

School Cash – Teacher’s QuickStart Guide



Welcome to School Cash!

This QuickStart guide covers everything you need to know to get started creating, managing, and collecting payments for Items in the *School Cash Online* store. Want to create a new Item or view students with outstanding balances? Check out the [Catalog guide](#) for an intro to Item management. Getting started with in-person payments for your School Store items? View our [Collections guide](#) where we’ll walk you through the process, start to finish.

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Catalog

Easily create and manage Items for sale in the *School Cash Online* store. Below, find helpful information about the three main areas of this application: **My Items**, **Create Item**, and **Reports**.



My Items

View details of current and past school store Items from the *My Items* page. Page contents include an Item List (left), Item Information panel (middle), and Item History panel (right).

The screenshot shows the 'My Items' interface. On the left is a list of items with search and filter options. The middle panel shows details for 'Whirlies Spirit Hoodie', including its status (LIVE), availability (TUE 1 SEP to FRI 4 JUN), and a donut chart showing 2371 total students, with 2369 remaining and 2 registered. The right panel shows an item history log with one entry: 'item was ITEM UPDATE' on Sep 12, 2020.

Item Name	Date	Time	By
Junior Class Fee	Jun 29, 2020	11:00 AM	Anne
Senior Class Fee	Jun 29, 2020	11:11 AM	Anne
YOUTH LEGISLATURE	Sep 9, 2020	8:38 PM	Barbara
Whirlies Spirit Hoodie	Sep 12, 2020	10:30 AM	Barbara

Category	Count
TOTAL	2371
Remaining Students	2369
Students Registered	2

Item History Log:

- item was ITEM UPDATE
The item was SHARED with you.
Sep 12, 2020 - 10:45 AM

- ❖ Locate an Item by scanning your Item list or by using any of the following search, filter, and sort options:
 - **Filter by Item Status** – Tap payment statuses to hide/show Items matching your selections. The **blue** highlight indicates that a status is currently selected.
 - **Search by Name** – Type a portion of the Item’s name into the **Search Item** field to see a list of matching Items.

- **Filter by School Year** – Search for prior-year Items by changing the **School Year** from its default (current year).
- **Filter by Source** – Filter your Item list by **Source** to view Items created by you and/or Items shared with you by your office administrator.
- **Available Sort Options** – Date Created, Item Name, Created By, Start Date, and End Date.

The screenshot displays a user interface for managing items. At the top left, under 'Items by Status', there are buttons for 0 Pending, 1 Approved, 5 Live, 0 Rejected, 0 Draft, and 0 Expired. Below this is a search bar with 'Fee' entered, and filters for School Year (2020/2021) and Source (Created by Me, Share...). A list of items shows 'Senior Class Fee' and 'Junior Class Fee'. The right panel provides details for the 'Senior Class Fee', including its status (LIVE), creator (Anne Waguespack), date created (Jun 29, 2020), and availability dates (Start: WED 1 JUL, Due: -, End: SUN 30 MAY). A donut chart shows 488 TOTAL students, with 472 Remaining Students and 16 Students Registered. At the bottom of the right panel are 'VIEW' and 'COPY' buttons.

- ❖ Select an item from your Item list to view basic Item information.
 - If desired, choose from the available options presented at the bottom of the Item Information panel. Depending on the Item’s current status, your options will include:

VIEW – Available for ALL Items

DELETE – Available for DRAFT-items only

COPY – Available for ALL Items

EDIT – Available for DRAFT-items only

Create Item

Create a new Item for your School Store in four simple steps. After completing the four-step process, submit the Item to your office administrator for review and approval.

❖ Step 1: Enter Item Information and Availability

Item Information

- **Item Name** – Required, 150-character max
- **Description** – 4,000-character max
- **Image** – PNG and JPEG files only; max file size: 2MB
- **Suggested Price**

Item Information



TURKEY-TRO...

