School Cash Catalog

How to Manage Items

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How to Manage Items

School Cash Catalog offers several methods to manage existing items. The ability to manage items will alter depending 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.

1. Item Management Features

Items must be created in the School Cash Catalog!

School Cash Catalog View items– Display

Features:

A.	**Status Filter:**	Defaults to "Active". Displays a list of active items. Filter options include: Active, Expired, Deleted, Not Attached
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", "Exclude Public".
D.	**Quantity Available Filter:**	Defaults to "All". Filter will also display "Low Stock", "Sold Out"*. *Under development **NOTE**: This option will only apply to items that have been created to include a "Quantity Available" amount.
E.	**Search:**	Allows user to search for a specific item. **NOTE:** Partial name searches can be used here.
F.	**Edit:**	Opens selected item in edit mode. *Some conditions will apply to the ability to edit the selected item.
G.	**Attach:**	Allows the user to Attach students to the selected item. See School Cash Catalog How to Attach Students to Items documentation.

H.	**Expire Now:**	Allows the selected item, to be "expired". *Some conditions will apply.
I.	**Delete:**	Allows the user to delete the selected item. *Some conditions will apply.
J.	**Manage Attachments:**	Allows the user to manage the student attachment for the selected item.
K.	**Refund:**	Allows the user to issue a refund for the selected item. See School Cash Catalog How to Process a Refund documentation. **NOTE:** Refunds can only be issued for items purchased through School Cash Online, using this option.
L.	**Copy:**	Allows the user to copy the selected item. All features of the item are copied using this option. **NOTE:** Name of the item must be edited and required students attached.

2. 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. **NOTE:** Any edits must be saved.

The most common type of edits include:

- ℃ Corrections to the item name or description
- ℃ Changes in Start and/or End dates
- ℃ Changes in Category information (Selected Category or price)
- ℃ Changes in Option information

School Cash Catalog View Items – Display

School Cash Catalog Item Edit – Display

Features:

A. Open text field: Any information can be edited in an open text field. Remember that the description field has room for 4,000 characters.

B. Selection Field: Click **Edit Pencil** to open a selection field
Any edits must be saved

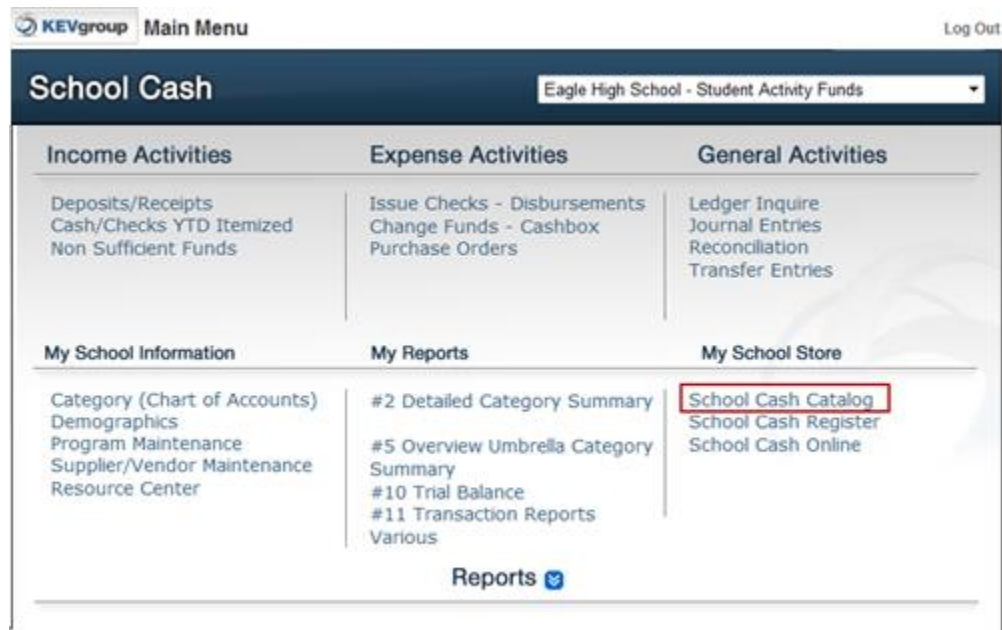**C. Selection field:**   Click **Delete** icon to deleted any selection
Click **OK** in warning dialog box to complete the deletion

D. Save: Click **Save** to save any edits

How to Edit an Item That Has Not Been Purchased

Step 1: From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

School Cash Main Menu – Display

Step 2: Select required Item from **List of Items** (For this example: an attached item that has not been purchased will be used.)

