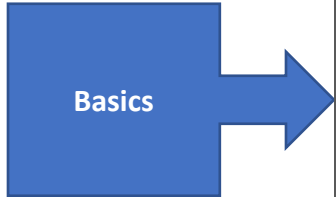


**SCHOOL CASH CATALOG: CREATE A NEW ITEM**



**Basics**

Name \*  0 / 150 characters  
Only 32 characters of the item name will appear on the ledger and in email notifications.

Description

0 / 4000 characters

**Picture**

Max: 100kb (.jpg or .png)



**Financials**

School Algonquin Ridge Elementary School

School Year \* 2017/2018

Bank Account \* Algonquin Ridge ES - SGF

**Categories \***

Category Name *	Category # *	Dept/Subledgers	Object Codes	Amount *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

+ Add Category



**Availability**

Effective Date \*  Start \*  End \*

Limit Per Student  Amount 1  
(Limit Per Person)

Reminder Email  Date

Limit Quantity   
(Quantity Available)

Visibility  Public  
(Available to Public)

Unlisted



**Extras**

Options & Choices (Add Option)

Scheduled Payments (Recurring Payments)

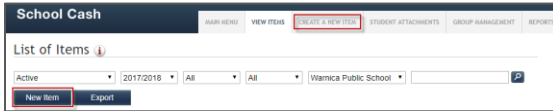
Permission Form

## SCHOOL CASH CATALOG: CREATE A NEW ITEM

### 1. To Create A New Item:

From the Main Menu, *My School Store* group:

- a) Select **School Cash Catalog**
- b) Click either the **Create a New Item** tab or **New Item** button



- c) Begin with the *Basics* section to complete all required fields. Required fields are marked with a red asterisk (\*).

#### 1.1 Basics:

##### Name\*:

Enter the Name of the new Item.

##### Description:

Descriptions can be up to 4000 characters. The description will display in School Cash Online i.e. The fee description could include the date and departure/arrival times of a planned field trip, etc.

##### Picture:

Use this feature to include a picture in the online display for the Item on School Cash Online i.e. A picture of the Agenda could be included.

**Note:** Pictures must be 100kb or less in .jpg or .png format.

Throughout the item creation, the header at the top of the screen will display:

- The first 32 characters of the Item Name, as it will appear on the ledger and in email notifications
- The School Year the item was created in
- Total Cost of the Item

#### 1.2 Financials:

##### School year:

Defaults to current school year. Once the next year is created, it will be available in a drop-down option.

##### Bank Account\*:

The Bank Account field will default to the Bank Account for your school. A drop-down option will only appear if there is more than one bank account available for your school.

##### Categories\*:

Select the category where the item payments should be applied. This list represents the available categories from the school's current Chart of Accounts.

#### 1.3 Availability:

##### Effective Date\*:

**Start Date:** Date when the Item will be available for payment.

**End Date:** Date when the Item will no longer display in School Cash Online.

##### 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.

##### Visibility:

**Public:** If selected, will allow the public to purchase the Item.

**Unlisted:** if selected, will create a URL so that it can be sent out manually to a select group of individuals.

##### Limit Per Student:

**Defaults to 1.** If more than 1 of the Item can be purchased, enter that value.

*Tip:* If turned off (unlimited), the selected item will continuously display on School Cash Online and allowing repeated purchases.

##### Limit Quantity:

**Defaults to Unlimited.** Enter a value if there is a known quantity for the selected item i.e. Only 250 yearbooks have been ordered.

## SCHOOL CASH CATALOG: CREATE A NEW ITEM

### 1.4 Extras:

#### Options & Choices:

Use this feature to add item options and choices i.e. options for a Sub Order with topping choices.

**Options:** The name of the option describes what the options will be i.e. Sub Bun Options, Admission Types, etc.

**Choices:** Add choices as required i.e. White Bread, Whole Wheat, Adult Ticket, Student Ticket, etc.

#### Scheduled Payments

This feature will allow for payment breakdown for large ticket items.

**Note:** This feature is only available for online payments using Cash Online and not applicable for all schools.

#### Permission Form

Includes a Permission Form when the item is viewed in School Cash Online. The permission form can be authorized online and the Permission Forms Report will list signed permission forms.

Please check with your district representative to see if the permission feature is approved and for any required wording, if applicable.

**Note:** Not applicable to all schools

### 1.5 Save Options:

**Save and Attach** – will save the item and bring you to the *Create Attachment* screen

**Save and Create New** – will save the item and bring you to the *Create a New Item* screen

**Save and Copy** – will save the item and copy the details in a new item creation screen

**Save** – will save the item and bring you to the *List of Items* screen

### 2. To Attach Students:

#### A. From the List of Items screen:

Select the item from *List of Items* and click the **Attach** button.

Select appropriate attachment type:

- 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
  - 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.
  - Individual Students:** Items can be attached to students on an individual basis. eg.: Parking Fees
- Once *Attach Item As:* and *Attach Item To* have been selected, click **Attach Students**.

#### B. From the Create Attachment: screen

Select appropriate attachment type:

- 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
- 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.
- Individual Students:** Items can be attached to students on an individual basis. eg.: Parking Fees

Once *Attach Item As:* and *Attach Item To* have been selected, click **Attach Students**.