



School Cash Register Item History

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School Cash Register

Item History

School Cash Register will provide the user with a student based Item History. This feature can be used to research items that have been attached to the selected student. The Item History display includes both Payment Status and Payment Date. The Item History offers has no editing capabilities, the Item History tab is for research purposes only.

The Item History display is based on:

- 🔍 A search for a specific Student
- 🔍 Selected School Year

The Item History will display details that include:

- 🔍 Selected Student details
- 🔍 Item Name
- 🔍 Cost
- 🔍 Paid Amount
- 🔍 Waived Amount
- 🔍 Refund Amount
- 🔍 Balance Owed
- 🔍 Status
- 🔍 Purchase Date

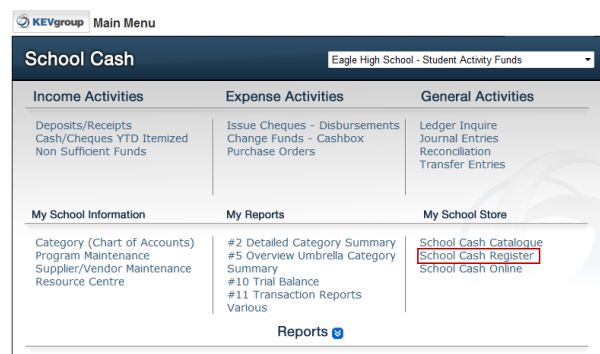
The Item History Payment Status display can be filtered based on selection from a drop-down. Filter choices include:

- 🔍 All Payments (default display)
- 🔍 Fully Paid
- 🔍 Partially Paid
- 🔍 Outstanding
- 🔍 Waived
- 🔍 Voided
- 🔍 Deleted
- 🔍 Refunded

1 To Access Item History

From **Main Menu**, **My School Store** group:

1. Click **School Cash Register**



2. Using **Search** dialog box, enter any known student information, entering a prompt letter in Student Name text slot will search for any student name containing that letter
3. Click **Search**
4. Click **Checkbox** to the left of required student name
5. Click **Select**

Search

Student Last Name, First: Student ID: Guardian Last Name, First: **Search**

Select **Close**

Search

a Student ID: Guardian Last Name, First: **Search**

✓ Last Name First	Gr	ID	Date of Birth
<input checked="" type="checkbox"/> Abell, Miguel	12	8875	01/01/2009
<input type="checkbox"/> Abraham, Brittany	12	343	01/01/2009
<input type="checkbox"/> Abraham, Jamin	11	17620	01/01/2009
<input type="checkbox"/> Adams, Brody	10	8354	01/01/2009
<input type="checkbox"/> Adams, Carter	10	16961	01/01/2009
<input type="checkbox"/> Adams, Charles	10	8271	01/01/2009
<input type="checkbox"/> Adams, Cole	10	8206	01/01/2009
<input type="checkbox"/> Adams, Rebecca	10	8425	01/01/2009
<input type="checkbox"/> Allan, Siena	11	1173	01/01/2009
<input type="checkbox"/> Allarie, Joey	10	17025	01/01/2009
<input type="checkbox"/> Alm, Adria	10	8275	01/01/2009
<input type="checkbox"/> Anderson, Branden	10	8454	01/01/2009
<input type="checkbox"/> Anderson, Cheyanne	12	14044	01/01/2009
<input type="checkbox"/> Anderson, Cody	10	1108	01/01/2009
<input type="checkbox"/> Anderson, Dylan	10	8274	01/01/2009

First Previous 1 2 3 4 5 Next Last

Select **Close**

6. Verify that the correct student has been selected

Cashdrawer: Trust Account (1) Eagle High School

School Cash **Checkout** Search Item History Refunds Group Collection Modification Close Out Print

Checkout

Item Name	Payment Action	Cost	Paid/Refunded to Date	Waived	Current Charges	Balance Owed	Comments	School Year
Abell, Miguel Grade - 12 ID - 8875 Birthday - 01/01/2009 Guardian - Gagnon, Katie								

Add additional item

Cashdrawer: Trust Account (1) Eagle High School

School Cash **Checkout** **Item History** Refunds Group Collection Modification Close Out Print

7. Click **Item History** tab

Cashdrawer: Trust Account (1)

Eagle High School

School Cash

Checkout

Search

Item History

Refunds

Group Collection

Modification

Close Out

Print

Student Item History

Payment Status: All Payments

School Year: 2012/2013

Item Name: Item Name

Abell, Miguel Grade - 12 ID - 8875 Birthday - 01/01/2009 Guardian - Gagnon, Katie

