# SCHOOL CASH CATALOG: HOW TO CREATE ITEM

School Cash       VIEW ITEMS       CREATE A NEW ITEM       STUDENT ATTACHMENTS       GROUP IMPORT       REPORTS         Create a New Item         Name: *       Description:         Uniformation       Year: *       © 2017/2013       © 2010/2011         Bank Account: *       © Engle High - School Funds       © School Division No 1575         Effective From: *       Send Reminder Email:       © and Date         Quantity Available: *       Unlimited? © 2         Information       Create Proprint       Intimited? © 2         Additional Item       Limit Per Person: *       1         Information       © Recurring Payments?       2         Extended Item       • Add Option	le High School	Eag									
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Basic Item Information       Description:         Year: *       2012/2013 © 2011/2012 © 2010/2011         Bank Account: *       Eagle High - School Funds © School Division No 1575         Effective From: *       Start Date         Send Reminder Email:       Send Date         Quantity Available: *       Unlimited? I ?         Additional Item Information       Limit Per Person: *       1         Recurring Payments?       ?         Extended Item       Start Option							em	Create a New It			
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Add Permission Form								+ Add Permission Form	$\rightarrow$		

School Cash Catalog – Create New Item Form - Display



# 1. To Create Item:

From the Main Menu, My School Store group:

- 1. Click School Cash Catalog
- 2. Click either Create a New Item tab or New Item button
- 3. Begin at top of **Create a New Item** form complete all required fields. Required fields are marked with red asterisk (\*).

(Tip: Save time, press TAB key to move to the next field in the form.)

# 1.1. Basic Item Information:

### Name\*:

Enter the name of the new Item Eg: Yearbook 2013-2014 (**Tip**: Be sure to include school year in the Item Name. Many items repeat from year to year.)

### Description:

Enter a description of the Item. (**Tip**: This information will appear in School Cash Online. Be sure to include such information as Departure time for a school trip, special features of a yearbook). Up to 5,000 characters are allowed here.

### School Year\*:

Defaults to current school year.

### Bank Account\*:

Select the bank account to which the funds from the sale of the item should flow. (**Tip**: School Cash Online payments flow directly to the selected school bank account, School Cash Register payments flow to the selected school bank account on Cash Drawer closeout.)

### Effect From\*:

**Start Date:** Date when item will be available for payment (visible in School Cash Online and listed in School Cash Register).

End Date: Date when item will no longer display in School Cash Online.

Required Items that have not been purchased will display as "Overdue" in School Cash Online after the End Date.

### 1.2. Additional Item Information

### Send a Reminder Email:

Selecting this feature and entering a date, will automatically send an email reminder to all School Cash Online registrants, who have provided an email address and not yet paid for the selected item.

### Quantity Available \*:

Default Unlimited. Enter a value if there is a known quantity for the selected item. **eg.:** Only 250 yearbooks have been ordered. **View Items** display watch the quantity sold, to monitor quantity remainder.

### Limit Per Person \*:

Defaults to 1. If more than 1 of the Item can be purchased enter that value. (**Tip**: Checking "Unlimited" will cause the selected item to continuously display on School Cash Online, and allow for repeated purchases. KEV does not recommend using "unlimited" for items that are required.)

### Available to Public\*:

Some items can be extended to the public for purchase. **eg.:** Spirit Wear could be made available to the public, for purchase by extended family members or alumni. Defaults to No (unchecked option).

### **Recurring Payments:\***

Allows for payment breakdown for large ticket items. **eg.:** The Graduation Trip cost is \$800.00 and could be paid for using 4 payments of \$200.00. Defaults to No (unchecked option).

**NOTE**: This feature is only available for online payments using School Cash Online.

### Add Category \*:

Select **Category** to which item payments should be credited. List of Categories comes from School Cash Accounting Category (Chart of Accounts).

# Click Add Category 🖿 button

- 1. Select Category Name from drop down. (eg.: Yearbook General. Category Number auto populates.)
- 2. Enter Amount (Cost of Item). (eg.: \$20.00)

3. Click Save Category

**Note**: Categories can be split by clicking **Add Category** a second time.



## 1.3. Extended Item Information:

#### Add Option:

Use this feature to add item options. **eg.:** Hoodie, could be purchased in a Size option.

