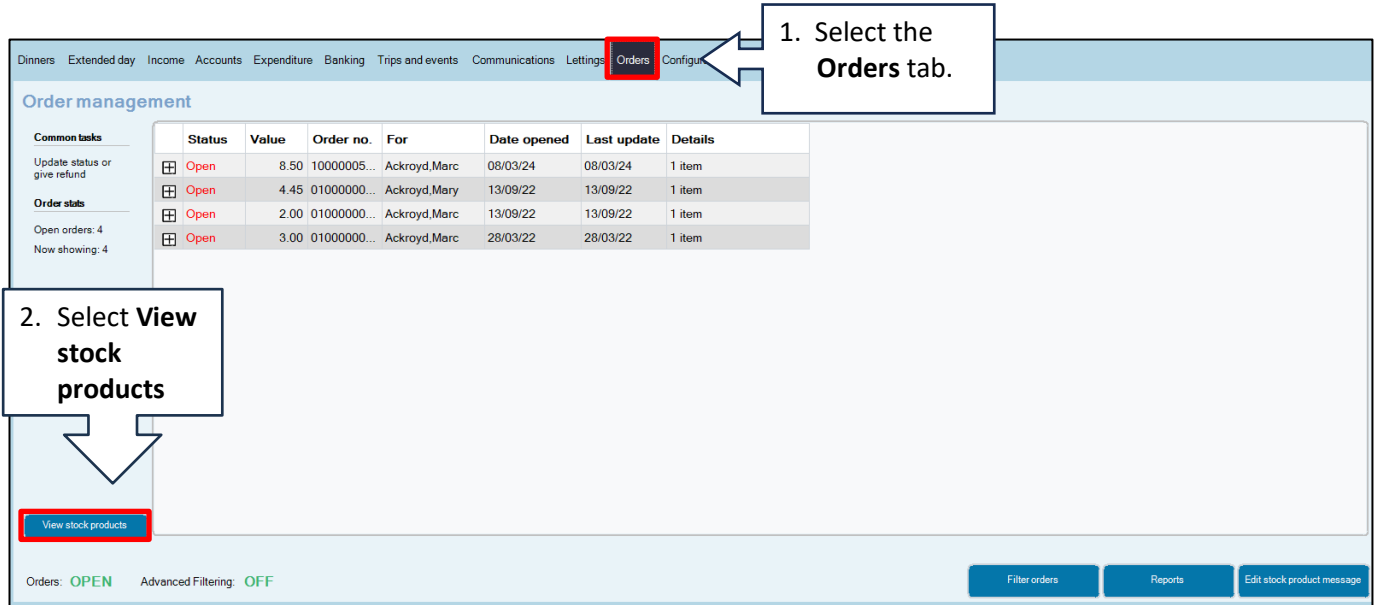


How do I enter stock levels?

1. Select the **Orders** tab.



Status	Value	Order no.	For	Date opened	Last update	Details
Open	8.50	10000005...	Ackroyd, Marc	08/03/24	08/03/24	1 item
Open	4.45	01000000...	Ackroyd, Mary	13/09/22	13/09/22	1 item
Open	2.00	01000000...	Ackroyd, Marc	13/09/22	13/09/22	1 item
Open	3.00	01000000...	Ackroyd, Marc	28/03/22	28/03/22	1 item

