

Cheat Sheet (Food Service) (Classic)

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

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

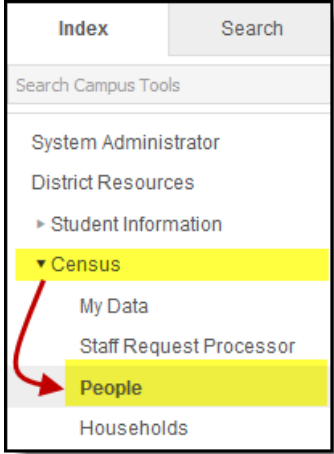
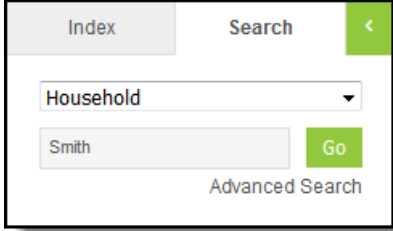
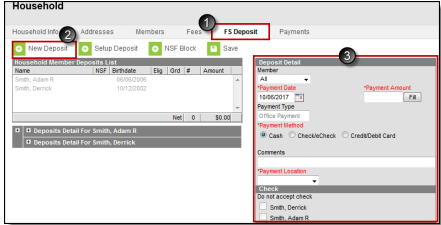
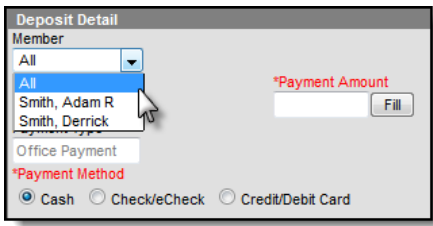
Deposit (Household)

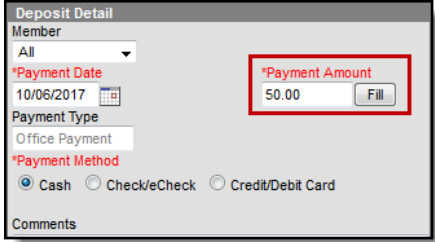
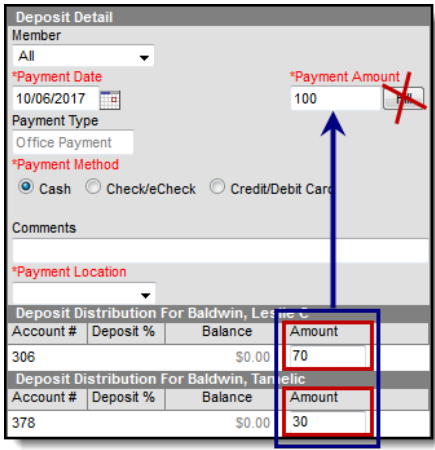
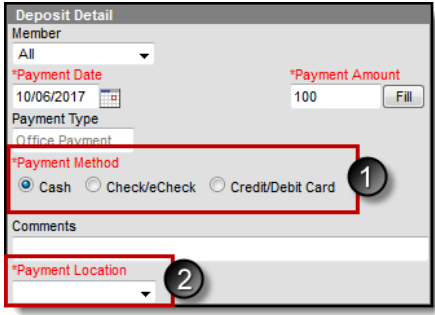
Quick Steps

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 |
|------|--------|---------|
|------|--------|---------|

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>  |
| 6 | Select the Payment Method and Payment Location . |  |
| 7 | Click Save . | |

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

FS Deposit | School Choice | Credentials | Overrides | Fees | ID History

New Deposit | Save | Documents

| Date | Description | Type | Credit |
|------------|-------------|-------|---------|
| 10/11/2013 | | CHECK | \$25.00 |
| 10/02/2013 | | CHECK | \$50.00 |
| Net | | | \$75.00 |
| Balance | | | \$46.25 |

New Deposit Detail

*Date: 05/20/2014 | *Amount: \$

Payment Type: Office Payment

Payment Method: ☒ Cash ☐ Check/eCheck ☐ Credit/Debit Card

Comments:

*Payment Location:
 *Default:
 Check:
 Do not accept check:
 ☒ Aaron, 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

