



School Cash Catalog

How to Manage Items

Update: May 2013

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School Cash Catalog

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

Eagle High School

VIEW ITEMSCREATE A NEW ITEMSTUDENT ATTACHMENTSGROUP IMPORTREPORTS

List of Items

Active2011/2012AllAll

New Item

Item Name

Grade 10 Field Trip to Science Museum 1

Spirit Hoodies

Yearbook

3 items found

EditAttachExpire NowDeleteManage AttachmentsRefundCopy

Spirit Hoodies

Show your school spirit by purchasing a Spirit Wear Hoodie!

Amount:

\$30.00

School:

Eagle High School

Bank Account:

Eagle High - School Funds

Start Date:

Jan 01, 2013

End Date:

Apr 30, 2013

Available to Public:

No

Recurring Payments:

No

Students Attached:

815

Purchased By:

0

Total Made Available:

Unlimited

Limit Per Person:

1

Quantity Sold:

0

Options:

2

Choices:

6

Created:

Mar 27, 2013

Last Modified:

Apr 28, 2013

School Cash Catalog View Items – Display

Eagle High School
School Cash

[VIEW ITEMS](#)
[CREATE A NEW ITEM](#)
[STUDENT ATTACHMENTS](#)
[GROUP IMPORT](#)
[REPORTS](#)

Create a New Item

A

Name: Spirit Hoodies

Description: Show your school spirit by purchasing a Spirit Wear Hoodie!

B

Year: 2011/2012 2010/2011 2009/2010

Bank Account: Eagle High - School Funds

C

Effective From: 1/1/2013 4/30/2013

Start Date End Date

D

Send Reminder Email: ☐

Send Date

E

Quantity Available: Unlimited? ☒ [?](#)

F

Limit Per Person: 1 Unlimited? ☐

G

Available to Public? ☐

H

Recurring Payments? ☐ [?](#)

+ Add Category

Category Name	Category Number	Amount	N/A	N/A
School Activities	09000000.00	\$30.00		

+ Add Option

Option Name	Category Name	Category Number	N/A	N/A	Min/Max Choices																
Size	School Activities	09000000.00			Between 1 and 1 choices																
<div style="display: flex; align-items: flex-start;"> <div style="width: 20px; text-align: center; border: 1px solid #ccc; border-radius: 50%; background-color: #2c4e64; color: white; margin-right: 5px;">I</div> <div> <p>Add Choice</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.7em;"> <thead> <tr> <th>Name</th> <th>Cost</th> <th>Cost Recovery</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Name: Small</td> <td>Cost: \$0.00</td> <td>Cost Recovery: \$0.00</td> <td>Total: \$0.00</td> </tr> <tr> <td>Name: Medium</td> <td>Cost: \$0.00</td> <td>Cost Recovery: \$0.00</td> <td>Total: \$0.00</td> </tr> <tr> <td>Name: Large</td> <td>Cost: \$0.00</td> <td>Cost Recovery: \$0.00</td> <td>Total: \$0.00</td> </tr> </tbody> </table> </div> </div>						Name	Cost	Cost Recovery	Total	Name: Small	Cost: \$0.00	Cost Recovery: \$0.00	Total: \$0.00	Name: Medium	Cost: \$0.00	Cost Recovery: \$0.00	Total: \$0.00	Name: Large	Cost: \$0.00	Cost Recovery: \$0.00	Total: \$0.00
Name	Cost	Cost Recovery	Total																		
Name: Small	Cost: \$0.00	Cost Recovery: \$0.00	Total: \$0.00																		
Name: Medium	Cost: \$0.00	Cost Recovery: \$0.00	Total: \$0.00																		
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Name	Cost	Cost Recovery	Total																		
Name: Red	Cost: \$0.00	Cost Recovery: \$0.00	Total: \$0.00																		
Name: Black	Cost: \$0.00	Cost Recovery: \$0.00	Total: \$0.00																		
Name: Blue	Cost: \$0.00	Cost Recovery: \$0.00	Total: \$0.00																		

+ Add Picture

+ Add Permission Form

D

Save
Cancel

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

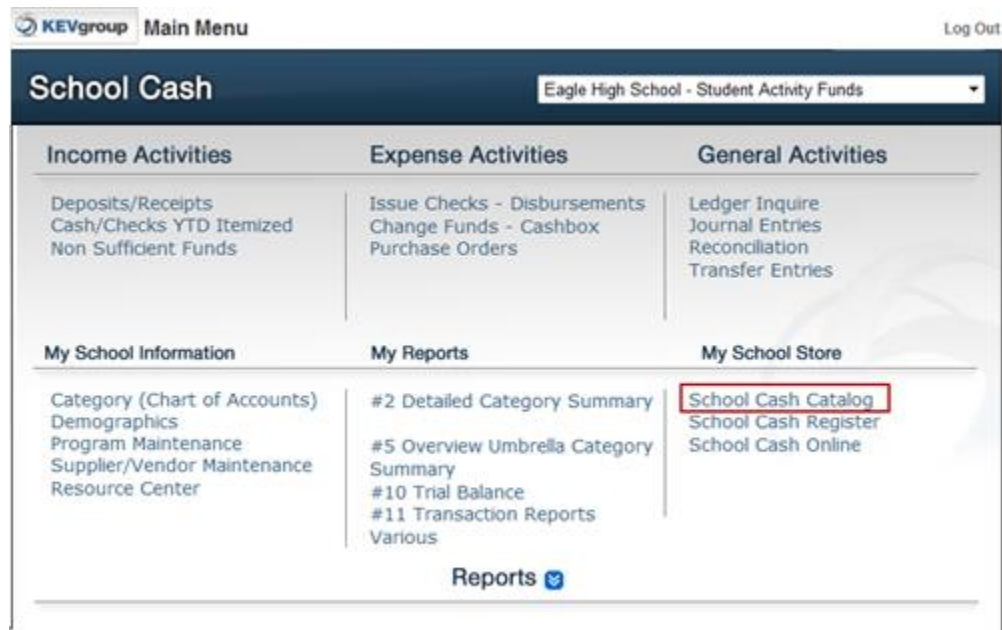
Click **OK** in warning dialog box to complete the deletion

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

A

Name:

Description:

School Cash Catalog Basic Text Fields – Display

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

B

Category Name	Category Number	Amount	N/A	N/A
Investments	00005000.00	\$30.00		



School Cash Catalog Selection Fields – Display

- Make any necessary changes
Click **Save Category**

Modify an Item Category

Category: Investments
 Red Cross Club
 Registration
 Reserve for Investment - School Climate
 SAE
 Sales Tax
School Activities
 Science
 Science Club W104

N/A:
 N/A:

Amount: 00005000.00

Cancel Save Category

School Cash Catalog Category Information Edit – Display

+ Add Category *

Category Name	Category Number	Amount	N/A	N/A
School Activities	09000000.00	\$30.00		

School Cash Catalog Edited Category Information – Display

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

+ Add Category *

Category Name	Category Number	Amount	N/A	N/A
School Activities	09000000.00	\$30.00		

