SCHOOL CASH CATALOG: HOW TO CREATE ITEM

Basic Item Information

Additional Item Information

Extended Item Information

School Cash Catalog – Create New Item Form - Display

School Cash Catalog – Create New Item – 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.
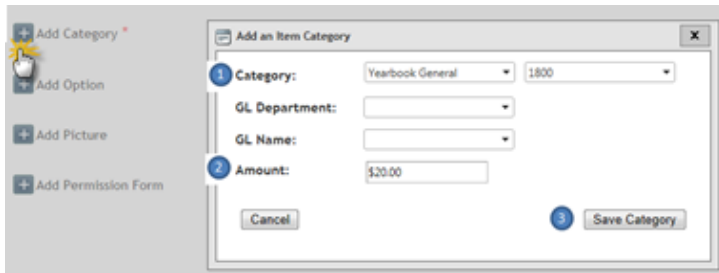

Add Category -Display

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** [+] **button**:
1. Enter **Option Name: Hoodie**
2. Enter **Description:**
3. Select **Category:**
4. 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
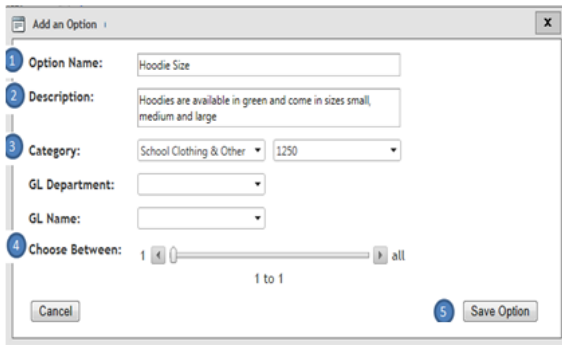

School Cash Catalog – Option Slider Display

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**
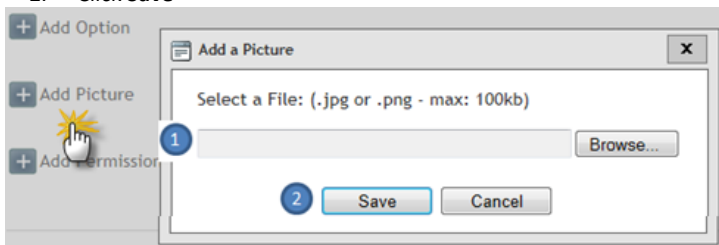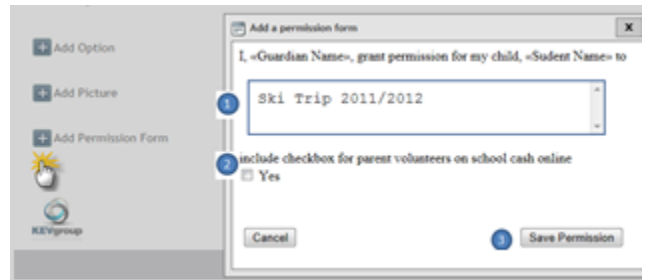

Add Permission Form:

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.
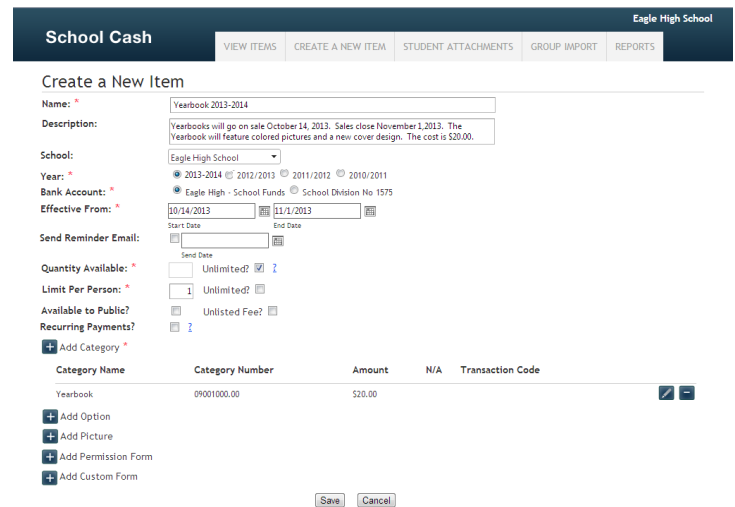Click **Add Permission Form** button
Permission Form popup will include:
1. **Item Name** (more text can be added to this text box if required
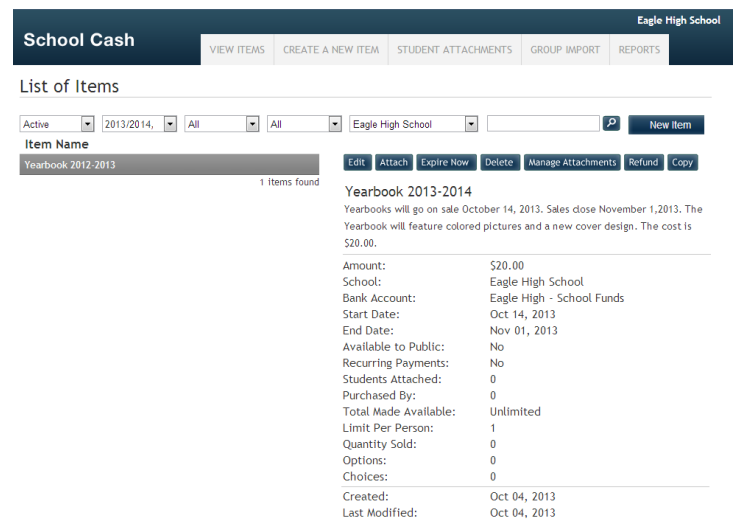2. **Include** parent volunteers check box (optional
3. Click **Save Permission**

Add Permission Form - Display

Save:

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

Complete Basic New Item Form – Display

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**

School Cash Catalog View Items – No Student Attachment– Display

3. Click **Attach**

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

School Cash Catalog Create Attachment – Display

4. Select appropriate attachment type:
   1. **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 Catalog Attach Items Completed – Display

6. 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.

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