

GoCardless:

Guide for Parents

GO CARDLESS



Message from Our Treasurer

Hi All,

This guide is designed to help you set up GoCardless for payments for both your child's subscription fees and events/other costs. We introduced GoCardless as a payment method in October 2019 and it has proved to save endless hours of admin for leaders and the group treasurer.

GoCardless uses the Direct Debit scheme to take payments, meaning that all that is required to sign up to it is a UK bank account, using your 6-digit Sort Code and 8-digit Account Number. Unlike with BACS payments, you do not need to have online banking, and using this method ensures that the correct amount is paid, and it is guaranteed to reach our account.

You will need to set up 2 direct debits for each child you have in our group, one for subscriptions and one for events/other payments. Currently, the subscription fee is £40 per child, per term, and will be taken 3 weeks into the start of each term. A payment for an event will be set up when you respond 'yes' to an event on OSM and will leave your bank account on the payment due date.

The advantage of using this system is that once you have set up both direct debits, taking about 5-10 minutes, you will not have to set up any more payments, saving you time as well. Please note, when your child moves from beavers to cubs, or cubs to scouts, you will have to set up the direct debit again.

For all payments above £10, we will be using the GoCardless payment method. If you would like to pay by another method, please contact the group treasurer on the email below.

For payments below £10, you will be able to pay by BACS, Cheque or Cash.

Below is a guide on how to set up the direct debit for your child, however if you have any issues in setting this up, please contact the group treasurer on treasurer@2ndbognor.org.uk

Many Thanks,

Ben Hardcastle
Group Treasurer

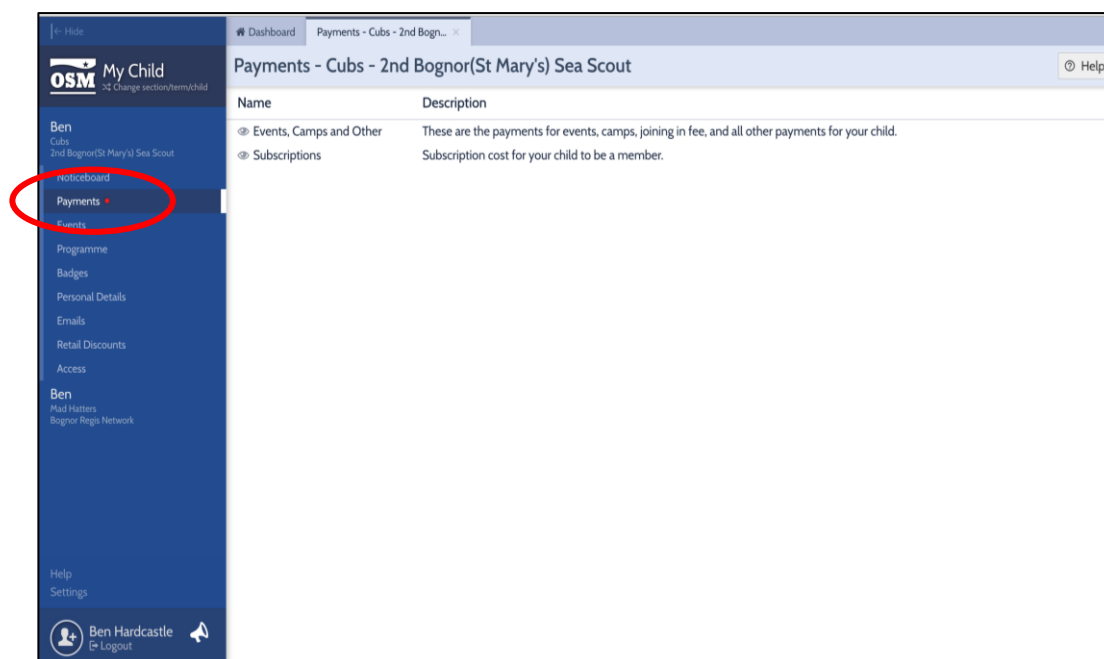
How to set up the Direct Debit

If you have just joined our group, you will have been sent a link to Online Scout Manager (OSM) which is the system we use to store all the contact details for your child and let you know what we are doing each week or any events/camps we have planned. This system is used by almost all scout groups in the UK and is also how we set up the payments with GoCardless.

In this guide, I will show you how to set up a direct debit for the subscription fee, however you will also need to do the same for the 'Events, Camps and Other' section, following the exact same instructions as below.