[REPLACE IMAGE](#)

Item Name *

Turkey Trot 5K 14/150

Description

Parking: Will be available at the Southern Shores town hall or at the Southern Shores shopping center off of HWY 16 on Ocean Boulevard. The 5k will start and finish at the town hall of Southern Shores. This is not a timed event; it is a family fun event. 255/4000

Suggested Price: \$30

Amount

Availability

- **From Date** – Required
- **Due Date**
- **To Date** – Required
- **Parent email reminder**
- **Quantity available**
- **Limit per Person**

Availability:

FROM*  _____ DUE  _____ TO*  _____

Send parents email reminders prior to this item expiring

Quantity Available: Limit Per Person:

1 UNLIMITED 1 UNLIMITED

Options (if applicable)

+ ADD OPTION

- > **Option Name** – Required, 50-character max
- > **Description** – 500-character max
- > **Choices** – Required, add one or more choices
 - + Choice name(s)
 - + Pricing – Enter added costs associated with choice(s)
 - + Choice Settings – Enter min and max choice selections

Permission Form (if applicable)

+ ADD PERMISSION FORM

- > Describe permission being granted
- > Parent Volunteers option

Preview Item



- > View Item as it will appear in School Cash Online

❖ Step 2: Recommend Attachment-type and Student-attachments

Attach to Students

For students, purchasing this item should be:

Optional Required

Recommend this item

Choose students at your school to make this available to:

All Students Grade Course Homeroom Group

Attachment-type

- **Optional** – Student attachments removed automatically on Item expiration date
 - > Recommend Item on School Cash Online (optional)
- **Required** – Student attachments remain until paid, even after Item expires

Student-attachments

- **All Students**
- **By Grade**
- **By Course**
- **By Homeroom**
- **By Group**

❖ Step 3: Enter notes for office administrator

Notes

Comments for your school's administrators:

Description

Requesting to make this item available to the public via SchoolCash Online.

75/300

❖ Step 4: Summary

- Review Item details
- Submit and confirm – Submit Item for Approval
- **CAUTION:** Discarding your Item will permanently delete the Item draft

Reports

Need to know which students have paid and which have not? Run our Activity report to see the Item's full payment history and balances outstanding. Want to review order-choices? We have a report for that, too – our Option Report. Read below to learn about payment and student filtering-options that will help you find exactly what you're looking for!

Follow in-app instructions to get the most out of you reports:



Customize reports using these steps

1. Select the desired **Report Type**
2. Select one or multiple items from your item list
3. Apply additional payment-status, student or date filters, if desired
4. **Generate PDF** report or **Export** results to CSV

❖ Step 1. Select the desired Report Type

Reports

Type Payment Status Date Range

ACTIVITY REPORT Fully Paid  From  To

- **Activity Report** – Shows payment and permission form data
- **Option Report** – Shows option/choice data
- **Custom Form Report** – Shows custom form data

- ❖ Step 2. Select one or multiple items from your item list

The screenshot shows a search interface with a search bar at the top. Below the search bar are two dropdown menus: 'School Year' set to '2020/2021' and 'Source' set to 'Created by Me, Share...'. Below these is a 'Sort By' section with 'Date Created' and 'Newest' options. The main area displays a list of three items, each with a checked checkbox:

- Turkey Trot 5K**
Sep 12, 2020 - 4:28 PM by , QASFOACCESS TEACHER1
- Whirlies Spirit Hoodie**
Sep 12, 2020 - 10:30 AM by , Barbara Bookkeeper
- YOUTH LEGISLATURE**
Sep 9, 2020 - 8:38 PM by , Barbara Bookkeeper

Select 1 or more Items when running the **Activity** Report or **Option** Report.

Select a single Item when running the **Custom Form** Report

- ❖ Step 3. Apply additional payment-status, student, or date filters, if desired

+ ADD FILTER(S)

Payment Filters

- **Payment Status** – (ie. Fully Paid, Outstanding, Refunded)
- **Payment Date**

Student Filters

- **Homeroom**
- **Group**
- **Course**
- **Grade**

- ❖ Step 4. **Generate PDF** report or **export to CSV**.

Two buttons are shown: a light blue button with the text 'GENERATE' and a dark blue button with the text 'EXPORT'.

