

# 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</a> Account Information                                                                                                                                                                                                                                                                                            | <a href="#">Account Info</a>                                                             |
| <a href="#">Viewing</a> Transactions                                                                                                                                                                                                                                                                                                        | <a href="#">Journal</a>                                                                  |
| <a href="#">Adding</a> Transactions                                                                                                                                                                                                                                                                                                         | <a href="#">Journal</a>                                                                  |
| <a href="#">Transferring</a> Funds Between Accounts                                                                                                                                                                                                                                                                                         | <a href="#">Journal</a>                                                                  |
| <a href="#">Printing</a> the Journal History                                                                                                                                                                                                                                                                                                | <a href="#">Journal</a>                                                                  |
| <a href="#">Inactivating</a> Student Accounts                                                                                                                                                                                                                                                                                               | <a href="#">Account Management Wizard</a>                                                |
| <a href="#">Inactivating</a> Staff Accounts                                                                                                                                                                                                                                                                                                 | <a href="#">Account Management Wizard</a>                                                |
| <a href="#">Removing</a> PIN Numbers from POS Accounts                                                                                                                                                                                                                                                                                      | <a href="#">Account Management Wizard</a>                                                |
| <a href="#">Inactivating</a> and Removing PIN Numbers from Student Accounts Simultaneously                                                                                                                                                                                                                                                  | <a href="#">Account Management Wizard</a>                                                |
| <a href="#">Inactivating</a> and Removing PIN Numbers from Staff Accounts Simultaneously                                                                                                                                                                                                                                                    | <a href="#">Account Management Wizard</a>                                                |
| <a href="#">Adjusting Balances</a> on Inactive POS Accounts                                                                                                                                                                                                                                                                                 | <a href="#">Account Management Wizard</a>                                                |
| <a href="#">Setting</a> Account Restrictions and Reminders                                                                                                                                                                                                                                                                                  | <a href="#">Reminder Restriction Wizard</a>                                              |
| <a href="#">Transferring</a> Patron Account Data                                                                                                                                                                                                                                                                                            | <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><br><a href="#">POS Account Messenger Scheduler</a> |

## Point of Sale Setup

| Topic                                                          | Tool                                       |
|----------------------------------------------------------------|--------------------------------------------|
| <a href="#">Creating</a> Item Categories                       | <a href="#">Item Categories</a>            |
| <a href="#">Creating</a> Purchasable Items                     | <a href="#">Purchasable Items</a>          |
| <a href="#">Copying</a> Service Layouts                        | <a href="#">Service Layout Copy Wizard</a> |
| <a href="#">Manage</a> Payment Locations                       | <a href="#">Payment Locations</a>          |
| <a href="#">Establishing</a> General Point of Sale Preferences | <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</a> Applications                    | <a href="#">Application Manager</a>     |
| <a href="#">Adding</a> Services                              | <a href="#">Application Manager</a>     |
| <a href="#">Creating</a> Service Layouts (Menus)             | <a href="#">Application Manager</a>     |
| <a href="#">Establishing</a> Class Serve Preferences         | <a href="#">Class Serve Preferences</a> |
| <a href="#">Establishing</a> PIN Auto-Generation Preferences | <a href="#">PIN Auto Gen</a>            |

## Terminal Setup

| Topic                                           | Tool                                |
|-------------------------------------------------|-------------------------------------|
| <a href="#">Establishing</a> Applications       | <a href="#">Application Manager</a> |
| <a href="#">Adding</a> Services                 | <a href="#">Application Manager</a> |
| <a href="#">Creating Service Layouts</a>        | <a href="#">Application Manager</a> |
| <a href="#">Managing</a> Terminals              | <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</a> Terminals              | <a href="#">Terminal Manager</a> |
| <a href="#">Remotely Reloading</a> Terminals              | <a href="#">Terminal Manager</a> |
| <a href="#">Remotely Shutting Down</a> Terminals          | <a href="#">Terminal Manager</a> |
| <a href="#">Remotely Viewing Terminal</a> Logs            | <a href="#">Terminal Manager</a> |
| <a href="#">Clearing</a> Remotely Requested Terminal Logs | <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, PIN barcode labels and PIN labels</a> .                                                                                                            | <a href="#">PIN Report</a>                   |

## Tool Rights

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