To Set up the Direct Debit:

1. Go to Online Scout Manager at www.onlinescoutmanager.co.uk/login.php and sign in with your email and password. If you do not yet have an email/password set up, please contact your section leader who will be able to send you an email link to set this up.
2. Once on OSM, select your child's name from the left-hand side and then the 'payments' tab as below.



3. Select 'Subscriptions' and you will get the screen below.
4. Select 'Create Subscription', as circled above, to set up the direct debit. you will need to set up a direct debit for both Subscriptions and Events.

The screenshot shows the OSM My Child website interface. On the left is a blue sidebar with navigation links: Ben, Noticeboard, Payments, Events, Programme, Badges, Personal Details, Emails, Retail Discounts, Access, Ben, Mad Hatters, Bognor Regis Network, Help, and Settings. The main content area is titled 'Payments - Subscriptions - Cubs - 2nd Bognor(St Mary's) Sea Scout'. It includes a 'Help' icon and a 'Create Subscription' button, which is circled in red. Below this, there is a table with columns 'Description', 'Due', and 'Amount'. The table shows a row for 'Summer 2020' with a due date of '01/05/2020' and an amount of '£30.00'. A 'Pay Now' button is next to the amount. A red 'Overdue' tag is next to the description. Above the table, there is a message: 'Subscription cost for your child to be a member. 77'.

5. Select 'Open GoCardless in new window'. This will open the new tab.

The screenshot shows a modal dialog titled 'Create GoCardless Direct Debit'. The dialog contains the following text: 'The next page will take you to GoCardless where you can enter your bank details to create a direct debit. The subscription will automatically take payments from your account when the payment is due.' Below this text is a small information icon and the text: 'Payments are protected by the Direct Debit Guarantee and GoCardless is regulated by the Financial Conduct Authority.' At the bottom of the dialog are two buttons: 'Cancel' and 'Open GoCardless in new window'. The 'Open GoCardless in new window' button is circled in red.

6. Enter your UK Bank Account details, and the address that your card is registered to (most likely your home address).

[Click here to use a company name](#)

Email

Your sort code


Your account number

[Click here to enter IBAN](#)

Post code

[Click here to enter your address manually](#)

☐ More than one person is required to authorise Direct Debits


 **Set up Direct Debit**

GOCARDLESS

bognorscouts2nd@outlook.com | +44 7743 286936

By confirming you are agreeing to our [Website Terms of Use](#). GoCardless uses personal data as described in our [Privacy Notice](#). We use analytics [cookies](#).

Your payments are protected by the [Direct Debit Guarantee](#)



Set up a Direct Debit with 2nd Bognor Sea Scout Group

Subscriptions

First name

Last name

[Click here to use a company name](#)

Email

Your sort code

Your account number

[Click here to enter IBAN](#)

