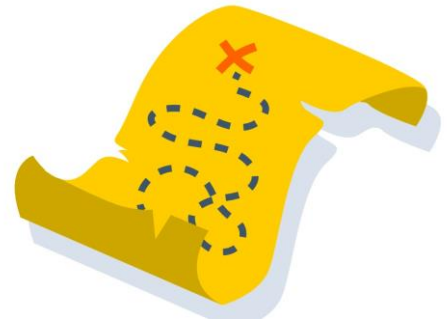


District or Group Treasurer

What can you do?

1. Have an overview of current groups in the District to view financial info - **coming soon**
2. Generate invoices
3. Manually pay off invoices – **coming soon**
4. Send District wide communications
5. Reports - **coming soon**
6. Manage stripe account
7. Resources section



1. Overview

Currently this function is not available. District Treasurers will eventually be able to select and view all groups in their Districts along with their financial information. More information to follow.

2. Generate invoices

As Treasurer of the district you can generate invoices either at a district level or at group level. Invoices can be generated for events, one off trips and subs etc. Parents are then emailed with instructions to pay. They can either make payment online using Stripe or you can include account details for them to make a bank transfer.

Please note you will be unable to generate invoices until your stripe account is activated (*see instructions below*).

- Click the **GroopPay Admin** option from the left-hand side bar.
- Fill in the invoice fields with relevant information such as reference number and a message to the recipients.
- Scroll down further to choose who the invoices are being sent to by filtering the register to relevant persons i.e. parents, child, leaders etc. Switch the button from red to green next to each member's name.
- At the bottom of the form you can choose to send the invoices now or save the invoice for you to send at a later date.
- The invoice can then be viewed by the recipient in their **My GroopPay** area and they can make a direct payment through Stripe.
- You have the ability to clone (make a copy) or edit an invoice by clicking on the individual invoice and selecting from the drop down.

**All invoice data can be exported into CSV files for accounting purposes*

Coming soon - If a payment has been received in cash, cheque or by bank transfer this can be marked as paid.

3. Send District wide communications

My GroopChat

Parents and leaders can receive messages and communicate with each other using the My GroopChat facility. This is a secure forum to share updates, post notifications, share good practice and fun ideas.

- Click on the **My GroopChat** on the left-hand side panel

- Create a new thread for everyone to see by typing a message in the **Write something** box at the top of the page
- To attach images or files, click the small **attachment** icon
- You can also **comment** on previous posts by clicking on the post and typing in the box below
- To like a comment, click the **Heart** button

Whenever a new post is created or one of your posts is commented on you will receive a notification.

Sending a message to all users in a specific Sub Group

- From within My GroopChat choose your specific Sub Group from the **Post to** drop down
- Create your post and attach photos or documents if required
- When you're ready press the **Post Comment** button

Send to specific person or people

- From within My GroopChat choose who you want to send the message to via an **Email, Name or Label** which you enter in the **Send Privately** field. e.g. everyone with a label '**Common Ground participants**'
- From the resulting list you can then choose an individual or add all
- Create your post and attach photos or documents if required
- When you're ready press the **Post Comment** button

Groop Knowledge Base article - <https://knowledge.groop.com/groopchat>

Communications

The Groop platform allows you to communicate in many ways with your users. One of which is through the communications area of the platform using Email.

- Click **Communications** on the left-hand side panel
- You can see an overview of all the emails you have sent on the main communications page
- To create a new email simply go to **Create new communication**
- You can now create your email with the **Subject and Content**. The **reply** email will be the email of your Groop account. You can change this by replacing it with an alternate address.
- Once you're happy with the information that you have entered you can filter the users and select the recipients to receive the communications by moving the slider buttons next to each individual name.
- You can save your email to send at a later date via the **Save Email** if required
- Once you're happy you can send the email
- When back in the main Communication page you can also **View** sent emails, **Clone** emails and also **Delete** any that are no longer needed.

Groop Knowledge Base article - <https://knowledge.groop.com/communications>

4. Reports - coming soon

5. Manage stripe account

A stripe account is required to transfer funds to your requested bank account when a user pays an invoice online via the Groop platform. This allows Groups to receive payments over the Internet. stripe provides the technical, fraud prevention, and banking infrastructure required to operate on-line payment systems.

- To activate your stripe account for your group or district, go to **Groop settings**

- Scroll to **GroopPay** and select **Connect stripe account'**. This will take you to the stripe account sign up.

Filling in the stripe account application form:

1. Select country UK
2. Business website: www.woodcraft.org.uk
3. Business description: Membership organisation > Charity
4. Written description of organisation:

'Woodcraft Folk is a children's charity. We run volunteer led co-operative youth groups around the UK in school halls, community venues and a host of other places to learn about big ideas through fun activities like singing, camping, playing and debating.'

5. Select business type 'sole trader' as the other options do not accept charity number and require VAT registration.
6. Named individual: use name of treasurer or a signatory on the account
7. Business address: Unit 9, 83 Crampton Street, SE17 3BQ
8. Date of birth of named individual
9. Statement descriptor: Woodcraft Folk followed by District name.
10. Account details – use the group or district bank account depending on how you manage finance for the district/group
11. Follow the two-step authentication
12. Use email address that is easier to use if there was a handover of treasurers
13. Keep your password safe and ensure it is memorable

stripe will take you through the remaining steps and will ask you to authenticate your account. Your login allows you to manage your stripe account and view payments, trends and pull off reports etc.

To access or change the details of your stripe account at any time you can go to <https://dashboard.stripe.com/login>. Once logged on you can manage your account.

Groop Knowledge Base article - <https://knowledge.groop.com/connect-stripe-account>

6. Resources

The resources section found on the left-hand panel is a library of all Woodcraft Folk policies, insurance info, programme ideas, publicity materials, resources and useful forms. This library is accessible to all parents to view.

Group Contacts and District Officeholders can easily upload their local policies, risk assessments, forms, adverts and notices for both parents and leaders to access.