

How do I enter stock levels?

1. Select the **Orders** tab.

Order management

Common tasks
Update status or give refund

Status	Value	Order no.	For	Date opened	Last update	Details
Open	4.45	0100000069	Ackroyd, Mary	13/09/22	13/09/22	1 item
Open	2.00	0100000068	Ackroyd, Marc	13/09/22	13/09/22	1 item
Open	3.00	0100000055	Ackroyd, Marc	28/03/22	28/03/22	1 item

Order stats

2. Select **View stock products**

View stock products

Orders: **OPEN** Advanced Filtering: **OFF** Filter orders Reports Edit stock product message

3. Select the **Item**

Stock level management

Common tasks
Edit stock product

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

4. Select **Edit stock product**

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

Edit stock product

Product: **Book Bag**

Stock count: **4**

Modify stock count

No change

Increase stock level by: 10

Decrease stock level by: 0

Set stock level to: 25

Notes for this stock product:

Restockable item
Leave unchecked if this item has a limited supply and cannot be restocked (e.g. seats in a hall)

OK Cancel

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

7. Add **Notes** if required

8. Tick if item is **Restockable**

9. Select **OK**

Edit stock product

Product: **Book Bag**

Stock count: **4**

Modify stock count

No change

Increase stock level by: 10

Decrease stock level by: 0

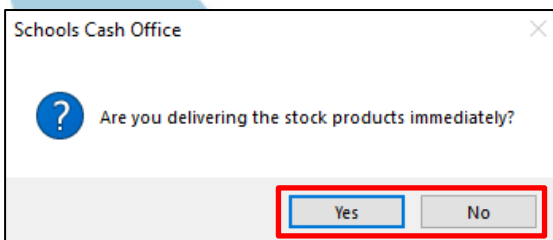
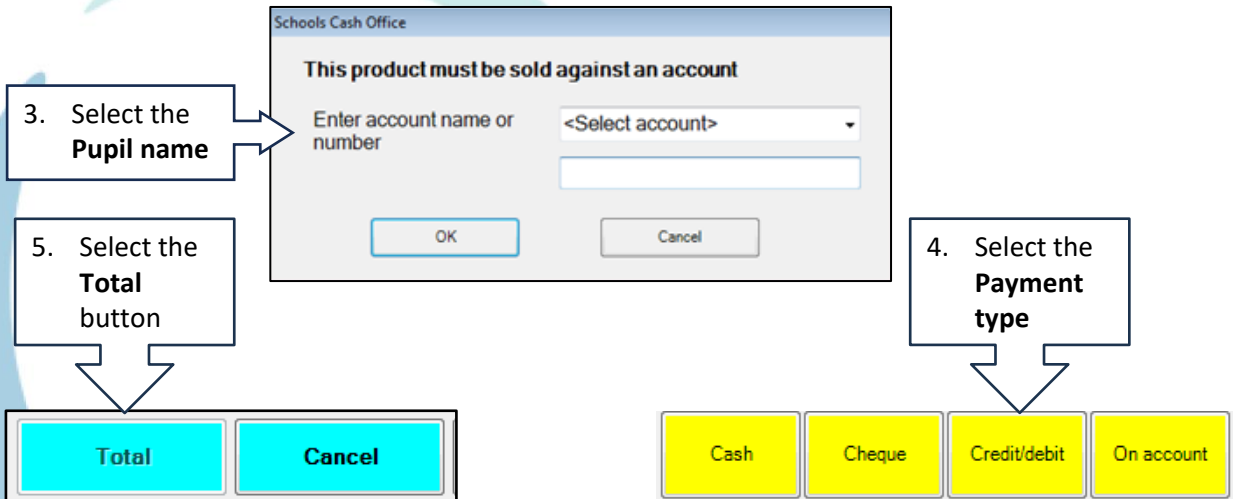
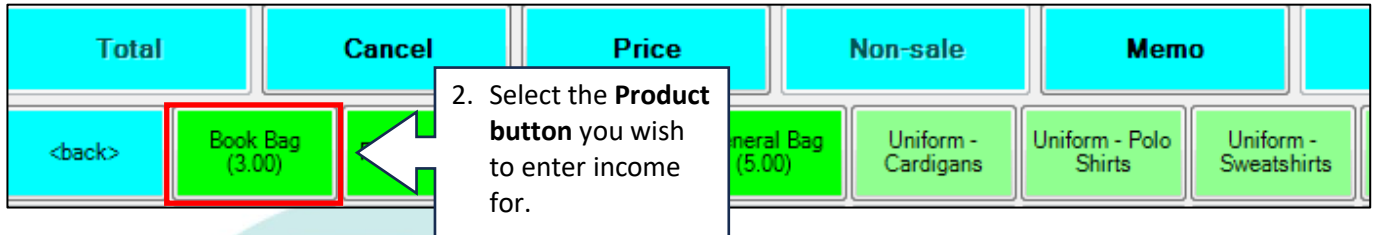
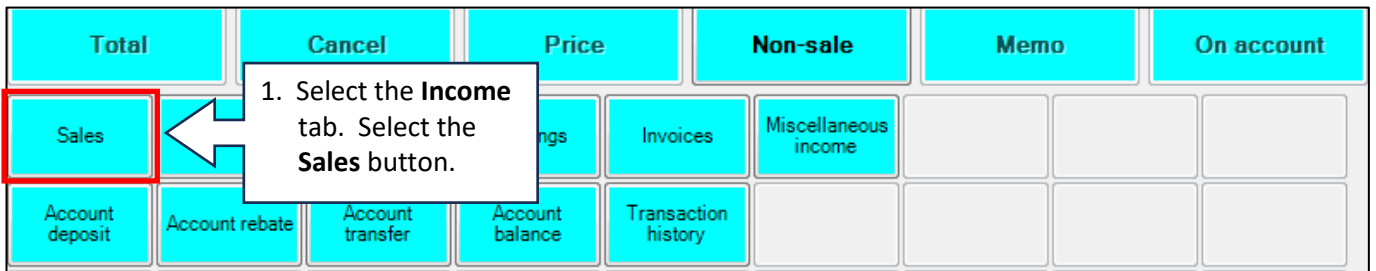
Set stock level to: 0

