

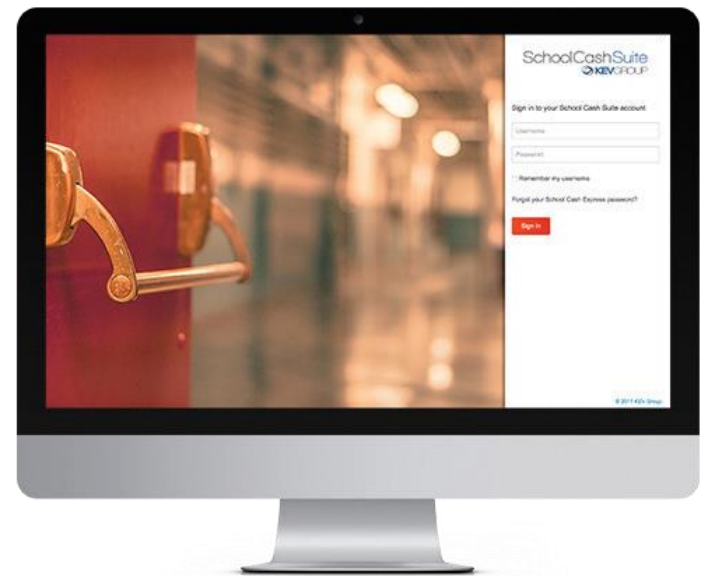


**SchoolCashSuite**

# SchoolCashExpress

## Training Guide

Update: October 2017



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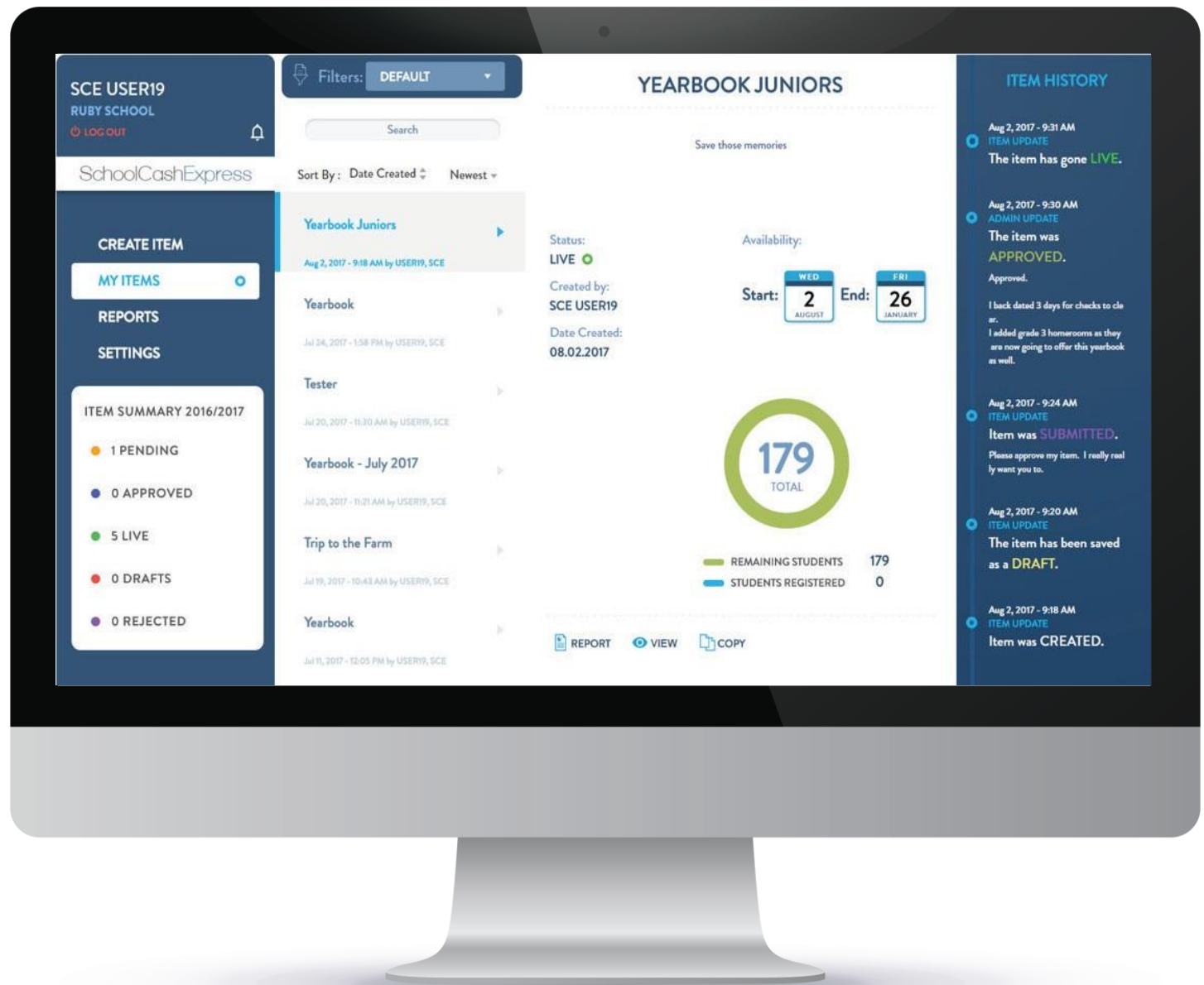
## School Cash Express

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## a. What is School Cash Express

*School Cash Express* gives staff other than office administrators access to item creation and reports. All items created by staff are always verified and approved by the front office.