Item Name	Cost	Paid	Waived	Refunded	Balance Owed	Status	Purchase Date
Athletic Participation Fee	40.00	0.00	0.00	0.00	40.00	Outstanding	
County Wide Cross Country Meet 2011/2012	0.00	0.00	0.00	0.00	0.00	Outstanding	
Dance-a-Thon	2.00	0.00	0.00	0.00	2.00	Outstanding	
Gr 9 Business Field Trip (Mr. Jones & Ms. Smith classes only)	10.00	0.00	0.00	0.00	10.00	Deleted	01/22/2013
Grad Trip to New York	800.00	0.00	0.00	0.00	800.00	Outstanding	
Grade 8 Zoo Trip 2011/2012	10.00	0.00	0.00	0.00	10.00	Outstanding	
Gym Uniform 2011/2012	5.00	0.00	0.00	0.00	5.00	Outstanding	
Laptop Lease	1,500.00	0.00	0.00	0.00	1,500.00	Outstanding	
Laptop Purchase 2011/2012	800.00	100.00	0.00	0.00	700.00	Partially Paid	02/06/2013
Pizza Day (Fri. Feb 1st)	0.00	0.00	0.00	0.00	0.00	Outstanding	
Pizza Day (Fri. Feb 7th)	0.00	0.00	0.00	0.00	0.00	Outstanding	
Prom Tickets	0.00	0.00	0.00	0.00	0.00	Outstanding	
Prom Tickets - 2013-2014	20.00	0.00	0.00	0.00	20.00	Outstanding	
Prom Tickets 2011/2012	25.00	0.00	0.00	0.00	25.00	Outstanding	
School Activity Fee \$20	20.00	20.00	0.00	0.00	0.00	Fully Paid	01/22/2013
Spirit Hoodies	30.00	0.00	0.00	0.00	30.00	Outstanding	
Spirit Hoodies	30.00	0.00	0.00	0.00	30.00	Outstanding	

School Cash Register – Item History – Display

Features:

A. Payment Status:

Filter allows the Item History list to be filtered based on selection from drop-down

Default display is All Payments

Filter choices included:

All Payments – displays a list of all item payments associated with selected student;

Fully Paid – filters the payment list to display only items that are fully paid;

Partially Paid – filters the payment list to display only items that are partially paid;

Outstanding – filters the payment list to display only items that are outstanding (items that are required and past the item end date);

Waived: filters the payment list to display any items that have been waived (items can be waived in full or in part);

Voided – filters the payment list to display any items that have been voided;

Deleted – filters the payment list to display any items that have been deleted;

Refunded – filters the payment list to display any items that have been


School Year: Item History display can be filtered based on school year. Default display is current school year. Drop-down choices depend on the number of years the school has used School Cash Register.

B. **Item Name:**

Enter an Item Name to search for a specific item.

C. **Required Item:**

Any items that have been attached as **Required**

display with a yellow star 

D. **Item Details:**

Item details include: Item Name, Cost, Waived, Refunded, Balance Owed, Status, Purchase Date.

E. **Vertical Scrollbar:**

Item History list can be lengthy, use the **Vertical Scrollbar** to scroll down the item history display.

F. **Student Details:**

Displays selected student information that includes: Student Name, Grade, Student ID, Birthdate, Parent/Guardian Name.

2 How to Manage Item History Display

The Item History display can be very lengthy, there are several tools in place that will assist in managing the display of the list.

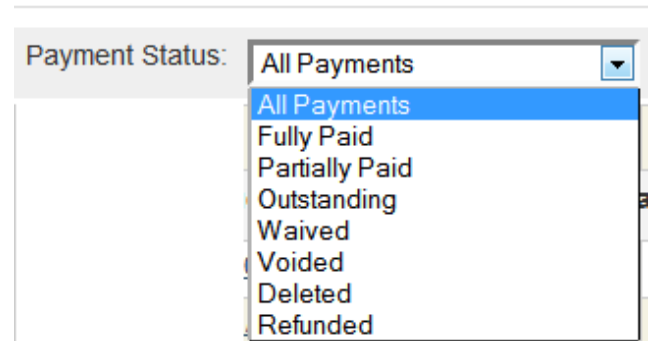
2.1 Payment Status:

Use the Payment Status filter to manage a long Item History list. Selecting a required Payment Status from the drop-down will filter the Item History display to display on the selected Payment Status.

To Filter Item History by Payment Status:

In **Item History** display:

1. Select required **Payment Status** from drop-down.
2. Item History list will be filtered based on Payment Status selection.



2.2 School Year:

Use the School Year filter to display Item History based on a previous school year. Selecting a required School Year from the drop-down will filter the Item History display so that only items that were attached to the selected student in the selected School Year display.

NOTE: Number of school years that are available in the drop-down depends on the number of years the school has used School Cash Catalog.

