

# Point of Sale (POS)

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This functionality is only available to customers who have purchased Campus Point of Sale as add-on functionality.

## About this Page

This page is designed to assist the user in 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 in which that action is completed and links to the appropriate help article as well.

## Release Notes

For release notes, see the [Point of Sale Release Notes](#) article.

## Cashier's Guide to Point of Sale

Topic
<a href="#">Getting Started</a> (logging in and navigation)
<a href="#">Terminal Screen Layout</a>
<a href="#">Managing Transactions</a>
<a href="#">End of serving period actions</a>

## Creating POS Accounts

Topic	Tool
<a href="#">Creating POS Accounts</a> for a Person	<a href="#">Add Account</a>
<a href="#">Creating POS Accounts</a> for a Household	<a href="#">Add Account</a>
<a href="#">Mass Creation</a> of Individual Accounts	<a href="#">Mass Account Creation Wizard</a>
<a href="#">Mass Creation</a> of Household Accounts	<a href="#">Mass Account Creation Wizard</a>

## Managing POS Accounts

Topic	Tool
<a href="#">Establishing Account Information</a>	<a href="#">Account Info</a>
<a href="#">Viewing Transactions</a>	<a href="#">Journal</a>
<a href="#">Adding Transactions</a>	<a href="#">Journal</a>
<a href="#">Transferring Funds Between Accounts</a>	<a href="#">Journal</a>
<a href="#">Printing the Journal History</a>	<a href="#">Journal</a>
<a href="#">Inactivating Student Accounts</a>	<a href="#">Account Management Wizard</a>
<a href="#">Inactivating Staff Accounts</a>	<a href="#">Account Management Wizard</a>
<a href="#">Removing PIN Numbers from POS Accounts</a>	<a href="#">Account Management Wizard</a>
<a href="#">Inactivating and Removing PIN Numbers from Student Accounts Simultaneously</a>	<a href="#">Account Management Wizard</a>
<a href="#">Inactivating and Removing PIN Numbers from Staff Accounts Simultaneously</a>	<a href="#">Account Management Wizard</a>
<a href="#">Adjusting Balances on Inactive POS Accounts</a>	<a href="#">Account Management Wizard</a>
<a href="#">Setting Account Restrictions and Reminders</a>	<a href="#">Reminder Restriction Wizard</a>
<a href="#">Transferring Patron Account Data</a>	<a href="#">Account Management Wizard</a>
Generating the Account Management Report for: <ul style="list-style-type: none"> <li>• <a href="#">Inactive Accounts</a></li> <li>• <a href="#">Removed PINs</a></li> <li>• <a href="#">PINs Removed and Accounts Inactivated Simultaneously</a></li> <li>• <a href="#">Adjusted Accounts</a></li> <li>• <a href="#">Account Transfers</a></li> </ul>	<a href="#">Account Management Wizard</a>
Send balance information and other routine food service messages.	<a href="#">POS Account Messenger</a> <a href="#">POS Account Messenger Scheduler</a>

## Point of Sale Setup

Topic	Tool
<a href="#">Creating Item Categories</a>	<a href="#">Item Categories</a>
<a href="#">Creating Purchasable Items</a>	<a href="#">Purchasable Items</a>
<a href="#">Copying Service Layouts</a>	<a href="#">Service Layout Copy Wizard</a>
<a href="#">Manage Payment Locations</a>	<a href="#">Payment Locations</a>
<a href="#">Establishing General Point of Sale Preferences</a>	<a href="#">POS Preferences</a>

## Class Serve Setup

The following tasks need to be completed prior to using the [Class Serve](#) tool.

Topic	Tool
<a href="#">Establishing Applications</a>	<a href="#">Application Manager</a>
<a href="#">Adding Services</a>	<a href="#">Application Manager</a>
<a href="#">Creating Service Layouts (Menus)</a>	<a href="#">Application Manager</a>
<a href="#">Establishing Class Serve Preferences</a>	<a href="#">Class Serve Preferences</a>
<a href="#">Establishing PIN Auto-Generation Preferences</a>	<a href="#">PIN Auto Gen</a>

## Terminal Setup

Topic	Tool
<a href="#">Establishing Applications</a>	<a href="#">Application Manager</a>
<a href="#">Adding Services</a>	<a href="#">Application Manager</a>
<a href="#">Creating Service Layouts</a>	<a href="#">Application Manager</a>
<a href="#">Managing Terminals</a>	<a href="#">Terminals</a>
<a href="#">Point of Sale Terminal Minimums</a>	<a href="#">Terminals</a>

## Configuring Point of Sale Hardware

Topic	Tool
<a href="#">Terminal Plug-in Capabilities and Accessory Maintenance</a>	<a href="#">Point of Sale Configuration Guide</a>

Topic	Tool
<a href="#">Connecting POS Terminals: Terminal Cables, Ports and Connectors</a>	<a href="#">Point of Sale Configuration Guide</a>
<a href="#">Understanding Terminal Configuration Requirements</a>	<a href="#">Point of Sale Configuration Guide</a>
<a href="#">Understanding Terminal Tool Rights</a>	<a href="#">Point of Sale Configuration Guide</a>
<a href="#">Data Interchange Components</a>	<a href="#">Point of Sale Configuration Guide</a>
<a href="#">Synchronizing Point of Sale Data</a>	<a href="#">Point of Sale Configuration Guide</a>
<a href="#">Terminal OS Recovery and Imaging</a>	<a href="#">Point of Sale Configuration Guide</a>
<a href="#">Troubleshooting Terminal Issues</a>	<a href="#">Point of Sale Configuration Guide</a>

## Terminal Software Installation/Configuration

Topic	Tool
<a href="#">Installing and Configuring a Terminal</a>	<a href="#">Terminals</a>

## Remotely Managing Point of Sale Terminals

Topic	Tool
<a href="#">Remotely Rebooting Terminals</a>	<a href="#">Terminal Manager</a>
<a href="#">Remotely Reloading Terminals</a>	<a href="#">Terminal Manager</a>
<a href="#">Remotely Shutting Down Terminals</a>	<a href="#">Terminal Manager</a>
<a href="#">Remotely Viewing Terminal Logs</a>	<a href="#">Terminal Manager</a>
<a href="#">Clearing Remotely Requested Terminal Logs</a>	<a href="#">Terminal Manager</a>

## Reporting Point of Sale Data

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

## Tool Rights

Topic	Tool
<a href="#">Point of Sale Tool Rights</a>	POS

