Cheat Sheet (Food Service) (Classic)

Last Modified on 12/14/2025 8:45 pm CST

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.)

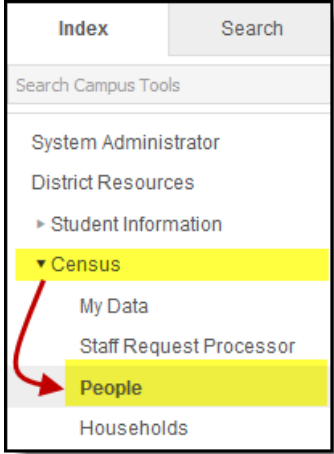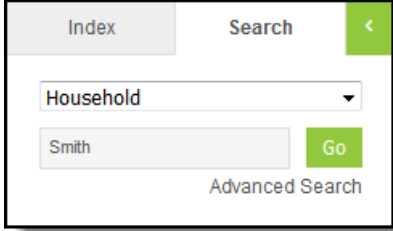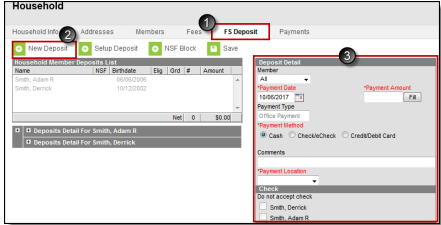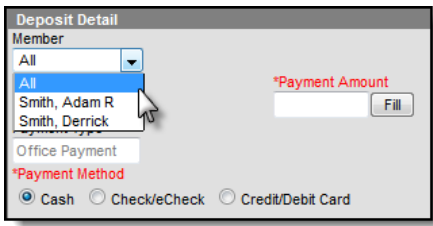> The instructions in this cheat sheet apply to the Classic look of Campus.
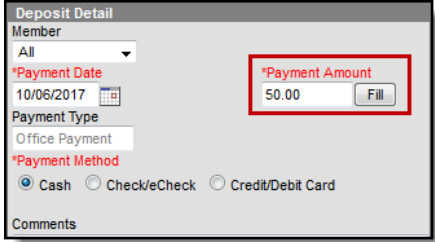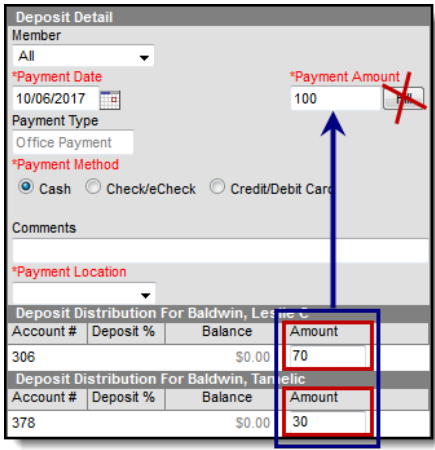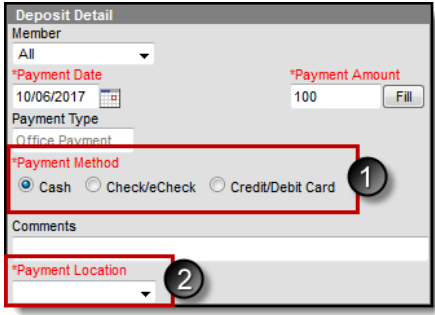
Deposit (Household)

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
Detailed Steps		

Step	Action	Example
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.	

Step	Action	Example
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.	 OR
6	Select the **Payment Method** and **Payment Location**.	
7	Click **Save**.	

Deposit (Single Patron)

Quick Steps	Example
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**.	

View One Patron's Transactions

Quick Steps	Example
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.	

New Transaction

Quick Steps	Example
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**.	

Void Transactions

Quick Steps	Example
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**.	

Adjustments

Quick Steps	Example
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**.	

