



School Cash Register

How to Modify a Payment

There are two types of modification that are allowed in the School Cash Register:

1. **Change a Tender** (Cash, Check, Credit Card)

An incorrect tender was selected during the checkout and a receipt was issued.

Example: User makes a payment selecting the Cash option and realized after printing the receipt that the tender should have been a Check

2. **Change a Student**

An incorrect student was selected during the checkout and a receipt was issued.

Example: User makes a payment for Evan Smith and realized after printing the receipt that the student should have been Emily Smith.

These modifications can only be made prior to a Closeout.

1.Change a Tender


User should be logged into School Cash Register Module to complete this task.

Step 1: Locate the student that requires the change. Use the Search option if the student is not displayed on the Checkout screen.


A search form with a dark blue header bar containing the word "Search" and a close button (X). Below the header are three input fields with placeholder text: "Student Last Name, First", "Student ID", and "Guardian Last Name, First". To the right of these fields is a dark blue "Search" button.

Step 2: From the Checkout Screen, select the **Modification** tab

Step 3: Modification Screen will display the current payment(s) made for the student. At this point, *Closeout has not yet been completed.*

Step 4: Select the Change icon  (Last column on right)

The screenshot shows the "School Cash" application interface. At the top is a dark blue navigation bar with the title "School Cash" and a menu containing "Checkout", "Search", "Item History", "Refunds", "Group Collection", "Modification" (highlighted with a blue circle labeled 2), "Close Out", and "Print". Below the navigation bar is a section titled "Modify a record". It contains a table with the following data:

Receipt #	Student Name	Payment Date	Amount	Tender	
14	Smith, Evan	09/07/2011 12:04 AM	\$30.00	Cash	 (4)

The "Receipt #" column has a blue circle labeled 3 next to the value 14. The "Change icon" in the last column has a blue circle labeled 4 next to it.

Step 5: The Modify Payment screen will appear, displaying 2 options; Change Student or Change Tender

Modify Payment Smith, Evan Grade: 11 ID: 246983 Guardian: Smith, Merry

Receipt #	Payment Date	Amount	Tender
14	09/07/2011 12:04 AM	\$30.00	Cash

Item	Amount	Options
Student Fees	\$30.00	1

☐ **Change Student** [search](#)

☐ **Change Tender**

Reason *

OK **Cancel**

Step 6: To Change Tender, select the checkbox beside this option, then select the correct tender type from the drop down.

Step 7: Enter the Reason for making this change. This is a mandatory field.

Step 8: Select **OK** to complete the transaction.

Modify Payment Smith, Evan Grade: 11 ID: 246983 Guardian: Smith, Merry

Receipt #	Payment Date	Amount	Tender
14	09/07/2011 12:04 AM	\$30.00	Cash

Item	Amount	Options
Student Fees	\$30.00	1

☐ **Change Student** [search](#)

☒ **Change Tender**

Reason *

Incorrect tender

OK **Cancel**

Note: Selecting Cancel will not save the changes.

Step 9: Use the **Print / Reprint Receipt** to re-issue the receipt with the correct tender.

2.Change a Student

Step 1: Locate the student that requires the change. Use the Search option if the student is not displayed on the Checkout screen.

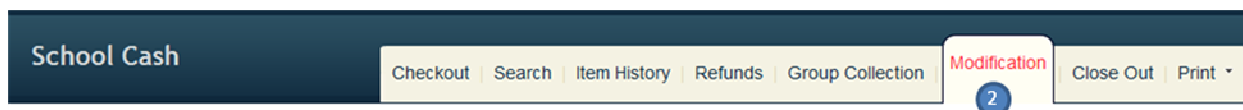


A search bar with a dark blue header containing the word "Search" and a close button (X). Below the header are three input fields: "Student Last Name, First", "Student ID", and "Guardian Last Name, First". To the right of these fields is a dark blue button labeled "Search".

Step 2: From the Checkout Screen, select the **Modification** tab


Step 3: Modification Screen will display the current payment(s) made for the student. At this point, *Closeout has not yet been completed.*

Step 4: Select the Change icon  (Last column on right)

