



**Schools Cash Office**  
Income Administration Software

# **What's Changed in Schools Cash Office version 2.4 Post-Migration Guide**



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## 1. About this document

This document is applicable to schools that have been migrated from Schools Cash Office (SCO) version 2.3 to version 2.4.

This document is designed to make the users familiar with the differences between the two versions of SCO. The initial steps in this document should be carried out in the order displayed.

- This document should be used in conjunction with the relevant Configuration and Quick Reference Guides.
- The data referred to in this document must be prepared and available.

## 2. Initial steps to getting started with SCO version 2.4

Before starting, please make sure that your SCO database has been migrated from version 2.3 to version 2.4.

The most significant difference between SCO version 2.3 and 2.4 is the location of the database which is hosted in version 2.4 (there is no local server involved). The hosting servers are secure, fully backed up and Tucasi owned.

There is no synchronisation between the database and the client(s) which means that any online changes (payments or orders) are instantly available in the SCO client(s). Similarly, any new trips or areas configured for scopay are available to the parents in real time. A lot of the functionality is now accessible by logging in to the relevant area via the Internet browser.

SCO can now be accessed from home, other school or any location as long as the computer has SCO client installed. Switching from one school database to another is simple as it is the log on that determines which SCO database is being accessed. This will be beneficial to those users who have to access different schools' databases from one computer.

**It is recommended that you don't install SCO client(s) on a wireless network. A wireless network is inherently not as reliable as a wired network, and is subject to many local conditions that can affect stability of the connection to the Internet.**

**Important:** SCO version 2.4 benefits from regular updates (normally released bi-weekly). To ensure best user experience, we will limit the amount of time you can use an old minor version of Schools Cash Office. It is therefore important that your IT team enables you to install updates to Schools Cash Office, or regularly performs this task on your behalf, to avoid loss of service.

For more detailed information on the individual modules refer to the relevant Configuration and Quick Reference Guides, as explained later in this guide.

## 2.1. Logging on to Schools Cash Office (SCO) version 2.4

- Start SCO by double-clicking the icon on your desktop.
- Log on using your existing username and password. Note that your username will need to be converted to a new 2.4 format.



For example, if your username was *Administrator* in version 2.3, it will need to be altered to your valid email address, for example: *administrator@yourschoolname*

- Upon first logon you **must** modify all usernames to a valid email address.

## 2.2. Modifying existing users

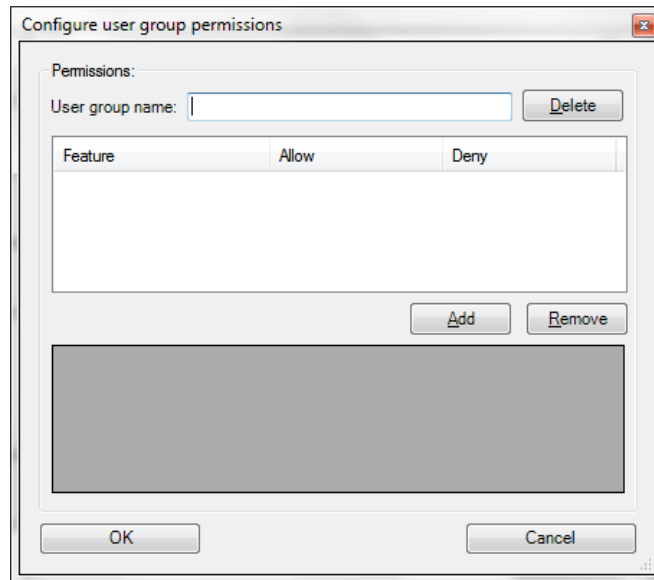
The system logs each transaction against the user signed on at the time the transaction is entered. This information can be used for audit purposes therefore we do not recommend users sharing login's or email addresses.

User IDs should be configured before data is entered. The User ID name will also appear on printed receipts.

