

SchoolCash Access – User Guide

Welcome to SchoolCash

This QuickStart guide covers everything you need to know to get started creating, managing, and collecting payments for Items in the SchoolCash Online store. Need to create a new Item or view students with outstanding balances? Check out the [Catalog guide](#) for an introduction 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. Finally, for our activity sponsors and fund category managers, learn how to track category balances and run transaction reports in our [Category Balance and Reporting guide](#).

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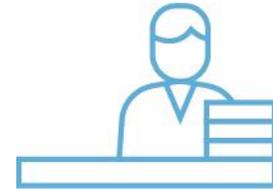
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Catalog

Easily create and manage Items for sale in the SchoolCash Online store. Below, find helpful information about the three main areas of this module: [My Items](#), [Create Item](#), and [Reports](#).



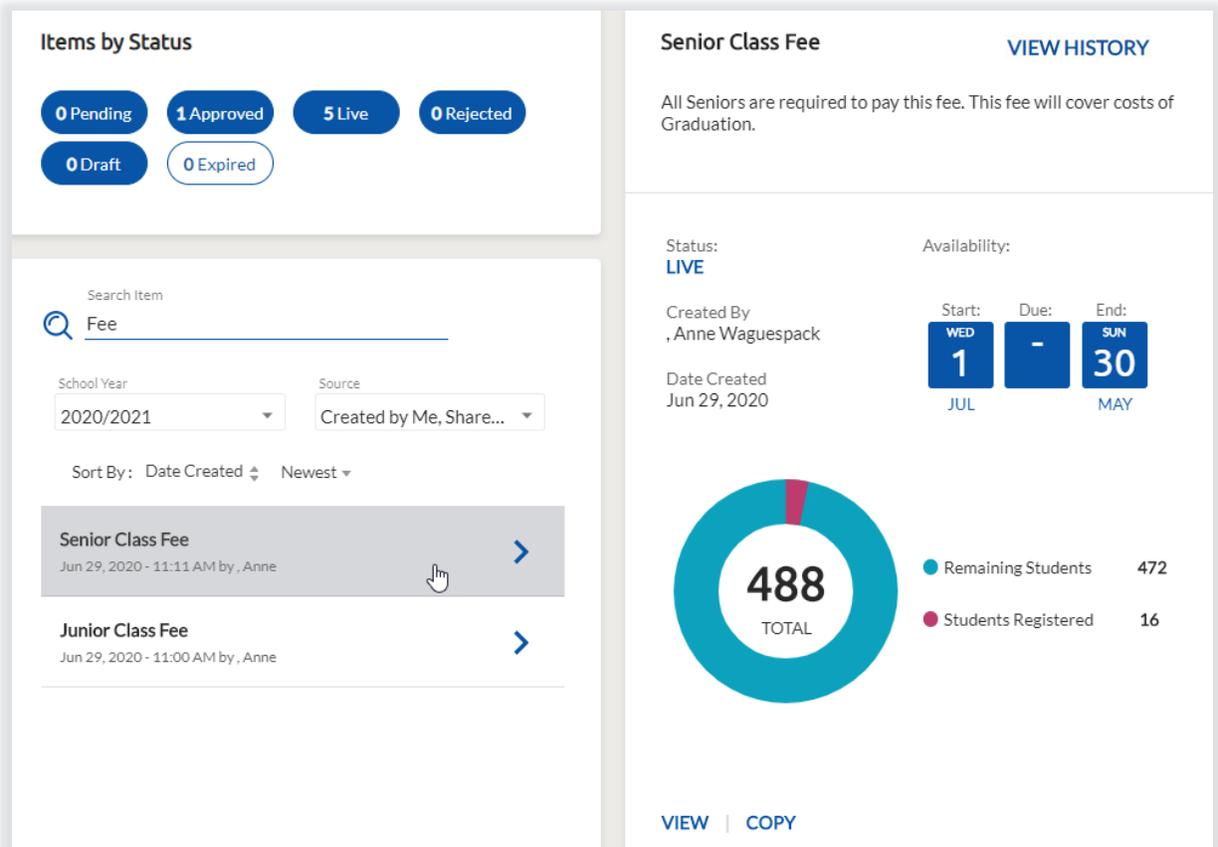
My Items

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 displays the 'My Items' interface with three main sections:

- Items by Status:** A row of buttons showing counts for Pending (0), Approved (0), Live (5), Rejected (0), Draft (0), and Expired (0).
- Item List (Left):** A search bar and filters for School Year (2020/2021) and Source (Created by Me, Share...). A list of items is shown, with 'Whirlies Spirit Hoodie' highlighted. Other items include Junior Class Fee, Senior Class Fee, and YOUTH LEGISLATURE.
- Item Information Panel (Middle):** Details for 'Whirlies Spirit Hoodie', including a description, status (LIVE), availability (TUE 1 SEP to FRI 4 JUN), and a donut chart showing 2371 total students, with 2369 remaining and 2 registered.
- Item History (Right):** A log showing an update: '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** – Select one or more Item 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



Items by Status

0 Pending 1 Approved 5 Live 0 Rejected
0 Draft 0 Expired

Search Item
Fee

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

Sort By: Date Created Newest

Senior Class Fee
Jun 29, 2020 - 11:11 AM by , Anne

Junior Class Fee
Jun 29, 2020 - 11:00 AM by , Anne

Senior Class Fee [VIEW HISTORY](#)

All Seniors are required to pay this fee. This fee will cover costs of Graduation.

Status: **LIVE**

Availability:

Created By: , Anne Waguespack

Date Created: Jun 29, 2020

Start: WED 1 JUL Due: - End: SUN 30 MAY

488
TOTAL

- Remaining Students: 472
- Students Registered: 16

[VIEW](#) | [COPY](#)

- ❖ Select an Item from your Item list to view basic Item information as well as Item history.
 - 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** – View complete Item details, including option and choice information and quantity limits (available for ANY Item).
 - **COPY** – Create Item drafts by copying an existing Item (available for ANY Item).
 - **DELETE** – Delete Item drafts that are no longer needed (available for DRAFT-Items only).
 - **EDIT** – Open an Item draft to resume editing of any Item that has not yet been submitted for approval (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: 1 UNLIMITED Limit Per Person: 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

PREVIEW

- 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

Status:
Recommended ▾

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.
 - Select an Item 'Status' to appear in SchoolCash Online store.
- **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: View Item Summary

- Review Item details.
- Submit Item for approval.

DISCARD

SUBMIT

CAUTION: Discarding your Item will permanently delete the Item draft.

Reports

Need to know which students have paid for an Item? Run our Activity report to see an Item’s full payment history and student 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.

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

Reports

Type: Payment Status: Date Range:

❖ Step 2. Select one or more Items from your Item list.

Search Item

School Year: Source:

Sort By:

- 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

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

+ ADD FILTER(S)

- **Payment Filters**
 - Payment Status – (ie. Fully Paid, Outstanding, Refunded, etc)
 - Date Range
- **Student Filters**
 - Homeroom
 - Group
 - Course
 - Grade

Type
Payment Status
Date Range

ACTIVITY REPORT

Fully Paid

From

 To

✕ CLEAR FILTER(S)

Homeroom
Group
Course
Grade

All Homero...