Index | Search | Account Info | **Journal** | Print | Transfer | Adjustment

Account | |

Journal Period: From 7/10/2017 To 8/09/2017 Date Type Post Date

Search Results: 34
Now viewing page 1 of 2

| Transaction ID | Patron | Description | Amount | Debit | Credit | Run Balance |
|-----------------------|----------------------|------------------|--------|--------|--------|-------------|
| 08/09/2017 08/09/2017 | System Administrator | Rollback Fixed | 1 | \$0.40 | | \$210.10 |
| 08/09/2017 08/09/2017 | System Administrator | Enroll w/Meal | 1 | \$1.65 | | \$208.45 |
| 08/09/2017 08/09/2017 | System Administrator | Enroll w/Meal | 1 | \$1.65 | | \$206.80 |
| 08/09/2017 08/09/2017 | System Administrator | Elementary Lunch | 1 | \$2.20 | | \$204.60 |
| 08/09/2017 08/09/2017 | System Administrator | Elementary Lunch | 1 | \$2.20 | | \$202.40 |
| 08/09/2017 08/09/2017 | System Administrator | Rollback Fixed | 1 | \$0.40 | | \$202.00 |

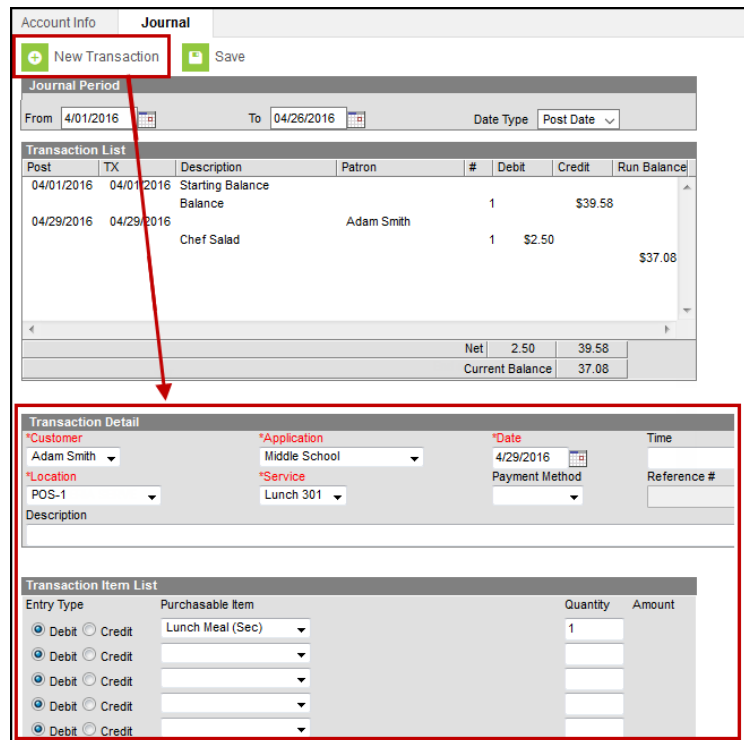
Account #15100001 | Credit: Aaron, Samantha L. | Run Balance: \$202.00

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

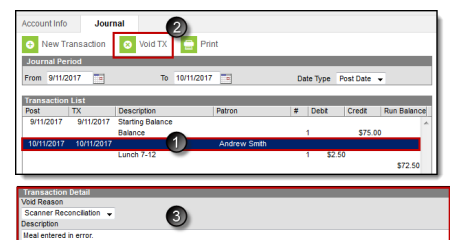
| Entry Type | Purchasable Item | Quantity | Amount |
|---|------------------|----------|--------|
| <input checked="" type="radio"/> Debit <input type="radio"/> Credit | Lunch Meal (Sec) | 1 | |
| <input type="radio"/> Debit <input type="radio"/> Credit | | | |
| <input type="radio"/> Debit <input type="radio"/>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