School Cash Catalog Edit Item Add Category – Display

Add an Item Category

Category: Art Club W102
 Art Donation
 Athletic Trainer
 AVID
 AVID - Fundraising
Band - Fundraising
 Band Supplies
 Baseball - Fundraising
 Basketball
 Basketball - Fundraising

N/A:
 N/A:

Amount:

Cancel Save Category

School Cash Catalog Edit Item Add Category – Display

Select additional category, edit amount

Click **Save Category**

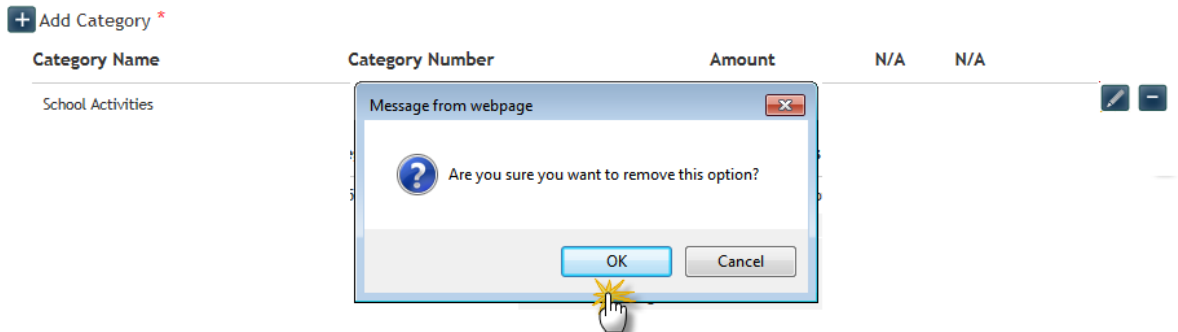
Step 7: **Delete** any selection field

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

+ Add Category *					
Category Name	Category Number	Amount	N/A	N/A	
School Activities	09000000.00	\$30.00			<div> <div>C</div> <div> <div></div> <div>-</div> </div> </div>

School Cash Catalog Delete Option – Display

Click **OK** to complete the deletion



School Cash Catalog Complete Delete Option – Display

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



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

Eagle High School

VIEW ITEMSCREATE A NEW ITEMSTUDENT ATTACHMENTSGROUP IMPORTREPORTS

List of Items

Active2011/2012AllAll

New Item

Item Name

Grade 10 Field Trip to Science Museum 1

Spirit Hoodies

Yearbook

3 items found

EditAttachExpire NowDeleteManage AttachmentsRefundCopy

Yearbook

A must to have to remember your days at school!

Amount:\$25.00

School:Eagle High School

Bank Account:Eagle High - School Funds

Start Date:Oct 02, 2012

End Date:Apr 30, 2013

Available to Public:No

Recurring Payments:No

Students Attached:815

Purchased By:6

Total Made Available:150

Limit Per Person:1

Quantity Sold:6

Quantity Remaining:144

Options:0

Choices:0

Created:Jan 23, 2013

Last Modified:Mar 26, 2013

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

Eagle High School

School Cash

VIEW ITEMS
CREATE A NEW ITEM
STUDENT ATTACHMENTS
GROUP IMPORT
REPORTS

Create a New Item

A

Name: *

Description:

B

Year: *

☒ 2011/2012
☐ 2010/2011
☐ 2009/2010

Bank Account: *

☒ Eagle High - School Funds

Effective From: *

Start Date

End Date

Send Reminder Email:

☐
Send Date

Quantity Available: *

Unlimited? ☐ ?

Limit Per Person: *

Unlimited? ☐

Available to Public?

☐

Recurring Payments?

☐ ?

C

Category Name

Yearbook

Category Number

09001000.00

Amount

\$25.00

N/A

N/A

D

Save
Cancel

School Cash Catalog Edit Purchased Item – Display

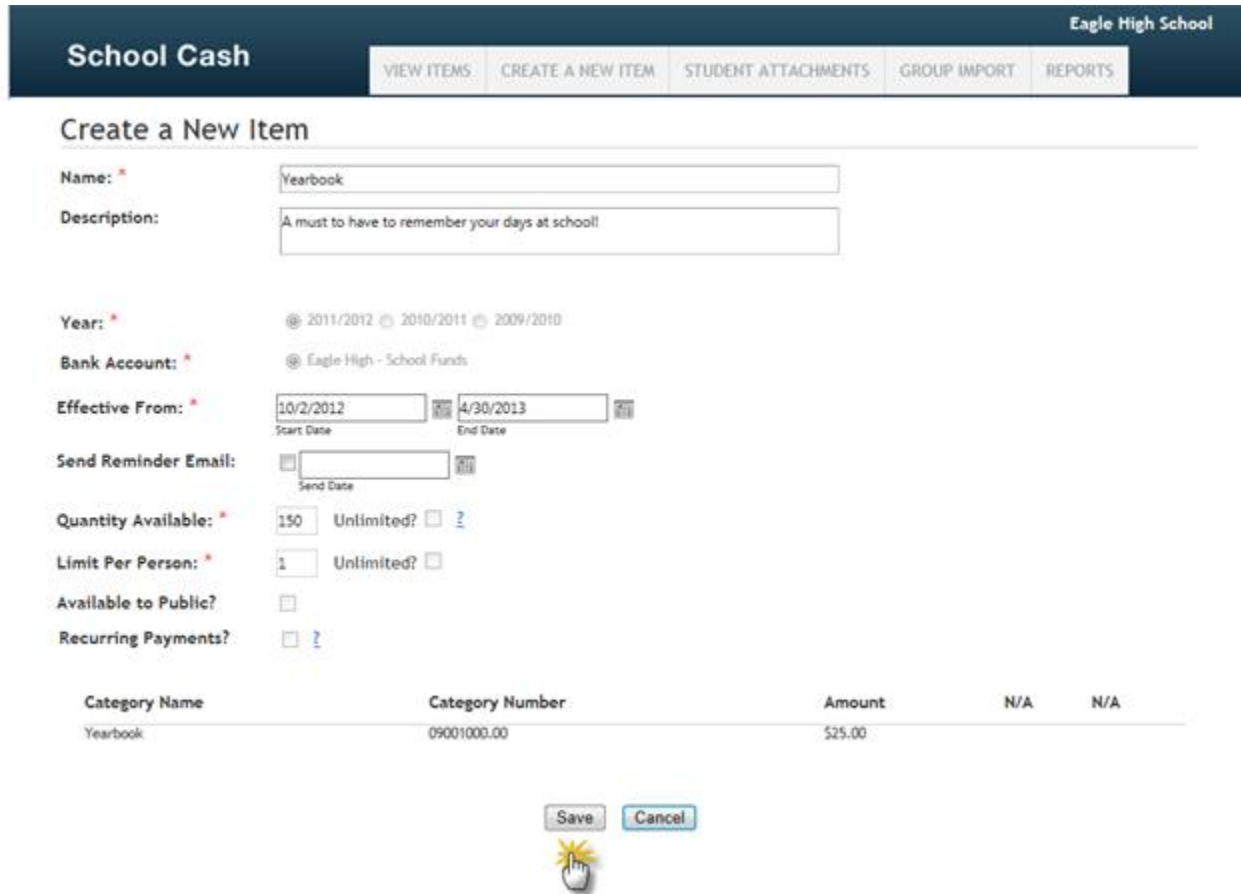
© KEV Group Inc.

