Point of Sale (POS)

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Point of Sale (POS) tools are available with Campus Food Service.

About this Page

This page is designed to assist the user with the tasks, skills, and procedures relating to Point of Sale. Identify the task to be completed in the **Topic** column and click the link to access explanations and directions for that task. The **Tool** column identifies the location in the Campus Index where that action is completed and links to the appropriate help article.

Release Notes

For release notes, see the Point of Sale Release Notes article.

Cashier's Guide to Point of Sale

Topic
Getting Started (logging in and navigation)
Terminal Screen Layout
Managing Transactions
End of serving period actions

Creating POS Accounts

Topic	Tool
Creating POS Accounts for a Person	Add Account
Creating POS Accounts for a Household	Add Account
Mass Creation of Individual Accounts	Mass Account Creation Wizard
Mass Creation of Household Accounts	Mass Account Creation Wizard

Managing POS Accounts

Topic	Tool
Establishing Account Information	Account Info
Viewing Transactions	Journal
Adding Transactions	Journal
Transferring Funds Between Accounts	Journal
Printing the Journal History	Journal
Inactivating Student Accounts	Account Management Wizard
Inactivating Staff Accounts	Account Management Wizard
Removing PIN Numbers from POS Accounts	Account Management Wizard
Inactivating and Removing PIN Numbers from Student Accounts Simultaneously	Account Management Wizard
Inactivating and Removing PIN Numbers from Staff Accounts Simultaneously	Account Management Wizard
Adjusting Balances on Inactive POS Accounts	Account Management Wizard
Setting Account Restrictions and Reminders	Reminder Restriction Wizard
Transferring Patron Account Data	Account Management Wizard
Generating the Account Management Report for: • Inactive Accounts • Removed PINs • PINs Removed and Accounts Inactivated Simultaneously • Adjusted Accounts • Account Transfers	Account Management Wizard
Send balance information and other routine food service messages.	POS Account Messenger POS Account Messenger Scheduler

Point of Sale Setup

Topic	Tool
Creating Item Categories	Item Categories

Topic	Tool
Creating Purchasable Items	Purchasable Items
Copying Service Layouts	Service Layout Copy Wizard
Manage Payment Locations	Payment Locations
Establishing General Point of Sale Preferences	POS Preferences

Class Serve Setup

The following tasks need to be completed prior to using the Class Serve tool.

Topic	Tool
Establishing Applications	Application Manager
Adding Services	Application Manager
Creating Service Layouts (Menus)	Application Manager
Establishing Class Serve Preferences	Class Serve Preferences
Establishing PIN Auto-Generation Preferences	PIN Auto Gen

Terminal Setup

Topic	Tool
Establishing Applications	Application Manager
Adding Services	Application Manager
Creating Service Layouts	Application Manager
Managing Terminals	Terminals
Point of Sale Terminal Minimums	Terminals

Configuring Point of Sale Hardware

Topic	Tool
Terminal Plug-in Capabilities and Accessory Maintenance	Point of Sale Configuration Guide
Connecting POS Terminals: Terminal Cables, Ports and Connectors	Point of Sale Configuration Guide

Topic	Tool
Understanding Terminal Configuration Requirements	Point of Sale Configuration Guide
Understanding Terminal Tool Rights	Point of Sale Configuration Guide
Data Interchange Components	Point of Sale Configuration Guide
Synchronizing Point of Sale Data	Point of Sale Configuration Guide
Terminal OS Recovery and Imaging	Point of Sale Configuration Guide
Troubleshooting Terminal Issues	Point of Sale Configuration Guide

Terminal Software Installation/Configuration

Topic	Tool
Installing and Configuring a Terminal	Terminals

Remotely Managing Point of Sale Terminals

Topic	Tool
Remotely Rebooting Terminals	Terminal Manager
Remotely Reloading Terminals	Terminal Manager
Remotely Shutting Down Terminals	Terminal Manager
Remotely Viewing Terminal Logs	Terminal Manager
Clearing Remotely Requested Terminal Logs	Terminal Manager

Reporting Point of Sale Data

Topic	Tool
Report manual increases or reductions made to POS accounts.	Adjustment Report

Topic	Tool
Audit potentially incorrect transactions within a specific time frame.	Audit Report
Report a list of backdated transaction adjustments in summary or detail form.	Backdated Adjustments Report
Report daily, period or monthly transaction information for specific POS terminals.	Cashier Report
Report a list of check, cash and credit card deposits made through the FS Deposit, Person FS Deposit, POS Terminal and Portal Food Service tools.	Deposit Report
Compare each school's daily counts of free, reduced and paid lunches against the number of children currently eligible for free, reduced and paid lunches.	Edit Check Report
Report information about daily transactions per serving period, allowing users to reconcile drawers and eliminate or reduce overages or shortages.	End of Day Report
Report detailed information about all fund transfers which occurred on a specific day, period of time or month.	Funds Transfer
Report all purchasable items, noting the total amount purchased and the total sales for the item based on a specific date range.	Item Summary
Report monthly transactions details and account balance information.	Journal Batch
Report active staff and student account balances.	Patron Balance
Report detailed information about Point of Sale terminal transactions.	Transaction Detail
Report patron summary information, transaction summary information and purchasable item detail information.	Transaction Summary
Report a list of all voided transactions.	Voids Report
Create letters that include demographic and patron account balance information.	Balance Letter Wizard
Report a list of patron PIN numbers, PIN barcode labels and PIN labels.	PIN Report

Tool Rights

Topic	Tool
Point of Sale Tool Rights	POS