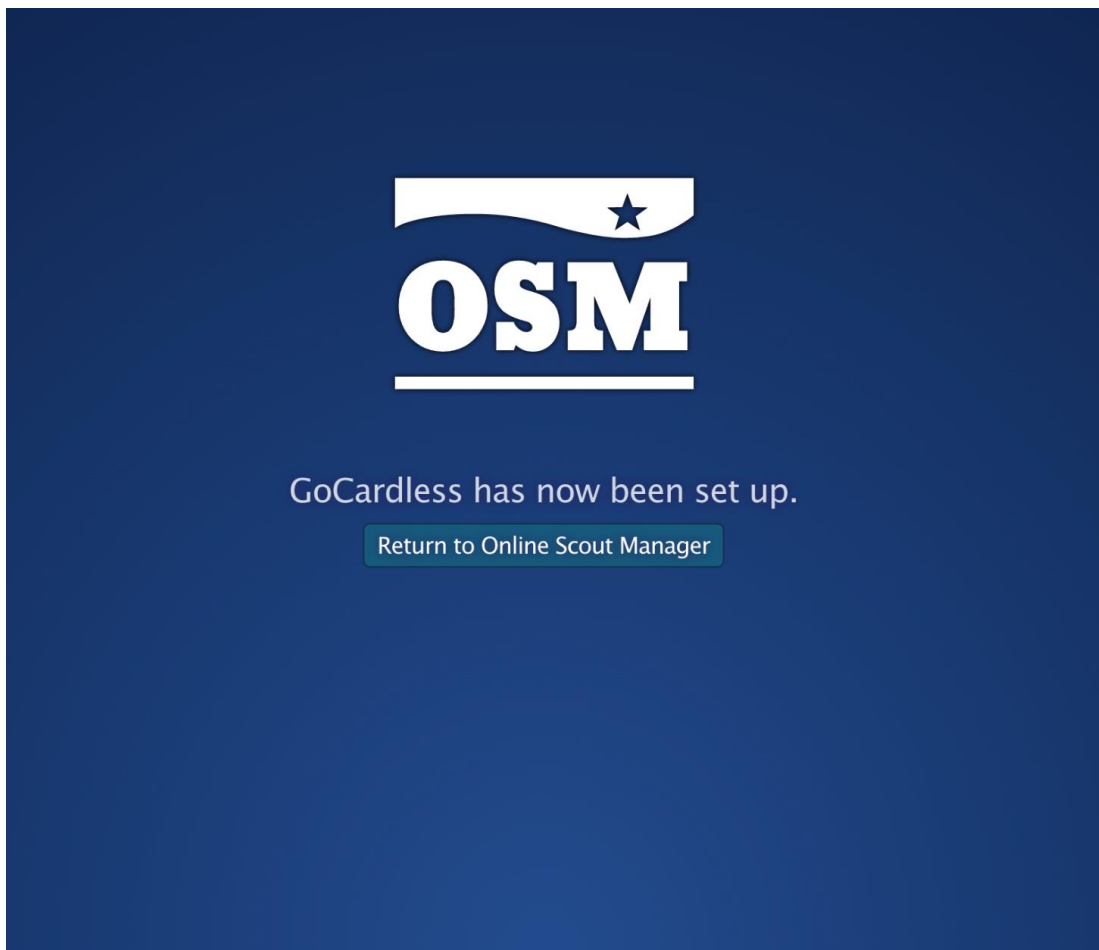
Post code

[Click here to enter your address manually](#)

☐ More than one person is required to authorise Direct Debits

- 7.
- Only click on 'More than one person is required to authorise Direct Debits' if 2 people are needed to authorise them, some joint accounts require this. If this is selected, you will need to follow a few extra steps to complete this. These are detailed in Steps 10-18.

8. Select 'Set up Direct Debit', then 'confirm' on the next page. This will bring up the page as below, select 'Return to Online Scout Manager'.



9. Repeat the steps as above for the 'Events, Camps and Other'.

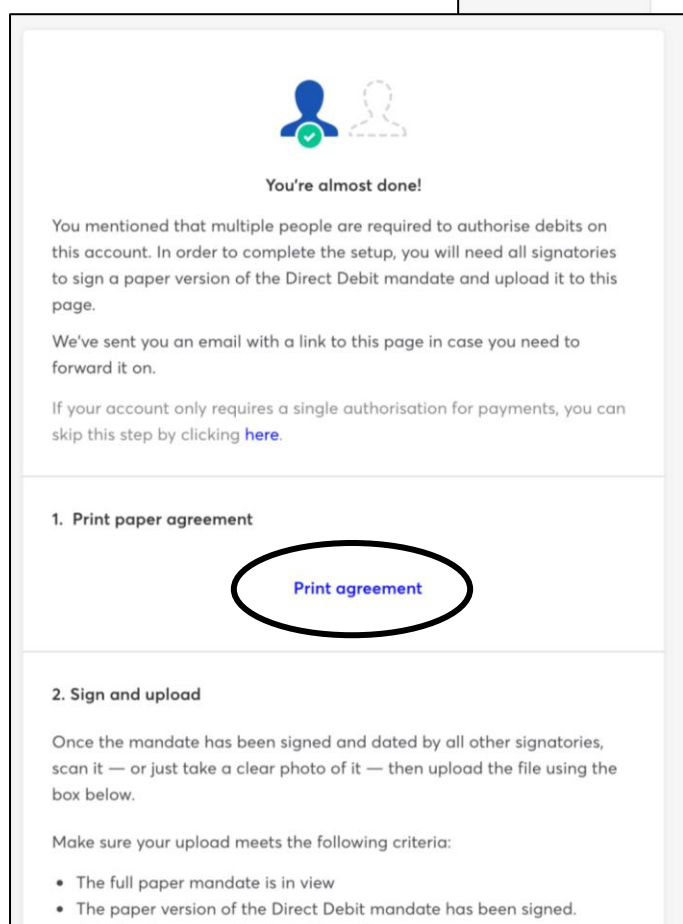
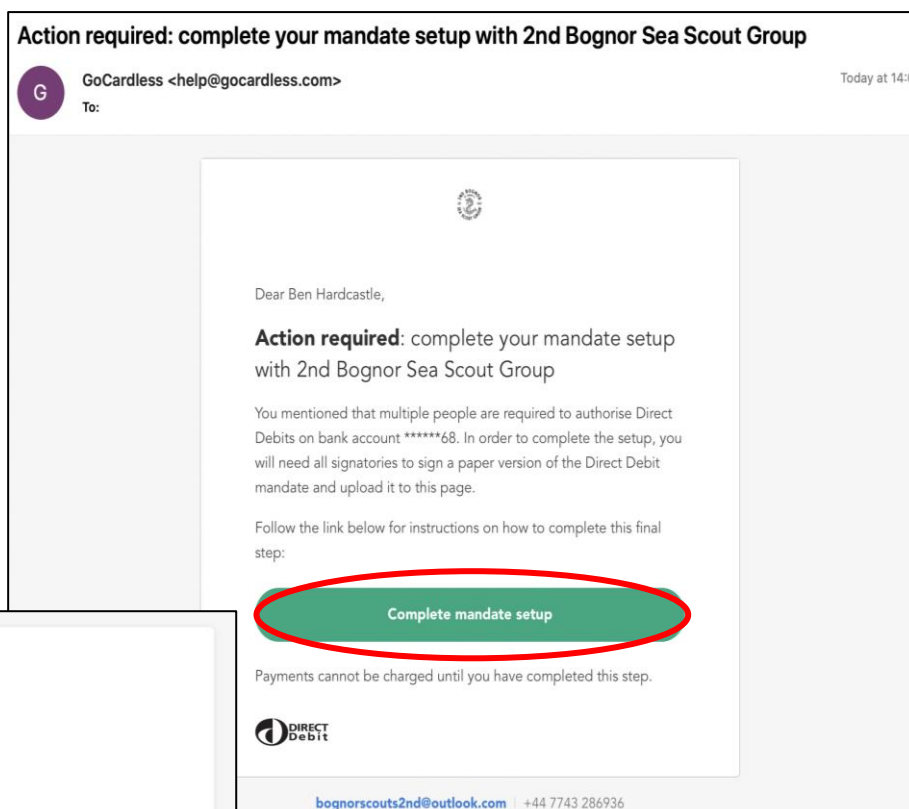
Please note: If you have more than one child in the group, this process will need to be repeated for each child.

