School Cash Catalog

How to Manage Items

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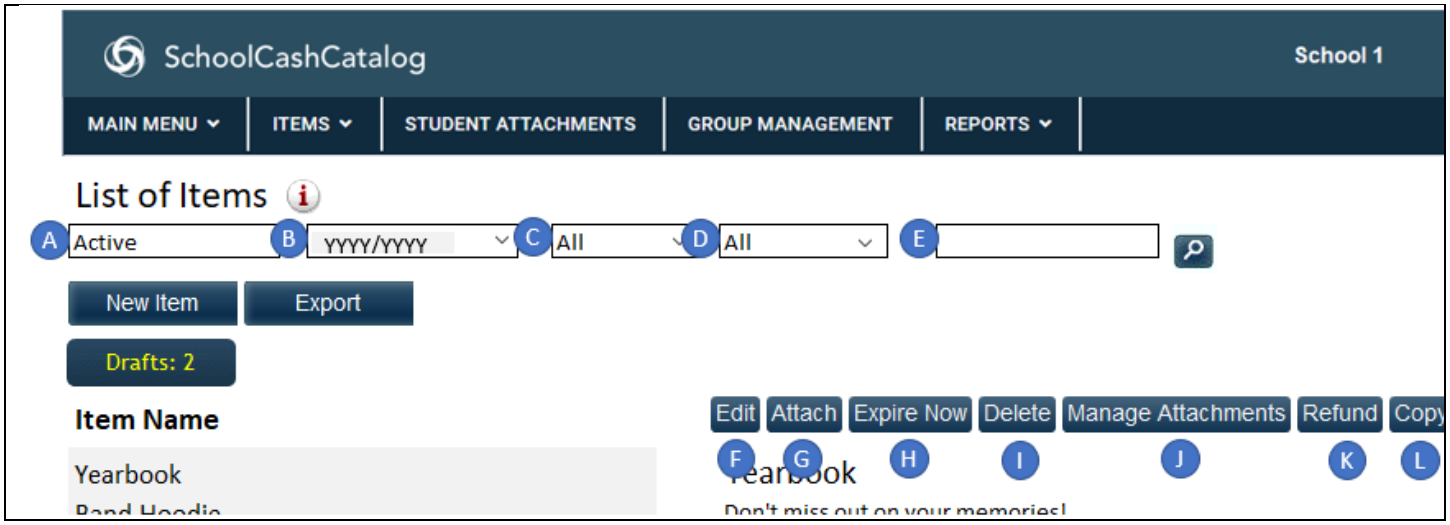
School Cash Catalog offers several methods to manage existing items. The ability to manage items will depend on:

- If the item has been attached to students
- If the item has been purchased

Note: Once saved, any edits will be reflected in both School Cash Online and School Cash Register.

A. Item Management Features

From **My School Store** group > **School Cash Catalog**. System will default to the List of Items window.



School Cash Catalog List of Items - Display.

Features

A. **Status** Filter: Defaults to **Active**. Displays a list of active items. Status filter options include: *All, Active, Expired, Deleted, Not Attached, Do Not Include Categories, Draft.*

B. **School Year** Filter: Defaults to **Current School Year**. Filter will display a list of previous school years that have School Cash Catalog Items.

C. **Available to** Filter: Defaults to **All**. Filter will also display *Only Public* and *Exclude Public*.

D. **Quantity Available** Filter: Defaults to **All**. Filter will also display *Low Stock* and *Sold Out*.
Note: This option will only apply to items that have been created to include a Quantity Available *other than the default of Unlimited*.

E. **Search** Field: Allows user to search for a specific item.
Note: Partial name searches can be used here.

F. Edit Button: Opens selected item in edit mode. *Some conditions will apply to the ability to edit the selected item.

G. Attach Button: Allows the user to Attach students to the selected item.
See School Cash Catalog **How to Attach Student to Items**

H. Expire Now Button: Allows the End Date of the selected item to be changed to Expired.
*Some conditions will apply.

I. Delete Button: Allows the user to delete the selected item. *Some conditions will apply.

J. Manage Attachments Button: Allows the user to manage the student attachment for the selected item.

K. Refund Button: Allows the user to issue a refund for the selected item. See School Cash Catalog **How to Process A Refund**

L. Copy Button: Allows the user to copy the selected item (same year or previous). All features, of the Item are copied using this option.
Note: Name of the item must be edited and required students attached.

B. Edit an Item That Has Not Been Purchased

Perfect when item information needs to be edited!

This is the most common type of item management. Any item that has not been attached to students and/or purchased is totally open to all edits. Any edits will be reflected in the item display in both School Cash Online and School Cash Register.

