


Checklist for setting up card payments

To collect	
<p>Make sure you have these permissions:</p> <ul style="list-style-type: none"> • 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. <p>If you don't have permission, ask a member of your team to add it for you .</p>	
<p>Have these School details to hand:</p> <ul style="list-style-type: none"> • School name • URN (find this in School > School Details) • School telephone number • School Address 	
<p>Proof of school name and address. We recommend using one of these documents:</p> <ul style="list-style-type: none"> • (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 	
<p>School director details:</p> <ul style="list-style-type: none"> • Job title • Legal first and last names • Date of birth • Email address • Postal address 	

<p>School representative details:</p> <ul style="list-style-type: none">● Job title● Legal first and last names● Date of birth● Email address● Telephone number● Postal address	
<p>School representative Photo ID.</p> <p>Make sure that:</p> <ul style="list-style-type: none">● 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 sta member's Arbor profile <p>Accepted documents:</p> <ul style="list-style-type: none">● Passport (preferred)● Driver's license● Other government-issued ID (both the front and back) <p>Requirements:</p> <ul style="list-style-type: none">● Both the front and back of the ID● A colour image, rotated with the image right-side-up● Clear picture with no light bouncing on the ID● JPG or PNG format● Less than 5MB in size● Image smaller than 8000px*8000px	
<p>School bank account details:</p> <ul style="list-style-type: none">● Account holder name● Account number● Sort code● Country● Currency	