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School Cash Catalog– How to Manage Items (05/13)

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 Eagle High School

VIEW ITEMS CREATE A NEW ITEM STUDENT ATTACHMENTS GROUP IMPORT REPORTS

Create a New Item

Name: * Yearbook

Description: A must to have to remember your days at school!

Year: * 2011/2012 2010/2011 2009/2010

Bank Account: * Eagle High - School Funds

Effective From: * 10/2/2012 4/30/2013
Start Date End Date

Send Reminder Email: ☐ Send Date

Quantity Available: * 150 Unlimited? ☐ ?


Limit Per Person: * 1 Unlimited? ☐

Available to Public? ☐

Recurring Payments? ☐ ?

Category Name	Category Number	Amount	N/A	N/A
Yearbook	09001000.00	\$25.00		

Save Cancel



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 Eagle High School

VIEW ITEMS CREATE A NEW ITEM STUDENT ATTACHMENTS GROUP IMPORT REPORTS

List of Items

Active 2011/2012 All All New Item

Item Name

Spirit Hoodies

Yearbook

2 items found

Edit Attach **Expire Now** Delete Manage Attachments Refund Copy

Spirit Hoodies

Show your school spirit by purchasing a Spirit Wear Hoodie!

Amount: \$30.00

School: Eagle High School

Bank Account: Eagle High - School Funds

Start Date: Jan 01, 2013

End Date: Apr 30, 2013

Available to Public: No

Recurring Payments: No

Students Attached: 815

Purchased By: 0

Total Made Available: Unlimited

Limit Per Person: 1

Quantity Sold: 0

Options: 2

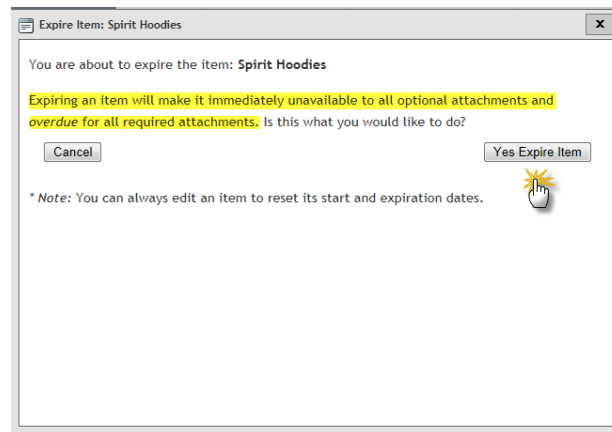
Choices: 6

Created: Mar 27, 2013

Last Modified: Mar 27, 2013

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:

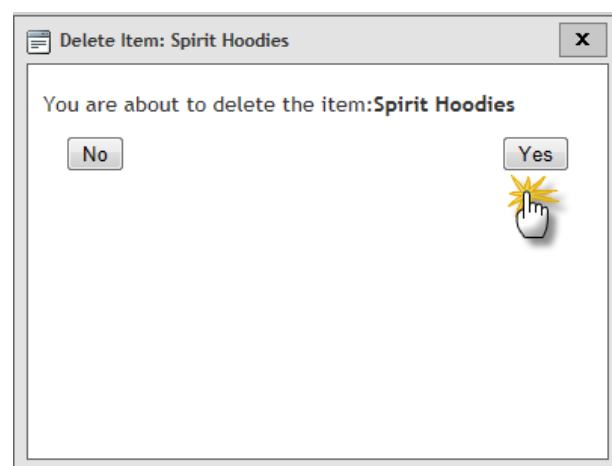
- ☑ Remove the item from both School Cash Online and School Cash Register
- ☑ Remove the item from the School Cash Catalog “Active” item display
- ☑ Will remove the item from any School Cash Catalog reports

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

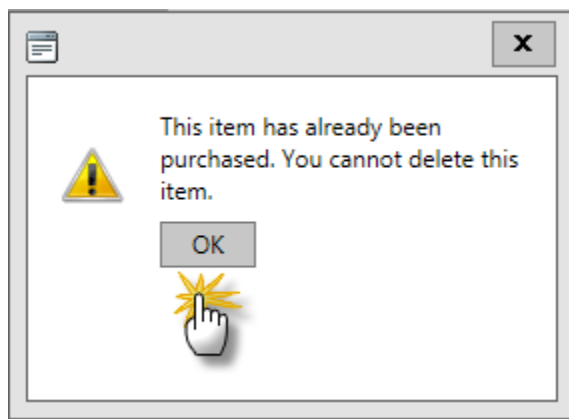
Click **Yes**

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.)

The screenshot shows the 'School Cash' interface for 'Eagle High School'. The top navigation bar includes 'VIEW ITEMS', 'CREATE A NEW ITEM', 'STUDENT ATTACHMENTS', 'GROUP IMPORT', and 'REPORTS'. The main heading is 'Edit Attachments for Item: Ski Trip'. Below this, there is a description of the item: 'Ski Trip will go to Mt. Sunshine on Feb.1,2012 Students will be required to have a signed permission form to attend. Cost of this year's trip is \$30.00 and includes transportation, lift tickets and equipment.' Under the heading 'Attachments for this item:', there is a 'New Attachment' button. Below that, a dropdown menu shows 'Course: BUS101-01 Jones, Mr.'. To the right, a table displays attachment details: 'Created: 12/18/2012', 'Students Attached: 21', 'Purchased By: 0', and 'Attached As: Optional'. At the bottom, there are 'Edit' and 'Delete' buttons.