Notes for this stock product:
Blue bags with yellow logo

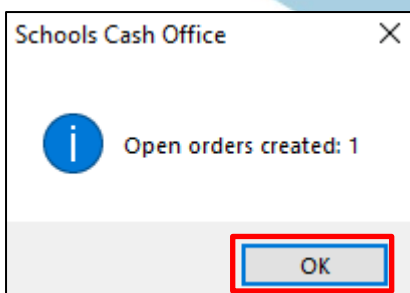
Restockable item
Leave unchecked if this item has a limited supply and cannot be restocked (e.g. seats in a hall)

OK Cancel

How do I record Income in school?



6. Select **Yes** – an order will be opened and completed, no further action required.
 Select **No** – an order will be opened. Will need completing once products are issued.



7. If **No** is selected, the following box will appear. Select **OK**.

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.

Common tasks: Update status or give refund

Order stats: View stock products

Orders: OPEN Advanced Filtering: OFF

Change order item status

Order item status: Please select an order status for:

Order item: Book Bag For: Ackroyd, Marc

Open

Received, ready for delivery

Complete

Cancelled, give a refund

Refund options: Please select a refund type:

Cash

Cheque

Credit/debit

On account

Do not return items to stock

Check this if the items ordered are no longer for sale, e.g. they are faulty.

OK Cancel

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 Cancelled: give a refund.

4. Select the refund payment type (choose Credit/debit if refunding an online payment). Select OK, then Yes to confirm.

Common tasks: Update status or give refund

Order stats: Open orders: 4 Now showing: 4

View stock products

Orders: OPEN Advanced Filtering: OFF

Order item status: Please select an order status for:

Order item: Book Bag For: Ackroyd, Marc

Complete

Cancelled, give a refund

Refund options: Please select a refund type:

Cash

Cheque

Credit/debit

On account

Do not return items to stock

Check this if the items ordered are no longer for sale, e.g. they are faulty.

OK Cancel

How do I report on my orders?

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: 4
Now showing: 4

	Status	Value	Order no.	For	Date opened	Last update	Details
<input type="checkbox"/>	Open	3.00	1000000580	Ackroyd, Marc	06/07/23	06/07/23	1 item
<input type="checkbox"/>	Open	4.45	0100000069	Ackroyd, Mary	13/09/22	13/09/22	1 item
<input type="checkbox"/>	Open	2.00	0100000068	Ackroyd, Marc	13/09/22	13/09/22	1 item
<input type="checkbox"/>	Open	3.00	0100000055	Ackroyd, Marc	28/03/22	28/03/22	1 item

View stock products

Orders: **OPEN** Advanced Filtering: **OFF** Filter orders **Reports** Edit stock product message

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

Products and

2. Select **Orders report**.

Select report

Orders report

Products report

Refunds required report

Close

Orders report selection

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

Report date range

Select report dates:

Today

This week

Last week

Select month

Month Jul 2023

Custom

From 06 Jul 2023

Until 06 Jul 2023

All dates

Select account: <All pupils>

Select order number: <All order numbers>

Select order status: **Incomplete**

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