



SBS Budgets

How to update School details

Contents

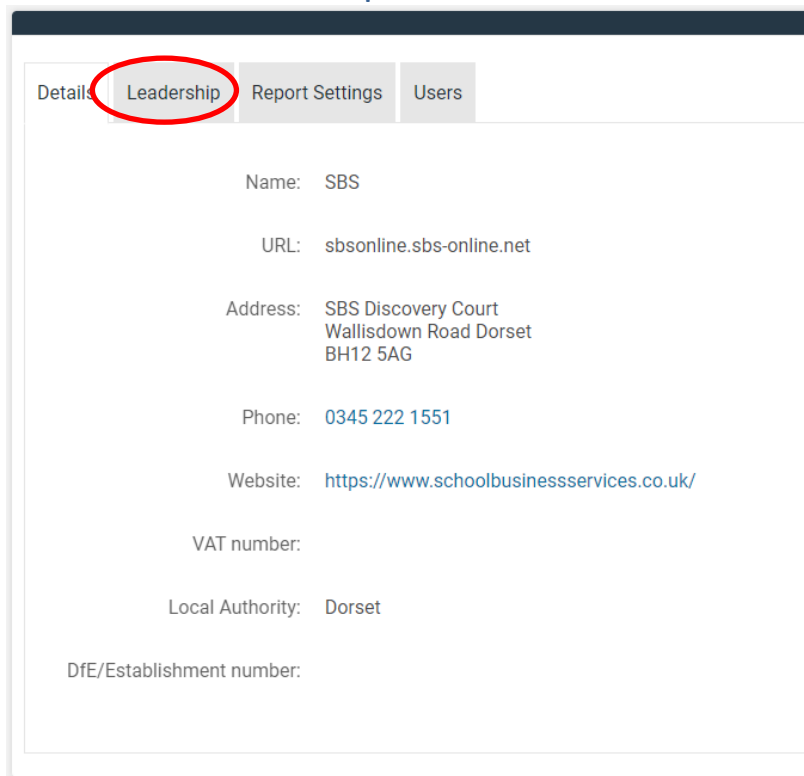
Updating Leadership information on Dashboard	3
Updating Report Settings	6
Updating Address on Salary Statements	9
Updating/uploading school logo or signatory	11

