School Cash Register

Item History

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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
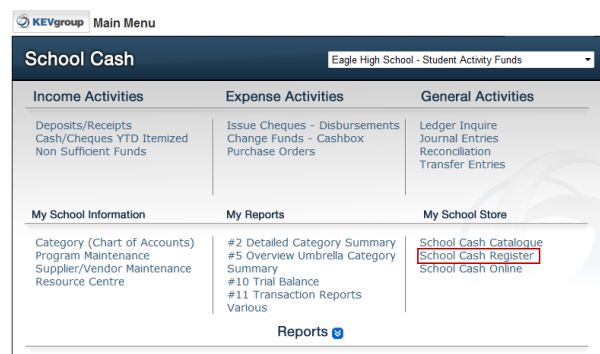- Refund Amount
- Balance Owed
- Status
- Purchase Date

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**

6. Verify that the correct student has been selected

7. Click **Item History** tab

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.
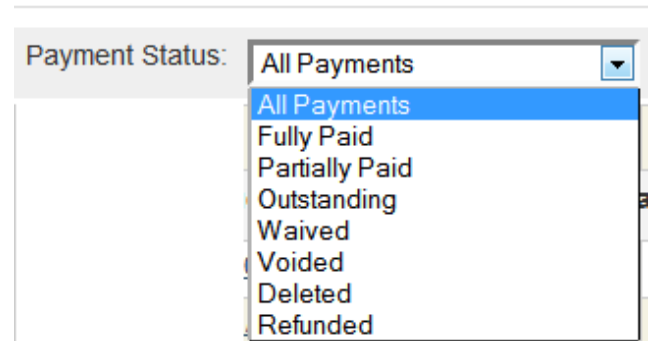
2.1 Payment Status:

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

Payment Status: All Payments ▾

All Payments
Fully Paid
Partially Paid
Outstanding
Waived
Voided
Deleted
Refunded

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
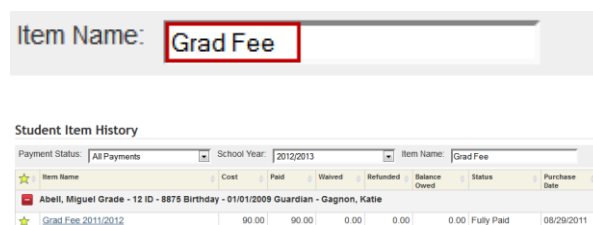2. Item History list will be filtered based on School Year selection

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
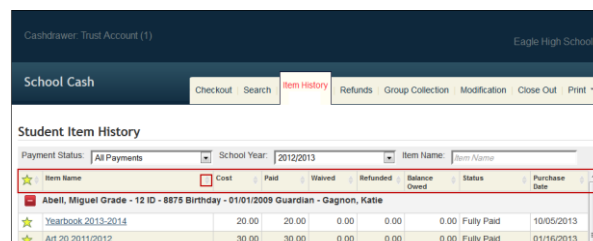

3 How to Sort Item History Display

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
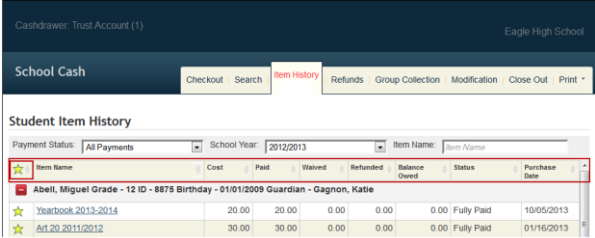3. For example: Clicking Item Name will sort the Item History display alphabetically by Item Name

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