

School Cash Express – QuickStart Item Catalog Guide



Welcome to *School Cash Express!*

This QuickStart guide covers everything you need to know to get started creating and managing Items in the *School Cash Online* store. Want to learn how to create a new Item? This guide covers our simple, 4-step process. Need to view paid students or those with outstanding balances? Check out our Reports guide, where we cover all of the available reporting options as well as our brand-NEW student filters!

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Item 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.

Status	Count
Pending	0
Approved	0
Live	5
Rejected	0
Draft	0
Expired	0

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

Field	Value
Status	LIVE
Availability	TUE 1 SEP - FRI 4 JUN
Created By	Barbara Bookkeeper
Date Created	Sep 12, 2020

Event	Date	Time
item was ITEM UPDATE	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. Filters for 'School Year' (2020/2021) and 'Source' (Created by Me, Share...) are visible. A 'Sort By' dropdown is set to 'Date Created' with 'Newest' selected. The search results list two items: 'Senior Class Fee' and 'Junior Class Fee'. The 'Senior Class Fee' item is selected, showing its details in a panel on the right. This panel includes the item name, a description, status ('LIVE'), availability dates (WED 1 JUL to SUN 30 MAY), creator information, and a donut chart showing 488 total students, with 472 remaining and 16 registered. 'VIEW' and 'COPY' buttons are at the bottom of the panel.

- ❖ 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 4 simple steps. After completing the 4-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 for your Item 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 <input type="text"/>  To <input type="text"/>

- **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

Search Item

School Year: 2020/2021 Source: Created by Me, Share...

Sort By: Date Created Newest

- 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 (NEW)

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

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

GENERATE EXPORT