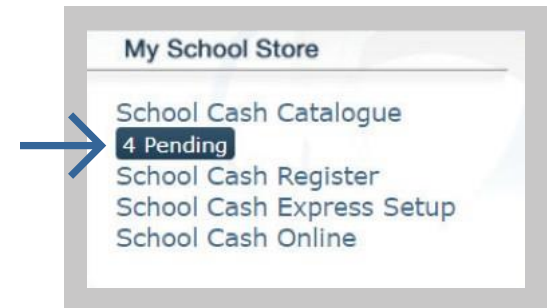
Please review  
School Cash Express  
Video pdf file for  
instructions on Item  
Creation in SCE



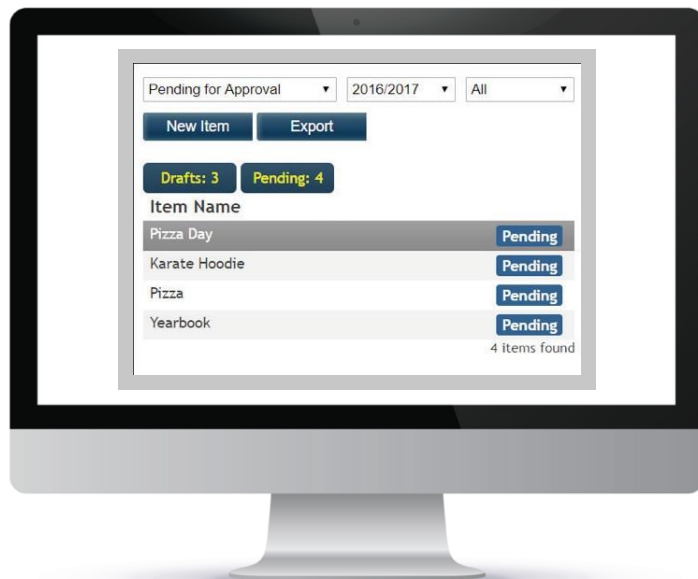
## c. Approving/Rejecting Items

When a staff member has entered a new item in your school. When you log in you will see a number and Pending. These are the number of pending items that need approval in *School Cash Catalogue*. If you would like to see these items, you can click directly on the “pending” status.

*NOTE: The final say in how an item is created still sits with the School Admin. Everything entered in School Cash Express is considered “Draft” until committed by the office. Anything can be overridden.*



A new status is available in the drop-down menu.  
**“Pending for Approval”**



If you are ready to approve an item. Select the item from the list. Then click **“Edit”**



You will notice some new fields on the creation screen.

Suggested Price and Comment.  
Both fields are from the staff member requesting approval.

The screenshot shows the 'Create a New Item' form. It includes fields for 'School' (Ruby School), 'School Year' (2016/2017), 'Name' (Pizza Day), and 'Description' (Lets enjoy pizza on friday!!). A 'Comment' field contains the text 'Aakash R: please approve this item'. A yellow box on the right displays 'Item Price: \$0.00' and 'Suggested Item Price: \$5.00'. A link 'Click here if creating an item for multiple schools' is also present.

All other fields are entered as they would be for a Non-Express Item

If you are satisfied with the information in the item, you can move to the “Next” step.  
If you find a problem and need to send the item back to the staff member who sent it, you can also “Reject”.

The screenshot shows three buttons: 'Save', 'Reject', and 'Next'.

The screenshot shows the 'Create Attachment: Pizza Day' form. It includes sections for 'Attach Item As' (Optional, Required, Recommend the item on School Cash Online), 'Attach Item To' (All Students, Grade, Course, Homeroom, Group, Individual), and a 'Comment' field. A 'Comment History' section shows a comment from 'Aakash R: please approve this item'. At the bottom are buttons for 'View Selected Students', 'Previous Screen', 'Reject', and 'Approve'.

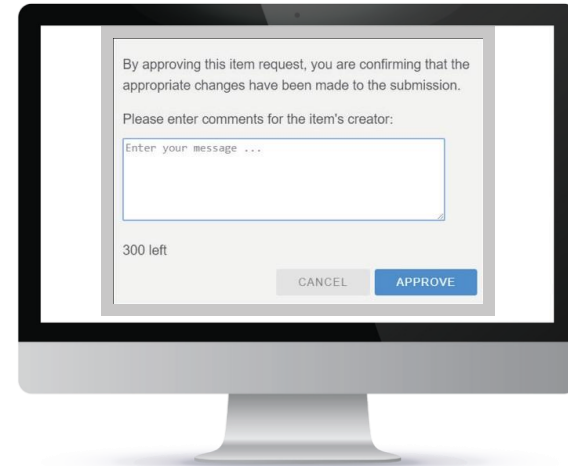
The final step is attaching students.  
School Cash will pre-select the students to attach based on the entry from the staff member in *School Cash Express*.