To Filter Item History by School Year:

In **Item History** display:

1. Select required **School Year** from drop-down
2. Item History list will be filtered based on School Year selection



The screenshot shows a 'School Year:' label followed by a dropdown menu. The menu is open, displaying a list of school years: '2012/2013' (highlighted in blue), '2011/2012', and '2010/2011'.

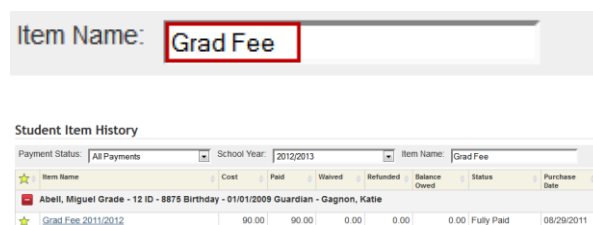
2.3 Item Name:

The Item History display can be very lengthy, searching for a specific item name is a time saving tool.

To Filter Item History by Payment Status:

In **Item History** display:

1. Enter an Item Name in **Item Name** text slot
2. Press **ENTER** on keyboard
3. Search results will be displayed below student information




The screenshot shows the 'Item Name:' text field with 'Grad Fee' entered and highlighted by a red box. Below it, the 'Student Item History' table is displayed. The table has columns: Item Name, Cost, Paid, Waived, Refunded, Balance Owed, Status, and Purchase Date. The first row shows 'Abell, Miguel Grade - 12 ID - 8875 Birthday - 01/01/2009 Guardian - Gagnon, Katie'. The second row shows 'Grad Fee 2011/2012' with a cost of 90.00, paid 90.00, and status 'Fully Paid'.

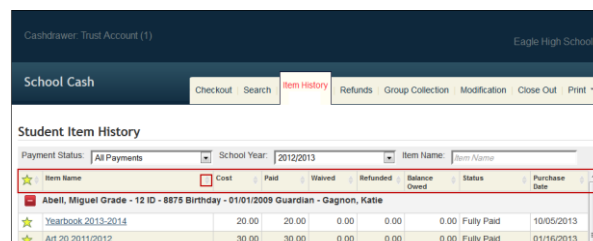
3 How to Sort Item History Display

Any one of the column headers can be used to sort the Item History display. Clicking column header one time will sort the list in ascending order, either alphabetically (A-Z) or numerically. Clicking a column header a second time reverses the sort order.

To Sort Item History:

In **Item History** display:

1. Click **sort icon**  to the right of any column header
2. Item History display will sort in ascending order based on the select column
3. For example: Clicking Item Name will sort the Item History display alphabetically by Item Name




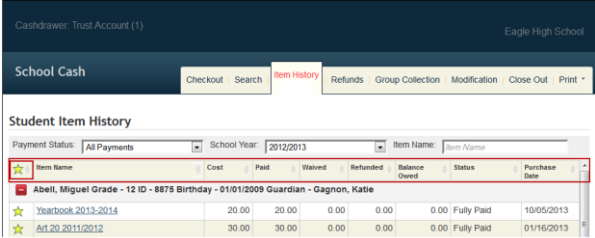
The screenshot shows the 'School Cash' interface with the 'Item History' tab selected. The 'Student Item History' table is displayed, sorted by 'Item Name'. The table has columns: Item Name, Cost, Paid, Waived, Refunded, Balance Owed, Status, and Purchase Date. The first row shows 'Abell, Miguel Grade - 12 ID - 8875 Birthday - 01/01/2009 Guardian - Gagnon, Katie'. The second row shows 'Yearbook 2013-2014' with a cost of 20.00, paid 20.00, and status 'Fully Paid'. The third row shows 'Art 20 2011/2012' with a cost of 30.00, paid 30.00, and status 'Fully Paid'. A red box highlights the 'sort icon' (a small triangle) to the right of the 'Item Name' column header.

Use the Required Items indicator to sort Item History display based on Required Items.

To Sort Item History based on Required Items:

In **Item History** display:

1. Click **Required Items** indicator 
2. Required Items will be displayed at the top of the Item History
3. Clicking **Required Items** indicator a second time will cause Required Items to be displayed at the end of the Item History



Item Name	Cost	Paid	Waived	Refunded	Balance Owed	Status	Purchase Date
Abell, Miguel Grade - 12 ID - 8875 Birthday - 01/01/2009 Guardian - Gagnon, Katie							
★ Yearbook 2013-2014	20.00	20.00	0.00	0.00	0.00	Fully Paid	10/05/2013
★ Art 20 2011/2012	30.00	30.00	0.00	0.00	0.00	Fully Paid	01/16/2013