Most Common Type of Edits for an Item Not Purchased

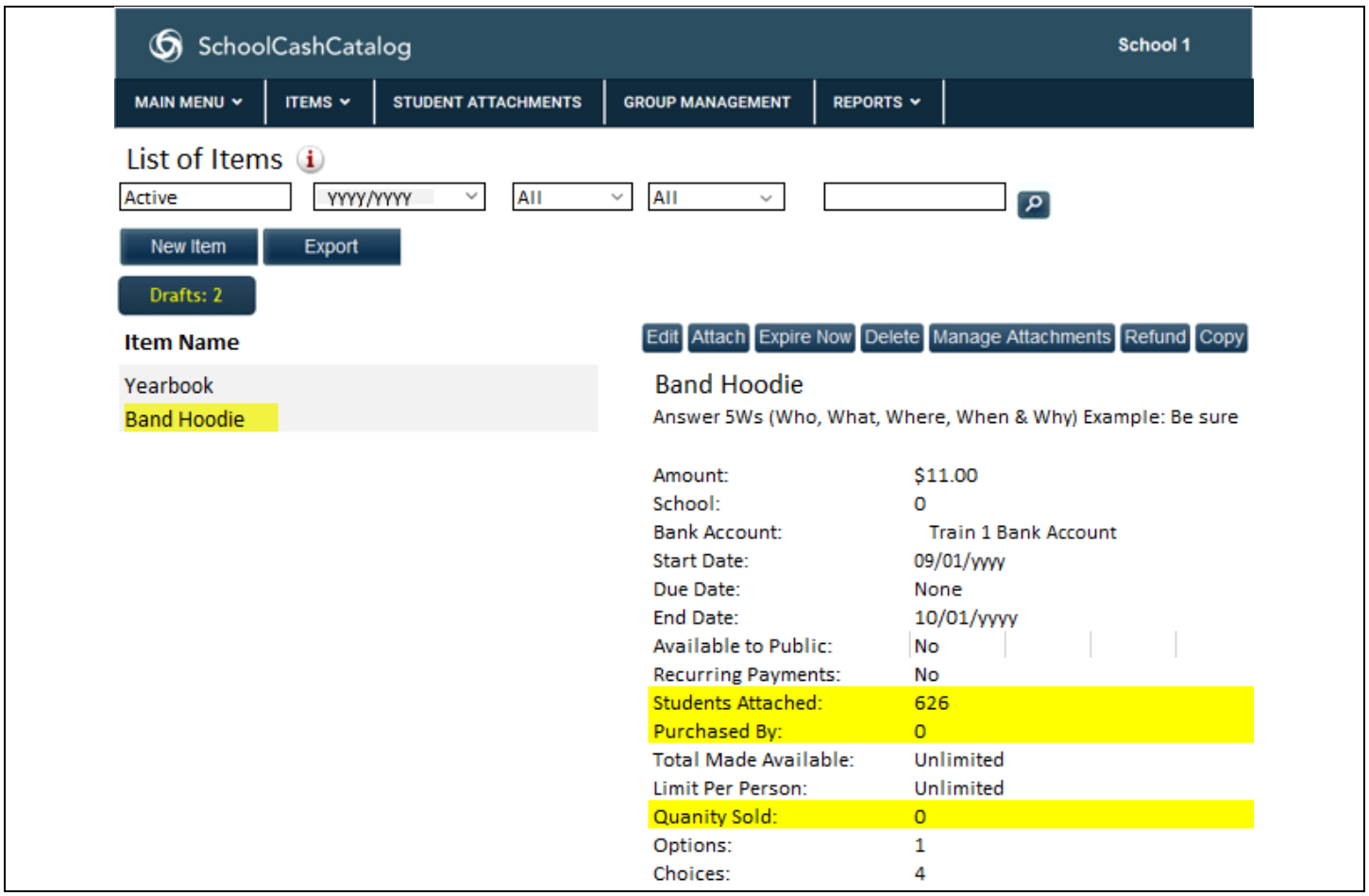
- Corrections to the item name or description
- Changes in Start and/or End Dates
- Changes in Category / Account information (Selected Category Name / Account Name and/or Price)
- Changes in Option and Choice information

How to Edit an Item Not Purchased

1. From **My School Store** group > **School Cash Catalog** > **List of Items**
2. Select *Item to edit*
3. Click **Edit** button

Fields Available for Edits for an Item Not Purchased

1. **All Fields** and **Toggles** are available for edits
2. Additions and Deletions can be made to **Categories, Options, Choices, etc.**
3. Changes can be made to the visibility if it was decided the item would be made available to the **Public** or to a specific target audience as **Unlisted**



School Cash Catalog List of Items - Display.

4. Complete Required Edits

Follow the same steps as if the user were creating a new item:

5. **PREVIEW** changes
6. **SAVE** changes

C. Edit a Purchased Item

Once an item has been purchased either using School Cash Online or School Cash Register, the ability to edit the item becomes limited. Only active item fields can be edited. Any fields that cannot be edited, will either appear in grey text.

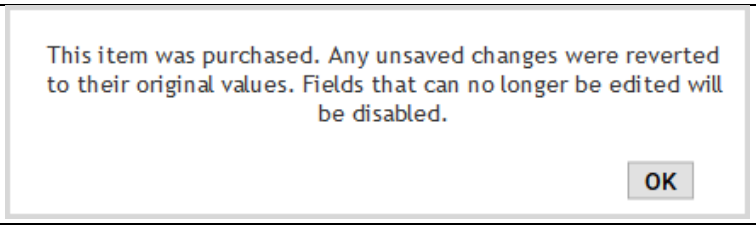
Most Common Type of Edits for a Purchased Item

- Item Description
- Item Start, Due and End Date
- Item Start and End Time
- Item Reminder Date
- Change Item to a Public Item

Once edits have been completed and the item is saved, all edits will appear in both School Cash Online and School Cash Register