If your Bank Account requires Dual Authorisation

Please follow the steps below.

10. If you selected you require more than one signature for your direct debit, you should have received an email like the one below.

11.
Select 'Complete
mandate setup',
which will take you
to the website
below.



12.
Select 'Print Agreement'. This will
create the document as below;
you will need to print out one copy
of this.

GoCardless

Please complete this form and upload securely.

GoCardless
Sutton Yard, 65 Goswell Road, London, EC1V 7EN,
GB

Instruction to your bank or building society to pay by Direct Debit

Customer Name or Company name
Ben Hardcastle

Name(s) of account holder(s)
B HARDCASTLE

Bank/Building Society account number
*****68

Branch sort code
--**

Name and full postal address of your Bank/Building Society
LLOYDS BANK PLC, BOGNOR REGIS, PO
Box 1000, Essex, BX1 1LT

Service User Number
2 7 5 0 6 9

Reference
2NDBOGNOR-35CXHWSN

Instruction to your Bank or Building Society
Please pay GoCardless Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with GoCardless and, if so, details will be passed electronically to my bank/building society.

Signature(s)

Date

Banks and building societies may not accept Direct Debit instructions for some types of accounts

13. On this form, get both people required to authorise the direct debit to sign in the signature box, and then put the current date in the date box.

14. Scan, or take a clear picture, of this form.

15. On the webpage, select 'choose file' as circled below to upload the form.

16. Once this is uploaded, select 'submit signed agreement' and your direct debit will be set up in a few days.

17. If you accidentally selected that your account needs more than 1 signature, there is an option to select to skip this step, and your direct debit will be set up as usual.

18. You will have to sign a form again for your second direct debit for 'events, camps and other'. You cannot use the same form as it will have a separate reference number on it. Just follow the steps as above again.

2. Sign and upload

Once the mandate has been signed and dated by all other signatories, scan it — or just take a clear photo of it — then upload the file using the box below.

Make sure your upload meets the following criteria:

- The full paper mandate is in view
- The paper version of the Direct Debit mandate has been signed.
- Any signatures are clearly visible on the page

Drop your document here or click to upload

Choose file No file chosen

Once you're satisfied, go ahead and submit the form!

Submit signed agreement

GoCardless
Sutton Yard, 65 Goswell Road, London, EC1V 7EN.

DIRECT Debit