Collections

Whether you're collecting cash and check payments in the classroom, the athletic field or anywhere in-between, our Collections module allows you to quickly record student payments, print or email student receipts, and auto-submit deposit reports. Follow along with our step-by-step instructions for completing your most common collecting activities.



Homepage

The Collections homepage allows quick access to all of your most common collecting activities:

- [Start a new Collection](#) – Select *Collect by Item* or *Collect by Student* links
- [Resume unfinished work](#) – Follow links for unfinished items in the 'Things to Do' list.
- [View completed work](#) – View your most recent Collections and Deposits

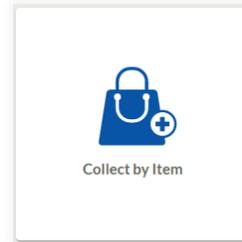
A screenshot of the SchoolCash Collections homepage. The page is titled "Hi Laura" and shows the user's location as "Riverside High School". The main content area is divided into several sections: "Collect by Item" and "Collect by Student" buttons, a "Things to do" list with three items (1 Unfinished collection(s), 2 Collection(s) ready to deposit, 0 Deposit(s) returned), a "Most recent:" table with columns for "Collections" and "Deposits", and a "Welcome" message with a "DOWNLOAD GUIDE" link. The "Most recent:" table lists several transactions with their dates and amounts.

Date	Amount
C8 ROCK, TYLER Completed: Sep 12 2020	\$15.00
C7 ACKLIN, SARAH Completed: Sep 12 2020	\$30.00
C5 SMITH, JAMES Completed: Sep 12 2020	\$35.00
C4 Senior Class Fee Completed: Sep 12 2020	\$240.00
C3 ACCORIA, NEVAEH Completed: Sep 12 2020	\$30.00

> Click the **COLLECTIONS** link in your side menu to return to this page at any time.

Collect by Item

This collection method works best when collecting for a *single Item* from multiple students.



Follow these steps to **Collect by Item**:

1. Select the Item you wish to collect:

Name	Due Date	Status	Cost	
YOUTH LEGISLATURE	Oct 03 2020		\$120.00	>
Junior Class Fee	May 30 2021	Required	\$40.00	>
Parking Pass	May 30 2021		\$15.00	>
Senior Class Fee	May 30 2021	Required	\$20.00	>
Whirlies Spirit Hoodie	Jun 04 2021		\$30.00	>

2. Filter student list (optional):

- a. By name
- b. By Grade, Group, or Homeroom

3. Select student

Senior Class Fee			Due: May 30 2021
\$20.00			
Name	Date of Birth	Grade	
SMITH, KAITLYN	Jan 01 2004	Grade 12	▼
SMITH, SOPHIE	Jan 01 2004	Grade 12	▼
SMITH, JAMES	Jan 01 2002	Grade 12	▼

4. Choose payment method.
 - a. If payment contains a check, enter check # and Name on Check (optional).
5. Add/confirm email address(es) to receive electronic copy of payment receipt.
6. Click 'Record Payment' to post payment.

Senior Class Fee

\$20.00

Due: May 30 2021

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🔍
☰

Name	Date of Birth	Grade	
ROBERTS, CHRISTAN	Jan 01 2004	Grade 12	⬆

Qty: 1

Payment Method

Cash
 Cheque
 Combo

Amount

\$ 20.00

Email receipts to:

✎
🗑

+ ADD EMAIL

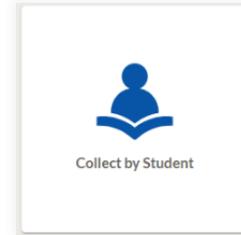
CANCEL

RECORD PAYMENT

7. Continue recording payments for the selected Item.
8. Once done collecting, click 'Add (x) to Deposit' to complete the Collection.
9. Print payment receipts.
10. Click 'Collect more'' to start a new Collect-by-Item Collection or 'Home' to return to the homepage.

Collect by Student

This method of collection works best when collecting for *multiple Items* from a single student.



Follow these steps to *Collect by Student*:

1. Search for and select desired student

← **Collect by Student**

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Name	Date of Birth	Grade	
SMITH, BRAYDEN	Jan 01 2004	Grade 10	➔
SMITH, BRAYLAA	Jan 01 2004	Grade 9	➔

2. Select one or more item checkboxes. (Item records will expand upon selection if Qty is variable or Item options are present).

