

Cheat Sheet (Food Service) (Classic)

Last Modified on 03/11/2024 8:44 am CDT

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The instructions in this cheat sheet apply to the Classic look of Campus.

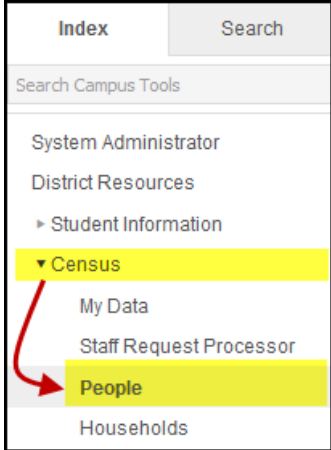
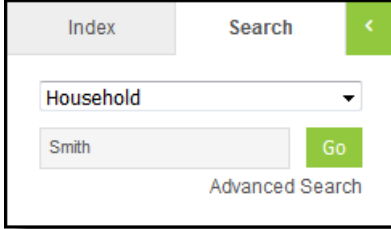
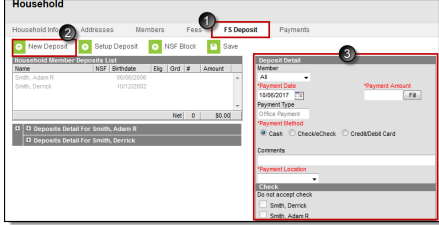
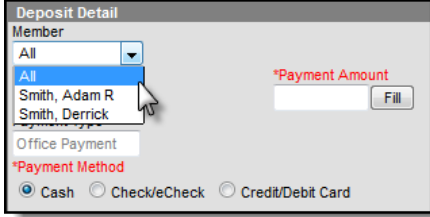
Deposit (Household)

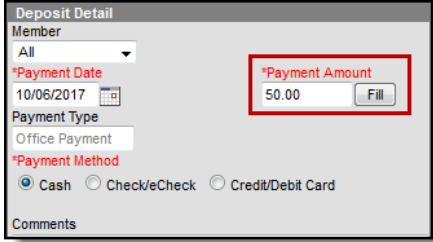
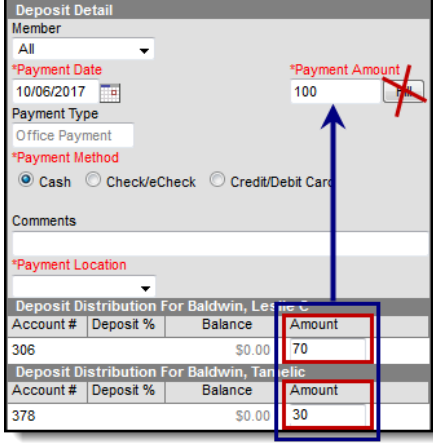
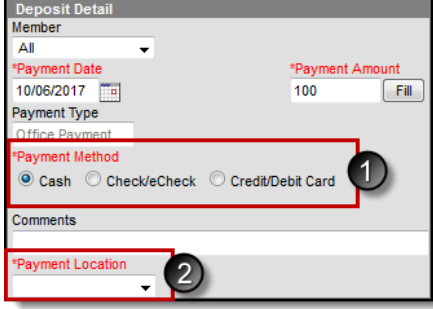
Quick Steps

1. Go to *Census > People*.
2. Select **Household**, enter the name, and click **Go**.
3. Select **FS Deposit** tab and click the **New Deposit** button.
4. Select **All** to split the payment evenly or select a household member.
5. Enter the **Payment Amount**, then complete one of the following tasks
 - To split the payment evenly between patrons, click **Fill**.
 - If there is a student in the household that is not receiving part of the deposit or the deposit is split unevenly, manually enter the amounts.
Do NOT Click FILL. The amount entered for each patron must equal the amount entered in the Payment Amount field.
6. Select the **Payment Method** and **Payment Location**.
7. Click **Save**.

Step	Action	Example
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Detailed Steps

Step	Action	Example
1	Go to <i>Census > People</i> .	
2	Select Household , enter the name, and click Go .	
3	Select FS Deposit tab and click the New Deposit button.	
4	Select All to split the payment evenly or select a household member.	