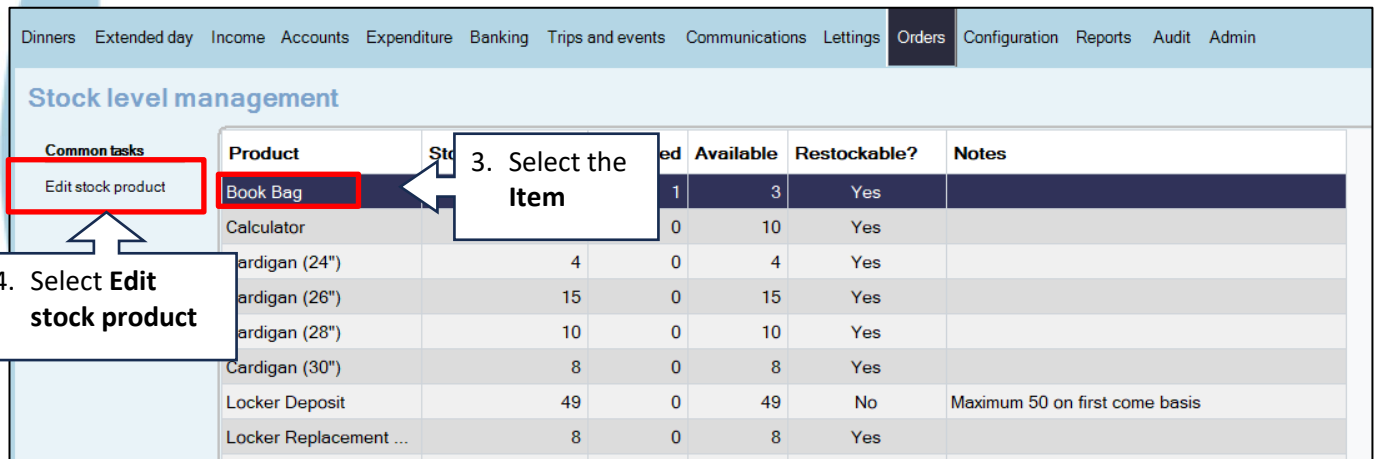
2. Select **View stock products**

Orders: **OPEN** Advanced Filtering: **OFF**

Filter orders Reports Edit stock product message

3. Select the **Item**

4. Select **Edit stock product**



Product	Stock	Ordered	Available	Restockable?	Notes
Book Bag	1	3	Yes		
Calculator	0	10	Yes		
Cardigan (24")	4	0	4	Yes	
Cardigan (26")	15	0	15	Yes	
Cardigan (28")	10	0	10	Yes	
Cardigan (30")	8	0	8	Yes	
Locker Deposit	49	0	49	No	Maximum 50 on first come basis
Locker Replacement ...	8	0	8	Yes	

5. Select **Set stock level to:** and enter the amount

The screenshot shows the 'Edit stock product' dialog box for 'Book Bag'. The current stock count is 4. Under the 'Modify stock count' section, the 'Set stock level to:' option is selected and highlighted with a red box, with the value '25' entered in the adjacent text field. Other options include 'No change', 'Increase stock level by:' (with a value of 0), and 'Decrease stock level by:' (with a value of 0). Below this, there is a 'Notes for this stock product:' field, a checked 'Restockable item' checkbox, and a warning message: 'Leave unchecked if this item has a limited supply and cannot be restocked (e.g. seats in a hall)'. At the bottom are 'OK' and 'Cancel' buttons.

