School Cash – Teacher's QuickStart Guide

Welcome to School Cash!

This QuickStart guide covers everything you need to know to get started creating, managing, and collecting payments for Items in the *School Cash Online* store. Want to create a new Item or view students with outstanding balances? Check out the *Catalog* guide for an intro to Item management. Getting started with in-person payments for your School Store items? View our *Collections* guide where we'll walk you through the process, start to finish.

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Catalog

Easily create and manage Items for sale in the *School Cash Online* store. Below, find helpful information about the three main areas of this application: **My Items**, **Create Item**, and **Reports**.

My Items

View details of current and past school store Items from the *My Items* page. Page contents include an Item List (left), Item Information panel (middle), and Item History panel (right).

❖ Locate an Item by scanning your Item list or by using any of the following search, filter, and sort options:

- **Filter by Item Status** – Tap payment statuses to hide/show Items matching your selections. The **blue** highlight indicates that a status is currently selected.

- **Search by Name** – Type a portion of the Item's name into the **Search Item** field to see a list of matching Items.

- **Filter by School Year** – Search for prior-year Items by changing the **School Year** from its default (current year).
- **Filter by Source** – Filter your Item list by **Source** to view Items created by you and/or Items shared with you by your office administrator.
- **Available Sort Options** – Date Created, Item Name, Created By, Start Date, and End Date.

❖ Select an item from your Item list to view basic Item information.

- If desired, choose from the available options presented at the bottom of the Item Information panel. Depending on the Item's current status, your options will include:

VIEW – Available for ALL Items

DELETE – Available for DRAFT-items only

COPY – Available for ALL Items

EDIT – Available for DRAFT-items only

Create Item

Create a new Item for your School Store in four simple steps. After completing the four-step process, submit the Item to your office administrator for review and approval.

❖   Step 1: Enter Item Information and Availability

Item Information

- **Item Name** – Required, 150-character max
- **Description** – 4,000-character max
- **Image** – PNG and JPEG files only; max file size: 2MB
- **Suggested Price**

Availability

- **From Date** – Required
- **Due Date**
- **To Date** – Required
- **Parent email reminder**
- **Quantity available**
- **Limit per Person**

Options (if applicable)

 ADD OPTION

> **Option Name** – Required, 50-character max

> **Description** – 500-character max

> **Choices** – Required, add one or more choices

+ Choice name(s)
+ Pricing – Enter added costs associated with choice(s)
+ Choice Settings – Enter min and max choice selections

Permission Form (if applicable)

 ADD PERMISSION FORM

> Describe permission being granted

> Parent Volunteers option

Preview Item
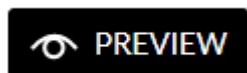
> View Item as it will appear in School Cash Online

❖   Step 2:   Recommend Attachment-type and Student-attachments

Attach to Students

For students, purchasing this item should be:

🔘 Optional   ⚪ Required   ✕ Clear Selection

☐ Recommend this item

Choose students at your school to make this available to:

⚪ All Students   ⚪ Grade   ⚪ Course   ⚪ Homeroom   ⚪ Group

<u>Attachment-type</u>

- **Optional** – Student attachments removed automatically on Item expiration date
  > Recommend Item on School Cash Online (optional)
- **Required** – Student attachments remain until paid, even after Item expires

<u>Student-attachments</u>

- **All Students**
- **By Grade**
- **By Course**
- **By Homeroom**
- **By Group**

❖   Step 3:   Enter notes for office administrator

Notes

Comments for your school's administrators:

Description

Requesting to make this item available to the public via SchoolCash Online.

75/300

❖ Step 4: Summary

  - Review Item details
  - Submit and confirm – Submit Item for Approval
  - **CAUTION:** Discarding your Item will permanently delete the Item draft

Reports

Need to know which students have paid and which have not? Run our Activity report to see the Item's full payment history and balances outstanding. Want to review order-choices? We have a report for that, too – our Option Report. Read below to learn about payment and student filtering-options that will help you find exactly what you're looking for!