Feature Label	Description
A	Item Name
B	Item Description
C	Create a New Attachment
D	Attachment Details
E	Edit
F	Delete

School Cash Catalog Manage Attachments– Display

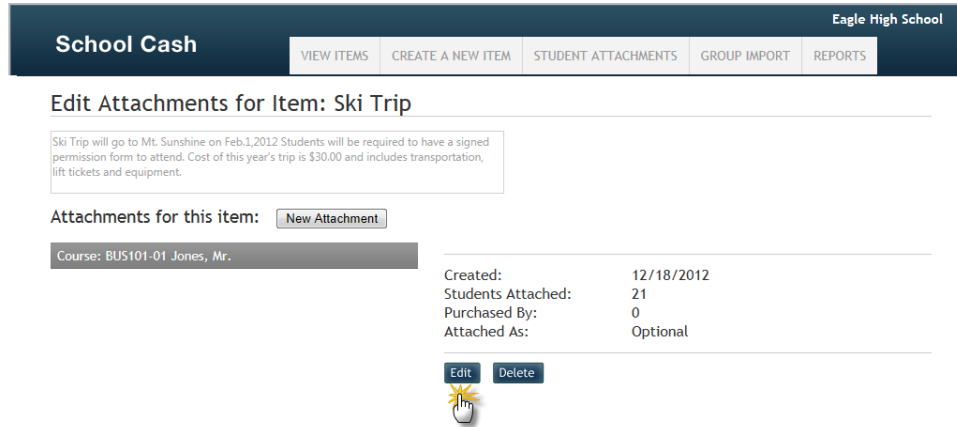
Features:

- 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 Eagle High School

VIEW ITEMS CREATE A NEW ITEM STUDENT ATTACHMENTS GROUP IMPORT REPORTS

Edit Attachments for Item: Ski Trip

Ski Trip will go to Mt. Sunshine on Feb.1,2012 Students will be required to have a signed permission form to attend. Cost of this year's trip is \$30.00 and includes transportation, lift tickets and equipment.

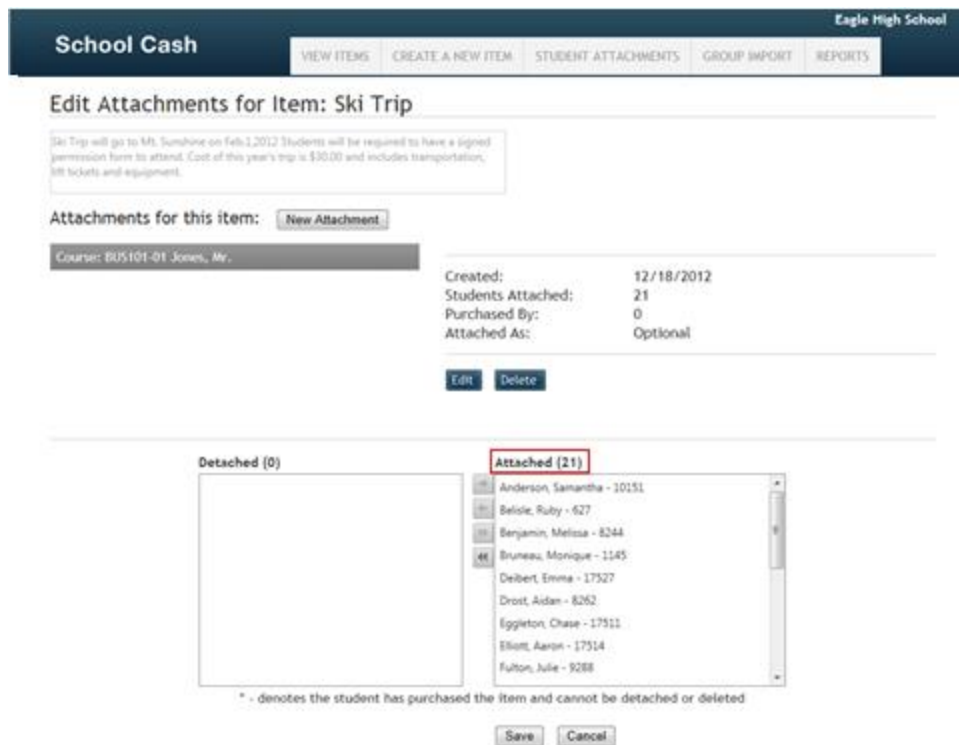
Attachments for this item: [New Attachment](#)

Course: BUS101-01 Jones, Mr.

Created:	12/18/2012
Students Attached:	21
Purchased By:	0
Attached As:	Optional

[Edit](#) [Delete](#)

School Cash Catalog Manage Attachment– Display



School Cash Eagle High School

VIEW ITEMS CREATE A NEW ITEM STUDENT ATTACHMENTS GROUP IMPORT REPORTS

Edit Attachments for Item: Ski Trip

Ski Trip will go to Mt. Sunshine on Feb.1,2012 Students will be required to have a signed permission form to attend. Cost of this year's trip is \$30.00 and includes transportation, lift tickets and equipment.

Attachments for this item: [New Attachment](#)

Course: BUS101-01 Jones, Mr.

Created:	12/18/2012
Students Attached:	21
Purchased By:	0
Attached As:	Optional

[Edit](#) [Delete](#)

Detached (0)

Attached (21)

- Anderson, Samantha - 10151
- Belsie, Ruby - 627
- Benjamin, Melissa - 8244
- Bruneau, Monique - 1145
- Delbert, Emma - 17527
- Drost, Aidan - 8262
- Eggerton, Chase - 17511
- Elliott, Aaron - 17514
- Fulton, Julie - 9288

* - denotes the student has purchased the item and cannot be detached or deleted

[Save](#) [Cancel](#)

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

Attachments for this item:

Course: BUS101-01 Jones, Mr.

Created: 12/18/2012
Students Attached: 21
Purchased By: 0
Attached As: Optional

Detached (0)

Attached (21)

Anderson, Samantha - 10151

← Belisle, Ruby - 627

Benjamin, Melissa - 8244

Bruneau, Monique - 1145

Deibert, Emma - 17527

Drost, Aidan - 8262

Eggleton, Chase - 17511

Elliott, Aaron - 17514

Fulton, Julie - 9288

* - denotes the student has purchased the item and cannot be detached or deleted

School Cash Catalog Detach Students– Display

Step 4: Click **Save**

Attachments for this item:

Course: BUS101-01 Jones, Mr.

Created: 12/18/2012
Students Attached: 21
Purchased By: 0
Attached As: Optional

Detached (1)

Anderson, Samantha - 10151

Attached (20)

Belisle, Ruby - 627

Benjamin, Melissa - 8244

← Bruneau, Monique - 1145

Deibert, Emma - 17527

Drost, Aidan - 8262

Eggleton, Chase - 17511

Elliott, Aaron - 17514

Fulton, Julie - 9288

Grahn, Quinten - 8202

* - denotes the student has purchased the item and cannot be detached or deleted

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 Eagle High School

VIEW ITEMS CREATE A NEW ITEM STUDENT ATTACHMENTS GROUP IMPORT REPORTS

Edit Attachments for Item: Ski Trip

Ski Trip will go to Mt. Sunshine on Feb.1,2012 Students will be required to have a signed permission form to attend. Cost of this year's trip is \$30.00 and includes transportation, lift tickets and equipment.

Attachments for this item: [New Attachment](#)

Course: BUS101-01 Jones, Mr.

Created:	12/18/2012
Students Attached:	21
Purchased By:	0
Attached As:	Optional

[Edit](#) [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**

Edit Attachments for Item: Ski Trip

Ski Trip will go to Mt. Sunshine on Feb.1,2012 Students will be required to have a signed permission form to attend. Cost of this year's trip is \$30.00 and includes transportation, lift tickets and equipment.

Attachments for this item: [New Attachment](#)

Course: BUS101-01 Jones, Mr.

