Arbor

Checklist for setting up card payments

To collect	✅
Make sure you have these permissions: • To complete any of the setup required to use card payments, you must have the **Finance: Administer** permission. • To be able to pay by card within the Arbor MIS as a staff member (apart from topping up your own account), you must have the **Finance: Administer** permission. • To be able to see all the information about card payments in Arbor, you must have the **Finance: View** permission. If you don't have permission, ask a member of your team to add it for you.	
Have these School details to hand: • School name • URN (find this in ***School > School Details***) • School telephone number • School Address	
Proof of school name and address. We recommend using one of these documents: • (Recommended) Your school's Ofsted inspection report • Utility bill in the name of your school • Bank-issued document in the name of your school • Companies House Document • Charity Commission Document	
School controllers/owners details: • Job title • Legal first and last names • Date of birth • Email address • Postal address	

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School representative details: • Job title • Legal first and last names • Date of birth • Email address • Telephone number • Postal address	
School representative Photo ID. Make sure that: • the legal name provided for the representative's details is the same as on the photo ID • the address included on the ID matches the user's address recorded on the staff member's Arbor profile Accepted documents: • Passport (preferred) • Driver's license • Other government-issued ID (both the front and back) Requirements: • Both the front and back of the ID • A colour image, rotated with the image right-side-up • Clear picture with no light bouncing off the ID • JPG or PNG format • Less than 5MB in size • Image smaller than 8000px*8000px	
School bank account details: • Account holder name • Account number • Sort code • Country • Currency	