Account Info **Journal**

New Transaction Print Transfer **Adjustment**

Journal Period
From 08/17/2016 To 08/17/2016 Date Type Post Date

| 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

Adjustment

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

Account Info **Journal**

New Transaction Print **Transfer** Adjustment

Journal Period
From 5/01/2016 To 05/26/2016 Date Type Post Date

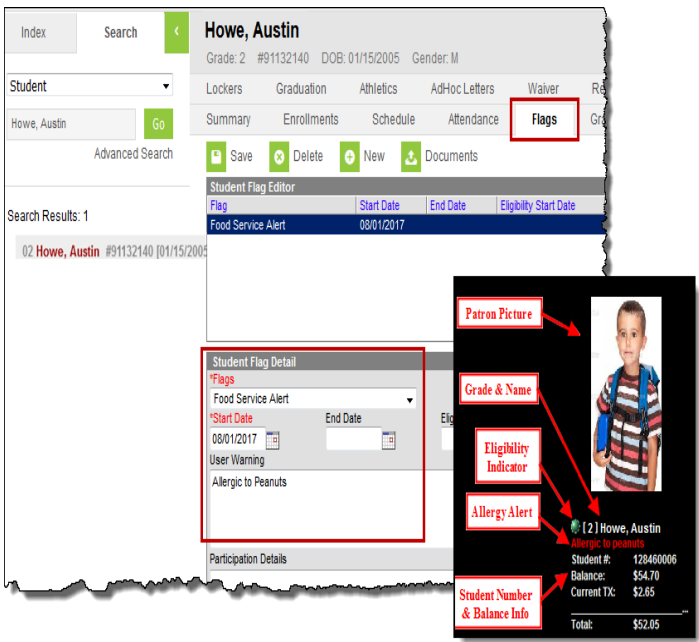
| Post | TX | Description | Patron | # | Debit | Credit | Run Balance |
|------------|------------|------------------|--------|---|-------|--------|-------------|
| 05/01/2016 | 05/01/2016 | Starting Balance | | | | \$0.00 | |

Net 0 50.00
Current Balance 50.00

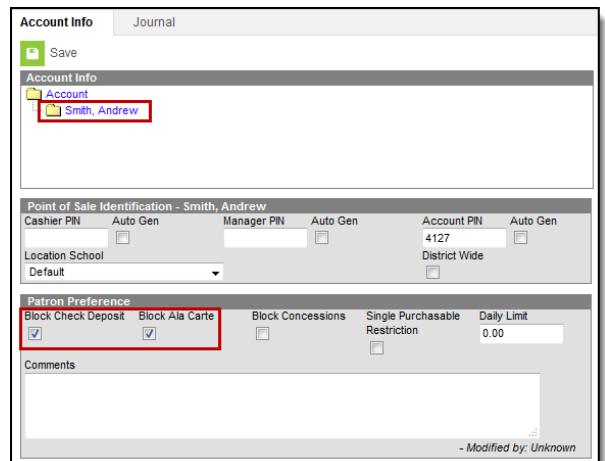
Transaction Detail

*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

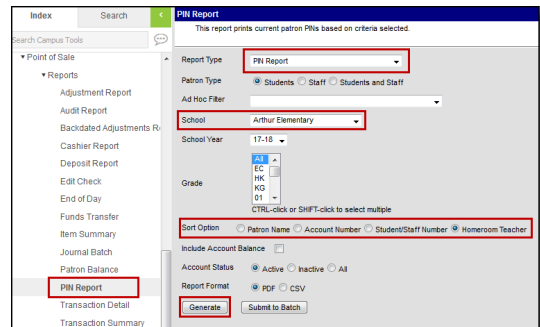
| Quick Steps | Example |
|--|--|
| <ol style="list-style-type: none"> 1. Click the Search tab. 2. Select Account, enter the student's last name, and click Go 3. Click on Account # (not name). 4. Click the Account Info tab. 5. Select the patron's name. 6. Mark the Block Check Deposit and/or Block Ala 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.
 - **Homeroom Teacher** - Pick this option if you have homerooms in your school to get a list sorted by teacher.
5. Click **Generate**.

