to add them.



- The highlighted activities should now appear in the right column called **Displayed Activities**. Finally, select the **Save button** at the bottom.



10. This will now sort your Activities into the category you just created on the Parent Site/eStore. Go to your School District's site to review.



HOME SIGN IN PAY OBLIGATION YOUR ACCOUNT CUSTOMER SERVICE SEARCH VIEW CART

Home :: HIGH SCHOOL :: TRA Training_School :: Sports

Schools

Sports

All sports related fees

Activity No.	Activity Name	Teacher / Sponsor	Grade Level	Course / Class	Activity Date	Price
DB999-42	Volleyball Fees - 2016	Ziegler,Lauren	N/A	NA	1/18/2016	\$225.00
	Varsity and JV Volleyball Fees. Covers all practice and game uniforms, equipment fees, and all entrance fees for tournaments. Pay by 1/23 and get free Wilson Volleyball.					
DB999-39	Boys Basketball Fees - 2016	Ziegler,Lauren	N/A	NA	1/18/2016	\$185.00
	Varsity and JV Boys Basketball Fees. Covers all practice and game uniforms, equipment fees, and all entrance fees for tournaments.					
DB999-38	Girls Basketball Fees - 2016	Ziegler,Lauren	N/A	NA	1/18/2016	\$150.00
	Varsity and JV Girls Basketball Fees. Covers all practice and game uniforms, equipment fees, and all entrance fees for tournaments.					