When you click approve, you will also see a pop up message that can be sent to the staff member about the item you created.

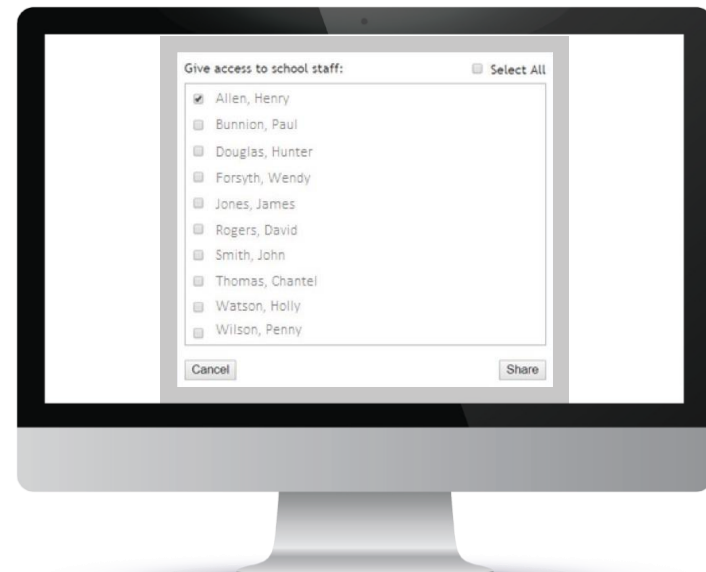
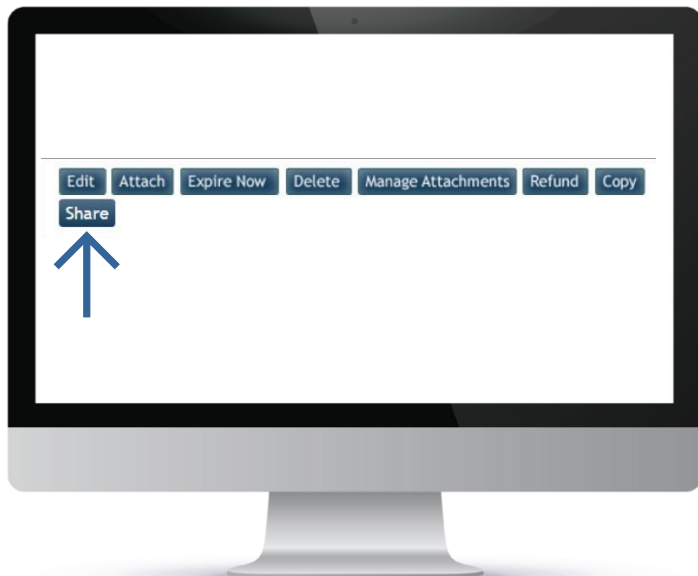
Once you give final approval the item will then be live and available for purchase if within the date range selected. Once it is approved it can also be shared to other staff members.

The addition of a new button on the items page called "Share" has been added.

### Click Share



A list of all available *School Cash Express* Users will appear. Select the users you would like to grant "**Read-Only**" access and reports to the item.

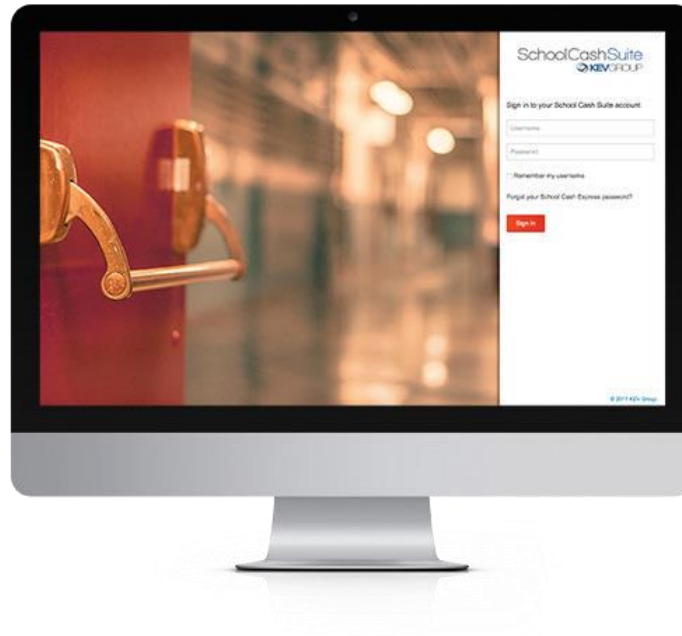


## Appendix

### **Active Directory:**

Also known as single sign-on or ADFS. Active directory allows school users to only login one time for access to all of their programs.

This is a feature your IT department will understand. They will know if you use Active Directory or not.



# SchoolCashExpress

[www.kevgroup.com](http://www.kevgroup.com)



## SchoolCashSuite

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