Follow in-app instructions to get the most out of you reports:

🔵 Customize reports using these steps

1. Select the desired **Report Type**
2. Select one or multiple items from your item list
3. Apply additional payment-status, student or date filters, if desired
4. **Generate PDF** report or **Export** results to CSV

❖ Step 1. Select the desired Report Type

Reports
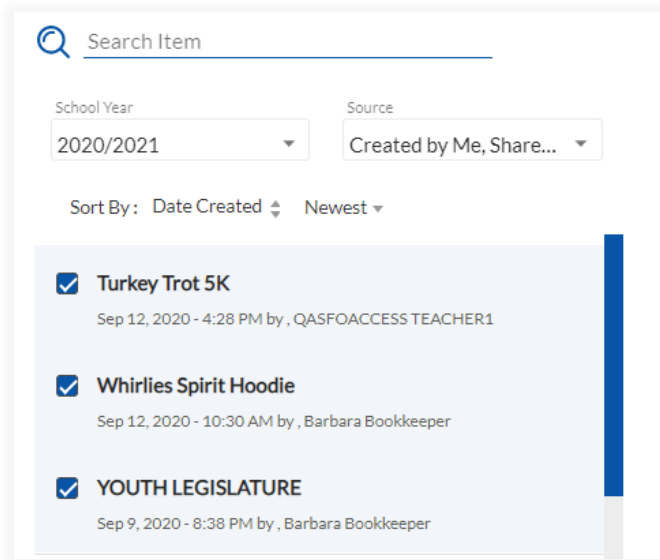
Type	Payment Status	Date Range
ACTIVITY REPORT ▾	Fully Paid ▾	📅 From 📅 To

  - **Activity Report** – Shows payment and permission form data
  - **Option Report** – Shows option/choice data
  - **Custom Form Report** – Shows custom form data

❖ Step 2. Select one or multiple items from your item list

Select <u>1 or more</u> Items when running the **Activity** Report or **Option** Report.

Select <u>a single</u> Item when running the **Custom Form** Report

❖ Step 3. Apply additional payment-status, student, or date filters, if desired

<u>Payment Filters</u>

- **Payment Status** – (ie. Fully Paid, Outstanding, Refunded)
- **Payment Date**

<u>Student Filters</u>

- **Homeroom**
- **Group**
- **Course**
- **Grade**

❖ Step 4. **Generate PDF** report or **export to CSV**.

Collections

Whether you're collecting cash and check payments in the classroom, the athletic field or anywhere in-between, our Collections module allows you to quickly record student payments, print or email student receipts, and auto-submit deposit reports. Follow along with our step-by-step instructions for completing your most common collecting activities.
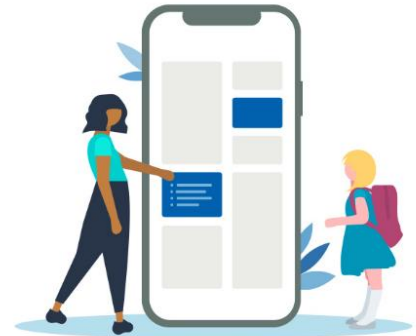
Homepage

The Collections homepage allows quick access to all of your most common collecting activities:

- - Start a new Collection – Select *Collect by Item* or *Collect by Student* links
- - Resume unfinished work – Follow links for unfinished items in the 'Things to Do' list.
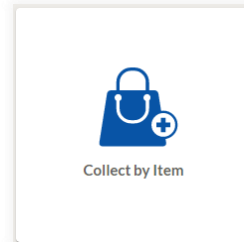- - View completed work – View your most recent Collections and Deposits

> Click the **COLLECTIONS** link in your side menu to return to this page at any time.

Collect by Item

This collection method works best when collecting for a *single Item* from multiple students.

Follow these steps to *Collect by Item*:

1. Select the Item you wish to collect:

Name	Due Date	Status	Cost	
YOUTH LEGISLATURE	Oct 03 2020		$120.00	›
Junior Class Fee	May 30 2021	Required	$40.00	›
Parking Pass	May 30 2021		$15.00	›
Senior Class Fee	May 30 2021	Required	$20.00	›
Whirlies Spirit Hoodie	Jun 04 2021		$30.00	›

2. Filter student list (optional):
    a. By name
    b. By Grade, Group, or Homeroom

3. Select student

Senior Class Fee

$20.00   Due: May 30 2021

Smit

Name	Date of Birth	Grade	
SMITH, KAITLYN	Jan 01 2004	Grade 12	⌄
SMITH, SOPHIE	Jan 01 2004	Grade 12	⌄
SMITH, JAMES	Jan 01 2002	Grade 12	⌄

4. Choose payment method.

   a. If payment contains a check, enter check # and Name on Check (optional).