Example

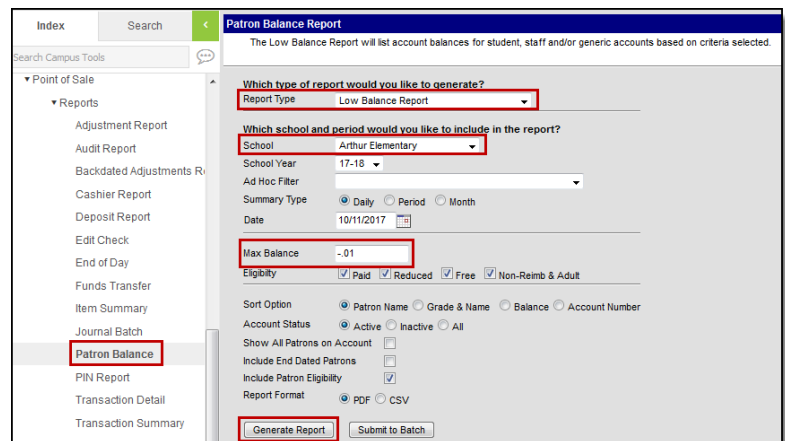


Negative Account Balance Report

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

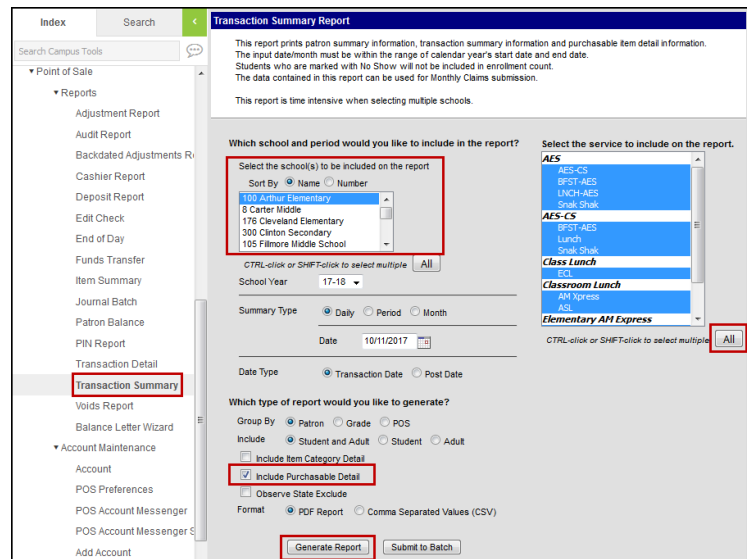


Transaction Summary Report (Production Counts)

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

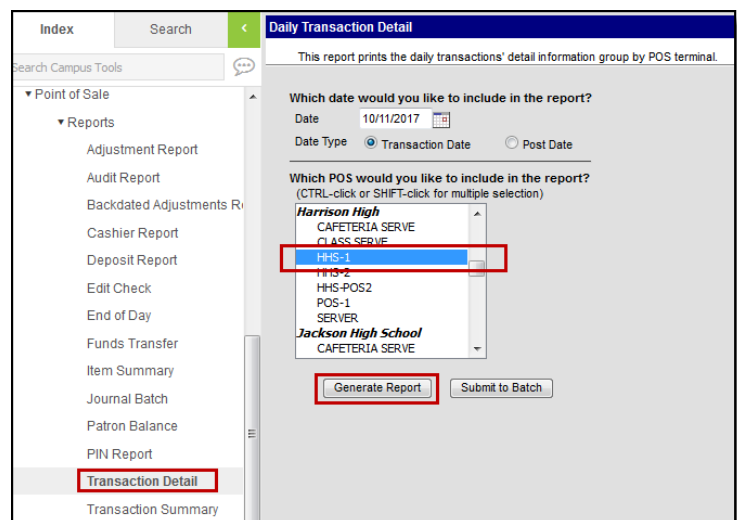


Transaction Detail Report (Journal of Transactions)

