TUCASI

Quick Reference Guide
Extended Day

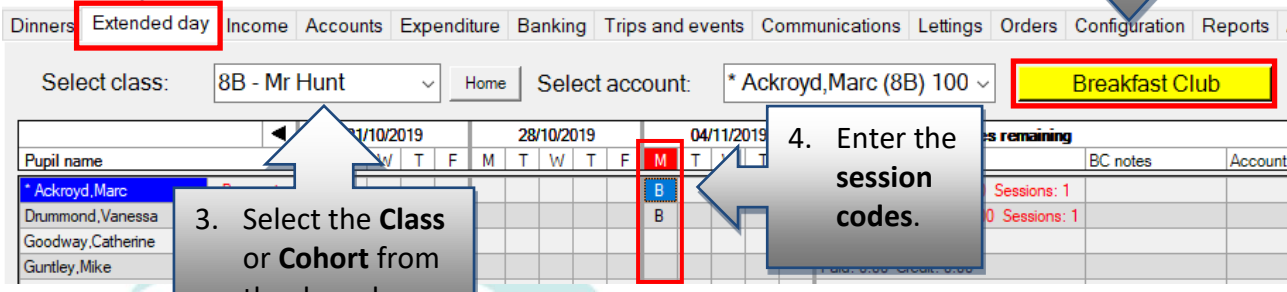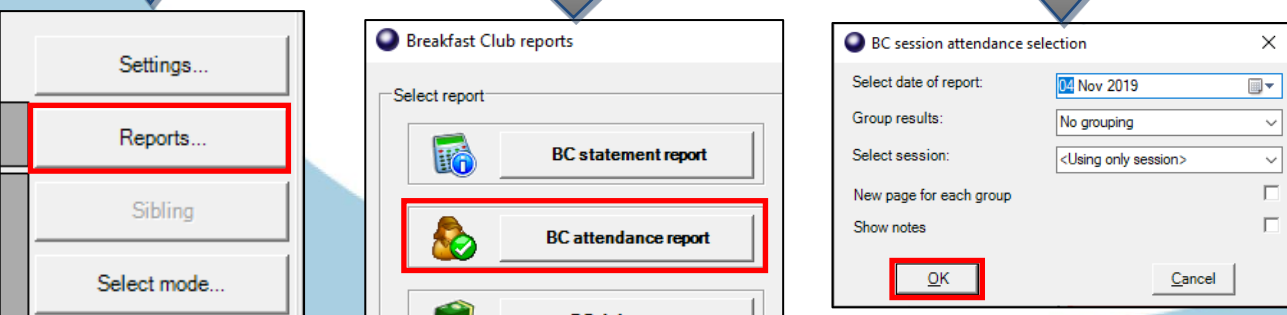## How do I enter sessions attended?

1. Click on the **Extended day** tab.

2. Select the relevant **Club** by clicking the coloured button.

| Dinners | Extended day | Income | Accounts | Expenditure | Banking | Trips and events | Communications | Lettings | Orders | Configuration | Reports |

Select class: **8B - Mr Hunt** [Home] Select account: *** Ackroyd,Marc (8B) 100** [Breakfast Club]

3. Select the **Class** or **Cohort** from the drop down.

4. Enter the **session codes**.

Pupil name:
* Ackroyd,Marc
Drummond,Vanessa
Goodway,Catherine
Guntley,Mike

BC notes | Account

Sessions: 1
Sessions: 1

ⓘ Sessions ordered in the **Classroom** or on **SCOPAY** will automatically appear on the Extended day screen.

How do I print a list of who is attending today?

1. Select **Reports**.

2. Select **Attendance report**.

3. Ensure the **date** is selected. Click **OK**.

- Settings...
- Reports...
- Sibling
- Select mode...
- Set session preferences
- Pre-payment account transfer

Key
Valid entries:
B: Inc. Breakfast
N: No Breakfast
X: Closed

Breakfast Club reports

Select report
- BC statement report
- **BC attendance report**
- BC debt report
- BC credit report
- Generate mail merge
- BC payment activity report

BC session attendance selection

Select date of report: **04 Nov 2019**
Group results: No grouping
Select session: <Using only session>
New page for each group ☐
Show notes ☐
[OK] [Cancel]

ⓘ The report displays who is due to attend today with space to record the time in/out and signature.