5. Add/confirm email address(es) to receive electronic copy of payment receipt.

6. Click 'Record Payment' to post payment.

Senior Class Fee

$20.00   Due: May 30 2021

🔍   ROBERT _____   🔍   ≡

Name	Date of Birth	Grade	
ROBERTS, CHRISTAN	Jan 01 2004	Grade 12	⌃

Qty : 1

Payment Method

◉ Cash   ◯ Cheque   ◯ Combo

Amount

$ 20.00

Email receipts to:

| lucymarion@kevmail.com | ✎ | 🗑 |

⊕ ADD EMAIL

CANCEL   RECORD PAYMENT

7. Continue recording payments for the selected Item.

8. Once done collecting, click 'Add (x) to Deposit' to complete the Collection.

9. Print payment receipts.

10. Click 'Collect more'' to start a new Collect-by-Item Collection or 'Home' to return to the homepage.

Collect by Student

This method of collection works best when collecting for *multiple Items* from a single student.
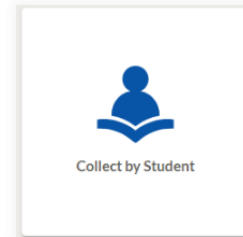
Collect by Student

Follow these steps to *Collect by Student*:

1. Search for and select desired student

Collect by Student

Search: Smith

Name	Date of Birth	Grade	
SMITH, BRAYDEN	Jan 01 2004	Grade 10	❯
SMITH, BRAYLAA	Jan 01 2004	Grade 9	❯

2. Select one or more item checkboxes. (Item records will expand upon selection if Qty is variable or Item options are present).

SMITH, JAMES

Grade 12   Jan 01 2002

2 selected   Total: $35.00

Search: Item's name

	Name	Due Date	Status	Cost	
☐	YOUTH LEGISLATURE	Oct 03 2020		$120.00	
☑	Parking Pass	May 30 2021		$15.00	
☑	Senior Class Fee	May 30 2021	Required	$20.00	
☐	Whirlies Spirit Hoodie	Jun 04 2021		$30.00	☰

COLLECT $35.00

3. Click 'Collect $X.XX' button when Item selections are complete.

4. From the Collect by Student checkout page,

   a. Review Item selections and checkout Total, making edits if necessary.

   b. Select Payment method. (Enter check # and Name on Check if collecting check payment)

SMITH, JAMES

Grade 12   Jan 01 2002

2 selected   Total: $35.00

Name	Selected Qty.	Status	Cost	
Parking Pass	1		$15.00	🗑
Senior Class Fee	1	Required	$20.00	🗑

Payment Method

◉ Cash   ◯ Cheque   ◯ Combo

Amount

$ 35.00

Email receipts to:

guardian@kevmail.com   ✎ 🗑

➕ ADD EMAIL

[DISCARD]   [POST PAYMENT]

5. Add/confirm email address(es) to receive electronic copy of payment receipt.

6. Click 'Post Payment' to complete the Collection.

7. Print payment receipt (optional).

8. Click 'Collect more' to start a new Collect-by-Student Collection or 'Home' to return to the homepage.

Make a Deposit

When ready to deliver collected funds to the school office, access the *Make a Deposit* page by clicking the side menu link or by clicking the 'X Collections Ready to Deposit' link under the homepage's 'Things to Do' list.

Follow these 6 steps to *Make a Deposit*:

1. Select one or more Collections to be deposited.

2. Review/validate 'Total Cash' and 'Total Check' amounts.

3. Enter 'Note to Office' (optional)

4. Click 'Deposit $X.XX' to submit deposit records to the school office.

5. Print Deposit Summary report, if desired. An electronic copy will be shared with your office administrator.

6. Deliver funds to your school office.

Make a Deposit

Deposit: D61   Deposit Date: Sep 12 2020

☑	Collection	Student/Item	Completed	Amount
☑	C7	ACKLIN, SARAH	Sep 12 2020	$30.00
☑	C8	ROCK, TYLER	Sep 12 2020	$15.00

Total Cash: $15.00
Total Check: $30.00   Total: $45.00

Note to Office
On my way!

DEPOSIT $45.00

My Collections

The following activities can be completed from the *My Collections* page:

❖ Resume an unfinished Collect-By-Item Collection

- Select a Collection under the 'Unfinished Collections' heading to open the Collection and resume your work.

❖ Review Collections completed within the past week or within the past 30 days.