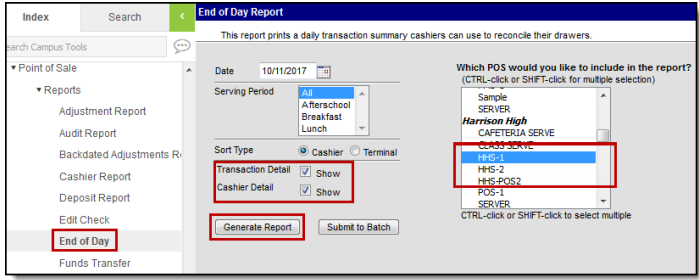
Quick Steps

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

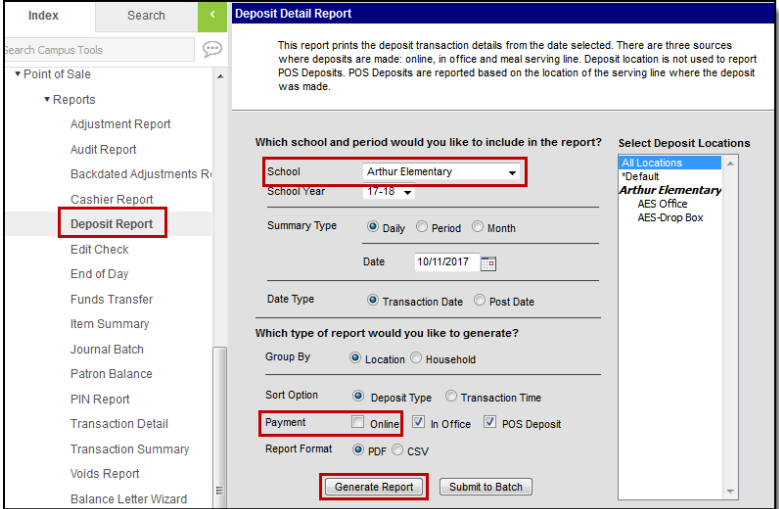
Example



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. |  |

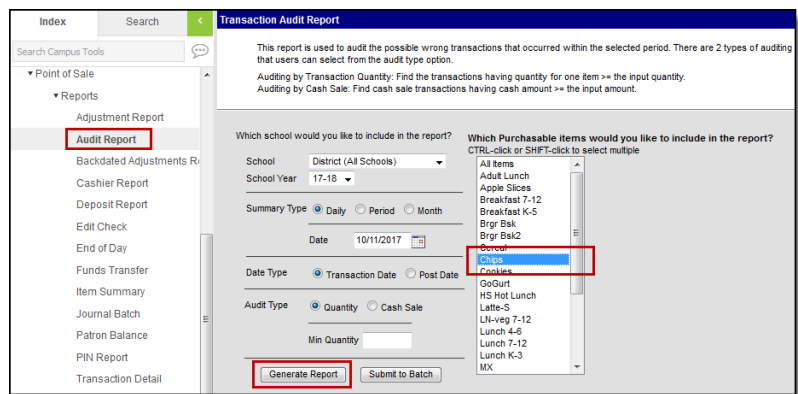
Audit Report (When Transactions Look Wrong)

| Quick Steps | Example |
|-------------|---------|
|-------------|---------|

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

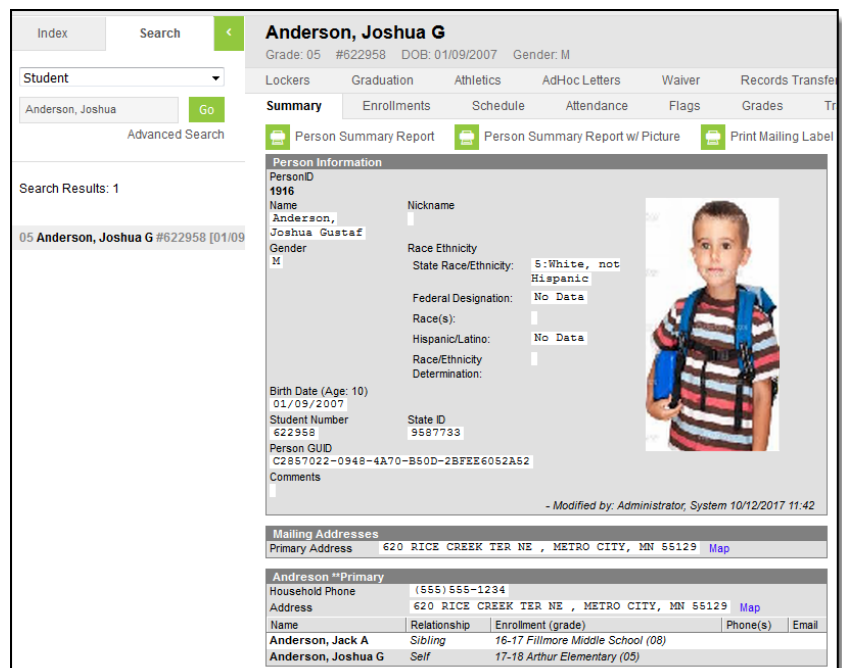


View Student Details (Phone Numbers, etc.)

Quick Steps

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

Example



Anderson, Joshua G
Grade: 05 #622958 DOB: 01/09/2007 Gender: M

Search Results: 1
05 Anderson, Joshua G #622958 [01/09]

Person Information
PersonID: 1916
Name: Anderson, Joshua Gustaf
Nickname: [Blank]
Gender: M
Race Ethnicity: S:White, not Hispanic
State Race/Ethnicity: [Blank]
Federal Designation: No Data
Race(s): [Blank]
Hispanic/Latino: No Data
Race/Ethnicity Determination: [Blank]
Birth Date (Age: 10): 01/09/2007
Student Number: 622958
State ID: 9587733
Person GUID: C2857022-0948-4A70-B50D-2BFE6052A52
Comments: [Blank]
- Modified by: Administrator, System 10/12/2017 11:42

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

Anderson **Primary
Household Phone: (555) 555-1234
Address: 620 RICE CREEK TER NE, METRO CITY, MN 55129 Map

| 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) | | |