How do I enter cash and cheque payments?

1. Click the **Payment** button to the right of the pupil's name.

2. Select the **Payment type**, enter the **Amount** and click **Confirm payment.**

Dinners	Extended day	Income	Accounts	Expendi

Select class: 8B - Mr Hunt

		◄	02/12/2019				
Pupil name			M	T	W	T	F
* Ackroyd,Marc	Payment						
Drummond,Vanessa	Payment						
Goodway,Catherine	Payment						
Guntley,Mike	Payment						
Healey,Karen	Payment						
Hobbs,Sam	Payment						
* Honeywell,Fred	Payment						
Hutchinson,Roger	Payment						
Jones,Jim	Payment						
Kaur,Samreen	Payment						
Kearney,Kev	Payment						
Kingston,Sarah	Payment						

Enter Breakfast Club payment details

Ackroyd,Marc   Payment history

Select: ● Payment ○ Refund ○ Discount ○ Write off balance

Specify the payment type:
- ● Cash
- ○ Cheque
- ○ Credit/debit
- ○ On account

Available account balance: 0.00

Effective date   17 Dec 2019 ☐ Enable
Enter payment amount: 10.00   Split...
Show receipt after payment?   ☑
Is pupil premium contribution?   ☐
Memo:

Confirm payment   Cancel

ⓘ If the payment type Cheque is selected, an extra screen will prompt you to add the cheque details.

How do I check the total income received?

1. Select **Reports**.

2. Select **Payment activity report**.

3. Select the **Date range**. Click **OK**.

Settings...

Reports...

Sibling

Select mode...

Set session preferences

Pre-payment account transfer

Key
Valid entries:

B: Inc. Breakfast
N: No Breakfast
X: Closed

Breakfast Club reports

Select report

- BC statement report
- BC attendance report
- BC debt report
- BC credit report
- Generate mail merge
- BC payment activity report

BC payment activity report selection

Report date range
Select report dates:

Today	●
This week	○
Last week	○
Select month	○
Month	Dec 2019
Custom	○
From	18 Dec 2019
Until	18 Dec 2019
All dates	○

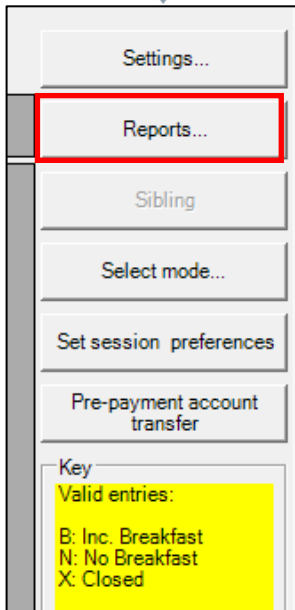Select class: <All classes>
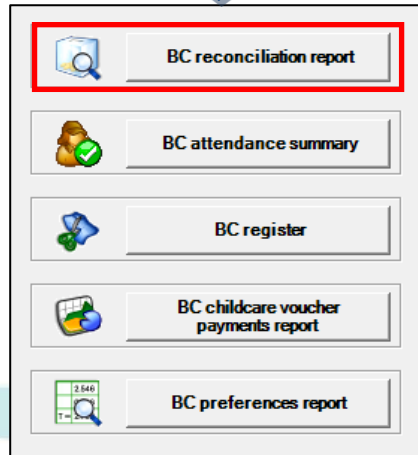Select payment method: <All payment methods>
Include staff   ☐