Step 3: Click **Edit**

Step 4: Edit **Text** Fields
Click inside any basic text fields to make any necessary changes
Save changes

School Cash Catalog Basic Text Fields – Display

Step 5: Click **Edit Pencil** to open any edit any selection fields

School Cash Catalog Selection Fields – Display

Make any necessary changes
Click **Save Category**

School Cash Catalog Category Information Edit – Display

School Cash Catalog Edited Category Information – Display

Step 6: Click **Add Category** icon to add an additional category

School Cash Catalog Edit Item Add Category – Display

School Cash Catalog Edit Item Add Category – Display

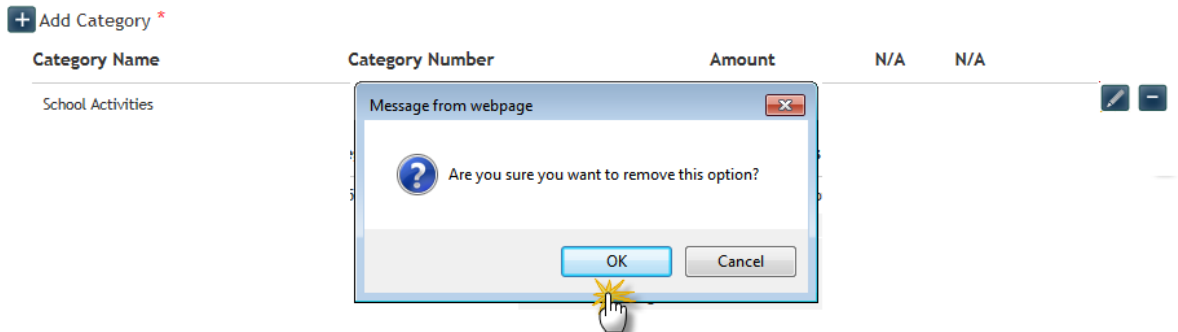Select additional category, edit amount

Click **Save Category**

Step 7: **Delete** any selection field

Click **Delete** option beside any selection field to delete information

School Cash Catalog Delete Option – Display

Click **OK** to complete the deletion

Message from webpage

? Are you sure you want to remove this option?

OK   Cancel

School Cash Catalog Complete Delete Option – Display

Step 8:   Click **Save** to save all edits

Save   Cancel

School Cash Catalog Save Item – Display

3. 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 "greyed" out text or the edit icons will not be displayed.

The most common edits that can be made to an item that has been purchased are:

- ⟳ Item Name
- ⟳ Item Description
- ⟳ Item Start and End Date

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

School Cash Catalog View Items, "Purchased" Item – Display

Features:

A. **Open Edit Fields:** Fields displayed in regular text are open to any required edits.
Eg: Name, Description

B. **Locked Fields:** Fields displayed in "greyed" out text are locked to any edits.
Eg: Year, Bank Account

C. **Selection Fields:** Selection Fields no longer display edit icon, or add field icon
Selection Fields that were not used when the item was originally created no longer available.

D. **Save:** Any available edits must be saved

School Cash Catalog Edit Purchased Item – Display
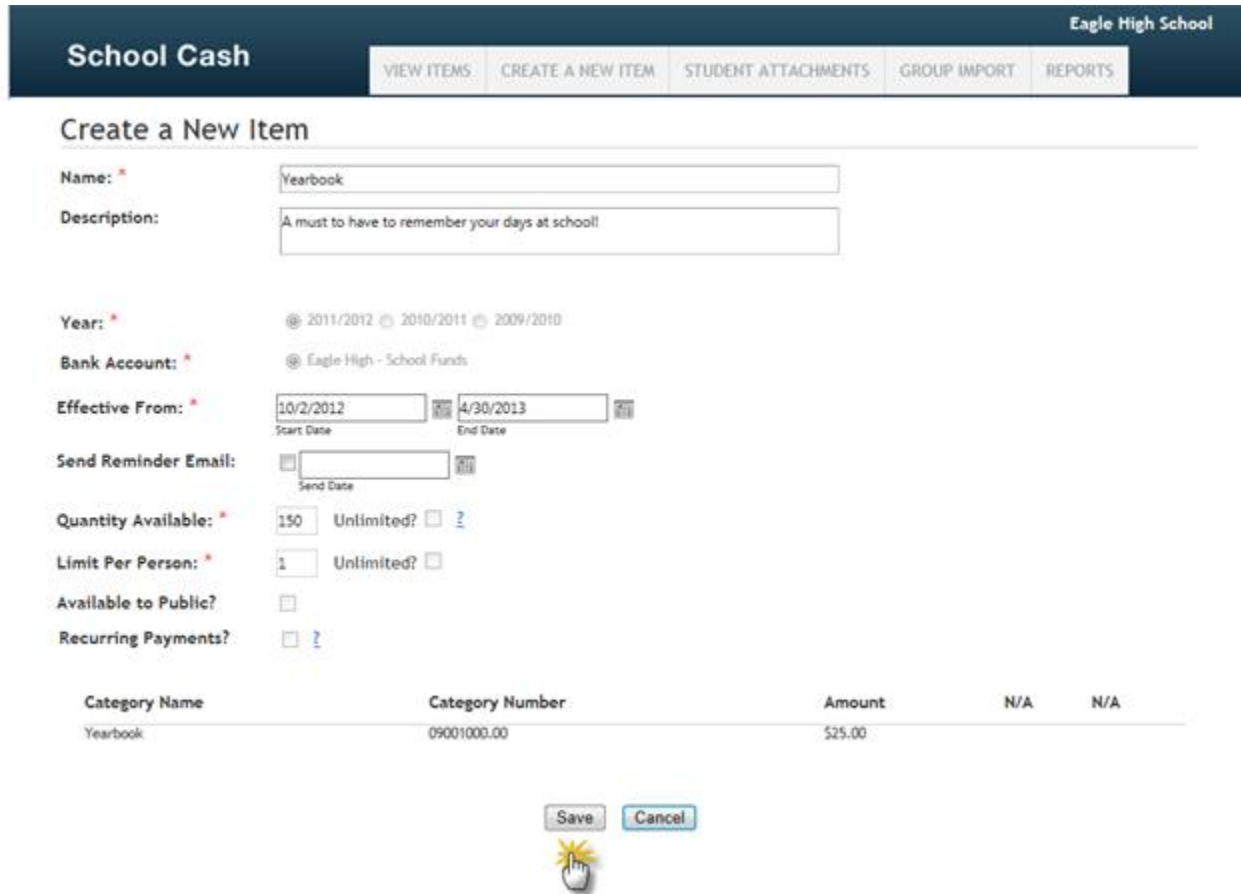
How To Edit An Item That Has Been Purchased

