

Cheat Sheet (Food Service) (Classic)

Last Modified on 10/21/2024 8:20 am CDT

[Deposit \(Household\)](#) | [Deposit \(Single Patron\)](#) | [View One Patron's Transactions](#) | [New Transaction](#) | [Void Transactions](#) | [Adjustments](#) | [Balance Transfers](#) | [Flags](#) | [Block Ala Carte Items or Checks on the POS Terminal](#) | [PIN Report](#) | [Negative Account Balance Report](#) | [Transaction Summary Report \(Production Counts\)](#) | [Transaction Detail Report \(Journal of Transactions\)](#) | [End of Day Report \(Drawer Counts\)](#) | [Deposit Report \(View Entered Checks, etc.\)](#) | [Audit Report \(When Transactions Look Wrong\)](#) | [View Student Details \(Phone Numbers, etc.\)](#)

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

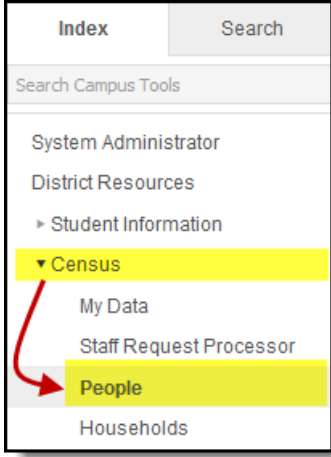
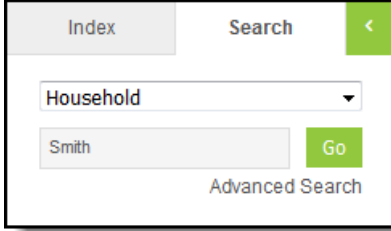
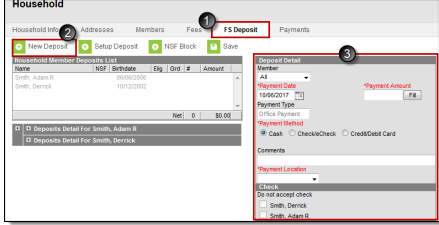
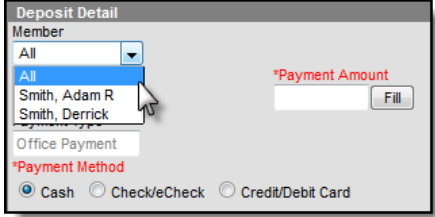
Deposit (Household)

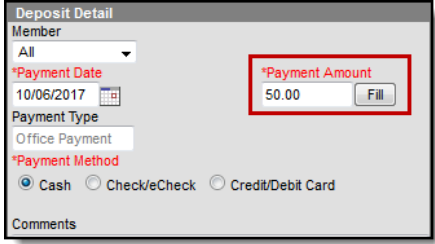
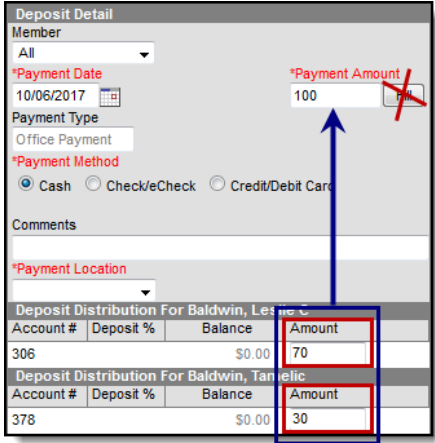
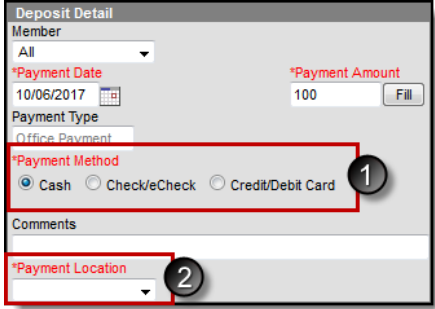
Quick Steps