Balance Transfers

Quick Steps	Example
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**.	
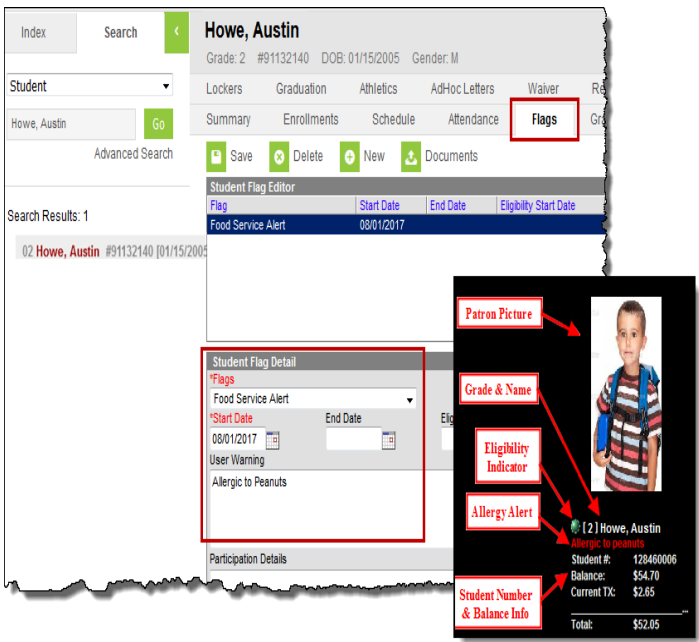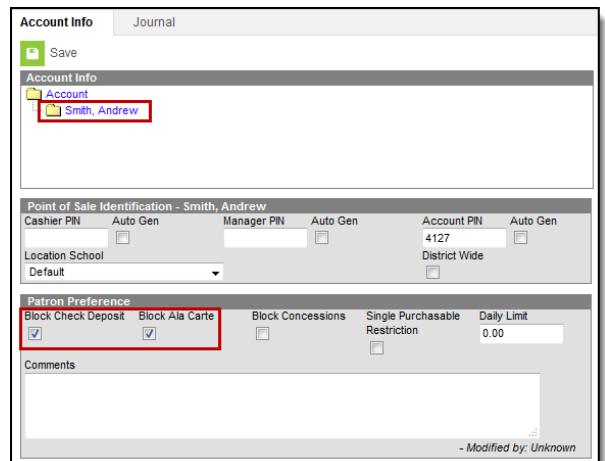
Flags

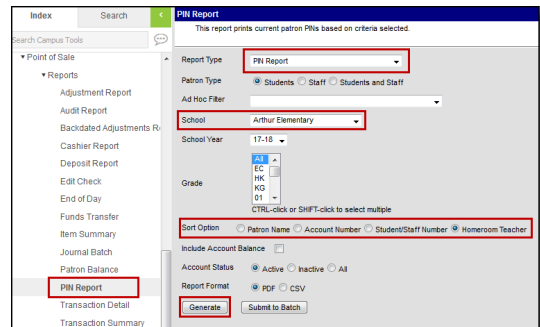| Quick Steps	Example
1. Go to *Student Information > General*. 2. Select **Student**, enter the name, and click **Go**. 3. Select the student then click the **Flags** tab. 4. Click **New**. 5. Select **Food Service Alert** in the Flags dropdown list. 6. Enter in a Start Date as 7/1/YYYY or 8/1/YYYY.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

Block Ala Carte Items or Checks on the POS Terminal

Quick Steps	Example
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

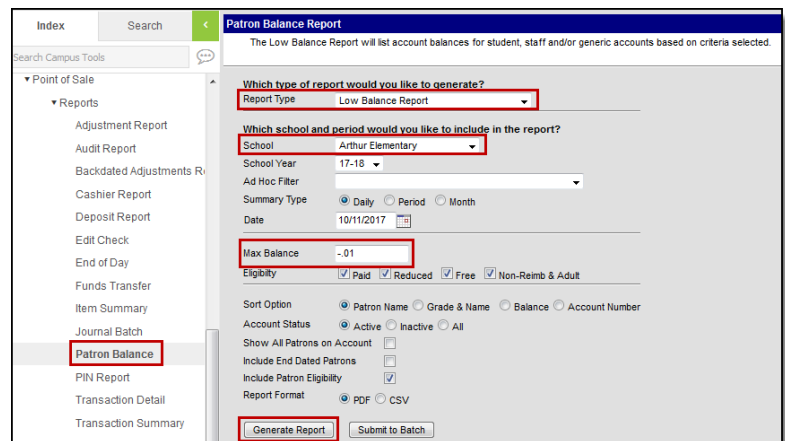| Quick Steps	Example

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.
  ○ **Homeroom Teacher** - Pick this option if you have homerooms in your school to get a list sorted by teacher.
5. Click **Generate**.	