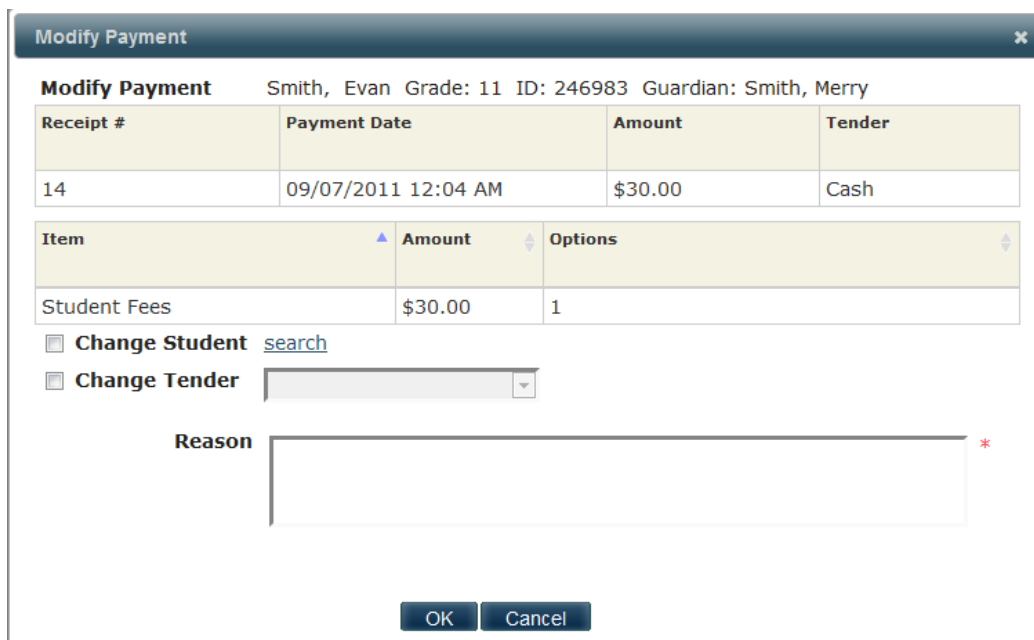


A horizontal navigation bar for "School Cash". It contains several tabs: "Checkout", "Search", "Item History", "Refunds", "Group Collection", "Modification" (highlighted with a blue circle containing the number 2), "Close Out", and "Print".

Modify a record

Receipt #	Student Name	Payment Date	Amount	Tender	
14	Smith, Evan	09/07/2011 12:04 AM	\$30.00	Cash	 4

Step 5: The Modify Payment screen will appear, displaying 2 options; Change Student/Change Tender



A "Modify Payment" dialog box. At the top, it says "Modify Payment" with a close button (X). Below this, it displays student information: "Smith, Evan Grade: 11 ID: 246983 Guardian: Smith, Merry". There are two tables. The first table has columns: Receipt #, Payment Date, Amount, and Tender. The second table has columns: Item, Amount, and Options. Below the tables are two checkboxes: "Change Student" with a "search" link, and "Change Tender" with a dropdown menu. Below these is a "Reason" label and a text input field. At the bottom are "OK" and "Cancel" buttons.

Receipt #	Payment Date	Amount	Tender
14	09/07/2011 12:04 AM	\$30.00	Cash

Item	Amount	Options
Student Fees	\$30.00	1

☐ **Change Student** [search](#)

☐ **Change Tender**

Reason *

OK **Cancel**

Step 6: To Change Student, select the checkbox beside this option, then select the [search](#) option.

Step 7: The Search screen will appear allowing you to enter the student's name that the payment should have been processed. Enter the name and then select **Search**.

Step 8: Select the correct student that is displayed by clicking on the checkbox and then click **Select**

The screenshot shows the 'Modify Payment' window. On the left, the 'Change Student' checkbox is checked and highlighted with a red box and a blue circle labeled '6'. The 'search' link is also visible. On the right, a 'Search' window is open, showing a search bar with 'smith, emily' entered, and fields for 'Student ID' and 'Guardian Last Name, First'. A blue circle labeled '8' is next to the 'Search' button in the search window. A blue circle labeled '7' is next to the 'Smith, Evan' text in the main window.

Step 9: The Modify Payment screen will refresh, displaying the found student's information beside the Change Student option.

Step 10: Enter the Reason for making this change. This is a mandatory field.

Step 11: Select **OK** to complete the transaction.

The screenshot shows the 'Modify Payment' window after the student change. The 'Change Student' checkbox is checked, and the student information 'Smith, Emily Grade: 9 ID: 263664 Guardian: Smith, Kristi' is displayed next to it, with a blue circle labeled '9' next to the 'search' link. The 'Change Tender' checkbox is unchecked. The 'Reason' field is highlighted in yellow and contains the text 'Incorrect student was charged (Evan Smith)', with a blue circle labeled '10' next to it. At the bottom, there are 'OK' and 'Cancel' buttons, with a blue circle labeled '11' next to the 'OK' button.

Note: Selecting Cancel will not save the changes.

Step 12: To re-print the receipt for the "changed" student, use the Search option to locate the student's information. Select the **Print / Reprint Receipt** to re-issue the receipt for the correct student.

What if I...

made a payment with a post-dated check;

made a payment with a check for the wrong amount (should have been a partial payment for an item); or

made a payment with a check for the incorrect item?

The modification option was intended to either change the tender or the student name, but we have found that other corrections may be required.

When dealing with checks, refunds are not an option to for this transaction because the close-out will still expect the check to be deposited. KEV's recommendation is to change the tender to cash, refund the total payment and resubmit the charge or payment.

Steps for making the corrections stated above:

1. Search for the student that requires the correction
2. Reprint the receipt for the payment that you require a correction. **Print tab > Reprint Receipt**
3. Select the **Modification** tab
4. Select the "**Change**" icon (far right column) for the payment that needs to be adjusted
5. The Modify Payment screen appears; select **Change Tender** (from check to cash), enter the **Reason**, (for example: Adjustment – Post-dated Check or Wrong Amount or Incorrect Item), Select **OK**
6. Select the **Refund** tab and refund the total payment (from cash to cash), enter the **Reason**, (for example: Adjustment – Post-dated Check or Wrong Amount or Incorrect Item), Select **OK**
7. Select the **Checkout** tab and re-enter the items that were attached to the original payment (reference the receipt for this information) and update the Payment Status for each item

Based on the reason that you have made the correction, the Payment Status could be:

Post-dated check: Payment Status for all items set to "Outstanding", hold onto the check until the deposit date and complete the payment at that time. Reference the original receipt.

Wrong amount: Payment Status and Partial Payment re-entered to match the check amount

Incorrect Item: Payment Status applied to the correct item