Created:	12/18/2012
Students Attached:	21
Purchased By:	0
Attached As:	Optional

[Edit](#) [Delete](#)

School Cash Catalog Add New Attachment– Display

Select the required type of attachment

Eagle High School
School Cash
VIEW ITEMS
CREATE A NEW ITEM
STUDENT ATTACHMENTS
GROUP IMPORT
REPORTS

Create Attachment: Yearbook

Attach Item As:

☒ Optional
 ☐ Required

Comment:

Attach Item To:

☐ All Students
 ☐ Grade
 ☐ Course
 ☐ Homeroom
 ☐ Group
 ☐ Individual Students

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**

Eagle High School
School Cash
VIEW ITEMS
CREATE A NEW ITEM
STUDENT ATTACHMENTS
GROUP IMPORT
REPORTS

List of Items

Active ▾ 2011/2012 ▾ All ▾ All ▾ 20 New Item

Item Name	Actions
Grade 10 Field Trip to Science Museum	Edit Attach Expire Now Delete Manage Attachments Refund Copy
Spirit Woodies	
Yearbook	

3 items found

Grade 10 Field Trip to Science Museum

Science Museum Field Trip will depart school on Wednesday Apr. 17, 2013 at 8:30 AM. Students will return to school by 3:45 PM. Cost of trip includes admission and a box lunch. Students must bring a note book and pen or pencil. Cameras and cell phones are not allowed in the Science Museum.

Amount:	\$20.00
School:	Eagle High School
Bank Account:	Eagle High - School Funds
Start Date:	Jan 16, 2013
End Date:	May 08, 2013
Available to Public:	No
Recurring Payments:	No
Students Attached:	30
Purchased By:	7
Total Made Available:	Unlimited
Limit Per Person:	1
Quantity Sold:	7
Options:	0
Choices:	0

Created: Apr 25, 2013
Last Modified: May 01, 2013

School Cash Catalog Item Selected to be Copied – Display

Step 3: Click **Copy**

School Cash Eagle High School

VIEW ITEMS CREATE A NEW ITEM STUDENT ATTACHMENTS GROUP IMPORT REPORTS

Create a New Item

Name: * Grade 10 Field Trip to Science Museum **COPY**

Description: * Science Museum Field Trip will depart school on Wednesday Apr. 17, 2013 at 8:30 AM. Students will return to school by 3:45 PM. Cost of trip includes admission

Year: * 2011/2012 2010/2011 2009/2010

Bank Account: * Eagle High - School Funds

Effective From: * 1/16/2013 5/8/2013
Start Date End Date

Send Reminder Email: * ☒ 1/1/2013
Send Date

Quantity Available: * ☐ Unlimited? ☒ 1

Limit Per Person: * 1 Unlimited? ☐

Available to Public? ☐

Recurring Payments? ☐ 1

+ Add Category *

Category Name	Category Number	Amount	N/A	N/A
Field Trips	05000000.00	\$20.00		

+ Add Option

+ Add Picture

+ Add Permission Form

Save Cancel

School Cash Eagle High School

VIEW ITEMS CREATE A NEW ITEM STUDENT ATTACHMENTS GROUP IMPORT REPORTS

Create a New Item

Name: * Grade 11 Field Trip to Science Museum

Description: * Science Museum Field Trip will depart school on Wednesday Apr. 17, 2013 at 8:30 AM. Students will return to school by 3:45 PM. Cost of trip includes admission

Year: * 2011/2012 2010/2011 2009/2010

Bank Account: * Eagle High - School Funds

Effective From: * 1/16/2013 5/8/2013
Start Date End Date

Send Reminder Email: * ☒ 1/1/2013
Send Date

Quantity Available: * ☐ Unlimited? ☒ 1

Limit Per Person: * 1 Unlimited? ☐

Available to Public? ☐

Recurring Payments? ☐ 1

+ Add Category *

Category Name	Category Number	Amount	N/A	N/A
Field Trips	05000000.00	\$20.00		

+ Add Option

+ Add Picture

+ Add Permission Form

Save Cancel

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 Eagle High School

VIEW ITEMS CREATE A NEW ITEM STUDENT ATTACHMENTS GROUP IMPORT REPORTS

List of Items

Active 2011/2012 All All

New Item

Item Name	Edit	Attach	Expire Now	Delete	Manage Attachments	Refund	Copy
Grade 11 Field Trip to Science Museum							
Grade 10 Field Trip to Science Museum							
Spirit Hoodies							
Yearbook							

4 items found

Grade 11 Field Trip to Science Museum

Science Museum Field Trip will depart school on Wednesday Apr. 17, 2013 at 8:30 AM. Students will return to school by 3:45 PM. Cost of trip includes admission and a box lunch. Students must bring a note book and pen or pencil. Cameras and cells phones are not allowed in the Science Museum.

Amount:	\$20.00
School:	Eagle High School
Bank Account:	Eagle High - School Funds
Start Date:	Jan 16, 2013
End Date:	May 08, 2013
Available to Public:	No
Recurring Payments:	No
Students Attached:	0
Purchased By:	0
Total Made Available:	Unlimited
Limit Per Person:	1
Quantity Sold:	0
Options:	0
Choices:	0

Created: May 01, 2013
Last Modified: May 01, 2013

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.

The screenshot shows the 'School Cash' header with the 'Eagle High School' logo. Below the header is a navigation bar with buttons: 'VIEW ITEMS', 'CREATE A NEW ITEM', 'STUDENT ATTACHMENTS', 'GROUP IMPORT', and 'REPORTS'. The main section is titled 'List of Items'. Below this title are five filter options labeled A, B, C, D, and E. Option A is 'Active', B is '2011/2012', C is 'All', D is 'All', and E is a search bar. There is a 'New Item' button on the right.

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

The screenshot shows the 'School Cash' header with the 'Eagle High School' logo. Below the header is a navigation bar with buttons: 'VIEW ITEMS', 'CREATE A NEW ITEM', 'STUDENT ATTACHMENTS', 'GROUP IMPORT', and 'REPORTS'. The main section is titled 'List of Items'. Below this title are five filter options labeled A, B, C, D, and E. Option A is 'All', B is '2011/2012', C is 'All', D is 'All', and E is 'Eagle High School'. There is a 'New Item' button on the right. A dropdown menu is open for the 'All' filter, showing options: 'All', 'Active', 'Expired', 'Deleted', and 'Not Attached'. Below the filters is a list of items: 'Grade 11 Field Trip to Science Museum', 'Grade 10 Field Trip to Science Museum', and 'Spirit Hoodies'. To the right of the list are buttons: 'Edit', 'Attach', 'Expire Now', 'Delete', 'Manage Attachments', 'Refund', and 'Copy'. Below the list is a section for 'Spirit Hoodies' with the text 'Show your school spirit by purchasing a Spirit Wear Hoodie!' and a price of '\$30.00'.