Updating Leadership information on Dashboard

1. First, follow the path Settings > School Details



2. Select the 'Leadership' tab



3. Select the edit icon in the top right (the pen with a line)

School Details ⓘ

ⓘ

Leadership Report Settings Users

Head teacher: John Smith

Head teacher email: sbsonline@schoolbusinessservices.co.uk

School business manager: Jane Doe

School business manager email: sbsonline@schoolbusinessservices.co.uk

School business manager phone: 0345 222 1551

4. Manually edit the relevant fields

Q Edit School Details ⓘ

Details Leadership Report Settings

Head teacher: John Smith



Head teacher email: sbsonline@schoolbusinessservices.co.uk

School business manager: Jane Doe

School business manager email: sbsonline@schoolbusinessservices.co.uk

School business manager phone: 0345 222 1551

5. Save changes using save icon (the green tick)

Edit School Details ⓘ  

John Smith

sbsonline@schoolbusinessservices.co.uk

Jane Doe

sbsonline@schoolbusinessservices.co.uk

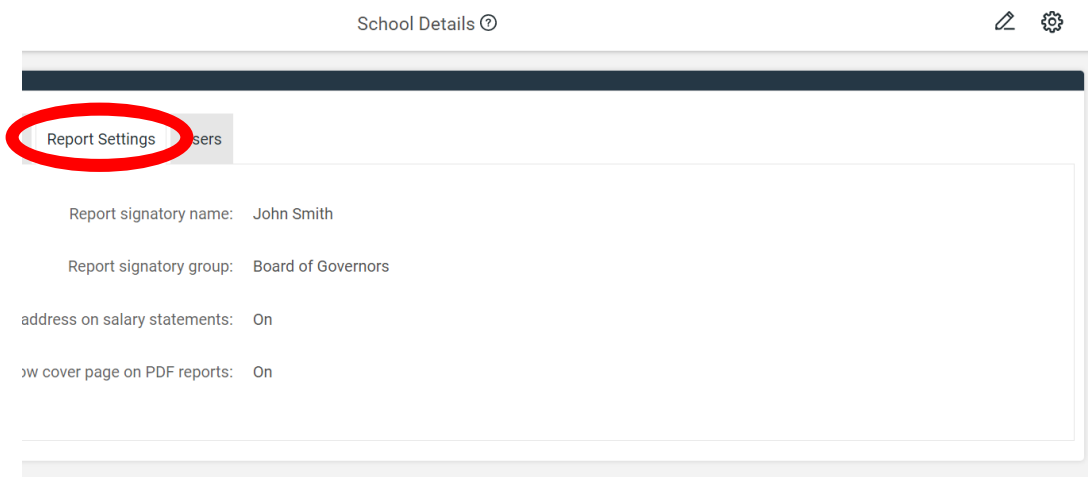
0345 222 1551

Updating Report Settings

1. Follow the path Settings > School details





2. Select the 'Report Settings' tab



3. Select the edit icon in the top right (the pen with a line)

School Details ⓘ

Report Settings Users

Report signatory name: John Smith

Report signatory group: Board of Governors

address on salary statements: On

show cover page on PDF reports: On

4. Manually overtype the relevant fields or select the toggles.

Edit School Details ⓘ

Leadership Report Settings

Report signatory name: John Smith



Report signatory group: Board of Governors

Show address on salary statements: ☒

Show cover page on PDF reports: ☒

5. Save your edits using the save icon (the green tick)

Edit School Details ⓘ

John Smith

Board of Governors

☐

☐

Updating Address on Salary Statements

1. Follow the path Settings > School Details



2. Select the edit icon in the top right (the pen with a line)



3. Manually overtype the relevant fields

2 Edit School Details ⓘ

Details Leadership Report Settings

Name: SBS

URL: <http://sbsonline.com>

Phone: 0345 222 1551

Address: SBS House
Marshes End
Upton Road
Poole
Dorset

Website: <https://www.schoolbusinessservices.co.uk/>

VAT number:

Local Authority: Dorset

DfE/Establishment number:

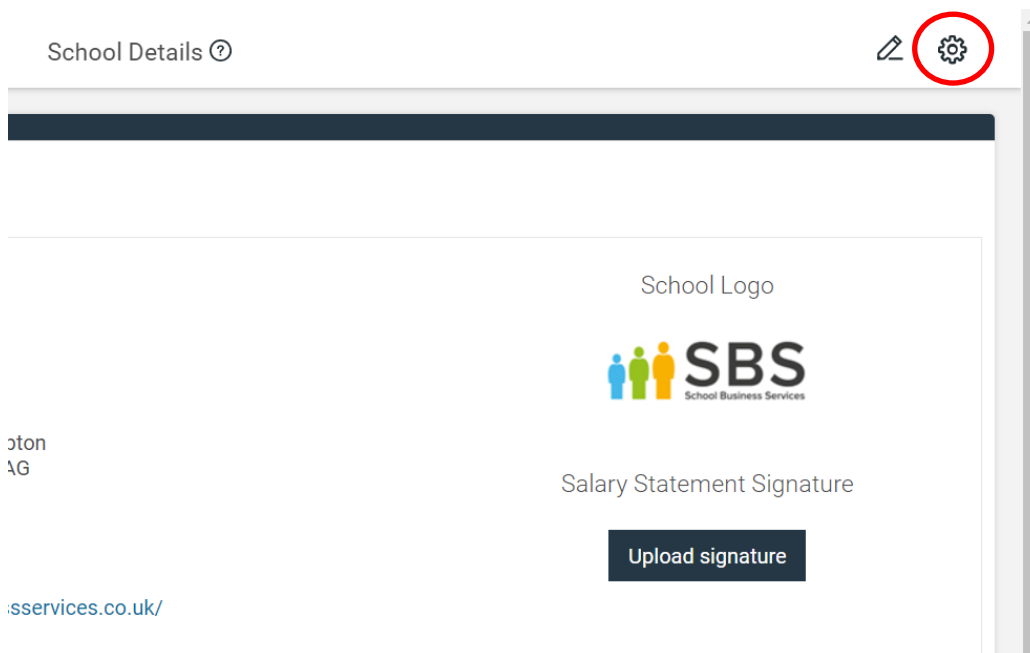
4. Save the changes using save icon (the green tick)