Step 1: From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2: Click **required item**

Step 3:

School Cash Catalog Purchased Item – Display

Click **Edit**
Complete any required edits
Click **Save**

4. 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. Items can expire automatically. For example: The Yearbook item has reached its end date and will be moved to the status of expire. In addition, items can be expired manually. For example: The Ski Trip has to be cancelled because of bad weather 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 active View Items list in School Cash Catalog
- Any expired items, that have had some purchases will still report in School Cash Catalog

It is not necessary to either 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 item will no longer display in School Cash Online or School Cash Register. After the end date a required item will display as overdue in School Cash Online and will remain in School Cash Register checkout as outstanding.

How to Expire an Item in School Cash Catalog

Step 1: From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2: Select **required item**

School Cash Catalog Expire Selected Item – Display

Step 3: Click **Expire Now**
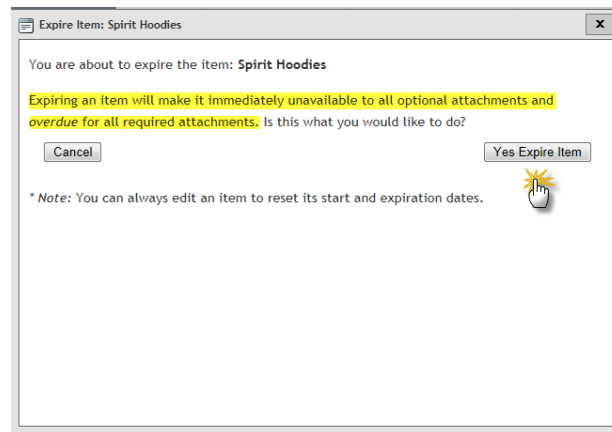
School Cash Catalog Expire Now Warning – Display

Click **Yes Expire Item**

5. Delete an Item that has been not purchased

Perfect for an item that will not be used in either School Cash Catalog or School Cash Register!

Any item that has not yet been purchased can be deleted. Example: An item for Spirit Wear was copied from a previous year, but now the school will not be selling spirit wear, the item can be deleted. . It is not necessary to either delete an item, that has no student attachment.

Deleting an item will:
- Remove the item from both School Cash Online and School Cash Register
- Remove the item from the School Cash Catalog "Active" item display
- Will remove the item from any School Cash Catalog reports

How to Delete an Item in School Cash Catalog

Step 1: From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2: Select **required item**

Step 3: Click **Delete**
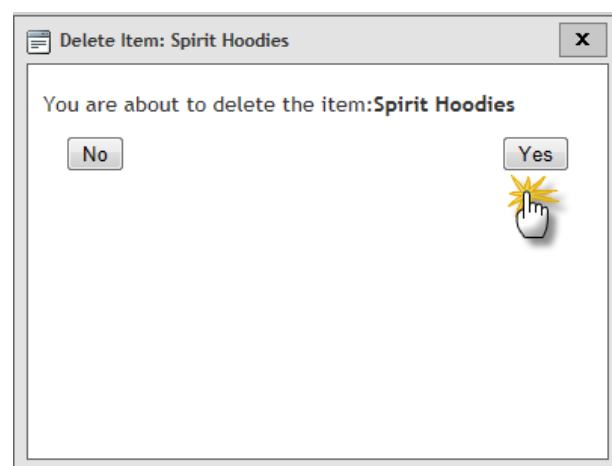
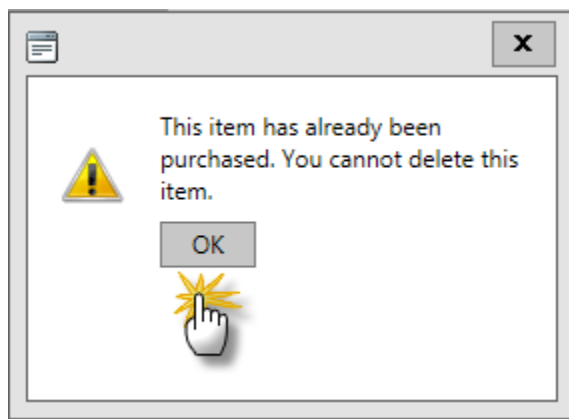*School Cash Catalog Delete Item Warning – Display*

Click **Yes**

6. Delete an Item that has been purchased

Items that have been purchased either through School Cash Online or School Cash Register cannot be deleted. It is not necessary to delete an item that has no student attachment.