How to Edit a Purchased Item

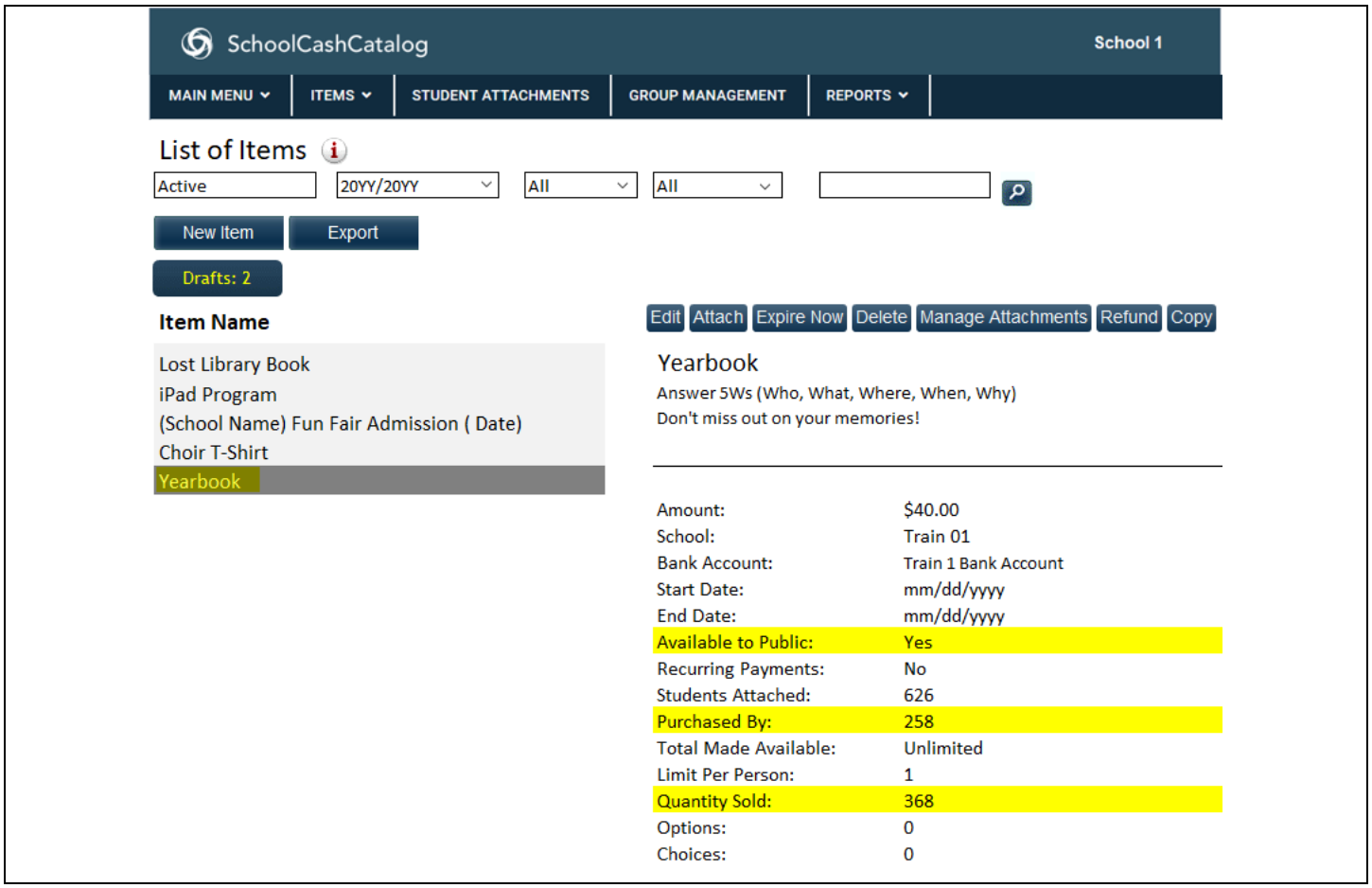
1. From **My School Store** group > **School Cash Catalog** > **List of Items**
2. Select *Item to edit*
3. Click **Edit** button



Warning Message indicating the Item was Previously Purchased.

Fields Not Available for Edits for a Purchased Item

- Change School
- Add a Picture
- Changes to Financials Section Category / Account Name(s)
- Change Amount of Item
- Change Limit Per Student
- Change Limit Quantity
- Extras Section:
  - Options & Choices
    - Unable to add Options and/or Choices
    - Unable to change category /account in this section
    - Unable to change Choices Minimum and/or Maximum
  - Changes to Permission Form Information
  - Changes to Scheduled Payments



School Cash Catalog List of Items - Display.

4. Complete **Required Edits**

Follow the same steps as if the user were creating a new item:

5. **PREVIEW** changes
6. **SAVE** changes

D. Expire an Item

Perfect for an item that should no longer be displayed in either School Cash Catalog or School Cash Register!

The "expire" feature is available for use for items that may or may not have been purchased. Optional and Recommended Items can expire automatically. For Example: The optional Yearbook item has reached its end date and will be moved to the status of expired. In addition, items can be expired manually. For Example: A Ski Trip has to be cancelled because of poor snow conditions.

When an item is marked "expired":

- Item End Date automatically edits to reflect "yesterday's" date
- Is no longer displayed in School Cash Catalog
- Displays in "greyed out" text School Cash Register
- Items that have been attached as "required" when the item was originally created, will now display as "overdue" in School Cash Online
- Will no longer display in the School Cash Catalog, View Items active list
- Any expired items, that have had some purchases will still report in School Cash Catalog

It is not necessary to expire an item that has no student attachment.

Note: Items that have passed their end date are automatically “expired”. After the end date an optional or recommended item will no longer display in School Cash Online or School Cash Register. After the end date of a required item, it will display as “Overdue” in School Cash Online and will remain in School Cash Register checkout as an outstanding item.