Negative Account Balance Report

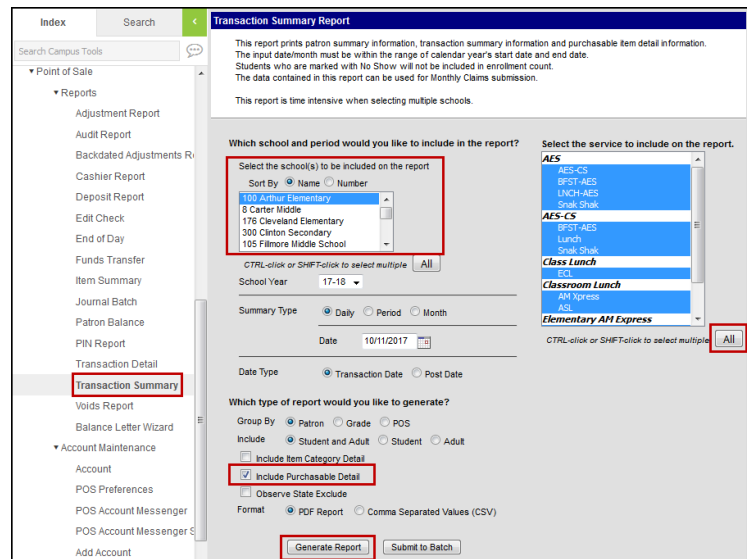| Quick Steps	Example
1. Go to *Point of Sale > Reports > Patron Balance*. 2. Select **Low Balance Report**. 3. Select your **School**. 4. Enter **-.01** as the **Max Balance**. 5. Click **Generate Report**.	

Transaction Summary Report (Production Counts)

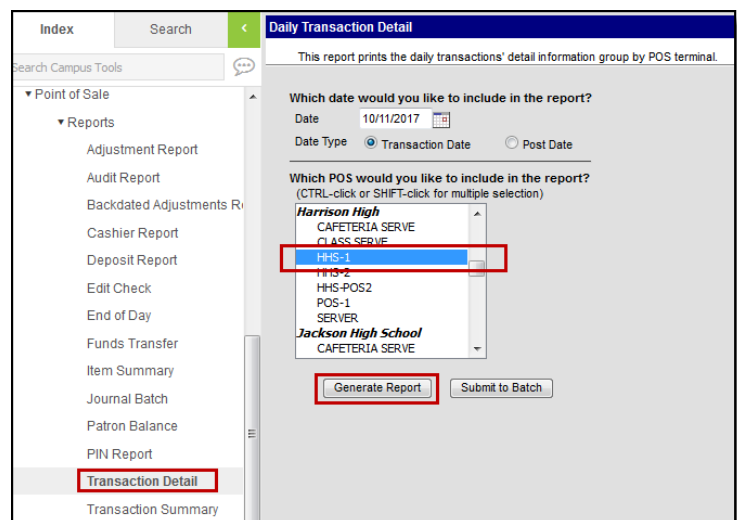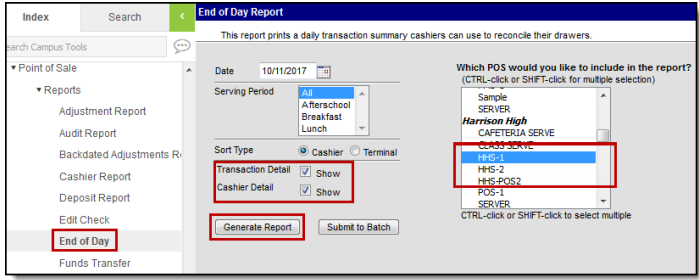| Quick Steps	Example
1. Go to *Point of Sale > Reports > Transaction Summary*. 2. Select your **School**. 3. Select **All Services**. 4. Mark the **Include Purchasable Detail** checkbox. 5. Click **Generate Report**.	