How to Delete an Item in School Cash Catalog

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Select **required item**

Step 3:   Click **Delete**

School Cash Catalog Delete Warning – Display

Click **OK** in the warning dialog box

NOTE: In this situation the item will need to be expired rather than deleted.

7. How to Manage Student Attachments

Perfect tool when student attachments need to be modified!

After a School Cash Catalog item has been attached to students, it is possible to modify the attachment. For example: A Ski Trip item attachment could be modified to exclude a student that has a broken ankle.

Manage Attachments includes the ability to:
- ⟳ Create a new attachment (additional attachment)
- ⟳ Edit an Existing attachment (For example: A Ski Trip item attachment could be modified to detach a student that has a broken ankle.)
- ⟳ Delete an existing attachment (For example: A text book item was assigned to the course.)

School Cash Catalog Manage Attachments– Display
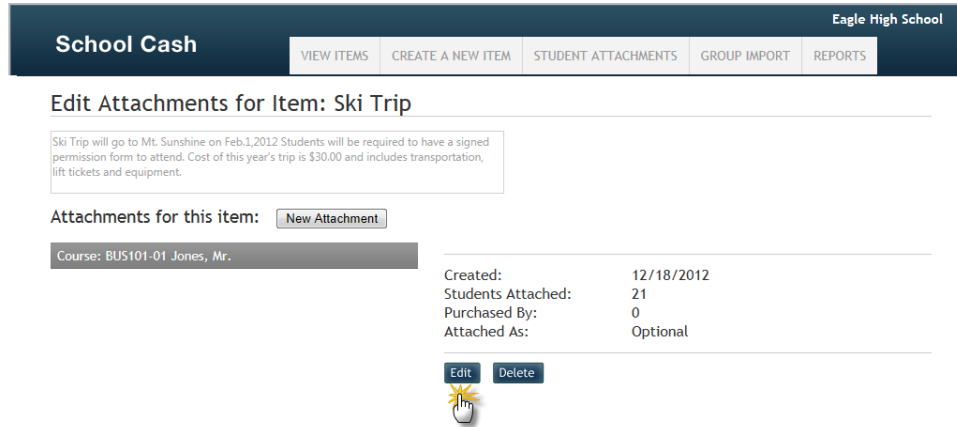
Features:

A.	**Item Name:**	Displays Selected Item Name (no edits allowed in this screen)
B.	**Item Description:**	Selected Item Description (no edits allowed in this screen)
C.	**Create a New Attachment:**	Click New Attachment to attach additional students to selected item
D.	**Attachment Details:**	Includes: date when attachment was created, type of attachment, number of students attached, number of purchases, attachment type)
E.	**Edit:**	Allows existing attachment to be modified (eg: a student can be deleted from the attachment)
F.	**Delete:**	Deletes the selected student attachment from the item

How to Edit an Existing Student Attachment School Cash Catalog

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the
My School Store group

Step 2:   Select the required item from the View Items display
Click **Manage Attachments**
Click **Edit**
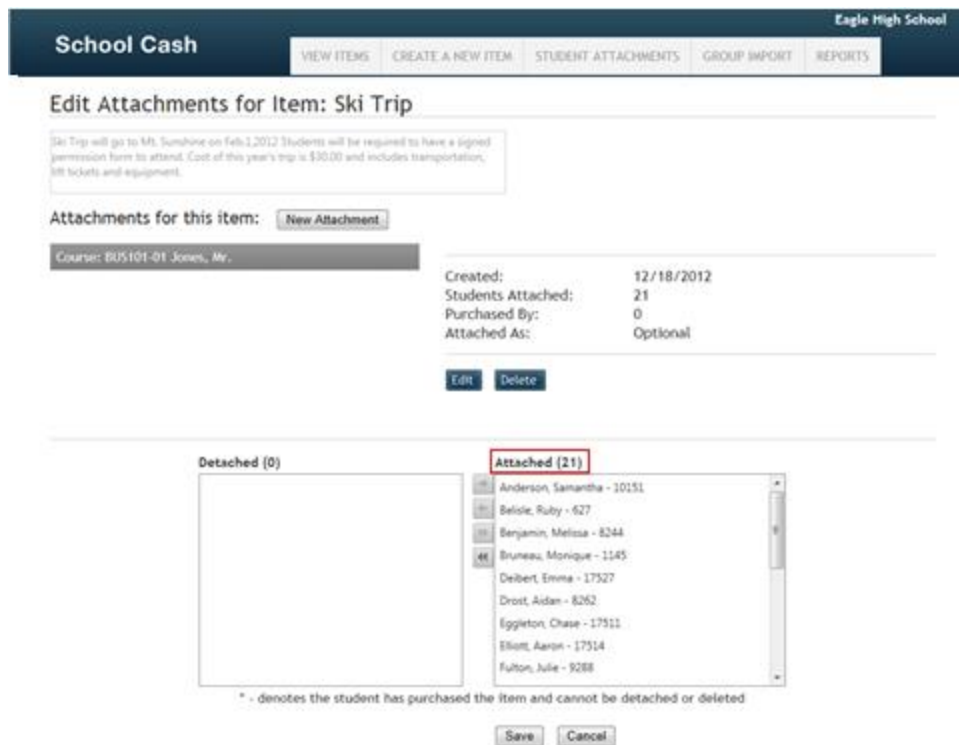
School Cash Catalog Manage Attachment– Display

