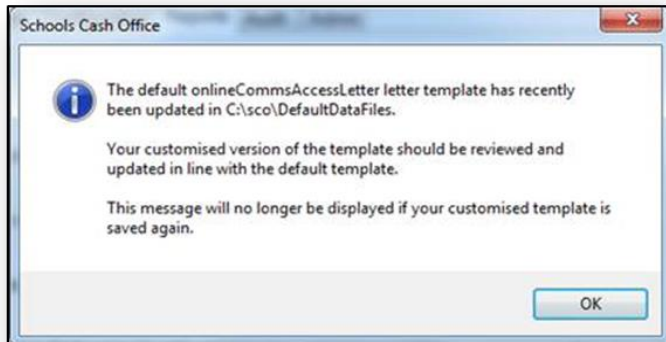**Schools Cash Office**
Income Administration Software
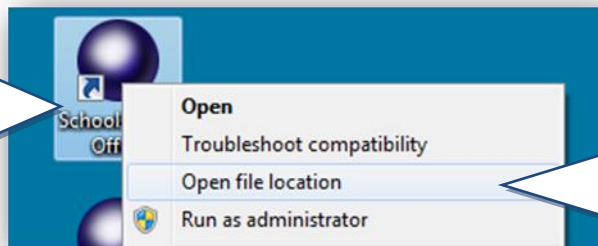
How do I review my templates in SCO?

Sometimes when you upgrade Schools Cash Office to a new version you may receive a message prompting you to review your customised templates.

Schools Cash Office

The default onlineCommsAccessLetter letter template has recently been updated in C:\sco\DefaultDataFiles.

Your customised version of the template should be reviewed and updated in line with the default template.

This message will no longer be displayed if your customised template is saved again.

OK

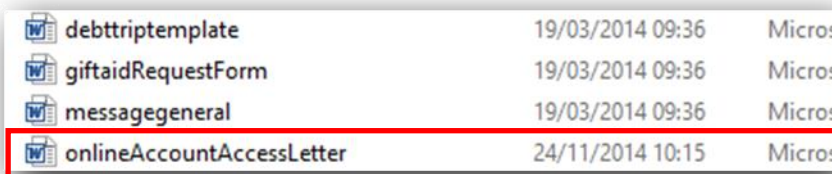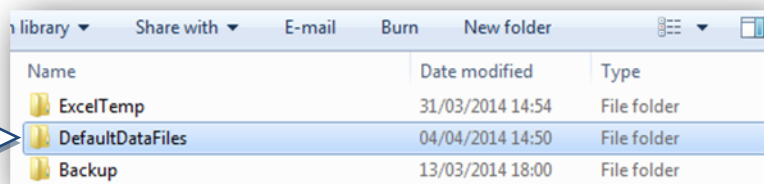The best way to open the new file is to browse to the folder where it is saved.

Important: You may receive some error messages but please ignore them.
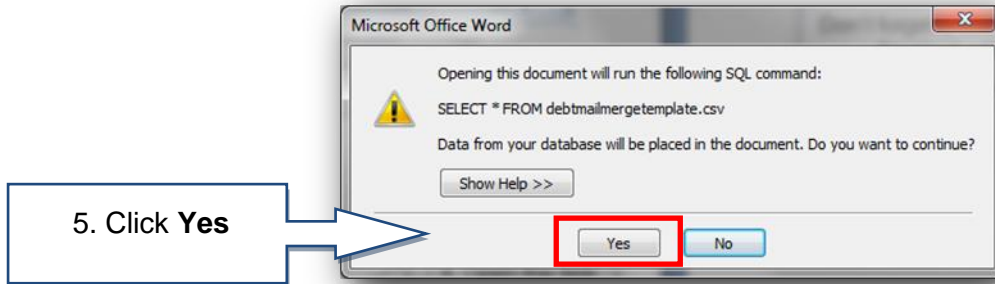
1.**Right click** on the SCO icon on your desktop

Open
Troubleshoot compatibility
Open file location
Run as administrator

2. Select **Open file location**

library ▼   Share with ▼   E-mail   Burn   New folder

Name	Date modified	Type
ExcelTemp	31/03/2014 14:54	File folder
DefaultDataFiles	04/04/2014 14:50	File folder
Backup	13/03/2014 18:00	File folder

3. Select the **DefaultDataFiles** folder and open

debttriptemplate	19/03/2014 09:36	Micros
giftaidRequestForm	19/03/2014 09:36	Micros
messagegeneral	19/03/2014 09:36	Micros
onlineAccountAccessLetter	24/11/2014 10:15	Micros

4. Open the first template you wish to review

Microsoft Office Word

⚠ Opening this document will run the following SQL command:

SELECT * FROM debtmailmergetemplate.csv

Data from your database will be placed in the document. Do you want to continue?

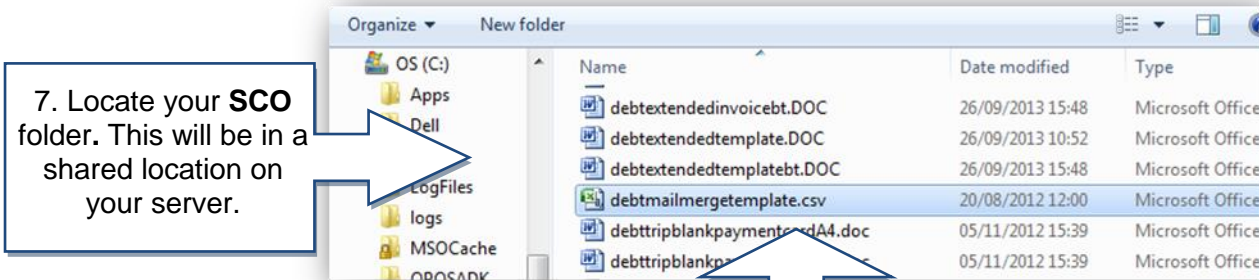Show Help >>

Yes   No

5. Click **Yes**

NB If you get the next message you will need to find the data source. If you don't see this message, then continue to step 9.