SMITH, JAMES

Grade 12 Jan 01 2002

2 selected Total: \$35.00

🔍

	Name	Due Date	Status	Cost	
<input type="checkbox"/>	YOUTH LEGISLATURE	Oct 03 2020		\$120.00	
<input checked="" type="checkbox"/>	Parking Pass	May 30 2021		\$15.00	
<input checked="" type="checkbox"/>	Senior Class Fee	May 30 2021	Required	\$20.00	
<input type="checkbox"/>	Whirlies Spirit Hoodie	Jun 04 2021		\$30.00	☰

COLLECT \$35.00

3. Click 'Collect \$X.XX' button when Item selections are complete.
4. From the Collect by Student checkout page,
 - a. Review Item selections and checkout Total, making edits if necessary.
 - b. Select Payment method. (Enter check # and Name on Check if collecting check payment)

SMITH, JAMES

Grade 12 Jan 01 2002

2 selected Total: \$35.00

Name	Selected Qty.	Status	Cost	
Parking Pass	1		\$15.00	
Senior Class Fee	1	Required	\$20.00	

Payment Method

Cash
 Cheque
 Combo

Amount

\$ 35.00

Email receipts to:




[+ ADD EMAIL](#)

DISCARD
POST PAYMENT

5. Add/confirm email address(es) to receive electronic copy of payment receipt.
6. Click 'Post Payment' to complete the Collection.
7. Print payment receipt (optional).
8. Click 'Collect more' to start a new Collect-by-Student Collection or 'Home' to return to the homepage.

Make a Deposit

When ready to deliver collected funds to the school office, access the *Make a Deposit* page by clicking the side menu link or by clicking the 'X Collections Ready to Deposit' link under the homepage's 'Things to Do' list.



Follow these 6 steps to *Make a Deposit*:

1. Select one or more Collections to be deposited.
2. Review/validate 'Total Cash' and 'Total Check' amounts.
3. Enter 'Note to Office' (optional)
4. Click 'Deposit \$X.XX' to submit deposit records to the school office.
5. Print Deposit Summary report, if desired. An electronic copy will be shared with your office administrator.
6. Deliver funds to your school office.

← **Make a Deposit**

Deposit: D61 Deposit Date: Sep 12 2020

<input checked="" type="checkbox"/>	Collection	Student/Item	Completed	Amount
<input checked="" type="checkbox"/>	C7	ACKLIN, SARAH	Sep 12 2020	\$30.00
<input checked="" type="checkbox"/>	C8	ROCK, TYLER	Sep 12 2020	\$15.00

Total Cash: \$15.00
Total Check: \$30.00 Total: \$45.00

Note to Office
On my way!

DEPOSIT \$45.00

My Collections

The following activities can be completed from the *My Collections* page:



- ❖ Resume an unfinished Collect-By-Item Collection
 - Select a Collection under the 'Unfinished Collections' heading to open the Collection and resume your work.

- ❖ Review Collections completed within the past week or within the past 30 days.
 - Search for Collections by:
 - > Collection # ('C22'),
 - > Student Name ('Smit')
 - > Item Name ('Yearbo')
 - > Amount ('48')

My Collections			
🕒 Unfinished			
Collection	Student/Item	Started	Amount
C6	Senior Class Fee	Sep 12 2020	\$20.00
🔍 _____			
This Week Last 30 days			
Collection	Student/Item	Completed	Amount
C8	ROCK, TYLER	Sep 12 2020	\$15.00
C7	ACKLIN, SARAH	Sep 12 2020	\$30.00
C5	SMITH, JAMES	Sep 12 2020	\$35.00

❖ Print, email, or cancel individual student payment receipts

← **My Collections**

C5
SMITH, JAMES Jan 01 2002
Receipt#: 251 Total: \$35.00

Item	Price	Qty	Cost
Parking Pass	\$15.00	1	\$15.00
Senior Class Fee	\$20.00	1	\$20.00
			Total: \$35.00
			Cash: \$35.00