School Cash Catalog Student Attachment– Display

Step 3: From the **Attached** Student list on the right, select the student that is to be detached from the item

Click the single detach arrow that points to the left

School Cash Catalog Detach Students– Display

Step 4: Click **Save**

School Cash Catalog Completed Detach Students– Display

NOTE: Detached students will display in the panel on the left and remaining attached students will display in the panel on the right.

To detach multiple students: select the first student in the attachment list, hold the CTRL key to select additional students.

Students who have already purchased the item, are marked with an asterisk (*) and cannot be detached.

How to Delete a Student Attachment School Cash Catalog

It may be necessary to delete a student attachment. For example: A field trip has been cancelled. Deleting a student attachment will cause the item to no longer be displayed for the attached students in School Cash Online and in School Cash Register. The item itself becomes Not Attached and could be used again in the future. It is not necessary to either expire or delete an item, that has no student attachment.

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Select **required item** from View Items list
Click **Manage Attachments**
Click **Delete**

School Cash Catalog Delete Student Attachment– Display

How to Add a New Attachment to an Item in School Cash Catalog

It is possible to add an additional attachment to an item. For Example: The field trip has been opened up to an additional class.

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Select **required item** from View Items List
Click **Manage Attachment**
Click **New Attachment**

School Cash Catalog Add New Attachment– Display

Select the required type of attachment

School Cash Catalog Attachment– Display

Click **Attach**

8. Copy An Item An Existing Item

Perfect way to save time creating items!

Many items are repeated from year to year or week to week, copying these types of items is a huge time saver. Items that have expired or have been deleted may also be copied.

After an item is copied it is still necessary to:

- Edit the item name
  NOTE: An item that has been copied will include the word "COPY" in the Item Name
- Attach students

How to Copy an Item in School Cash Catalog

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Select **required item**

School Cash Catalog Item Selected to be Copied – Display

Step 3:   Click **Copy**

School Cash Catalog Copied Item Edited – Display

Step 4: Make any necessary edits. Be sure to edit the item name to delete the word "**COPY**"

Step 5: Click **Save**

School Cash Catalog Student Attachment Necessary – Display

Step 6: Attach students as necessary

9. Filter the View Items Display

The list of items displayed in School Cash Catalog can be managed by using the available filter options. By default the View Items display, lists all "active" items. If the list is very long, page turns will be displayed at the bottom of the active item list. To see the item details, select the item from the list on the left side of the window. The item details will be displayed on the right.

To alter the display, click the down arrow to right of the filter option and select another option from the list.

School Cash Catalog Display Filter Options – Display

How to View All Items in School Cash Catalog

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Click pick list down arrow to right of "Active" filter
Select **All** from filter options

School Cash Catalog All Items Filter– Display

School Cash Catalog All items– Display

List of all items will display.

NOTE: List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.

How to View Expired Items

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Click pick list down arrow to right of "Active" filter
Select **Expired** from filter options

School Cash Catalog Expired Items Filter– Display

List of all expired items (items that have passed their end date) will display.

NOTE: List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.

How to View Deleted Items

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Click pick list down arrow to right of "Active" filter
                   Select **Deleted** from filter options

School Cash Catalog Deleted Items Filter– Display

List of all deleted items will display.
NOTE: List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.

How To View Items That Have Not Been Attached To Students In School Cash Catalog

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Click pick list down arrow to right of "Active" filter
                   Select **Not Attached** from filter options

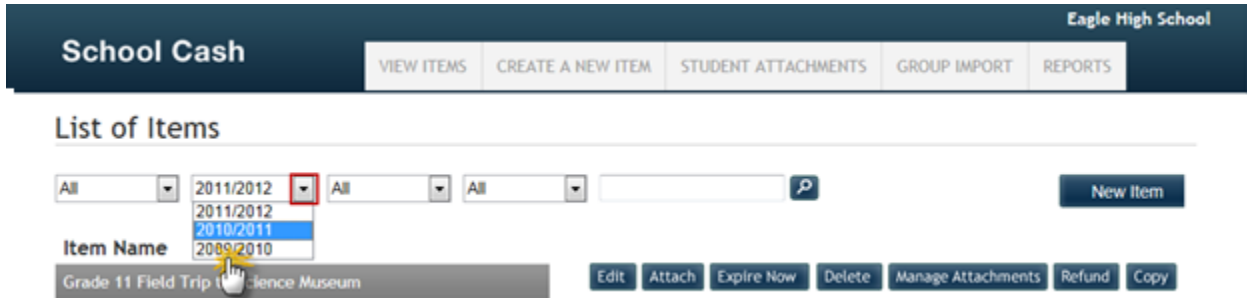*School Cash Catalog Not Attached Filter– Display*

List of all items that do not have student attachments will display.
NOTE: List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.