Microsoft Office Word

❓ onlinePaymentAccessLetter.doc is a mail merge main document. Word cannot find its data source, C:\...\debtmailmergetemplate.csv.

Find Data Source...   Options...
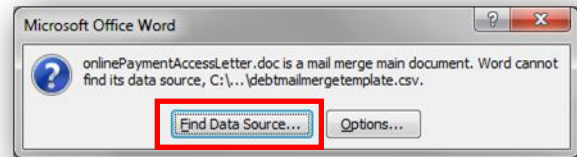
6. Click on **Find Data source...**

Organize ▼   New folder

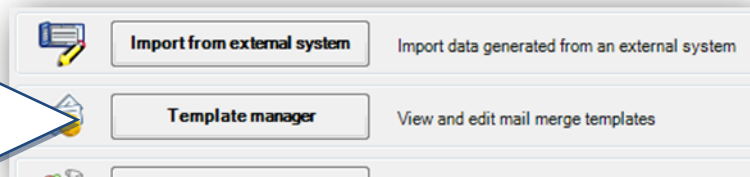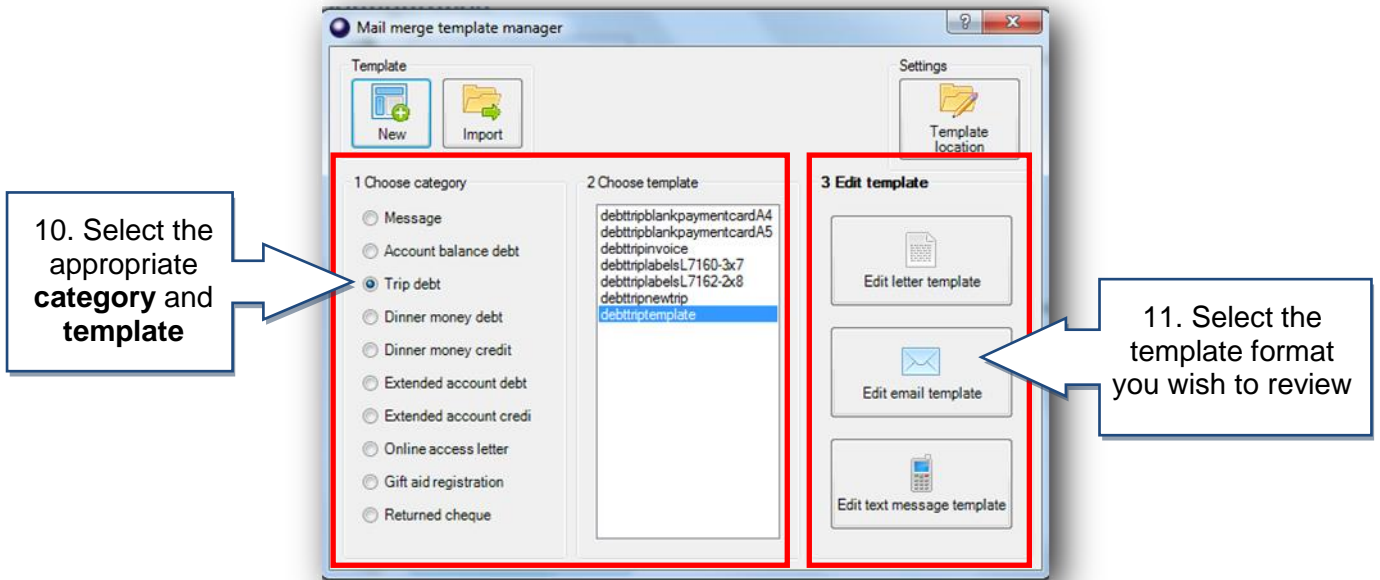|	Name	Date modified	Type
OS (C:)			
Apps	debtextendedinvoicebt.DOC	26/09/2013 15:48	Microsoft Office
Dell	debtextendedtemplate.DOC	26/09/2013 10:52	Microsoft Office
	debtextendedtemplatebt.DOC	26/09/2013 15:48	Microsoft Office
LogFiles	debtmailmergetemplate.csv	20/08/2012 12:00	Microsoft Office
logs	debttripblankpaymentecdA4.doc	05/11/2012 15:39	Microsoft Office
MSOCache	debttripblankpa...	05/11/2012 15:39	Microsoft Office
OROSADK			

7. Locate your **SCO** folder**.** This will be in a shared location on your server.

8. Select **debtmailmergetemplate.csv**

Once you open the template read carefully through the wording.

Keep this document open whilst you review your own template from the Template Manager, to compare against any changes you might want to make.

9. From the Configuration tab menu, select **Template Manager**

📝 **Import from external system**   Import data generated from an external system

📄 **Template manager**   View and edit mail merge templates

10. Select the appropriate category and template

11. Select the template format you wish to review

You should now have both template documents open (your customised template and the new template from the latest upgrade). You can compare the differences and copy/paste relevant text to update your customised template in line with the changes.

Important: Even if your customised letter looks identical you must make a small change and save the document otherwise the 'Date modified' won't update. Once saved, the message prompt in SCO will no longer appear.

11. Save the template once edited