Schools

Field Trip

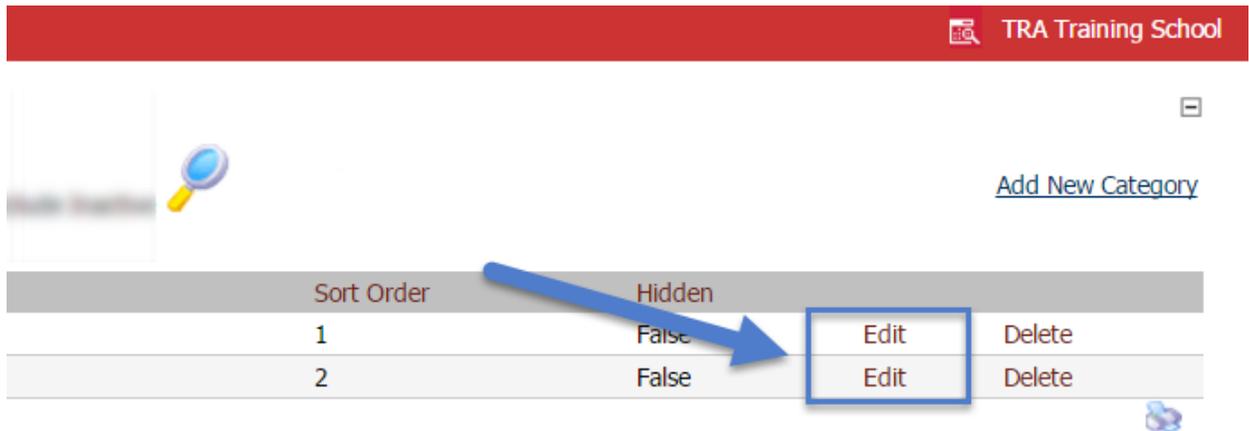
Sports

Class Fees

High School

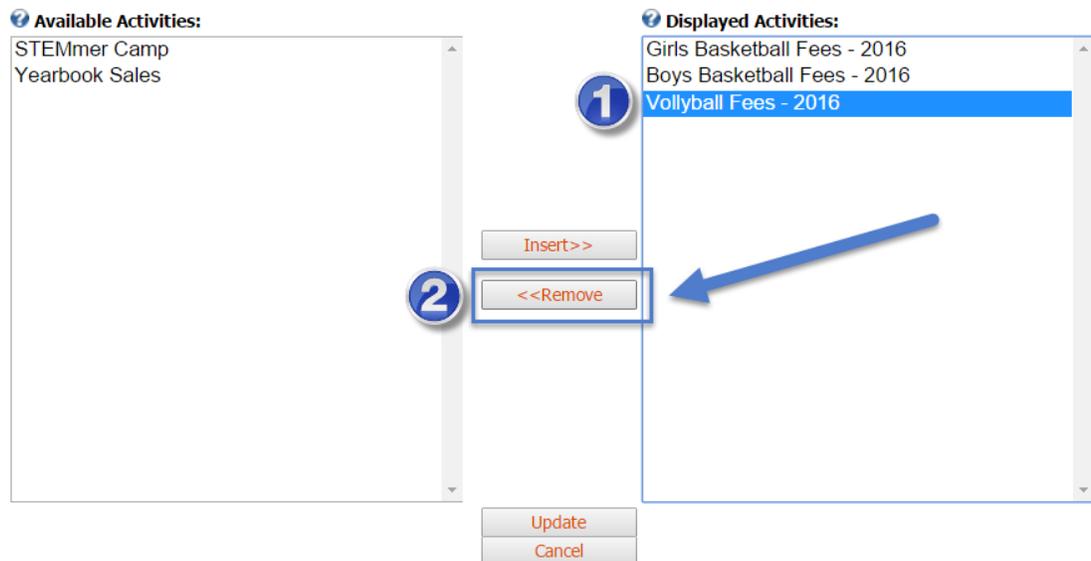
2) Uncategorized OSP Activities

To remove Activities from a Category, go to the **Activity tab** → **OSP Category page** → select the **Edit button** to open that Category.



Sort Order	Hidden		
1	False	Edit	Delete
2	False	Edit	Delete

Then, scroll down to the **Displayed Activities column**, and then select the **Remove button**. Finally, select the **Save button**.

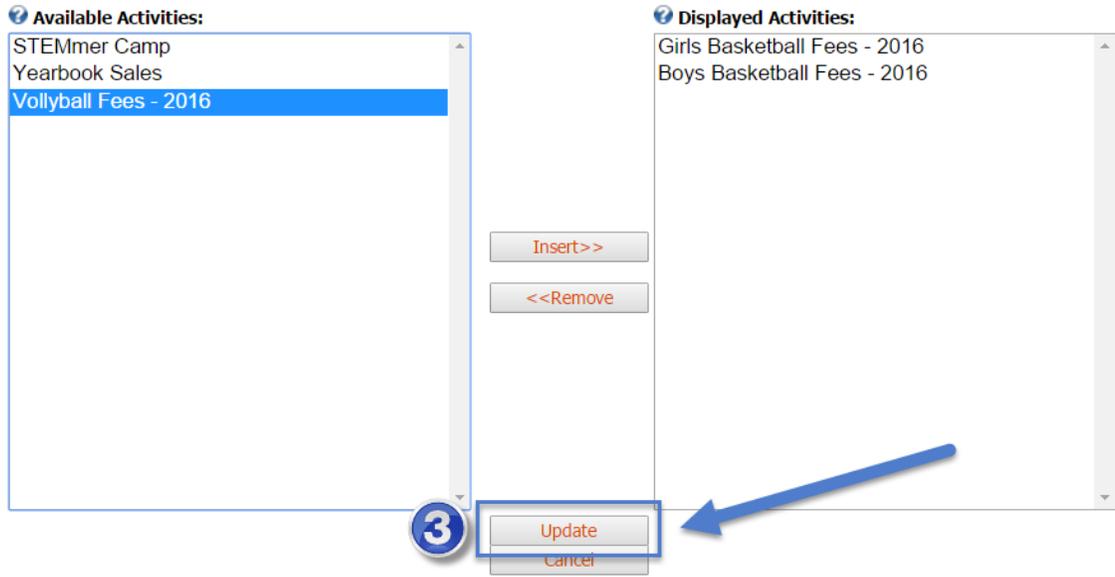


Available Activities:
STEMmer Camp
Yearbook Sales

Displayed Activities:
Girls Basketball Fees - 2016
Boys Basketball Fees - 2016
Volleyball Fees - 2016

Buttons: Insert>>, <<Remove, Update, Cancel

Finally, select the **Save button**.



3) Other Notes

- Can't find your Activities? Remember, **only Active items** can be categorized. Also, check to see if the Activities were created and saved.
- If you see Activities but not the correct ones, it's possible **they are already categorized**, and therefore cannot be categorized a second time.

To check, go to the **Activity tab** → **OSP Category page** → select the **Edit button** by any of the previously saved Categories → **Add New/Edit Category page** → **Displayed Activities section**.

Home Statements Transactions Inquiry Reports Setup Import/Export ManagePassword Students Admin Host

Transactions - OSP Category TRA Training School

OSPCategory

Search: Include Inactive  [Add New Category](#)

Category No	Category Name	Description	Sort Order	Hidden	Edit	Delete
DB999C-3	Field Trip	School Field Trips	1	False	Edit	Delete
DB999C-4	Class Fees	Class Fees	2	False	Edit	Delete