How To See Items From Previous School Years School Cash Catalog

Perfect when an old School Cash Catalog needs to be viewed!

Step 1: From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2: Click pick list down arrow to right of "School Year" filter
Select **required school year** from filter options

School Cash Catalog School Year Filter– Display
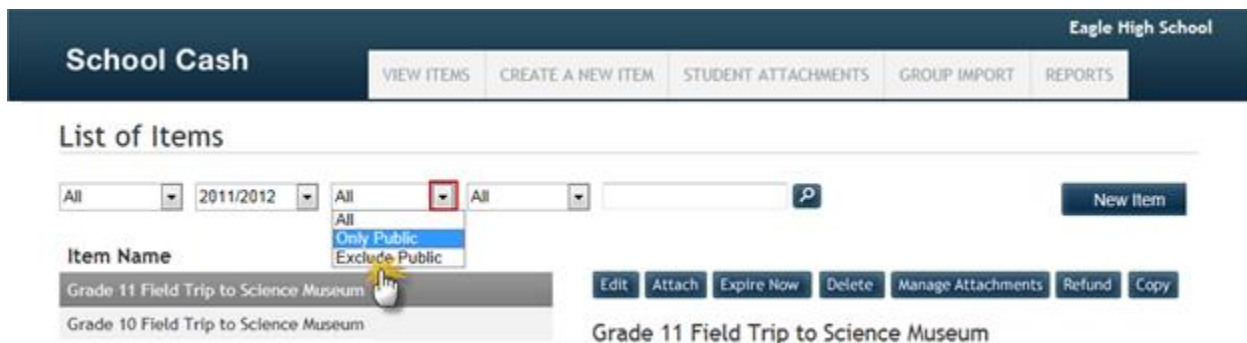
List of all items from selected school year will display.
NOTE: List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.

How to View Public Facing Items School Cash Catalog

Perfect when Public Facing items need to viewed!

Step 1: From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2: Click pick list down arrow to right of "Public" filter
Select **Only Public** from filter options

School Cash Catalog Only Public Filter– Display

List of all public facing items will display.
Note: List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.

How To View Items That Are Not Available To The Public In School Cash Catalog

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Click pick list down arrow to right of "Public" filter
Select **Exclude Public** from filter options

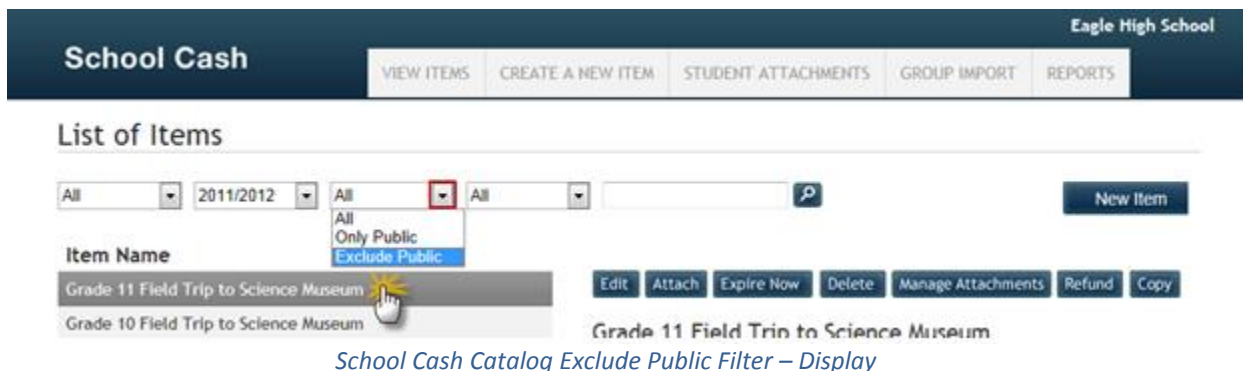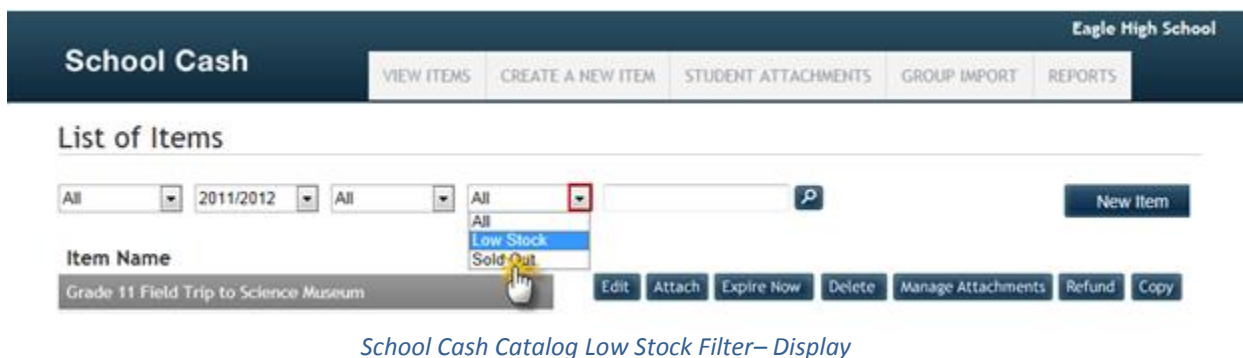*School Cash Catalog Exclude Public Filter – Display*

List of all items except those available to the public will display
NOTE: List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.