Step	Action	Example																
<p>5</p> <p>Enter the Payment Amount, then complete one of the following tasks</p> <ul style="list-style-type: none"> To split the payment evenly between patrons, click FILL. If there is a student in the household that is not receiving part of the deposit or the deposit is split unevenly, manually enter the amounts. Do NOT Click FILL. <p>The amount entered for each patron must equal the amount entered in the Payment Amount field.</p>		 <p>OR</p>  <p>Deposit Distribution For Baldwin, Leslie C</p> <table border="1"> <thead> <tr> <th>Account #</th> <th>Deposit %</th> <th>Balance</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>306</td> <td></td> <td>\$0.00</td> <td>70</td> </tr> </tbody> </table> <p>Deposit Distribution For Baldwin, Tanelic</p> <table border="1"> <thead> <tr> <th>Account #</th> <th>Deposit %</th> <th>Balance</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>378</td> <td></td> <td>\$0.00</td> <td>30</td> </tr> </tbody> </table>	Account #	Deposit %	Balance	Amount	306		\$0.00	70	Account #	Deposit %	Balance	Amount	378		\$0.00	30
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306		\$0.00	70															
Account #	Deposit %	Balance	Amount															
378		\$0.00	30															
<p>6</p>	<p>Select the Payment Method and Payment Location.</p>																	
<p>7</p>	<p>Click Save.</p>																	

Deposit (Single Patron)

Quick Steps

1. Click the **Search** tab.
2. Select **All People**, enter the name, and click **Go**.
3. Select the patrons name then click the **FS Deposit** tab.
4. Click **New Deposit**.
5. Enter the **Amount**.
6. Select the **Payment Method** and **Payment Location**.
7. Click **Save**.

Example

The screenshot shows the 'FS Deposit' interface. At the top, there are tabs for 'School Choice', 'Credentials', 'Overrides', 'Fees', and 'ID History'. Below these are buttons for 'New Deposit', 'Save', and 'Documents'. A 'Deposit History' table is visible with columns for Date, Description, Type, and Credit. The table contains two entries: 10/11/2013 for a CHECK of \$25.00 and 10/02/2013 for a CHECK of \$50.00. Below the table, there are 'Net' and 'Balance' fields showing \$75.00 and \$46.25 respectively. A 'New Deposit Detail' form is open below the table, with fields for Date (05/20/2014), Amount (\$), Payment Type (Office Payment), Payment Method (Cash selected), and Payment Location (Check). A checkbox for 'Do not accept check' is checked, and the name 'Aarons, Samantha L.' is listed at the bottom.

View One Patron's Transactions

Quick Steps

1. Click the **Search** tab.
2. Select **Account**, enter the name, and click **Go**. If you don't know the student's last name, enter a comma, space, and then the first name.
3. Click on Account # (not name).
4. Click the **Journal** tab.

Example

The screenshot shows the 'Account Journal' interface. At the top, there are tabs for 'Account Info', 'Journal', 'Print', 'Transfer', and 'Adjustment'. Below these are buttons for 'New Transaction', 'Print', 'Transfer', and 'Adjustment'. A 'Journal Period' section shows 'From: 7/15/2017' and 'To: 08/09/2017'. A search bar contains 'smh'. Below the search bar, there is a table of transactions with columns for Transaction List, Post, To, Description, Patron, #, Credit, and Run Balance. The table contains several entries, including 'RustBun Flouat' for \$9.40, 'Entree w/Meal' for \$1.65, 'Elementary Lunch' for \$2.20, and 'Elementary Lunch' for \$2.20. A red box highlights the account number '43728' in the search results. Another red box highlights the 'Journal' tab at the top.

New Transaction

Quick Steps

1. Click the **Search** tab.
2. Select **Account**, enter the name, and click **Go**.
3. Click on Account # (not name).
4. Click the **Journal** tab.
5. Click **New Transaction**.
6. Fill in all required fields.
7. Click **Save**.