Step 1: Create Item

School Will default to User's school
District Users will see school they are viewing on main menu, but can change school within School Cash Catalog for one item entry

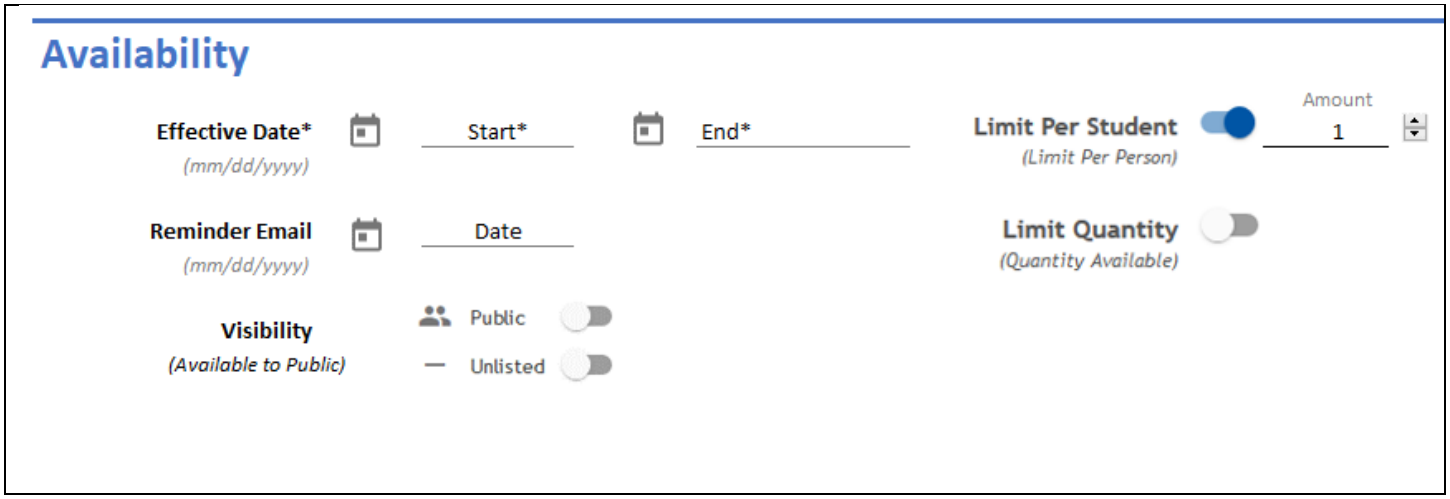
School Year * Defaults to current school year
Once the next year is created it will be available in the drop-down

Bank Account * Defaults to current bank account.
Should user have access to more than one bank account, a different bank account can be selected, by clicking required account from drop-down

Accounts/Categories * Select **Account/Category Name** from drop-down
Account/Category Number will auto populate
Category/GL Department may be required
Event Code/GL Name may be required
Enter **Amount** (cost of item)

NOTE: Categories can be split by selecting a second (third, etc.). Select the Add Account/Category button (plus sign)

A. Availability



Effective Date * Date range of items could span entire school year, i.e. an Agenda, or for a short duration, i.e. Field Trip
Start Date is date item will be available for payment (visible for purchase in School Cash Online and listed in School Cash Register)
NOTE: Item Created today, New Item email notification will be sent following business day.
Item Created with a future date, New Item email notification will be sent that day if a business date, or the first following business date.
End Date is date (as of 11:59 pm ET that date) item will no longer display in School Cash Online
NOTE: Dates may be entered in mm/dd/yyyy format, or by selecting a date on calendar

Reminder Email Defaults to No Reminder

Reminder is desired: Reminder Email notification will be sent to any registered individuals, who have not purchased item online, as of reminder date.

NOTE: Date may be entered in mm/dd/yyyy format, or by selecting a date on calendar

Limit Per Student Toggle — Defaults to Limit Per Person of 1

Number limit of purchases per person can be changed. Sliding the toggle to the left will change the limit per student to unlimited.

Tip: Checking Unlimited will cause the selected item to continuously display on School Cash Online and allow for repeated purchase.

If Limit Per Student is set to "Unlimited", item cannot be attached as required

Limit Quantity Toggle — Defaults to Unlimited quantity available to purchase

Slide the toggle to the right to enter the number available to purchase.

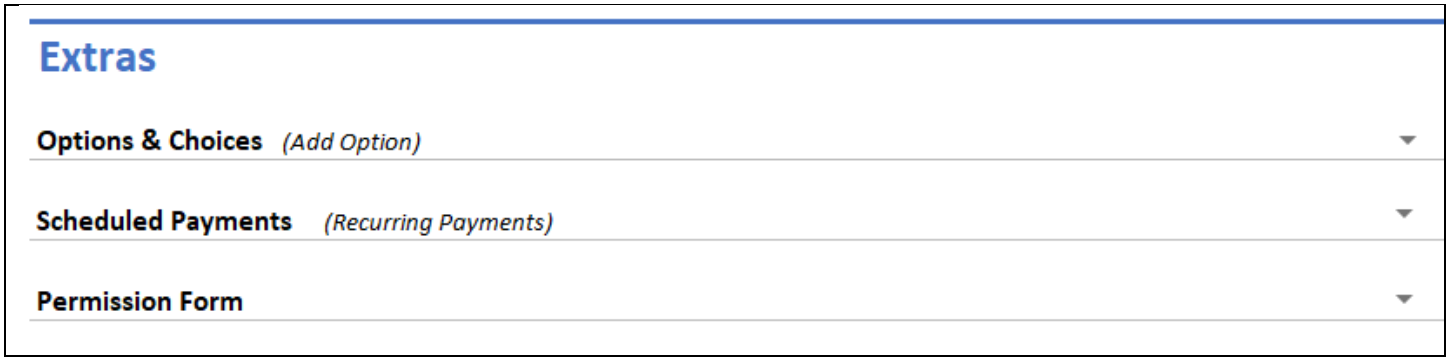
Visibility – Public Toggle — Default is not Activated