How To View Items That Are In Low In Stock In School Cash Catalog

Perfect way to monitor Quantity Available!

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Click pick list down arrow to right of "Stock" filter
Select **Low Stock** from filter options

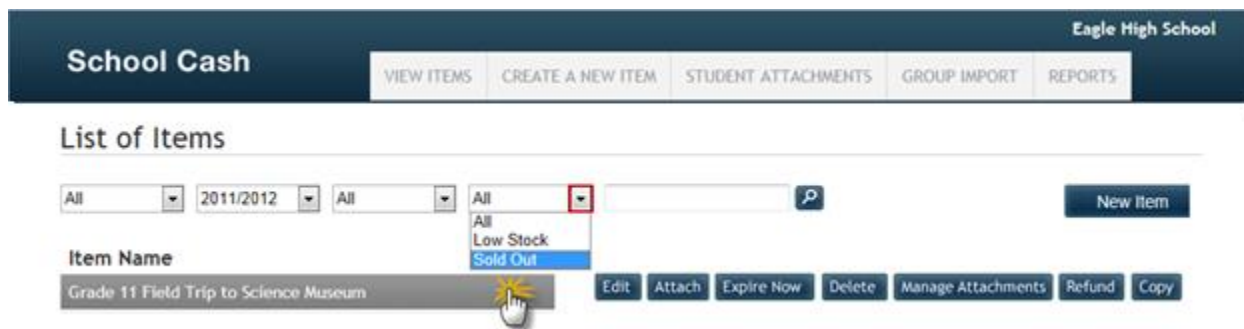*School Cash Catalog Low Stock Filter– Display*

List of all items that are low in stock will display.
NOTE: Quantity Available field must be used for items that "track" stock.
List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.

How To View Items That Are Sold Out In School Cash Catalog

Step 1: From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2: Click pick list down arrow to right of "Stock" filter
Select **Sold Out** from filter options

School Cash Catalog Sold Out Filter– Display

List of all items that have Zero (0) Quantity Remaining will display.
NOTE: List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.
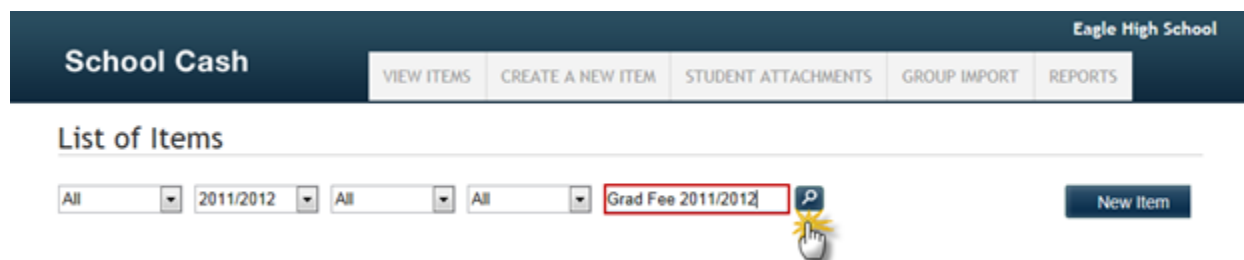
10. <u>Item Search</u>

Perfect way to locate an item, when there the View Items display is very long!

Searching for an item is a fast, easy way to locate an item, when the list of items if very long. Searches can use either:

- ○ Exact match (The specific item name is entered into the search text box.)
- ○ Enter any known part of the item name (Enter only a portion of the Item Name.)

How To Search For A Specific Item In School Cash Catalog

Step 1: From the School Cash Accounting Main Menu, select **School Cash Catalog** from the **My School Store** group

Step 2: Enter Item Name in search text box eg: Grad Fee 2011/2012
Click **Search**

School Cash Catalog Item Search– Display

Search results will display in List of Items window

School Cash Catalog Search Results– Display

> **NOTE:** Only the search results will be displayed in the List of Items.

How To Search Using A Partial Item Name Search In School Cash Catalog

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Enter any known portion of the item name eg: Spirit Wear
Click **Search**

School Cash Catalog Wild Card Search– Display

School Cash Catalog Wild Card Search Results– Display

List of all items that contain the portion of the item name will display.

NOTE: List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.

11. District Level ONLY Filter

In addition to all of the regular item filters, District Level access provides an additional filter by School. This filter will allow school specific items to be displayed.