Updating/uploading school logo or signatory

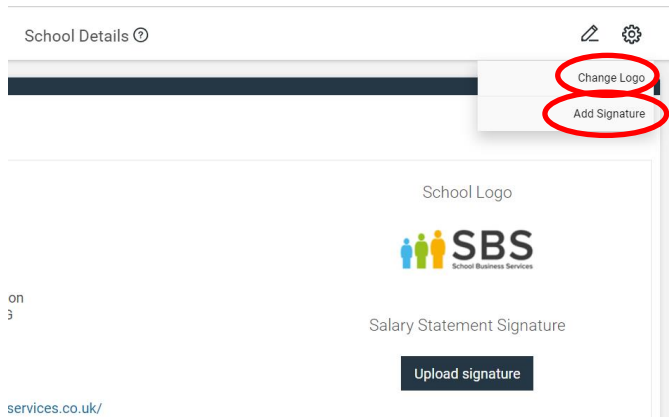
1. Follow the path Settings > School Details



2. Select the actions cog in the top right



3. Select which item you would like to update/upload



School Details ⓘ

Change Logo

Add Signature

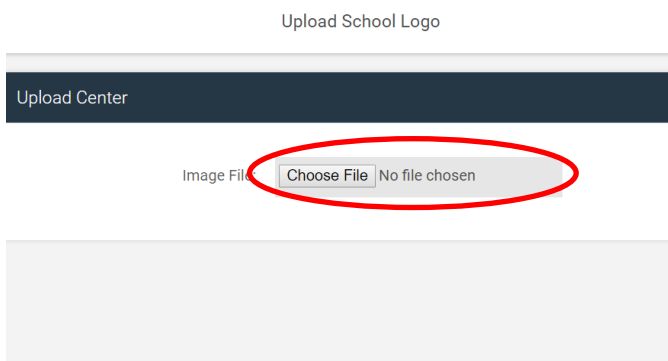
School Logo

Salary Statement Signature

Upload signature

services.co.uk/

4. Choose the PNG or JPEG file to upload

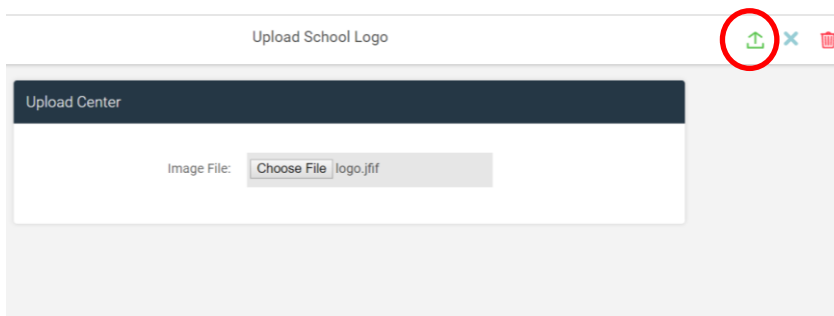


Upload School Logo

Upload Center

Image File: Choose File No file chosen

5. Once your file has been uploaded, use the green import button in the top right



Upload School Logo

Upload Center

Image File: Choose File logo.jfif

Green import button