Once the student payment is located,



Print a copy of the student payment receipt



Email a copy of the student payment receipt



Cancel student payment (for eligible payment receipts only)

- + **CAUTION:** Once confirmed, this action cannot be undone.
- + A cancellation receipt may be printed and will be emailed to any recipients of the original payment receipt

My Deposits

The following activities can be completed from the *My Deposits* page:



- ❖ Review Deposits submitted with the past week or within the past 30 days.
 - > Search for Deposits by:
 - Deposit # ('D54')
 - Date ('Sep 12')
 - Amount ('105')
- ❖ Print Deposit Summary report for the selected Deposit
- ❖ View or inspect Collections within the selected Deposit

←

My Deposits

🔍

This WeekLast 30 days

Deposit	Status	Date	Amount	
D61	🕒 Pending	Sep 12 2020	\$45.00	⌵
D60	⚠️ Returned	Sep 12 2020	\$275.00	⌶
Office note: Funds turned in contained an extra \$15 in cash.				
2 collection(s)			Cash: \$55.00 Check: \$220.00	
C4 Senior Class Fee		Sep 12 2020	\$240.00	➔
C5 SMITH, JAMES		Sep 12 2020	\$35.00	➔

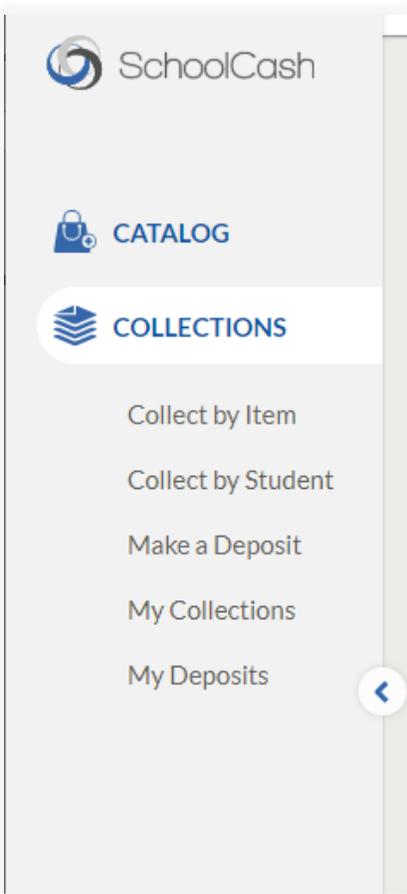
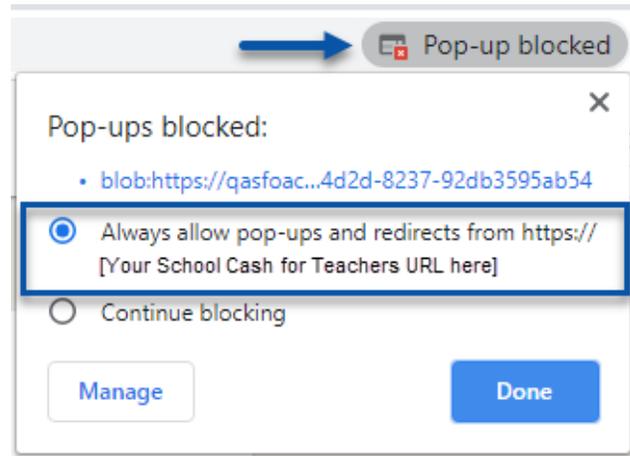
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Helpful Tips

- ❖ When printing documents from the Collections module (such as payment receipts and deposit reports), a pop-up blocker may prevent the report window from appearing.

If this happens, look for a 'Pop-up blocked' (or similar) notification in the upper-right hand corner of your browser window.

Click on the notification to change pop-up settings for your Collections application to 'Always allow pop-ups and redirects from **https:// {Your School Cash URL here}**'



- ❖ Your *School Cash* side-menu has two positions: collapsed and expanded.

When collapsed, hover your mouse over the side-menu tray to expand the menu temporarily.

If you wish to lock the menu in its expanded position, click the right-pointing arrow icon