# Click Add Option to button:

- 1. Enter Option Name: Hoodie
- 2. Enter Description:
- 3. Select Category:
- Set Choose Between: Adjust Slider (Slider will determine how Option functions. 1 to 1 will force user to select a ONE size on checkout.) For further information on Option sliders please see How to Create An Item documentation.)
- 5. Click Save Option
- 6. Add choices as required

Option Name:	Hoodie Size
Description:	Hoodies are available in green and come in sizes small, medium and large
Category:	School Clothing & Other 🔹 1250 🔹
GL Department:	•
GL Name:	•
Choose Between:	1 🗹 🕽 🗾 🕨 all
	1 to 1

School Cash Catalog – Option Slider Display

### Add Picture:

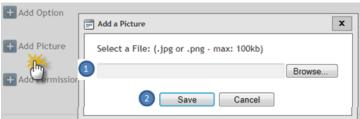
Use this feature to include a picture in the online display for the selected item. **eg.:** A picture of the Spirit Wear Hoodie could be included. **NOTE**: Pictures must be 100kb or less and in .jpg or .png format. Pictures will display in School Cash Online.

# Click Add Picture 🖿 button:

#### In Add Picture popup:

1. Click Browse ...: Locate desired .jpg or .png file

2. Click Save



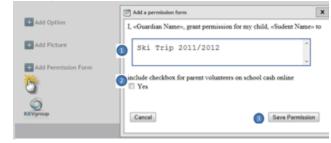
### Add Permission Form:

Includes a Permission Form, when the item is viewed in School Cash Online. **eg.:** In order to participate in the Field Trip, a permission form must be returned to the school. The permission form can be authorized online. Permission Forms Report will list signed permission forms.

Click Add Permission Form button

Permission Form popup will include:

- 1. Item Name (more text can be added to this text box if required
- 2. Include parent volunteers check box (optional
- 3. Click Save Permission



Add Permission Form - Display

#### Save:

Click **Save** button to save Create New Item form. Item forms do not save automatically. Any additional edits must be saved.

					Eagle High So
School Cash	VIEW ITEMS	CREATE A NEW ITEM	STUDENT ATTACHMENTS	GROUP IMPORT	REPORTS
Create a New It	:em				
Name: *	Yearbook 2013-2014				
Description:	Yearbooks will go on sale Octo Yearbook will feature colored				
School:	Eagle High School 💌				
Year: *	● 2013-2014 © 2012/2013	D 2011/2012 D 2010/2011			
Bank Account: *	Eagle High · School Funds	🗢 School Division No 1575			
Effective From: *	10/14/2013 📰 11	/1/2013			
Send Reminder Email:	Start Date End	1 Date			
Quantity Available: *	Unlimited? 🗹 👔				
Limit Per Person: *	1 Unlimited?				
Available to Public?	Unlisted Fee?				
Recurring Payments?	2				
+ Add Category *					
Category Name	Category Number	Amount	N/A Transaction	Code	
Yearbook	09001000.00	\$20.00			/ -
+ Add Option					
+ Add Picture					
+ Add Permission Form					
+ Add Custom Form					
_		Save Cancel	0		
	Complete	Basic New Ite	em Form – Dis	nlav	

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						Eagle High Sch
School Cash	VIEW ITEMS	CREATE A NEW ITEM	STUDENT ATTACH	IMENTS	GROUP IMPORT	REPORTS
ist of Items						
ctive  2013/2014,  All	•	All 💌 Eagle H	ligh School 💌			D New Item
tem Name (earbook 2012-2013		Edit A	ttach Expire Now	Delete A	Aanage Attachmen	ts Refund Copy
			ks will go on sale Oct k will feature colored			
		Recurrir Student: Purchas Total Ma	count: te: e: e to Public: g Payments: s Attached: ed By: ade Available: rr Person: y Sold: :		2013	nds
		Created Last Mod	:	Oct 04, Oct 04,		

School Cash Catalog View Items – Display

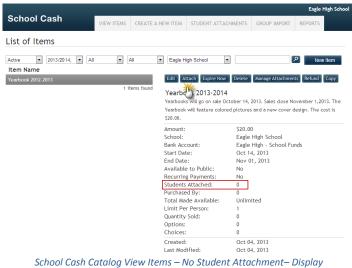
# 2. To Attach An Item:

Once an item has been created, it must be attached to students. **NOTE:** Student lists are uploaded to School Cash Catalog on a regular basis.