Example

Account Info **Journal**

New Transaction Save

Journal Period
From 4/01/2016 To 04/26/2016 Date Type Post Date

Post	TX	Description	Patron	#	Debit	Credit	Run Balance
04/01/2016	04/01/2016	Starting Balance		1		\$39.58	
04/29/2016	04/29/2016	Chef Salad	Adam Smith	1	\$2.50		\$37.08
					Net	2.50	39.58
					Current Balance		37.08

Transaction Detail

*Customer Adam Smith *Application Middle School *Date 4/29/2016 Time
 *Location POS-1 *Service Lunch 301 Payment Method Reference #
 Description

Transaction Item List

Entry Type	Purchasable Item	Quantity	Amount
<input checked="" type="radio"/> Debit <input type="radio"/> Credit	Lunch Meal (Sec)	1	
<input type="radio"/> Debit <input type="radio"/> Credit			
<input type="radio"/> Debit <input type="radio"/> Credit			
<input type="radio"/> Debit <input type="radio"/> Credit			
<input type="radio"/> Debit <input type="radio"/> Credit			

Void Transactions

Quick Steps

1. Click the **Search** tab.
2. Select **Account**, enter the name, and click **Go**.
3. Click on Account # (not name).
4. Click the **Journal** tab.
5. Click the transaction you want to void. You must select the transaction. After you select the transaction, the **Void TX** button displays.
6. Click **Save**.

Example

Account Info **Journal**

New Transaction **Void TX** Print

Journal Period
From 9/11/2017 To 10/11/2017 Date Type Post Date

Post	TX	Description	Patron	#	Debit	Credit	Run Balance
9/11/2017	9/11/2017	Starting Balance		1		\$75.00	
10/11/2017	10/11/2017	Lunch 7-12	Andrew Smith	1	\$2.50		\$72.50

Transaction Detail

Void Reason
Scanner Reconciliation
Description
Meal entered in error.

Adjustments

Quick Steps

1. Click the **Search** tab.
2. Select **Account**, enter the name, and click **Go**.
3. Click on Account # (not name).
4. Click the **Journal** tab.
5. Click **Adjustment**.
6. Fill in all required fields.
7. Click **Save**.

Example

The screenshot shows the 'Journal' interface for an account. The 'Adjustment' button is highlighted with a red box. A red arrow points from this box to the 'Adjustment' form below. The form contains the following fields:

- *Customer: smith, ben
- *Type: Write-Off
- *Date: 08/17/2016
- *Amount: \$ 0.75
- *Description: Cashier error

The Transaction List above shows the following data:

Post	TX	Description	Patron	#	Debit	Credit	Run Balance
08/17/2016	08/17/2016	Starting Balance		1		\$0.00	
08/17/2016	08/17/2016	Yogurt	ben smith	1	\$0.75		-\$0.75
					Net	0.75	0
					Current Balance		-0.75

Balance Transfers

Quick Steps

1. Click the **Search** tab.
2. Select **Account**, enter the name, and click **Go**.
3. Click on Account # (not name).
4. Click the **Journal** tab.
5. Click **Transfer**.
6. Enter the **Account #** of the person RECEIVING the money and the **Amount**.
7. Click **Save**.

Example

The screenshot shows the 'Journal' interface for an account. The 'Transfer' button is highlighted with a red box. A red arrow points from this box to the 'Transaction Detail' form below. The form contains the following fields:

- *Transfer To Account #
- *Amount

The Transaction List above shows the following data:

Post	TX	Description	Patron	#	Debit	Credit	Run Balance
05/01/2016	05/01/2016	Starting Balance				\$0.00	
					Net	0	50.00
					Current Balance		50.00

Flags

Quick Steps

1. Go to *Student Information > General*.
2. Select **Student**, enter the name, and click **Go**.
3. Select the student then click the **Flags** tab.
4. Click **New**.
5. Select **Food Service Alert** in the Flags dropdown list.
6. Enter in a Start Date as 7/1/YYYY or 8/1/YYYY.
7. Enter a **User Warning**. (40 character max)
8. Click **Save**.