All Groups

All Courses

All Grades

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

GENERATE

EXPORT

Student Information			Purchase Information					
Student Name	Homeroom	Paid	Refund in Progress	Refunded	Owing	Waived	Price	Payments
Ackley, Alyssa	2315- Robert, Tamara	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$26.25 - Check - 01/23/22
Adkins, Reese	1325-Reed, Dandridge J	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$10.00 - Cash - 01/22/22, \$16.25 - Check - 01/22/22
Anderson, Alexander	1119-Engler, Peter	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$26.25 - Cash - 01/23/22
Bench, Miles	1103-Johnson, Aaron	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$26.25 - Cash - 01/23/22
Cerelli, Benjamin	2303-Barnes, Sarah B	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$26.25 - Cash - 01/23/22
Cooke, Kaylie	1119-Engler, Peter	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$26.25 - Check - 01/22/22
DeLeon, Bria	1321-Proffitt, Kelsey	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$26.25 - Check - 01/22/22
McDaniel, Cade	2313-Hsia, Diana	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$26.25 - Check - 01/22/22
Statham, Jack	1321-Proffitt, Kelsey	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$26.25 - Check - 01/22/22
Tolman, Benjamin	2317-Begnoche, Justin	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$26.25 - Cash - 01/22/22
Tullis, William	8007-	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$26.25 - Check - 01/22/22
Wells, Nathan	2313-Hsia, Diana	\$26.25	\$0.00	\$0.00	\$0.00	\$0.00	\$26.25	\$26.25 - Cash - 01/22/22
AP World History - test prep coursebook totals			\$315.00	\$0.00	\$0.00	\$0.00	\$0.00	\$315.00
TOTALS			\$315.00	\$0.00	\$0.00	\$0.00	\$0.00	\$315.00

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 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.

Hi Laura
Riverside High School ▾



Collect by Item



Collect by Student

Most recent:

Collections
Deposits

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

[VIEW ALL](#)



Welcome

Don't know where to start? We have you covered. Learn more about this module's capabilities with these helpful tips.

[DOWNLOAD GUIDE](#)

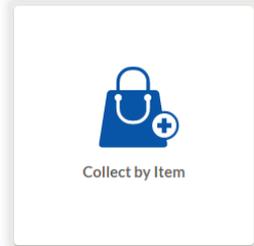
Things to do

1	Unfinished collection(s) <small>Last update: Sep 12 2020</small>	>
2	Collection(s) ready to deposit <small>Last update: Sep 12 2020</small>	>
0	Deposit(s) returned <small>Last update: NA</small>	>

- 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 an Item from your Item list by tapping the blue arrow icon.

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. Search or filter student list (optional):

- Search by student name
- Filter by Grade, Group, or Homeroom

3. Select student by tapping the blue arrow icon in the student record.

Senior Class Fee			Due: May 30 2021
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.
 - 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

🔍 ☰

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:

✎ 🗑

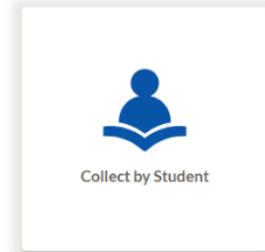
+ ADD EMAIL

CANCELRECORD PAYMENT

7. Continue recording payments for the selected Item.
8. Once done collecting, click 'Add \$ 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

🔍

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

2. Select one or more Items from the Item list (Item records will expand upon selection if Item quantity is variable or if 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 \$' 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:

guardian@kevmail.com  

 ADD EMAIL

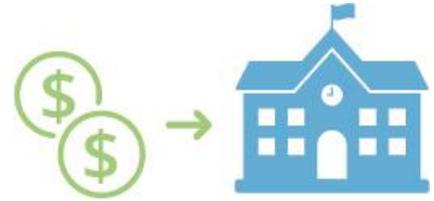
5. Add/confirm email address(es) to receive electronic copy of payment receipt.
6. Click 'Post Payment' to complete the Collection.
7. Print payment receipt (optional).
8. Click 'Collect more' to start a new Collect-by-Student Collection or 'Home' to return to the homepage.

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 '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 \$' 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

Receipt#: 251

Jan 01 2002

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 Week
Last 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	▶

🖨️

Categories

Serving as an activity sponsor or fund category manager? Our Fund Lookup module allows you to easily check balances and view and export a detailed transaction history for your assigned fund categories.



My Categories – Balances

View current balances for assigned fund categories.