Items to be extended to public for purchase by activating the Public toggle - Public purchaser does not have to have a child attending the school

Visibility – Unlisted Toggle — Default is not Activated

When activated, will create a 'private' item that can only be accessed by using a unique URL

B. Extras



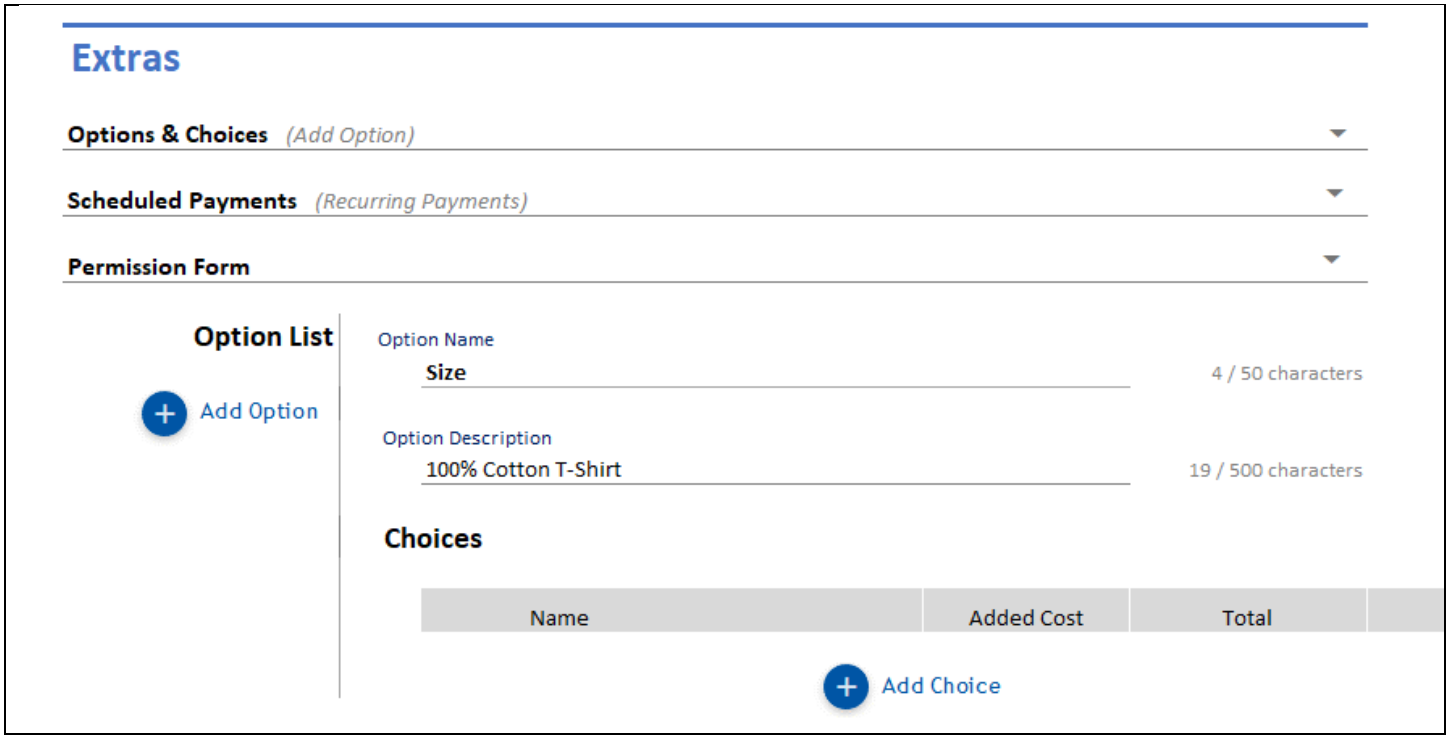
Options & Choices — This feature is used to add item options, i.e. T-shirt has size options & choices

Scheduled Payments — Allows for payment breakdown for large ticket items

Permission Form — Includes a limited Permission Form, when item is viewed in School Cash Online