#### **To Attach Students:**

## From Main Menu, My School Store group

- 1. Click School Cash Catalog
- 2. Select Item from List of Items



# 3. Click Attach

**Tip:** Before continuing with the student attachment process be sure to verify Create Attachment: details.

							Eagle H	ligh School
	School Cash	VIEW ITEMS	CREATE A NEW IT	EM STUDENT AT	TACHMENTS	GROUP IMPORT	REPORTS	
	Create Attachment: Ye	earbook 2	013-2014					
1	Attach Item As: Optional				Comment:			
2	Attach Item To: All Students     Grade	© Cours	e 🔍 Home	room ©	Group	Individual Stud	lents	
3	View Selected Students						Attach S	tudents

School Cash Catalog Create Attachment – Display

- 4. Select appropriate attachment type:
  - Optional: Gives the parent/student the option of making the item purchase. After the End Date the item will no longer display on School Cash Online student account. eg.: Yearbook Required: Item must be purchased by parent/student. After the End Date the item displays as "Overdue" on the School Cash Online student account. eg.: School Agenda
- 5. Select appropriate student grouping (Attach Item To:
  - 2. All Students: All students in currently in the student database will be attached to the selected item eg.: Yearbook

Grade: Item is Grade specific. eg.: Grade 10 Ski Trip

Homeroom: Item is specific to a Homeroom. eg.: Room 100 Track Meet

**Group:** Item is specific to a selected group. eg.: Basketball Team Tournament Fees. **NOTE**: Group file must be created in Excel and uploaded to School Cash Catalog in order for this feature to available. Please see School Cash Catalog –Import a Group and Attach documentation for further information.

Individual Students: Items can be attached to students on an individual basis. eg.: Parking Fees

School Cash		VIEW ITEMS	CREATE A NEW ITEM	STUDENT ATTACHMENTS	GROUP IMPORT	Eagle High Sch REPORTS
Create Attachm	ent: Ye	arbook 2	013-2014			
Attach Item As: Optional	lequired			Comment:		
Attach Item To: attach Students	© Grade	Cours	e 🔍 Homeroom	© Group	Individual Stude	ents
View Selected Students						Attach Students

Click either View Selected Students or Attach Students
 Once the Attach Item As: and Attach Item To: selections are complete, the user can either: View Selected Students or

Attach Students.

- 3. View Selected Students: would display a list of all students in the selected Attach Item To: choice.
  - Attach Students: will proceed with the selected attachment

**NOTE:** Depending on the number of students the attachment process make take several moments.

The number of students that are currently attached to the selected items will be displayed in the List of Items details.

—			Eagle High Scho
School Cash	EW ITEMS CREATE A	NEW ITEM STUDENT ATTAC	CHMENTS GROUP IMPORT REPORTS
list of Items			
ctive v 2013/2014, v All	▼ All	Eagle High School	P New Item
earbook 2012-2013		Edit Attach Expire Now	Delete Manage Attachments Refund Copy
	1 items found	Yearboth 2013-2014	
		Yearbooks will go on sale Oc	ctober 14, 2013. Sales close November 1,2013. The
		Yearbook will feature colore	ed pictures and a new cover design. The cost is
		\$20.00.	
		Amount:	\$20.00
		School:	Eagle High School
		Bank Account:	Eagle High - School Funds
		Start Date:	Oct 14, 2013
		End Date:	Nov 01, 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:	0
		Choices:	0
		cholees.	
		Created:	Oct 04, 2013

School Cash Catalog View Items – Display

For further information regarding School Cash Catalog features please refer to the following documents on the Resource Center:

School Cash Catalog: How to Create An Item School Cash Catalog: How to Create An Item with Variable Costs

School Cash Catalog: How to Attach An Item

School Cash Catalog: How to Generate Reports

School Cash Catalog: How to Reconcile Online Payments

School Cash Catalog: How to Process A Refund

School Cash Catalog: How to Import a Group and Attach

School Cash Catalog: How to Manage Items

Year-End Procedures