School Cash Catalog All Items Filter– Display

School Cash Eagle High School

VIEW ITEMS | CREATE A NEW ITEM | STUDENT ATTACHMENTS | GROUP IMPORT | REPORTS

List of Items

All | 2011/2012 | All | All | Eagle High School | | **New Item**

Item Name	
Spirit Hoodies	Edit Attach Expire Now Delete Manage Attachments Refund Copy
Grade 11 Field Trip to Science Museum	
Grade 10 Field Trip to Science Museum	
School Agendas	
Eagle High School - Donation	
Ohio State Basketball Trip	
Subs March	
Subs COPY	
County Wide Cross Country Meet 2011/2012	
Spirit Wear Vest	
Pizza Day (Fri. Feb 7th)	
Laptop Purchase 2011/2012	
Gym Rental	
Winter Concert 2011/2012	

Spirit Hoodies

Show your school spirit by purchasing a Spirit Wear Hoodie!

Amount:	\$30.00
School:	Eagle High School
Bank Account:	Eagle High - School Funds
Start Date:	Jan 01, 2013
End Date:	May 09, 2013
Available to Public:	No
Recurring Payments:	No
Students Attached:	0
Purchased By:	0
Total Made Available:	Unlimited
Limit Per Person:	1
Quantity Sold:	0
Options:	2
Choices:	6

Created: May 08, 2013
Last Modified: May 08, 2013

Page size: 20
147 items in 8 pages

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 Eagle High School

VIEW ITEMS | CREATE A NEW ITEM | STUDENT ATTACHMENTS | GROUP IMPORT | REPORTS

List of Items

Expired | 2011/2012 | All | All | Eagle High School | | **New Item**

All
Active
Expired
Deleted
Not Attached

Item Name	
Grade 11 Field Trip to Science Museum	
Grade 10 Field Trip to Science Museum	
Dance-a-Thon	

Spirit Hoodies

Show your school spirit by purchasing a Spirit Wear Hoodie!

Amount:	\$30.00
School:	Eagle High School
Bank Account:	Eagle High - School Funds
Start Date:	Jan 01, 2013

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 Eagle High School

VIEW ITEMS CREATE A NEW ITEM STUDENT ATTACHMENTS GROUP IMPORT REPORTS

List of Items

Deleted 2011/2012 All All Eagle High School New Item

All
Active
Expired
Deleted
Not Attached

County Wide Cross Country Race
Pizza Lunch - Friday, Jan 25th
School Activity Fee \$20

Edit Attach Expire Now Delete Manage Attachments Refund Copy

County Wide Cross Country Race

Once again this year we will hold a county wide cross country race. The race date is set for May 2nd with a rain date of May 3rd. Entrance fees are \$17.00. Specator tickets are \$3.50. There is a maxium of 2 specator tickets

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 Eagle High School

VIEW ITEMS CREATE A NEW ITEM STUDENT ATTACHMENTS GROUP IMPORT REPORTS

List of Items

Not Attached 2011/2012 All All New Item

All
Active
Expired
Deleted
Not Attached

Trip to Science Museum
Sch... Agendas
Eagle High School - Donation
Gym Rental

Edit Attach Expire Now Delete Manage Attachments Refund Copy

Grade 11 Field Trip to Science Museum

Science Museum Field Trip will depart school on Wednesday Apr. 17, 2013 at 9:30 AM. Students will return to school by 3:45 PM. Cost of trip includes

School Cash Catalog Not Attached Filter– Display

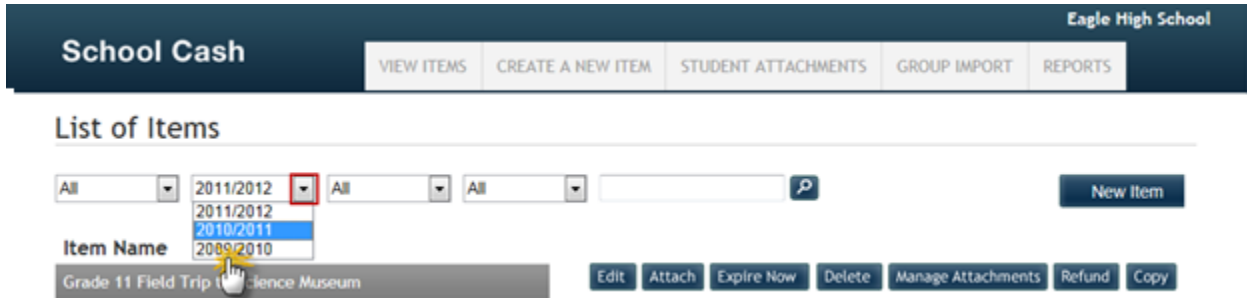
List of all items that do not have student attachments will display.

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



The screenshot shows the 'School Cash' header with navigation tabs: VIEW ITEMS, CREATE A NEW ITEM, STUDENT ATTACHMENTS, GROUP IMPORT, and REPORTS. Below the header is the 'List of Items' section. It features a filter bar with dropdown menus for 'All', '2011/2012', 'All', and 'All'. The '2011/2012' dropdown is open, showing a list of school years: 2011/2012, 2010/2011 (highlighted), and 2009/2010. A search icon and a 'New Item' button are also present. Below the filter bar, a table lists items, with 'Grade 11 Field Trip to Science Museum' visible. Action buttons (Edit, Attach, Expire Now, Delete, Manage Attachments, Refund, Copy) are located to the right of the item list.

School Cash Catalog School Year Filter– Display

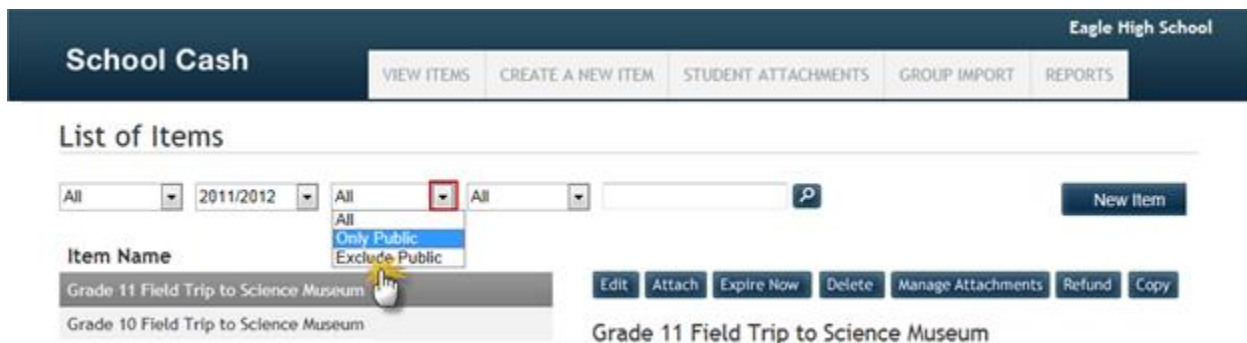
List of all items from selected school year will display.

