



PTBoard makes it easier!

How to Enter Cash or Checks from In-Person Events or Online Purchases

You can enter cash or checks from:

- In-person events
- Online purchases placed with the "Place Order by Check or Cash" button

In-person Events or Paper Forms

You can use the "Place Order for Others" feature to enter orders that have been placed in-person or by paper form.

In order to do that:

- (1) Click on "Forms & Payments."
- (2) Click "Manage Form."
- (3) Click "Place Order for Others."
- (4) You will see this screen:

Manage Form & Payment

Place order for other user

Input User (Parent or Purchaser) Email

Next

(5) Enter the Email Address of the purchaser and click "Next."


NOTE: In order to be on the PTBoard site, Parents/Guardians, Faculty/Staff etc. need to provide a First Name, Last Name and Email Address. However, if you want to keep track of all of your financial transactions and the purchaser does not have an email, you can use a common school email like your PTA or PTO Email Address. If you choose to do that, be sure to put notes in the "Admin Notes" section to record who purchased the item.

(6) You will see a list of all of your Forms that are open and in draft. Click on the Form you want and fill it out like this example:

[Manage Form & Payment](#)

Headbands

Will be closed on 11/21/2024Manage this form



**SALES &
DONATIONS**

Headband

Price: \$10.00

Quantity *

[Manage this item](#)

Wildcats Headbands *

Red - XL (20 left)▼

[Add to Cart](#)

[Add an item](#)

(7) Click "Add to Cart" and you will be taken to this screen, the "User's Shopping Cart."


(8) Fill in the information, including the payment amount, if the purchaser received a discount and whether you received cash or check. It's a good idea to also add notes in the "Admin Notes" section, so there is additional information on the transaction.

(9) Remember to click "Place Order!"

User's Shopping Cart

You are placing order(s) for Andrea Maneval, PTBoard account: andrea.maneval@ptboard.com .

Below is Andrea Maneval's (PTBoard account: andrea.maneval@ptboard.com) shopping cart. **To add more items, click on the above form link.**

	Headband <ul style="list-style-type: none">Quantity: 1The item is for: Andrea ManevalWildcats Headbands: Red - Large	Item Unit Price: \$10.00 Item Total Amount: \$10.00	Delete
---	---	--	------------------------

Total Amount Due: \$10.00

You are placing order for Andrea Maneval, PTBoard account: andrea.maneval@ptboard.com .

Payment Amount Checking # (Optional, help you track the payment)

Payment amount must be the same as Amount Due (\$10.00). [Click Here](#) to apply discounts to change the Amount Due value.

Admin's Notes

Place Order