Permission Forms Report will indicate the relationship to the child

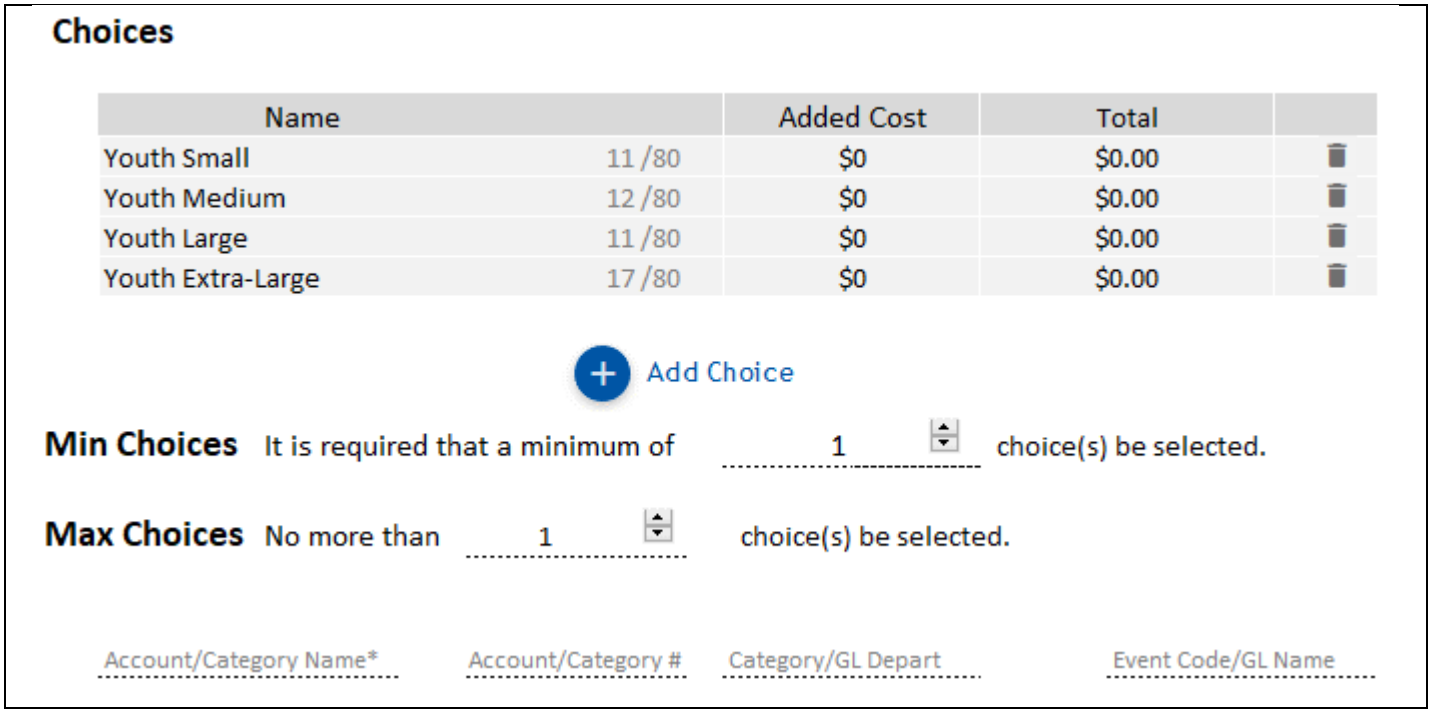
i. Options



Option Name Enter the Option Name that will require a choice to be made
Option Description Enter the Description of the Option (optional)

Note: Additional Options can be added once Choices have been entered for the first Option

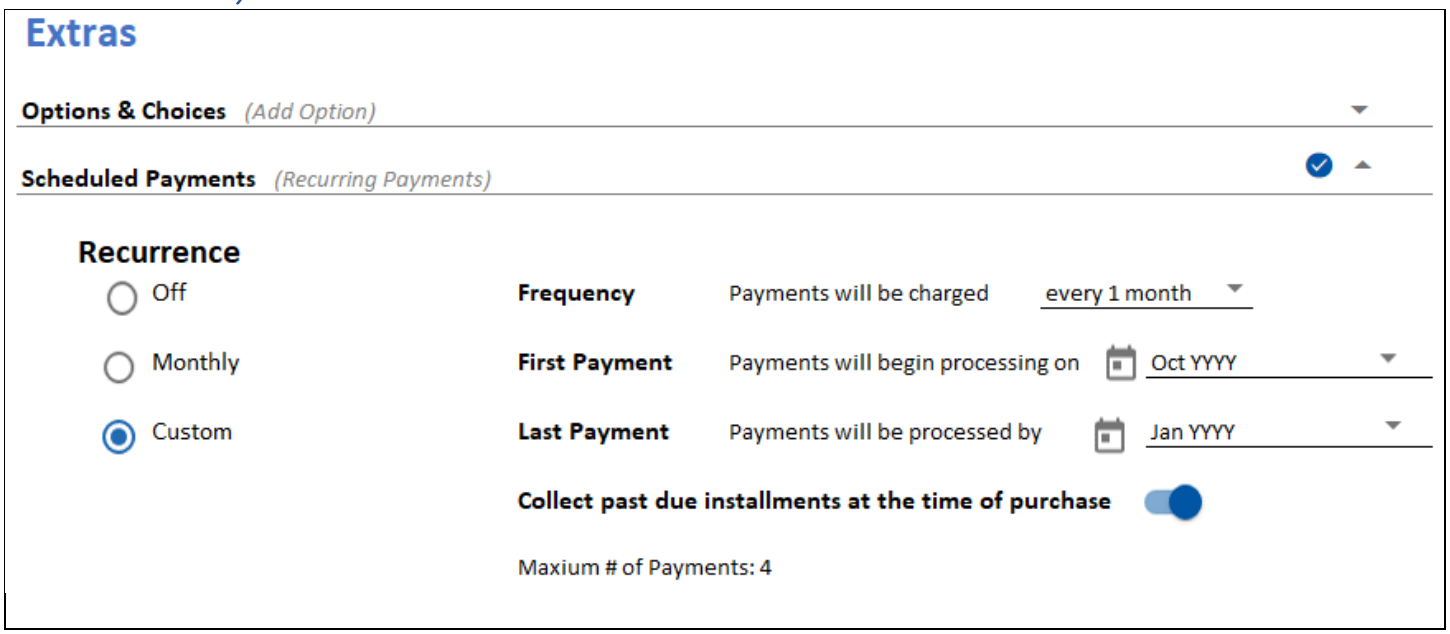
ii. Choices



Choice Name	Enter the Choice Name as it pertains to the Option above. For example, size of the T-Shirt
Added Cost	Add a cost (if applicable) from the base cost recorded under the Financials.
Min and Max Choices	Defaults that the purchaser must select a minimum of 1 choice and a maximum of 1 choice.
Account/Category Name*	Enter the appropriate account/category information. (Mandatory field even if no additional cost will be applied)