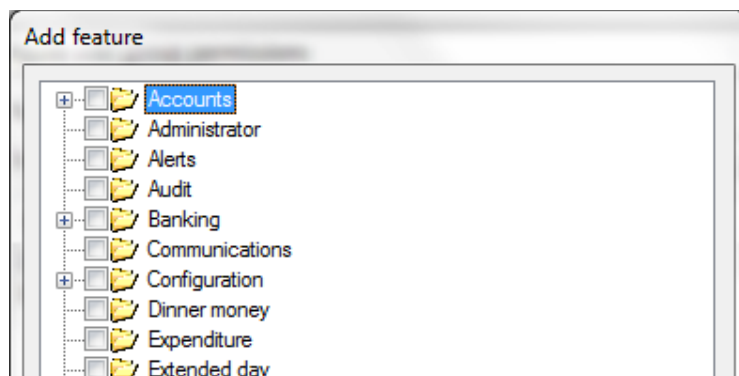
- On the **Configuration** screen, select **User configuration**.
- Select **User**, and then click **Modify**.

A screenshot of the 'User properties' dialog box. It contains several input fields and buttons. The 'User name' field is filled with 'sallybrown@testschool.com' and has a 'Change password' button next to it. Below this is a note: 'A new or changed username must be an email address.' The 'First name' field is 'Sally' and the 'Last name' field is 'Brown'. The 'User group' dropdown is set to '<Add new>' and has an 'Edit user group' button. There are three more dropdown menus: 'Default startup tab' (set to 'No function available'), 'Default extended day account' (set to '<Select extended day account>'), and 'Staff account' (set to '<Select staff account>'). Below these is the text 'Link this user to a staff account'. At the bottom are 'OK' and 'Cancel' buttons.

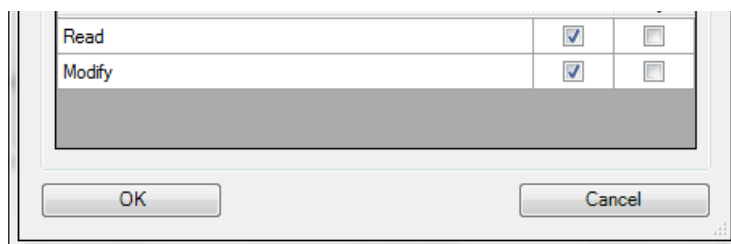
- Edit the **User name** (this **must** be a valid email address).
- Select **Change Password** to set a new password, then click Change Password.
- Enter the **First name** and **Last name**.
- Assign the user to a **User group**.
  - To add a new user group, from the dropdown select **Add new** and click on **Edit user group**.
  - Enter User group name and click on the **Add** button.



- Tick the boxes as required to give access to the features, or remove the ticks to restrict access to those screens. Click on **OK**.



- Edit the permission for your new user group by clicking on **Allow** or **Deny** for each feature.



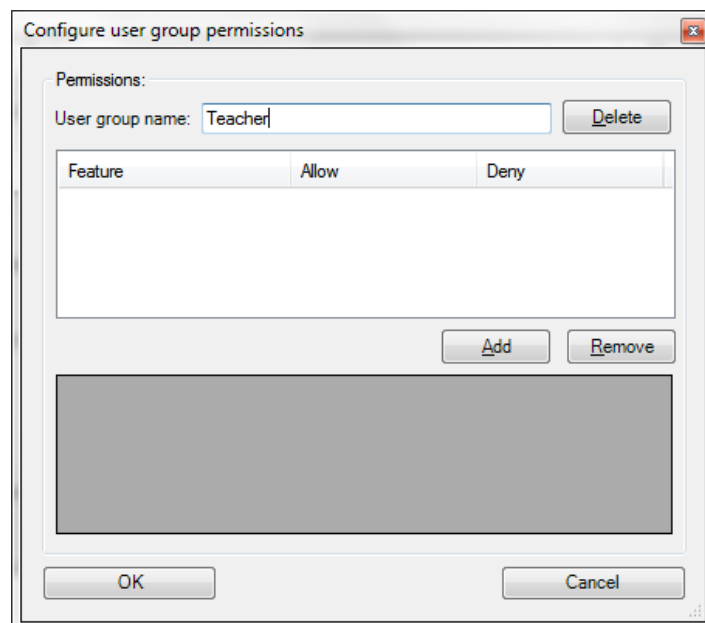
- Click on **OK**.
- Check the user details and the user group.
- Click the down arrow next to **Default startup tab** and the default screen which appears when they login to SCO.
- From the **Staff account** dropdown, select the staff account to which their username will be linked, if applicable.
- Click **OK**.
- Click **Yes** when asked to save user.
- Repeat for other users and click on **Close**.