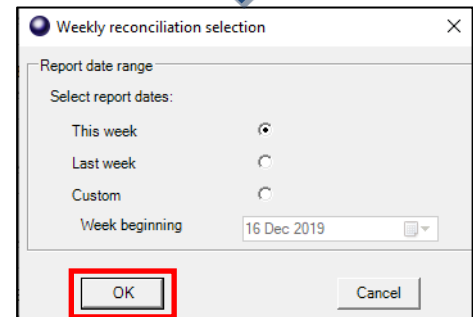OK   Cancel

How do I reconcile at the end of the week?
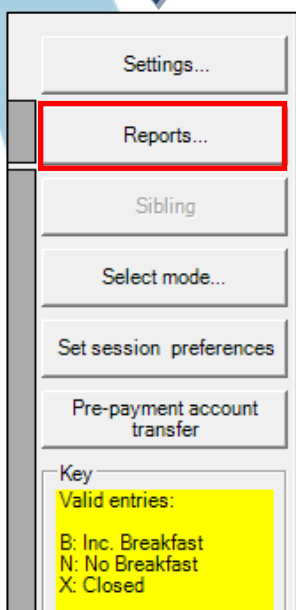
1. Select Reports.

- Settings...
- **Reports...**
- Sibling
- Select mode...
- Set session preferences
- Pre-payment account transfer

Key
Valid entries:

B: Inc. Breakfast
N: No Breakfast
X: Closed

2. Select the Reconciliation report.

- **BC reconciliation report**
- BC attendance summary
- BC register
- BC childcare voucher payments report
- BC preferences report

3. Select the Date range. Click OK.

Weekly reconciliation selection

Report date range
Select report dates:

This week	●
Last week	○
Custom	○
Week beginning	16 Dec 2019

OK   Cancel

How do I check for debt?

1. Select Reports.

- Settings...
- **Reports...**
- Sibling
- Select mode...
- Set session preferences
- Pre-payment account transfer

Key
Valid entries:

B: Inc. Breakfast
N: No Breakfast
X: Closed

2. Select the Debt report.

Breakfast Club reports

Select report

- BC statement report
- BC attendance report
- **BC debt report**
- BC credit report
- Generate mail merge
- BC payment activity report
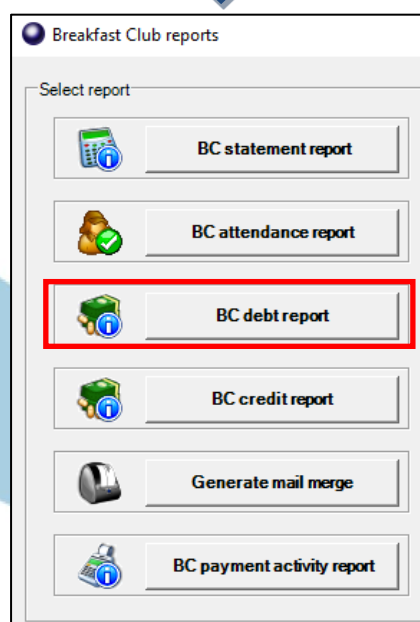
3. Select the required Options. Click OK.

BC debt report selection

Select class:	<All classes>
Minimum debt amount:	0.01
Minimum age of debt (days):	0
Display summary only	☐
Include staff	☐

OK   Cancel
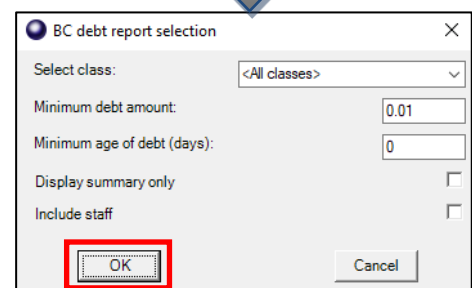
How do I send letters or emails/texts to chase for debts?

Settings...

Reports...

Sibling

Select mode...

Set session preferences

Pre-payment account transfer

Key
Valid entries:

B: Inc. Breakfast
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Breakfast Club reports

Select report

BC statement report

BC attendance report

BC debt report

BC credit report

Generate mail merge

BC payment activity report

Generate mail merge

Select extended day account:

Breakfast Club

Pupils with Breakfast Club credit? ☐
Exclude pupils paying with childcare vouchers? ☑

Recipients

Select recipient:
All accounts with debt

Filters

Pupils ☑ Staff ☐

Options

Attach statement report? ☑

Report selection

Templates

Select template:
<Create a message>
debtextended - fees
debtextended - payments due
debtextended - reminder
debtextendedfees

Letter Email Text

Generate Cancel

How do I get help?

Email

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
Extended Day section
help.tucasi.com