For information on Options & Choices, please refer to How to Create an Item with Options and Choices documentation.

iii. Scheduled Payments



Recurrence Defaults to **Off**

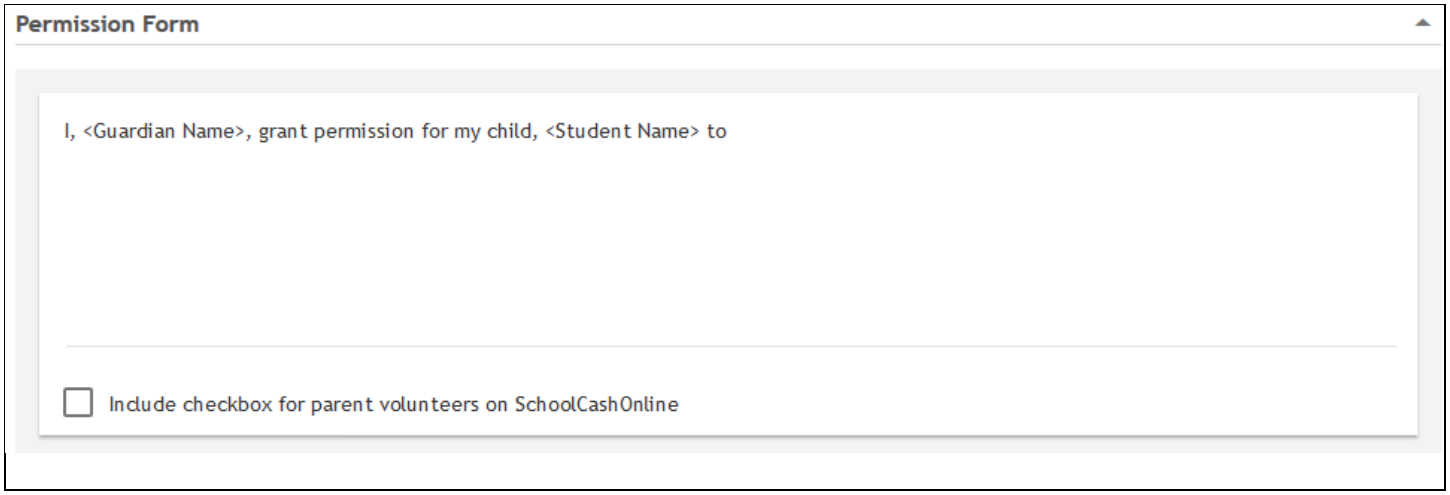
Monthly – payments will be withdrawn on a monthly basis
(Max payment 1 to 24 payments)
Custom

Frequency; Twice a Month, every 1 months up to 6 months
First Payment; indicate the first month that the payment will start
Last Payment; indicate the last month that the payment must be made
Collect past due installments at the time of purchase

Default not activated. When activated, if the initial payment (first month) was missed, the purchaser can make back-payments.

For information on Scheduled Payments, please refer to How to Create an Item with Scheduled Payments documentation.