### 2.3. Adding Teacher users and passwords

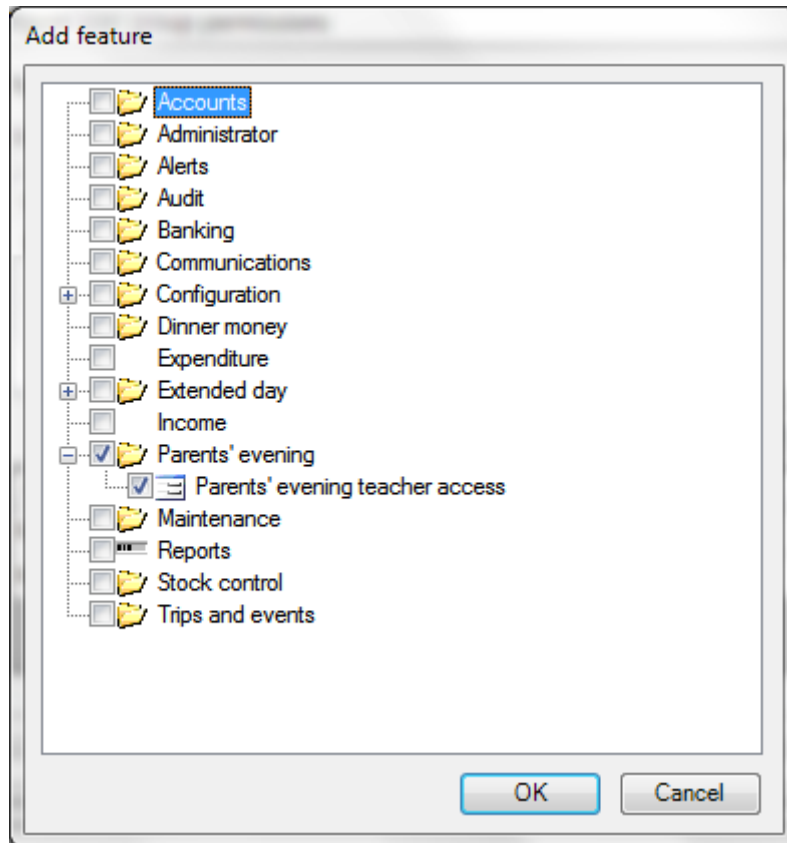
Teachers who use Classroom Edition or Parents' Evening module will need to be added to SCO as new users. They will not need to log into SCO but rather will use their login details to access online modules.

To add additional users:

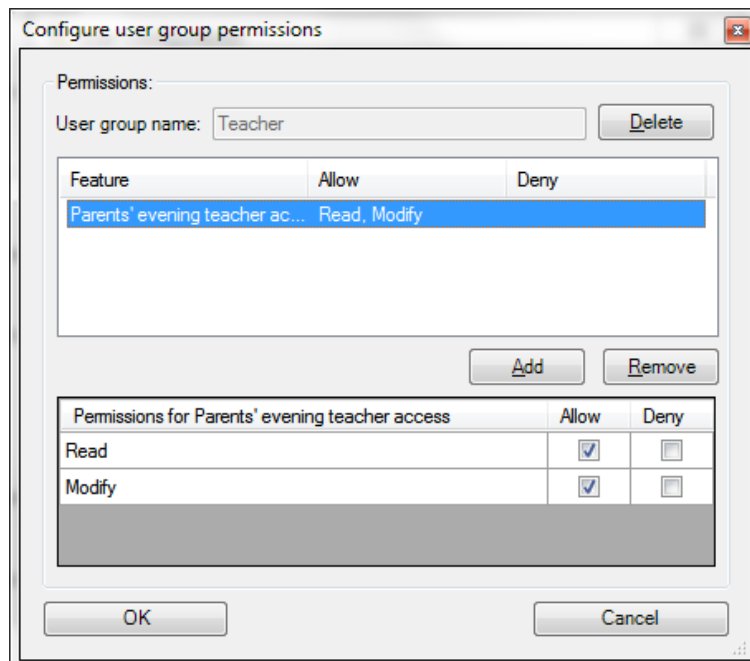
- On the **Configuration** screen, select **User configuration**.
- Click **Add**.
- Enter the **User name** (this **must** be a valid email address).
- Select **Change Password** to set a new password, then click Change Password.
- Enter the **First name** and **Last name**.
- Assign the user to a **User group**.
  - To add a new user group, from the dropdown select **Add new** and click on **Edit user group**.
  - Enter User group name and click on the **Add** button.



- Tick the boxes as required to give access to the features, or remove the ticks to restrict access to those screens. Click on **OK**.



- Edit the permission for your new user group by clicking on **Allow** or **Deny** for each feature, if necessary.



- Click on **OK**.
- Check the user details and the user group.
- From the **Staff account** dropdown, select the staff account to which their username will be linked.

- Click **OK**.
- Click **Yes** when asked to save user.
- Repeat for other users and click on **Close**.

For more details please refer to the **Getting Started Guide**:

<http://www.tucasihelp.com/documents/2.4SCOGettingStartedGuide.pdf>

### 3. □ What's Changed: Configuration

#### 3.1. System Options

Term dates are now set up in System options which replaces the Setup Wizard. For information on how to set your term dates please refer to the **Getting Started Guide**:

<http://www.tucasihelp.com/documents/2.4SCOGettingStartedGuide.pdf>

#### 3.2. User Configuration

The most significant change is that each user now must have a valid email address in order to obtain a log in and you are able to configure different user groups with comprehensive permission levels. For more information please refer to the **Getting Started Guide**:

<http://www.tucasihelp.com/documents/2.4SCOGettingStartedGuide.pdf>

#### 3.3. Account Configuration

There are only minor changes in this area, there is now an 'Edit address' button for changing addresses on pupil or staff accounts. The 'Add new admin user' button has been removed from the Online users configuration as all SCO users can log with the same username (their email) & password to their scopay account (via UserWebapp).

For more information please refer to the **Getting Started Guide**:

<http://www.tucasihelp.com/documents/2.4SCOGettingStartedGuide.pdf>



### **3.4. Income Configuration**

There is now a tick box to define a default in the VAT codes configuration.

For more information please refer to the **Getting Started Guide**:

<http://www.tucasihelp.com/documents/2.4SCOGettingStartedGuide.pdf>

### **3.5. Banking Configuration | Bank Accounts/Cost Centres**

It is now possible to set different Worldpay surcharges for each bank account.

For more information please refer to the **Online Payments Configuration Guide**:

<http://www.tucasihelp.com/documents/2.4scoonlinepaymentsconfigadminguide.pdf>

### **3.6. Banking Configuration | Pre-payment Accounts**

It is now possible to allow parents to order meals / book sessions online and school have the ability to decide a cut-off point. For more information please refer to:

**Dinner Money Configuration Guide:**

<http://www.tucasihelp.com/documents/2.4SCODinnerMoneyConfigurationGuide.pdf>

**Extended Day Configuration Guide:**

<http://www.tucasihelp.com/documents/2.4SCOExtendedDayConfigurationGuide.pdf>

### **3.7. Update Online Logo**

A new button has been added to allow users to add their School logo to scopay.com directly from the SCO client.