- Search for Collections by:
    > Collection # ('C22'),
    > Student Name ('Smit')
    > Item Name ('Yearbo')
    > Amount ('48')

My Collections

🕐 **Unfinished**

Collection	Student/Item	Started	Amount	
C6	Senior Class Fee	Sep 12 2020	$20.00	❯

🔍 _____

This Week   Last 30 days

Collection	Student/Item	Completed	Amount	
C8	ROCK, TYLER	Sep 12 2020	$15.00	❯
C7	ACKLIN, SARAH	Sep 12 2020	$30.00	❯
C5	SMITH, JAMES	Sep 12 2020	$35.00	❯

❖ Print, email, or cancel individual student payment receipts

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← **My Collections**

C5
SMITH, JAMES   Jan 01 2002
Receipt#: 251   Total: $35.00

Item	Price	Qty	Cost
Parking Pass	$15.00	1	$15.00
Senior Class Fee	$20.00	1	$20.00

🗑 ✉ 🖶   Total: $35.00
                                                                 Cash: $35.00

Once the student payment is located,

🖶   Print a copy of the student payment receipt

✉   Email a copy of the student payment receipt

🗑   Cancel student payment (for eligible payment receipts only)

  +   **CAUTION:** Once confirmed, this action cannot be undone.

  +   A cancellation receipt may be printed and will be emailed to any
       recipients of the original payment receipt

My Deposits

The following activities can be a completed from the *My Deposits* page:

❖ Review Deposits submitted with the past week or within the past 30 days.

> Search for Deposits by:

- Deposit # ('D54')

- Date ('Sep 12')

- Amount ('105')

❖ Print Deposit Summary report for the selected Deposit

❖ View or inspect Collections within the selected Deposit

My Deposits

🔍 Deposit

This Week   Last 30 days

Deposit	Status	Date	Amount	
D61	🕐 Pending	Sep 12 2020	$45.00	🔽
D60	⊙ Returned	Sep 12 2020	$275.00	🔼

Office note:
Funds turned in contained an extra $15 in cash.

2 collection(s)			Cash: $55.00 Check: $220.00	
C4 Senior Class Fee		Sep 12 2020	$240.00	❯
C5 SMITH, JAMES		Sep 12 2020	$35.00	❯

🖶

Helpful Tips

❖ When printing documents from the Collections module (such as payment receipts and deposit reports), a pop-up blocker may prevent the report window from appearing.

  If this happens, look for a 'Pop-up blocked' (or similar) notification in the upper-right hand corner of your browser window.

  Click on the notification to change pop-up settings for your Collections application to 'Always allow pop-ups and redirects from **https:// {Your School Cash URL here}**'
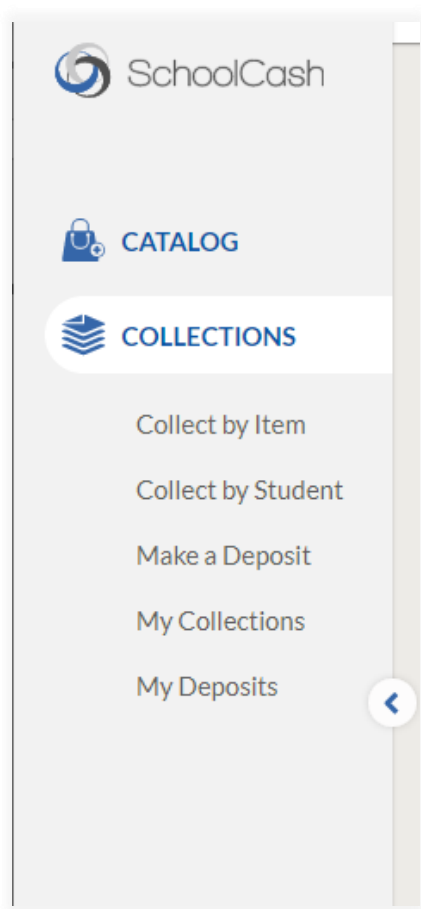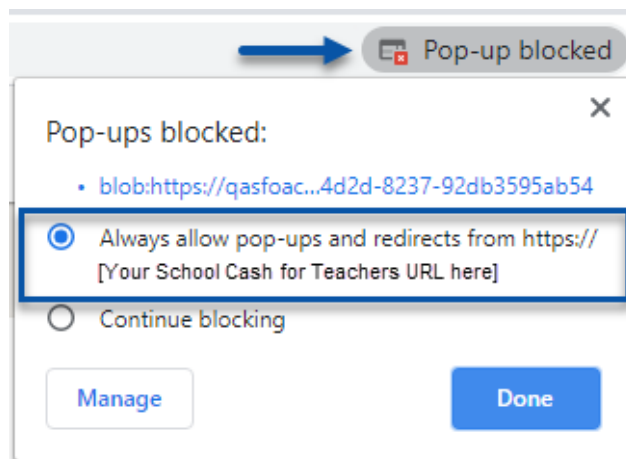
❖ Your *School Cash* side-menu has two positions: collapsed and expanded.

  When collapsed, hover your mouse over the side-menu tray to expand the menu temporarily.

  If you wish to lock the menu in its expanded position, click the right-pointing arrow icon