6. Or select **Increase or Decrease stock level by ...**

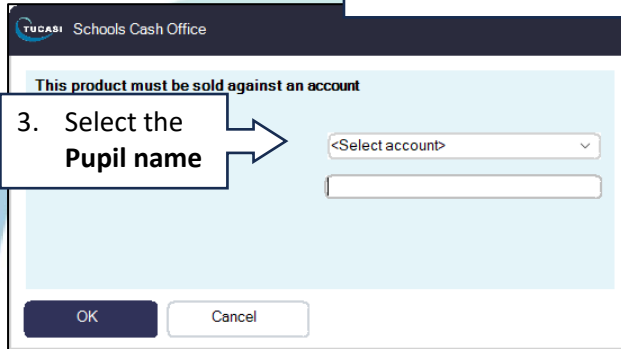
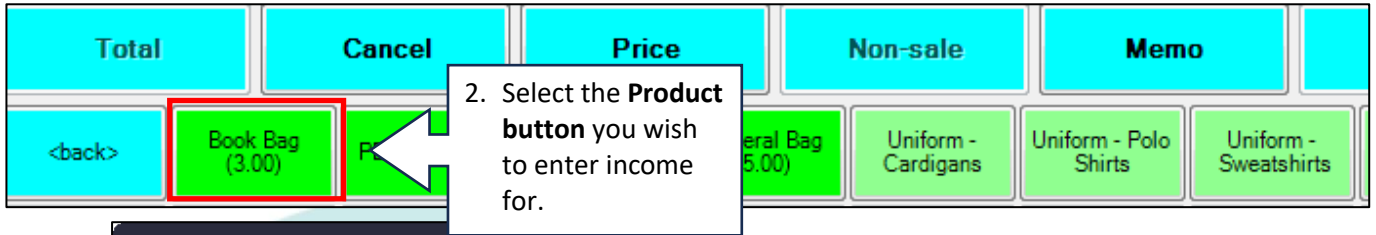
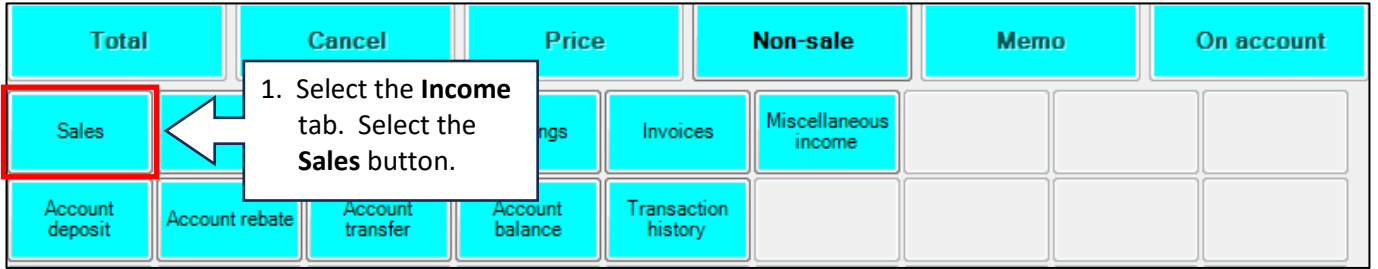
The screenshot shows the 'Edit stock product' dialog box for 'Book Bag'. The current stock count is 4. Under the 'Modify stock count' section, the 'Increase stock level by:' option is selected and highlighted with a red box, with the value '25' entered in the adjacent text field. Other options include 'No change', 'Decrease stock level by:' (with a value of 0), and 'Set stock level to:' (with a value of 0). Below this, there is a 'Notes for this stock product:' field containing the text 'Book bag with yellow logo', a checked 'Restockable item' checkbox, and a warning message: 'Leave unchecked if this item has a limited supply and cannot be restocked (e.g. seats in a hall)'. At the bottom are 'OK' and 'Cancel' buttons.

8. Add **Notes** if required

7. Tick if item is **Restockable**

9. Select **OK**

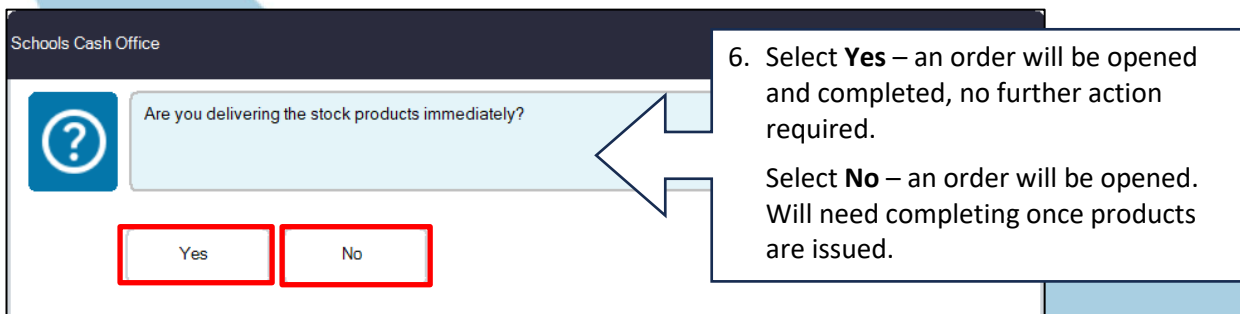
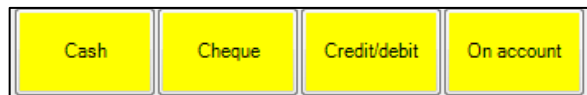
How do I record Income in school?