## **4. What's Changed: Dinners**

School can now allow parents to order meals online and configure which meal codes parents can see and whether their account needs to be in credit to allow them to order meals.

When parents order meals online they will show in Schools Cash Office dinner registers with a green background colour. Their online choices will update Schools Cash Office instantly.

Mail merge can now be generated for Staff as well as Pupils.

For more information please see:

**Dinner Money Configuration Guide:**

<http://www.tucasihelp.com/documents/2.4SCODinnerMoneyConfigurationGuide.pdf>

**Quick Reference Guide for Meal Ordering Online for Parents:**

<http://www.tucasihelp.com/documents/2.4SCOQuickReferenceGuideMealOrderingOnlineParent.pdf>

## 5. What's Changed: Classroom Edition

It is no longer necessary to install Schools Cash Office on the classroom computers as the SCO Classroom Edition is web based and can be accessed from the Internet browser via

[www.scopay.com/ClassroomWebapp](http://www.scopay.com/ClassroomWebapp)

All teachers will need to be set up as a user in School Cash Office before they can log in to the Classroom Edition.

For more information please see:

### **Getting Started Guide:**

<http://www.tucasihelp.com/documents/2.4SCOGettingStartedGuide.pdf>

### **Dinner Money Classroom Edition Configuration Guide:**

<http://www.tucasihelp.com/documents/2.4SCODMClassroomEditionConfigurationGuide.pdf>

### **Quick Reference Guide Classroom Edition for Teachers:**

<http://www.tucasihelp.com/documents/2.4SCOQuickReferenceGuideClassroomEditionforTeachers.pdf>

## 6. What's Changed: Extended Day

School can now allow parents to order sessions online and configure which session codes parents can see and whether their account needs to be in credit to allow them to order the sessions.

When parents order sessions online they will show in Schools Cash Office registers with a green background colour. Their online choices will update Schools Cash Office instantly.

Mail merge can now be generated for Staff as well as Pupils.

For more information please see:

### **Extended Day Configuration Guide:**

<http://www.tucasihelp.com/documents/2.4SCOExtendedDayConfigurationGuide.pdf>

### **Quick Reference Guide for Session Ordering Online for Parents:**

<http://www.tucasihelp.com/documents/2.4SCOQuickReferenceGuideSessionOrderingOnlineParent.pdf>

## 7. What's Changed: Accounts

Whilst the functions have not changed the screen layout has. The new layout has 'Common tasks' section on the left hand side which allows you to edit account details, view account statements or delete an account. Right mouse click on any of the accounts also shows these options. The 'Block/Unblock' button has been removed.

## 8. What's Changed: Trips and Events

The Trip list screen now shows the number of places left on a trip if the trip has been set up with limited places.

Whilst in the Trip List or Trip Grid view you will see that the screen now shows the Pupil ID, this can be switched off in System Options if required.

The trip configuration window now has a new tick box to allow overpayments. If this is left unticked and you try to make an overpayment the system will display a pop-up message stating "This trip does not allow overpayments".

Mail merge can now be generated for Staff as well as Pupils.

For more information please see:

### **Trips and Income Configuration Guide:**

<http://www.tucasihelp.com/documents/2.4SCOTripsIncomeConfigurationGuide.pdf>

### **Quick Reference Guide for Trips and Income:**

<http://www.tucasihelp.com/documents/2.4SCOQuickReferenceGuideTripsandIncome.pdf>

## 9. What's Changed: Communications

The Message history log has now changed to show specific message status. It allows to preview the message, edit recipients and resend or export it to Word.

There is now a new 'Failed contacts' button, this will show contacts that do not have a mobile or email in a valid format.