iv. Permission Form

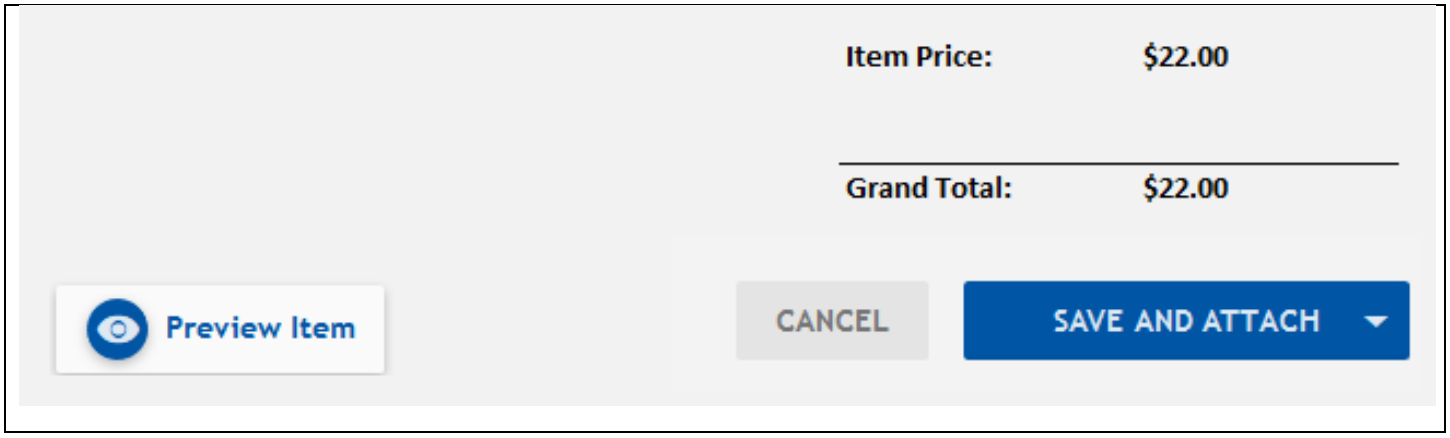


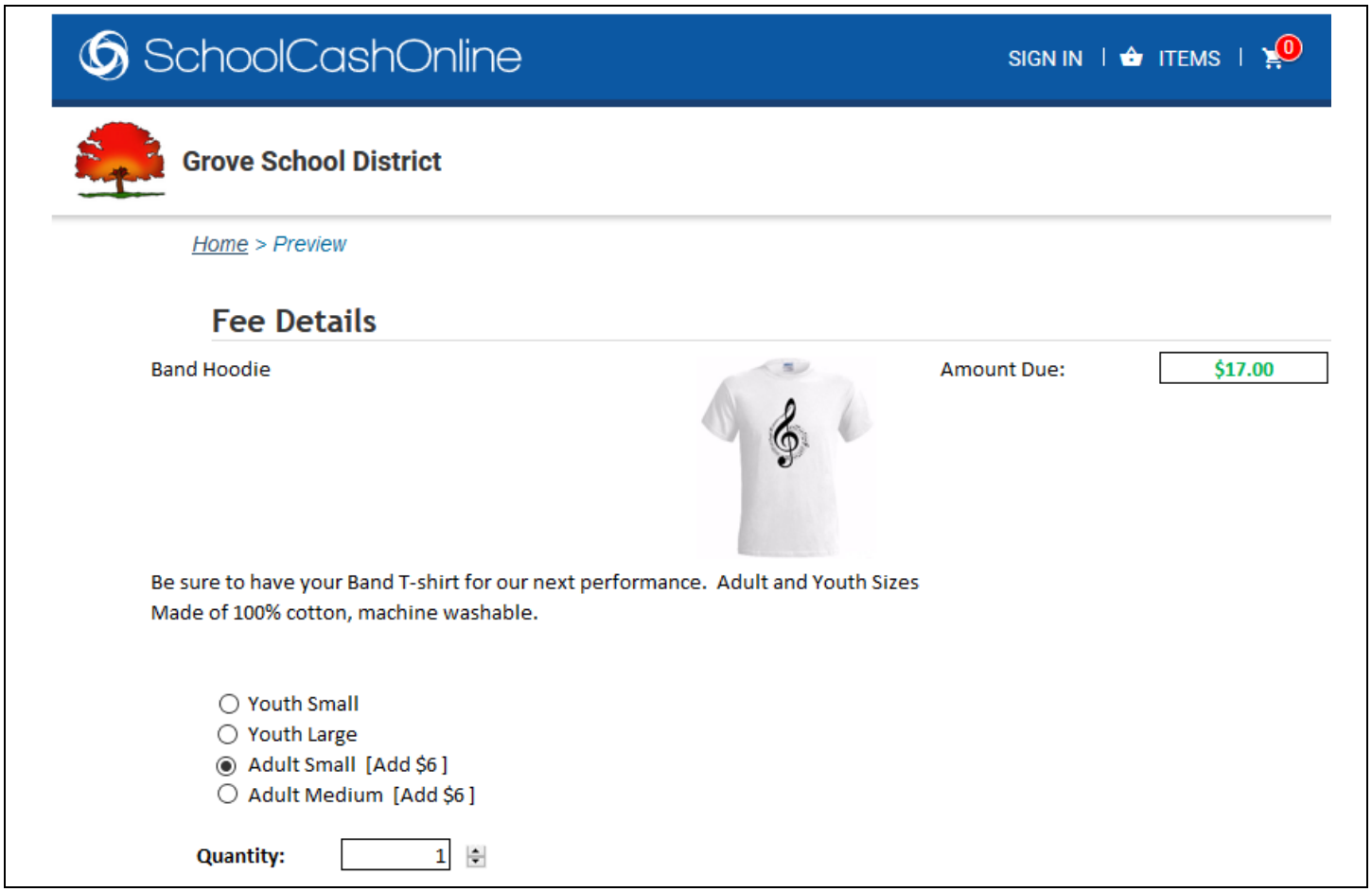
Permission Form	Include instructions on the trip information, legal information, etc.
Volunteer Option	Checkbox for purchaser to volunteer to be part of the trip.

For information on Permission Form, please refer to How to Create an Item a Permission Form documentation.

Step 2: Preview Item

View the item in School Cash Online before saving and attaching students - highly recommended.





A new window will open displaying a preview of the item on School Cash Online. Make any changes to your item before moving to Step 4.

Step 3: Save and Attach

Save Options

Save and Attach	Saves item and takes user to Student Attachment window
Save and Create New	Saves item and opens a blank Create a New Item window
Save and Copy	Saves item, copies it and opens the copy in a new window
Save	Saves item
Cancel	Select Cancel to cancel all recent entries Confirm? will appear, User must confirm cancellation

Student Attachment

Attach Item As:

a. Optional gives the guardian the option to purchase the item. Once the item expires, the guardian will not see this item online to purchase, for example, a yearbook.
b. Select Optional to have the opportunity of selecting "Recommend the item on School Cash Online", which gives the guardian the option to purchase the item. Once the item expires, the guardian will not see this item online to purchase, for example, a field trip.
c. Required will indicate to the guardian that are required to be purchased. Once the item expires, the guardian will see this item online as Overdue, for example, a registration fee.

Attach Item To:

All Students / Grade / Course / Homeroom / Group/ Individual

View Selected Students (List of students based on the 'Attach Item' selection)

Attach Students (Will attach the students based on the 'Attach Item' selection)

For information on student attachments, please refer to How to Attach Students to Items documentation.