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 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 “Public” filter
Select **Only Public** from filter options



The screenshot shows the 'School Cash' header with navigation tabs: VIEW ITEMS, CREATE A NEW ITEM, STUDENT ATTACHMENTS, GROUP IMPORT, and REPORTS. Below the header is the 'List of Items' section. It features a filter bar with dropdown menus for 'All', '2011/2012', 'All', and 'All'. The third 'All' dropdown is open, showing a list of public filters: All, Only Public (highlighted), and Exclude Public. A search icon and a 'New Item' button are also present. Below the filter bar, a table lists items, with 'Grade 11 Field Trip to Science Museum' and 'Grade 10 Field Trip to Science Museum' visible. Action buttons (Edit, Attach, Expire Now, Delete, Manage Attachments, Refund, Copy) are located to the right of the item list.

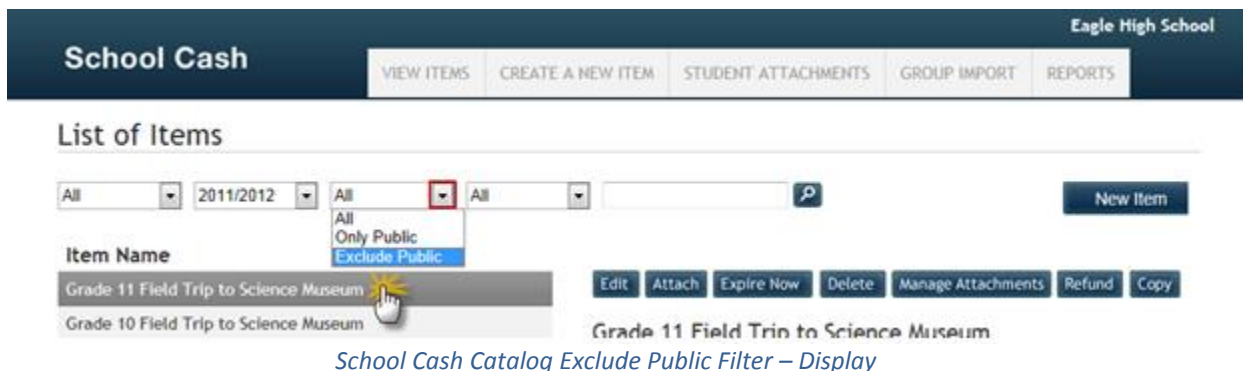
School Cash Catalog Only Public Filter– Display

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



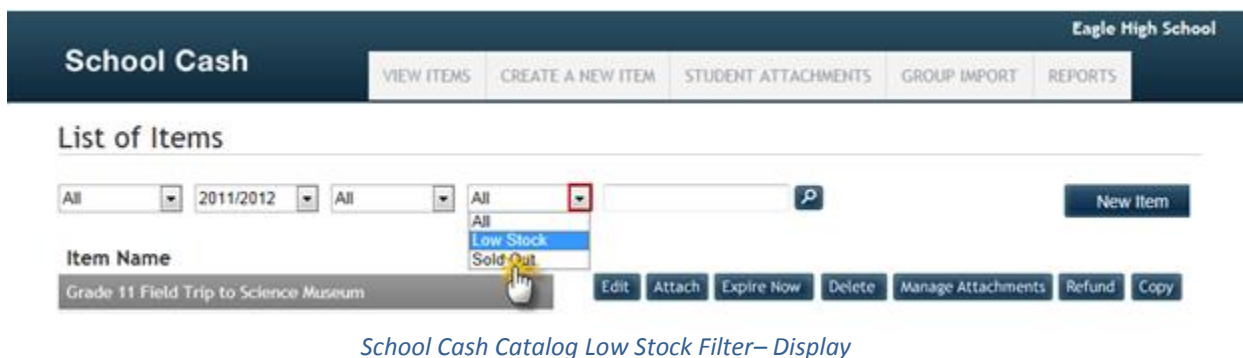
List of all items except those available to the public will display

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



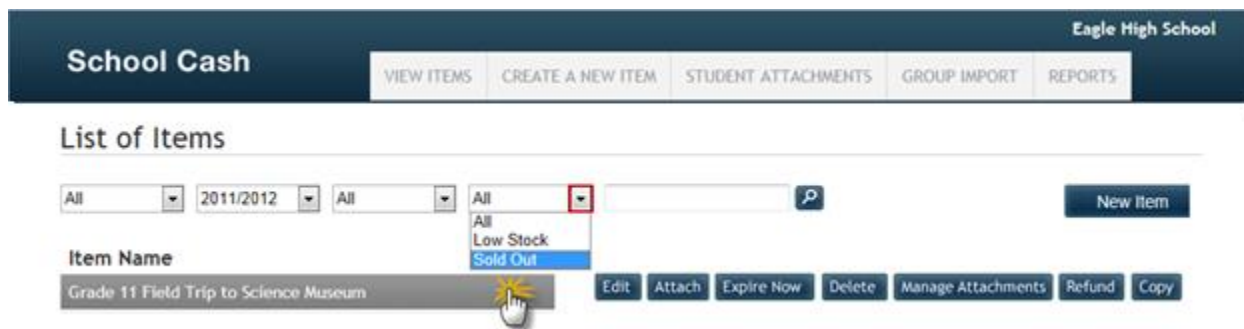
List of all items that are low in stock will display.

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. Item Search

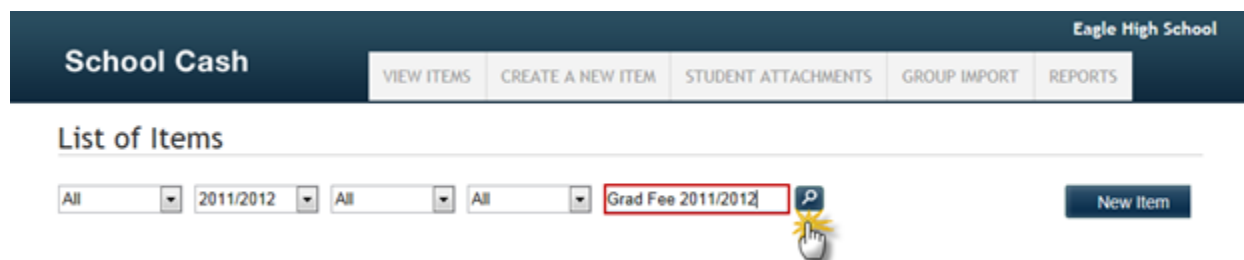
Perfect way to locate an item, when there the View Items display is very long!