Transaction Detail Report (Journal of Transactions)

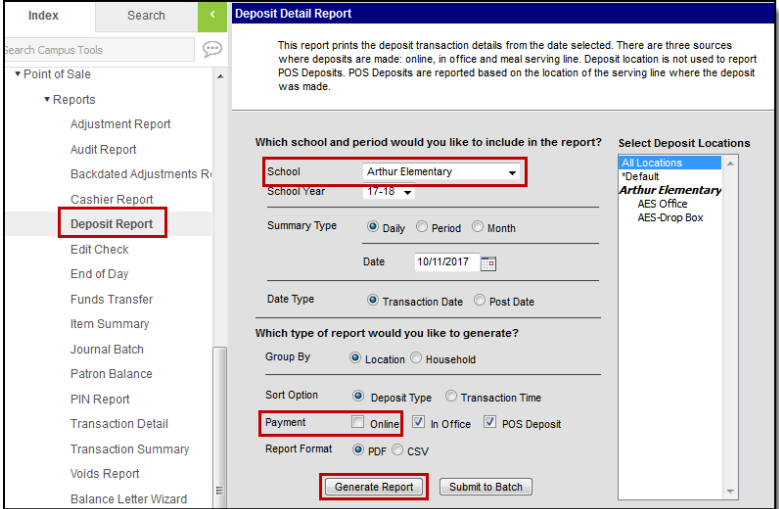| Quick Steps	Example
1. Go to *Point of Sale > Reports > Transaction Detail*. 2. Choose the Terminal. 3. Click **Generate Report**.	

End of Day Report (Drawer Counts)

Quick Steps	Example
1. Go to *Point of Sale > Reports > End of Day*. 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.)

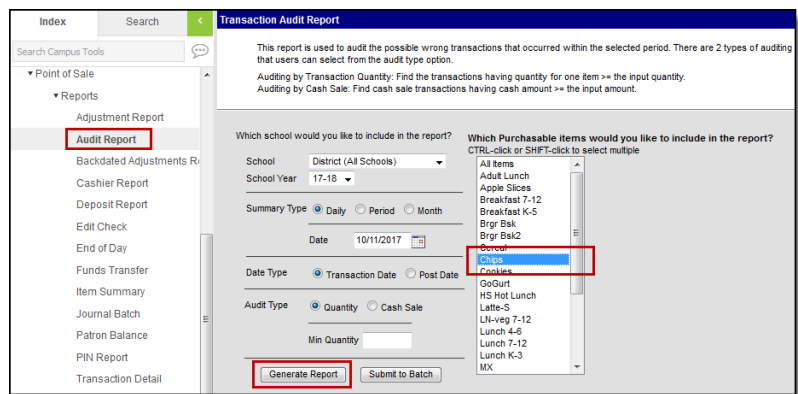| Quick Steps	Example
1. Go to *Point of Sale > Reports > Deposit Report*. 2. Select your **School**. 3. Clear the **Online** Payments checkbox. 4. Click **Generate Report**.	

Audit Report (When Transactions Look Wrong)

Quick Steps	Example

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

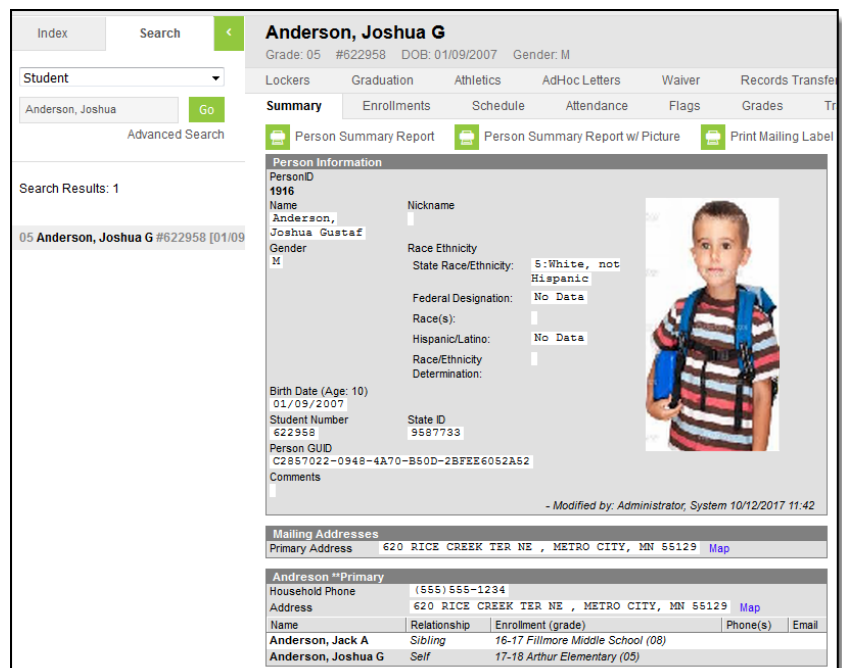# View Student Details (Phone Numbers, etc.)

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