Example

The screenshot shows the 'Student Information' page for Austin Howe. The 'Flags' tab is selected, displaying a 'Food Service Alert' flag. A callout box on the right provides a summary of the student's information:

- Patron Picture: [Image of Austin Howe]
- Grade & Name: [2] Howe, Austin
- Eligibility Indicator: Allergic to peanuts
- Allergy Alert: Allergic to Peanuts
- Student Number & Balance Info:

Student #:	128460006
Balance:	\$54.70
Current TK:	\$2.65
Total:	\$52.05

Block Ala Carte Items or Checks on the POS Terminal

Quick Steps

1. Click the **Search** tab.
2. Select **Account**, enter the student's last name, and click **Go**
3. Click on Account # (not name).
4. Click the **Account Info** tab.
5. Select the patron's name.
6. Mark the **Block Check Deposit** and/or **Block Ala Carte** checkboxes.
7. Click **Save**.

Example

The screenshot shows the 'Account Info' page for Andrew Smith. The 'Patron Preference' section is highlighted, showing the following settings:

<input checked="" type="checkbox"/> Block Check Deposit	<input checked="" type="checkbox"/> Block Ala Carte	<input type="checkbox"/> Block Concessions	<input type="checkbox"/> Single Purchasable Restriction	<input type="text" value="0.00"/> Daily Limit
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PIN Report

Quick Steps

1. Go to *Point of Sale > Reports > PIN Report*
2. Select **PIN Report**.
3. Select your **School**.
4. Select one of the following **Sort Options**.
 - **Patron Name** - Pick this option if you want a master list.
 - **Homerroom Teacher** - Pick this option if you have homerooms in your school to get a list sorted by teacher.
5. Click **Generate**.

Example

Negative Account Balance Report

Quick Steps

1. Go to *Point of Sale > Reports > Patron Balance*.
2. Select **Low Balance Report**.
3. Select your **School**.
4. Enter **-.01** as the **Max Balance**.
5. Click **Generate Report**.

Example

Transaction Summary Report (Production Counts)

Quick Steps

1. Go to *Point of Sale > Reports > Transaction Summary*.
2. Select your **School**.
3. Select **All Services**.
4. Mark the **Include Purchasable Detail** checkbox.
5. Click **Generate Report**.

Example

Transaction Detail Report (Journal of Transactions)

Quick Steps

1. Go to *Point of Sale > Reports > Transaction Detail*.
2. Choose the Terminal.
3. Click **Generate Report**.

Example

End of Day Report (Drawer Counts)

Quick Steps	Example
<ol style="list-style-type: none"> 1. Go to <i>Point of Sale > Reports > End of Day</i>. 2. Select the Terminal on the right side. 3. Mark the Transaction Detail and Cashier Detail checkboxes. 4. Click Generate Report. 	

Deposit Report (View Entered Checks, etc.)

Quick Steps	Example
<ol style="list-style-type: none"> 1. Go to <i>Point of Sale > Reports > Deposit Report</i>. 2. Select your School. 3. Clear the Online Payments checkbox. 4. Click Generate Report. 	

Audit Report (When Transactions Look Wrong)

Quick Steps	Example
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Quick Steps

1. Go to *Point of Sale > Reports > Audit Report*.
2. Select the Item(s) you want to report.
3. Click **Generate Report**.

Example

View Student Details (Phone Numbers, etc.)

Quick Steps

1. Go to *Student Information > General*.
2. Search for the student and click **Go**.
3. Click the student's name.

Example

Person Information
PersonID: 1916
Name: Anderson, Joshua Gustaf
Nickname:
Gender: M
Race Ethnicity: S:White, not Hispanic
State Race/Ethnicity:
Federal Designation: No Data
Race(s):
Hispanic/Latino: No Data
Race/Ethnicity Determination:
Birth Date (Age: 10): 01/09/2007
Student Number: 622958
State ID: 9587733
Person GUID: C2857022-0948-4A70-B50D-2BFEE6052A52
Comments:
- Modified by: Administrator, System 10/12/2017 11:42

Mailing Addresses
Primary Address: 620 RICE CREEK TER NE, METRO CITY, MN 55129

Anderson **Primary
Household Phone: (555) 555-1234
Address: 620 RICE CREEK TER NE, METRO CITY, MN 55129
Name: Anderson, Jack A
Relationship: Sibling
Enrollment (grade): 16-17 Fillmore Middle School (08)
Name: Anderson, Joshua G
Relationship: Self
Enrollment (grade): 17-18 Arthur Elementary (05)