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																								
5	<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>The distribution table in the second screenshot is as follows:</p> <table border="1"> <thead> <tr> <th colspan="4">Deposit Distribution For Baldwin, Les...</th> </tr> <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> <tr> <th colspan="4">Deposit Distribution For Baldwin, Tamelic</th> </tr> <tr> <th>Account #</th> <th>Deposit %</th> <th>Balance</th> <th>Amount</th> </tr> <tr> <td>378</td> <td></td> <td>\$0.00</td> <td>30</td> </tr> </tbody> </table>	Deposit Distribution For Baldwin, Les...				Account #	Deposit %	Balance	Amount	306		\$0.00	70	Deposit Distribution For Baldwin, Tamelic				Account #	Deposit %	Balance	Amount	378		\$0.00	30
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6	<p>Select the Payment Method and Payment Location.</p>																									
7	<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 (Default). There is also a checkbox for 'Do not accept check' and a list of locations including 'Aarons, Samantha L'.

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 '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 the account number '43728'. 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 Flout', 'Entree w/Meal', and 'Elementary Lunch'. A red box highlights the account number '43728' in the search bar.

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

The screenshot shows the 'Journal' interface with the 'New Transaction' button highlighted. Below it, the 'Transaction Detail' section is shown with fields for Customer (Adam Smith), Application (Middle School), Date (4/29/2016), Location (POS-1), and Service (Lunch 301). The 'Transaction Item List' below shows a single entry for 'Lunch Meal (Sec)' with a quantity of 1 and an amount of \$2.50.

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

The screenshot shows the 'Journal' interface with the 'Void TX' button highlighted. Below it, the 'Transaction Detail' section is shown with the 'Void Reason' dropdown menu open, displaying the option '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 with the 'Adjustment' button highlighted. Below it, the 'Adjustment' form is populated with the following information:

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

Balance Transfers

Quick Steps

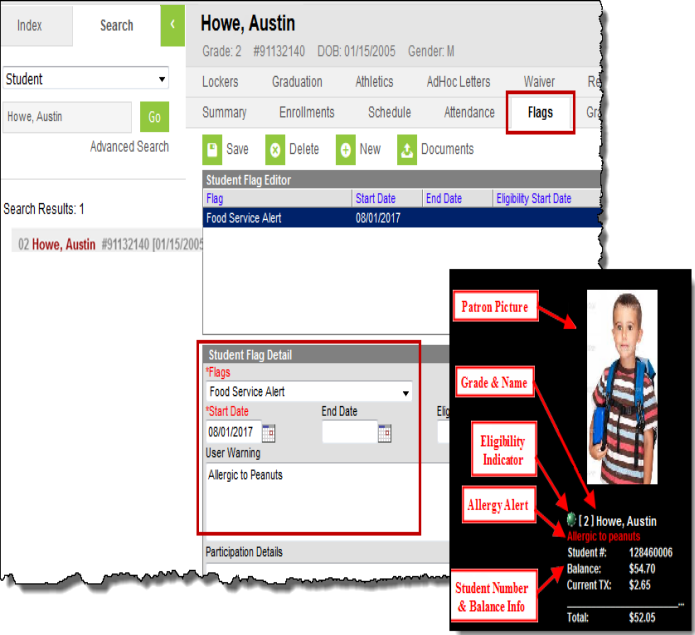
1. Click the **Search** tab.
2. Select **Account**, enter the name, and click **Go**.
3. Click on Account # (not name).
4. Click the **Journal** tab.
5. Click **Transfer**.
6. Enter the **Account #** of the person RECEIVING the money and the **Amount**.
7. Click **Save**.