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

Eagle High School
School Cash

[VIEW ITEMS](#)
[CREATE A NEW ITEM](#)
[STUDENT ATTACHMENTS](#)
[GROUP IMPORT](#)
[REPORTS](#)

List of Items

All ▾

2011/2012 ▾

All ▾

All ▾

Grad Fee 2011/2012

[New Item](#)

Item Name

Grad Fee 2011/2012

1 items found

[Edit](#)
[Attach](#)
[Expire Now](#)
[Delete](#)
[Manage Attachments](#)
[Refund](#)
[Copy](#)

Grad Fee 2011/2012

Amount:	\$90.00
School:	Eagle High School
Bank Account:	Eagle High - School Funds
Start Date:	Aug 24, 2011
End Date:	Jun 30, 2012
Available to Public:	No
Recurring Payments:	No
Students Attached:	305
Purchased By:	251
Total Made Available:	Unlimited
Limit Per Person:	1
Quantity Sold:	251
Options:	0
Choices:	0

Created:

Jun 24, 2011

Last Modified:

Dec 07, 2012

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**

Eagle High School
School Cash

[VIEW ITEMS](#)
[CREATE A NEW ITEM](#)
[STUDENT ATTACHMENTS](#)
[GROUP IMPORT](#)
[REPORTS](#)

List of Items

All ▾

2011/2012 ▾

All ▾

All ▾

spirit wear

[New Item](#)

School Cash Catalog Wild Card Search– Display

School Cash

Eagle High School

VIEW ITEMS

CREATE A NEW ITEM

STUDENT ATTACHMENTS

GROUP IMPORT

REPORTS

List of Items

All

2011/2012

All

All

spirit wear

New Item

Item Name

Spirit Wear Vest

Spirit Wear Hoodie

Spirit Wear Hoodie

3 Items found

Edit

Attach

Expire Now

Delete

Manage Attachments

Refund

Copy

Spirit Wear Vest

This year's spirit wear item is a polar fleece vest. The vest cost is \$18.00.

Amount:

\$18.00

School:

Eagle High School

Bank Account:

Eagle High - School Funds

Start Date:

Dec 06, 2011

End Date:

Feb 10, 2013

Available to Public:

No

Recurring Payments:

No

Students Attached:

1

Purchased By:

0

Total Made Available:

Unlimited

Limit Per Person:

Unlimited

Quantity Sold:

0

Options:

0

Choices:

0

Created:

Jan 29, 2013

Last Modified:

Jan 30, 2013

School Cash Catalog Wild Card Search Results– Display

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

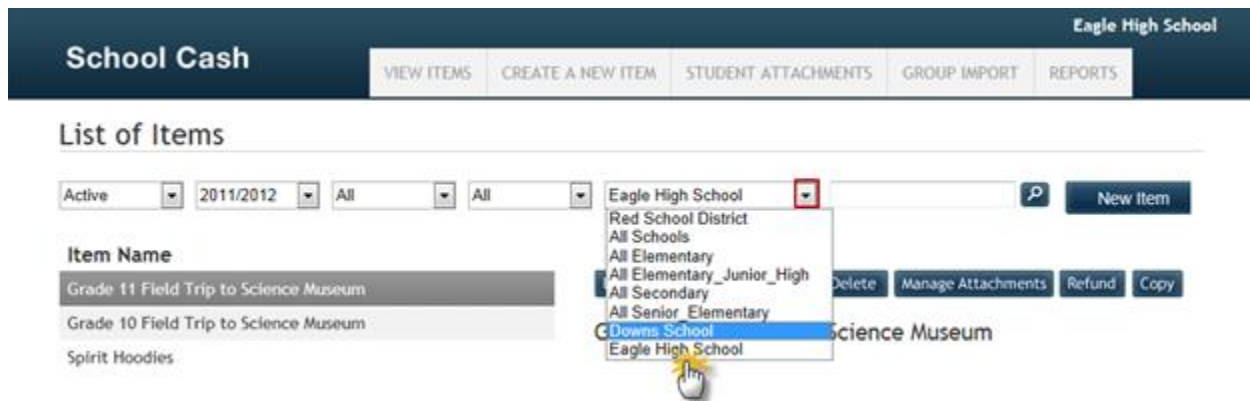
NOTE: List of Items displays 20 items at a time, it may be necessary to use the page turns at the bottom of the list to see additional items.

11. District Level ONLY Filter

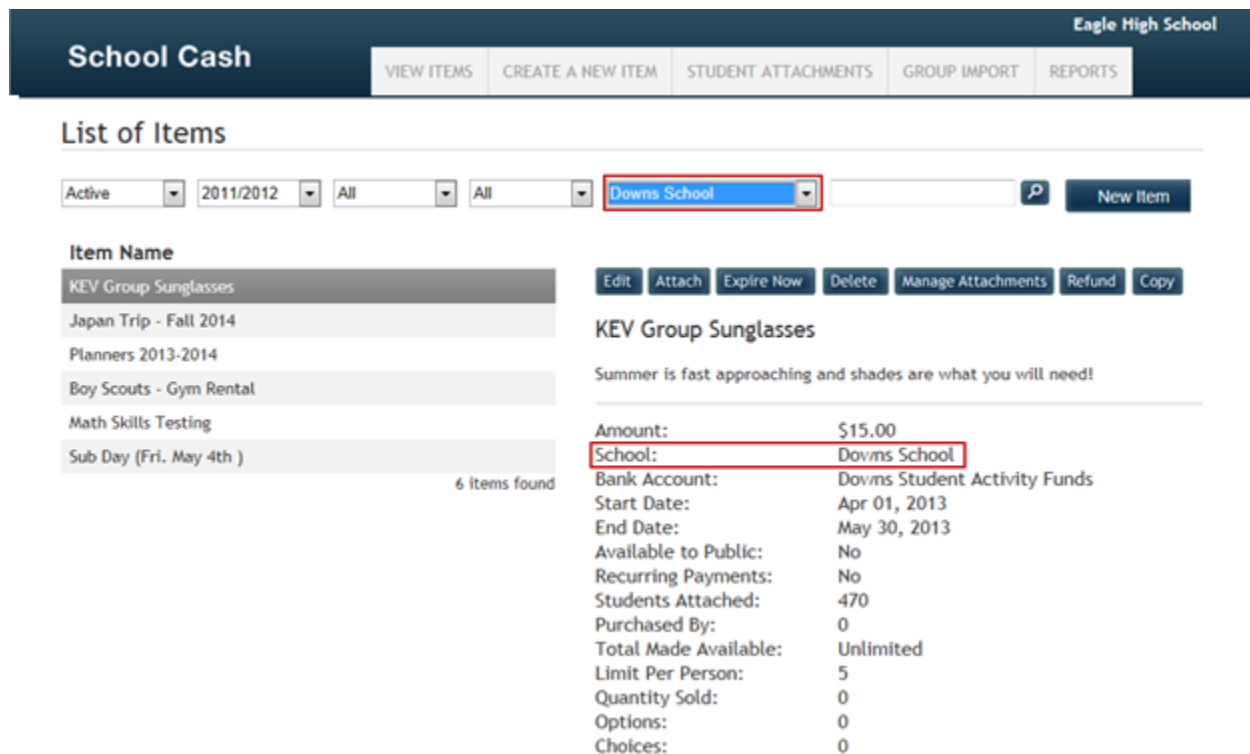
In addition to all of the regular item filters, District Level access provides an additional filter by School. This filter will allow school specific items to be displayed.

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.