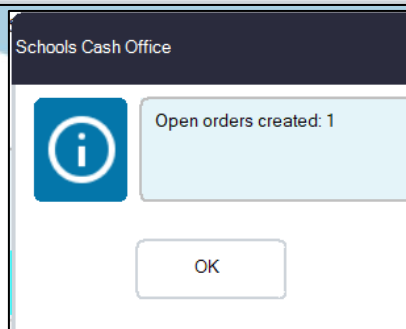
4. Select the **Total** button



5. Select the **Payment type**



An Open order is created



How do I complete an order?

1. Select the **Orders** tab.

2. Select the **View orders** button

3. Select the + next to the Order to expand. If only some of the order is available then select individual items.

4. Select **Update status or give refund**

5. Select **Complete** if all products delivered or **Received** if order is still open as only some of the products have been delivered. Select **OK**.

Status	Value	Last update	Details
Open	3.00	08/03/22	1 item
Open	4.45	13/03/22	1 item
Open	2.00	13/03/22	1 item
Open	3.00	28/03/22	1 item

How do I cancel an order and issue a refund?

1. Select the **Order** or individual product.

2. Select **Update status or give refund**

3. Select the **Payment Type** for the refund. Choose **Credit/Debit** for online payments and click **OK**

4. Select **Cancelled: give a refund**.

Status	Value	Order no.	Item
Open	3.00	1000000...	1 item
Open	3.00	Book Bag	1 item
Open	8.50	10000005...	1 item
Open	4.45	01000000...	1 item
Open	2.00	01000000...	1 item
Open	3.00	01000000...	1 item

How do I report on my orders?

Navigation: Dinners Extended day Income Accounts Expenditure Banking Trips and events Communications Lettings **Orders** Configuration Reports Audit Admin

Order management

Common tasks
Update status or give refund

Order stats
Open orders: 5
Now showing: 5

Status	Value	Order no.	For	Date opened	Last update	Details
Open	3.00	10000005...	Ackroyd,Smith...	08/03/24	08/03/24	1 item
Open	3.00	Book Bag				
Open	8.50	10000005...	Ackroyd,Marc	08/03/24	08/03/24	1 item
Open	4.45	01000000...	Ackroyd,Mary	13/09/22	13/09/22	1 item
Open	2.00	01000000...	Ackroyd,Marc	13/09/22	13/09/22	1 item
Open	3.00	01000000...	Ackroyd,Marc	28/03/22	28/03/22	1 item

1. On the **Orders** tab, select **Reports**

Buttons: Filter orders, **Reports**, Edit stock product message

Orders: OPEN Advanced Filtering: OFF

2. Select **Orders report**.

Options: Orders report, Products report, Refunds required report

Close

3. Select the required **Filters**. Click **OK**.

Report date range
Select report dates:

Today
This week
Last week
Select month: Month (Mar 2024)
Custom
From: 08 03 2024
Until: 08 03 2024
All dates

Select account: <All pupils>
Select order number: <All order numbers>
Select order status: <All orders>
Select stock product: <All stock products>
Only show stocked products?

OK Cancel

Orders Report

Reported at: 06/07/2023 13:35:17

Open orders

Order number	Status	Value	For	Class	Date opened	Last update
100000580	Open	3.00			06/07/2023	06/07/2023
	Open	3.00	Ackroyd, Marc	Year 6	Book Bag	
10000069	Open	4.45			13/09/2022	13/09/2022
	Open	4.45	Ackroyd, Mary	11B	Year 11 Revision Guide - English	
10000068	Open	2.00			13/09/2022	13/09/2022
	Not stock	12.00	Ackroyd, Marc	Year 6	Yellow Leavers Hoodie (Hoodies: Small)	
	Open	2.00	Ackroyd, Marc	Year 6	Water Bottle	
10000055	Open	3.00			28/03/2022	28/03/2022
	Open	3.00	Ackroyd, Marc	Year 6	Book Bag	

How do I get help?



Email your query to the
Tucasi Customer Support Team
support@tucasi.com



Tucasi Customer Support Team
02380 016 564
8.30 am to 4.00 pm Monday to Friday

SCO Help Centre
See the
Orders/Stock Control section
help.tucasi.com