Example

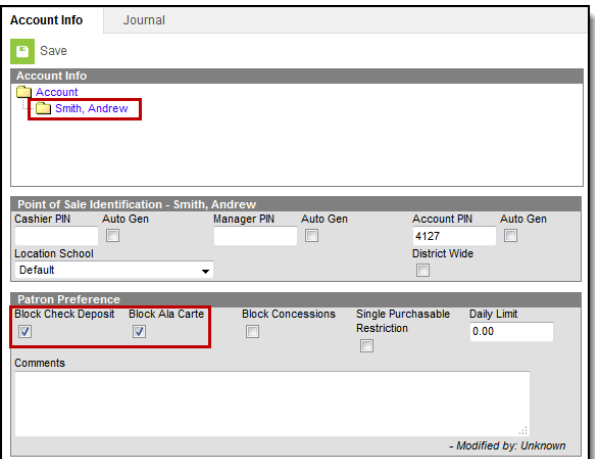
The screenshot shows the 'Journal' interface with the 'Transfer' button highlighted. Below it, the 'Transaction Detail' form is partially visible, showing the following fields:

*Transfer To Account #	*Amount

Flags

Quick Steps	Example
<ol style="list-style-type: none"> 1. Go to <i>Student Information > General</i>. 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. 	

Block Ala Carte Items or Checks on the POS Terminal

Quick Steps	Example
<ol style="list-style-type: none"> 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. 	

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**.

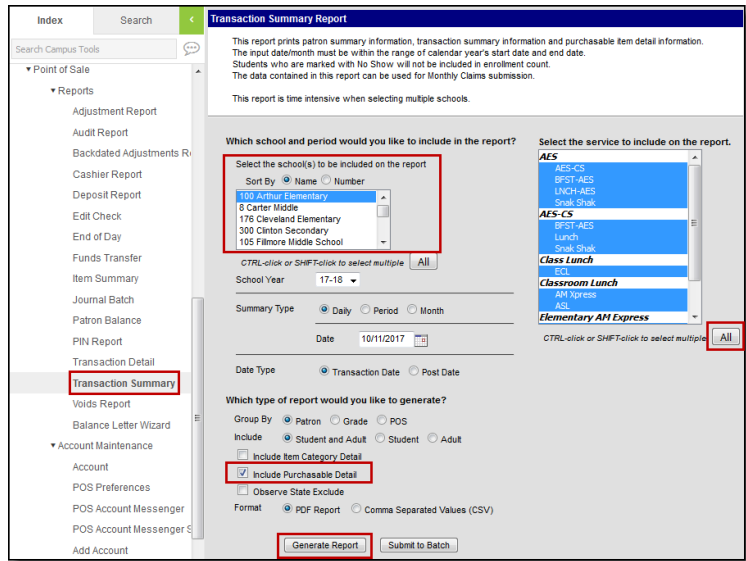
Example

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

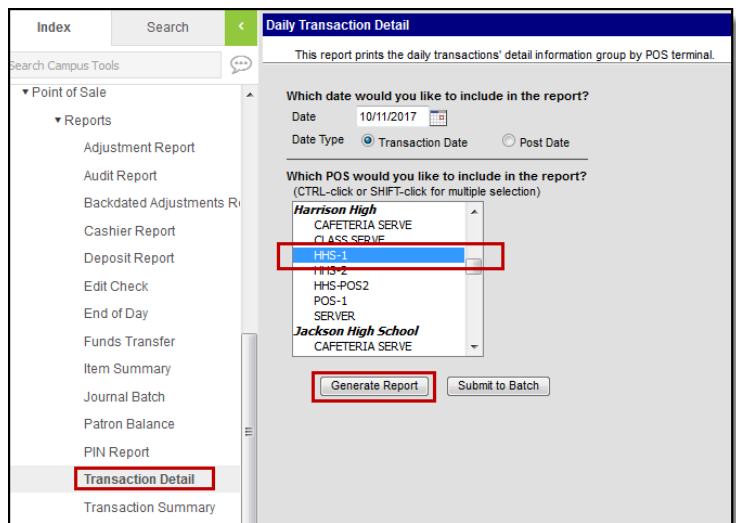


Transaction Detail Report (Journal of Transactions)

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

Name	Relationship	Enrollment (grade)	Phone(s)	Email
Anderson, Jack A	Sibling	16-17 Fillmore Middle School (08)		
Anderson, Joshua G	Self	17-18 Arthur Elementary (05)		