How To Filter For School Specific Items In School Cash Catalog

Step 1:   From the School Cash Accounting **Main Menu**, select **School Cash Catalog** from the **My School Store** group

Step 2:   Click pick list down arrow to right of "School" filter
Select **Required filter option** from list

School Cash Catalog District Level School Filter– Display

School Cash Catalog District Level School Filter– Display

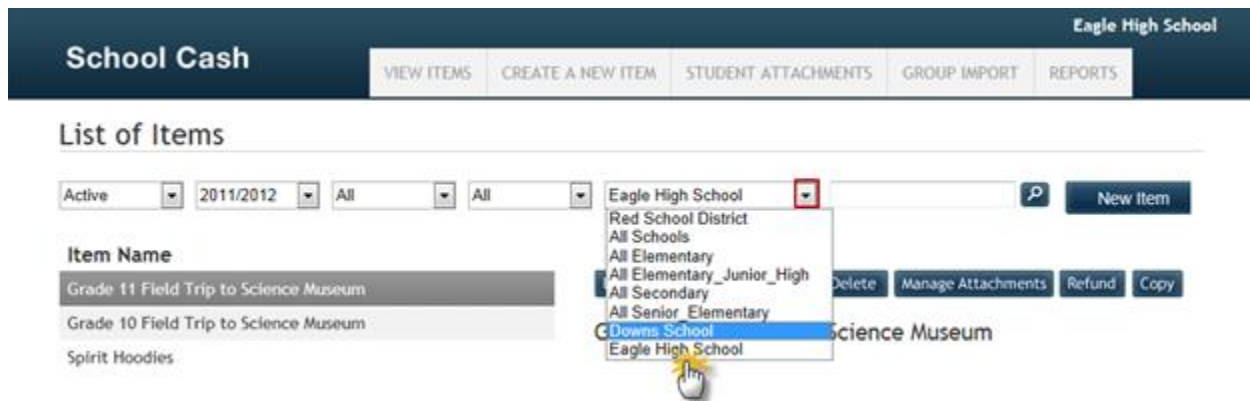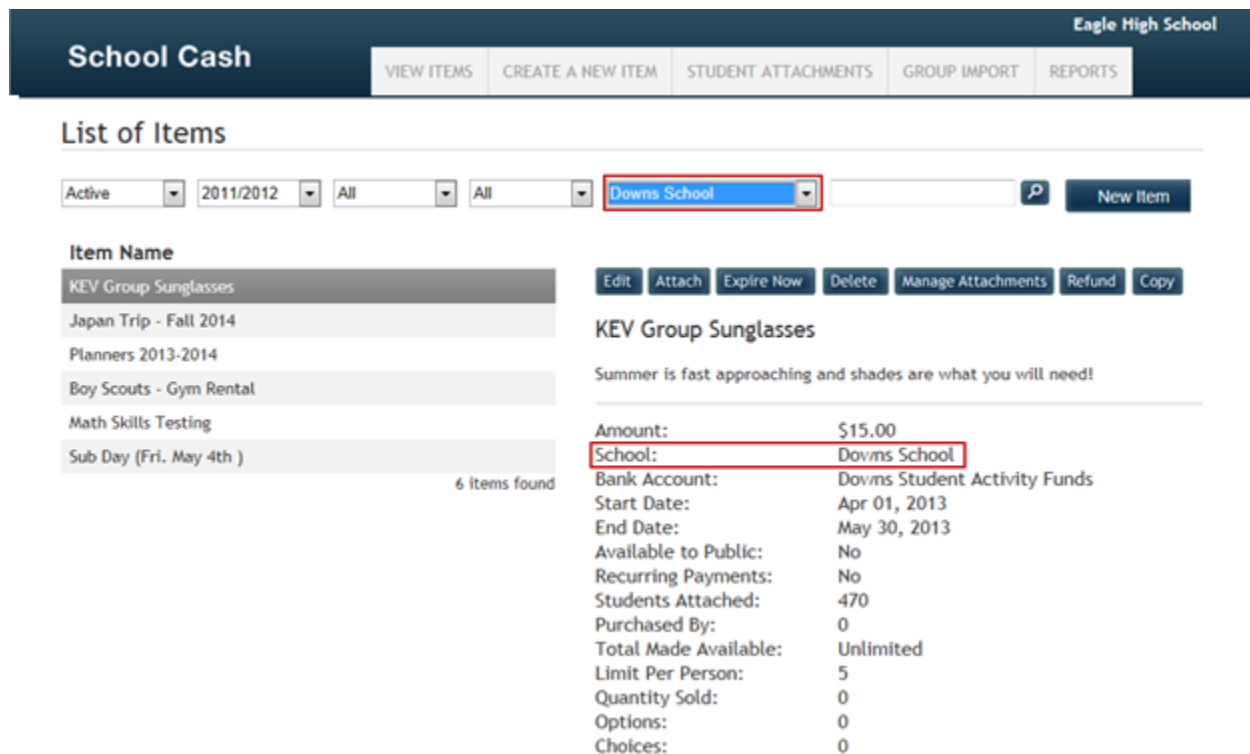List of all items created by the selected school will display in the View Items list.
NOTE: List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.