For more information please see:

### **Communications Configuration Guide:**

<http://www.tucasihelp.com/documents/2.4SCOCommunicationsConfigurationGuide.pdf>

### **Quick Reference Guide for Communications:**

<http://www.tucasihelp.com/documents/2.4SCOQuickReferenceGuideCommunications.pdf>

## 10. What's Changed: Orders - **FULL FUNCTIONALITY COMING SOON**

This is a brand new module in SCO introducing stock control. Orders can already be marked as ready for collection (as well as open, complete and cancelled). **However, the full stock control functionality is coming soon** – this will allow for stock levels to be increased/decreased and managed for products that need to be restocked. Notes will be able to be added to stock products to display online as well as comprehensive note fields within stock products themselves.

For more information on this future functionality please see:

### **Stock Control Configuration Guide:**

<http://www.tucasihelp.com/documents/2.4SCOStockControlConfigurationGuide.pdf>

### **Quick Reference Guide for Stock Control:**

<http://www.tucasihelp.com/documents/2.4SCOQuickReferenceGuideStockControl.pdf>

## 11. What's Changed: Reports

The following changes have been made to the Reports:

Dinner money reports: **Meal trends** button has been removed.

Account reports: **Account card issue number** button has been removed.

Products and orders: **Browse orders** functionality has been moved to the Orders tab.

Online reports: **Online access letter** can now be generated for Staff as well as Pupils.

Financial reports: **Financial year end** report has been renamed to Transaction audit report.

**System status report** has been moved to the Admin tab.

## 12. What's Changed: Audit

The following changes have been made to the Audit:

**Error log**, and **Overnight event log** buttons have been removed as there is no synchronisation process.

Other logs | Activity logs: **Archive creation**, **Database compaction** and **Database initialisation** buttons have been removed as there is no local SCO server.

Other logs: **Message history log** button has been added.

## 13. What's Changed: Admin

The following changes have been made the Admin:

**Archive management** button has been removed as archiving is now supported centrally.

**Scheduled task maintenance** button has been removed as there is no synchronisation process.

End of academic year: **Create archive** button has been removed.

Database management: **Compress database**, **Database clean-up wizard**, **Restore from archive**, **Pre-migration check tool** and **Migrate database** buttons have been removed.

**Today's information alerts**: new functionality to display specific alerts, e.g. alerts for catering reports. This option is configurable in System options ('Display catering warnings').

**System status report** has been moved from the Reports tab. **Change licence key** button has been removed as licensed components are now applied centrally by Tucasi. **Database, Network and Scheduled tasks** tab has been removed as there is no local SCO server.

## 14. What's Changed: Parents' Evening

Classes can now be automatically invited to the meetings when associated with the relevant teacher. There are also several additional views to choose from (Class, Year, Cohort and Gender in addition to Last Name and Trips) when inviting pupils manually. Teacher users can be added to the SCO client. Teachers can log in to the Parents' Evening module via the Internet Browser to run their own reports or to exchange notes with parents. Parents' notes, if used, are visible only to the relevant teachers.

**School administrator login screen:**

[www.scopay.com/UserWebapp](http://www.scopay.com/UserWebapp)

**Teacher login screen:**

[www.scopay.com/CustomerWebapp](http://www.scopay.com/CustomerWebapp)

For more information please see:

**Parents Evening Configuration Guide:**

<http://www.tucasihelp.com/documents/2.4SCOParentsEveningConfigurationGuide.pdf>

**Quick Reference Guide for Parents Evening Booking System for School:**

<http://www.tucasihelp.com/documents/2.4QuickReferenceGuideParentsEveningBookingSystemSchool.pdf>

**Quick Reference Guide for Parents Evening Booking System for Teachers:**

<http://www.tucasihelp.com/documents/2.4QuickReferenceGuideParentsEveningBookingSystemTeacher.pdf>

**Quick Reference Guide for Parents Evening Booking System for Parents:**

<http://www.tucasihelp.com/documents/2.4QuickReferenceGuideParentsEveningBookingSystemParent.pdf>

## 15. Support

If you have any queries please contact our Support Team or log to the Self Service Portal.

Tucasi Customer Support

Email: [Migrationsteam@tucasi.com](mailto:Migrationsteam@tucasi.com)

Tel: 0844 800 4017

Self Service Portal: <http://tucasi.force.com/>