My Categories			
🔍 Search Categories			
Category # ↑	Category Name	Current Balance	
4445	History Club	\$599.95	➤
6005	General Teacher Fund	\$1,495.56	➤
6060	AP Testing	\$3,816.60	➤
6106	History Field Trip	\$236.75	➤

- ❖ View a full list of assigned fund categories.
- ❖ Search for categories by:
 - Category # ('6106')
 - Category Name ('Field Trip')
- ❖ Sort category list by tapping a column header; tap again to reverse the order:
 - Category #
 - Category Name
 - Current Balance
- ❖ Select a category record to view transaction history



My Categories – Transaction History and Reporting

View transaction history for the selected fund category and generate custom transaction reports using one or more of the available filters.

←

My Categories

6000
General Student Fund

Current Balance: \$15,261.31

Most Recent

Last Month

This Month

This Year

ADVANCED SEARCH

Date ↓	Transaction	Supplier/ Handed in By	Description	Debit	Encumbrance	Credit
03/12/2022	Check #1639	Christoher Zepler	One Act Play Expenses Inv# 641.26	\$641.26	\$0.00	\$0.00
03/08/2022	Direct Deposit #2865		Library - Lost Book(s)	\$0.00	\$0.00	\$26.39
03/07/2022	Direct Deposit #2852		Library - Lost Book(s)	\$0.00	\$0.00	\$10.99
03/04/2022	Deposit #188	Josh Adler	Sales from vending	\$0.00	\$0.00	\$50.99
02/27/2022	Deposit #185	Colleen Pasiano	Shirts for GO Challenge	\$0.00	\$0.00	\$780.00
02/26/2022	Check #1530	Colleen Pasiano	Alonti Catering Lunch for Feeder Principal Meeting 4/29/19 Inv# 1575763	\$90.43	\$0.00	\$0.00

- ❖ Choose a date filter to view transactions posted within the specified date range.

Most Recent

Last Month

This Month

This Year

- ❖ Apply custom sort order for records appearing in the transaction grid.
 - Tap any column header once to sort transactions in ascending order; tap once more to sort transactions in descending order.

- ❖ Apply additional filters and search criteria using the Advanced Search panel.

ADVANCED SEARCH

My Categories

6000
General Student Fund

Current Balance: \$15,261.31

Most Recent
Last Month
This Month
This Year

ADVANCED SEARCH

Deposits/ other credits ✕ Colleen Pasiano ✕

Date ↓	Transaction	Supplier/ Handed in By	Description	Debit	Encumbrance	Credit
02/24/2022	Deposit #185	Colleen Pasiano	Shirts for GO Challenge	\$0.00	\$0.00	\$780.00
02/21/2022	Deposit #178	Colleen Pasiano	Grizzly Challenge	\$0.00	\$0.00	\$1938.50
02/20/2022	Deposit #173	Colleen Pasiano	Vending	\$0.00	\$0.00	\$78.93
02/19/2022	Deposit #126	Colleen Pasiano	I/S CAFE	\$0.00	\$0.00	\$138.21

Jump to Page: 1 ▼
Rows per page: 10 ▼
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EXPORT PDF

❖ Export results of search/filtering to create custom Category transaction reports.

Category Report-Custom

Grand Oaks High School - Activity Fund

Category Name: General Student Fund
Category Number: 6000

Showing Deposits/ other credits from
Feb 1, 2022 - Feb 28, 2022

Additional Criteria:
Money Handed in By: Colleen Pasiano

Date	Transaction	Supplier/ Handed in By	Description	Debit	Encumbered	Credit
02/19/22	Deposit #126	Colleen Pasiano	I/S CAFE			\$138.21
02/20/22	Deposit #173	Colleen Pasiano	Vending			\$78.93
02/21/22	Deposit #178	Colleen Pasiano	Grizzly Challenge			\$1938.50
02/24/22	Deposit #185	Colleen Pasiano	Shirts for GO Challenge			\$780.00
Transaction Totals				\$0.00	\$0.00	\$2,935.64