

General Serve (Process Patron Transactions)

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Point of Sale 1.0 has been deprecated as of 7/1/2023. Please see the [Cashier Cheat Sheet](#).

General Serve is used when patrons can select from a variety of different purchasable items. Selecting General Serve from the Campus POS Menu Control will prompt the Search screen, where a cashier may start processing transactions.

This article includes the following topics:

[General Serve Transaction Process Overview](#) | [Searching for Patrons](#) | [Processing Payments](#) | [Processing Change Returned](#) | [Combination Payment Using Cash/Check and Account](#) | [Depositing Check/Cash into a Patron's Account](#)

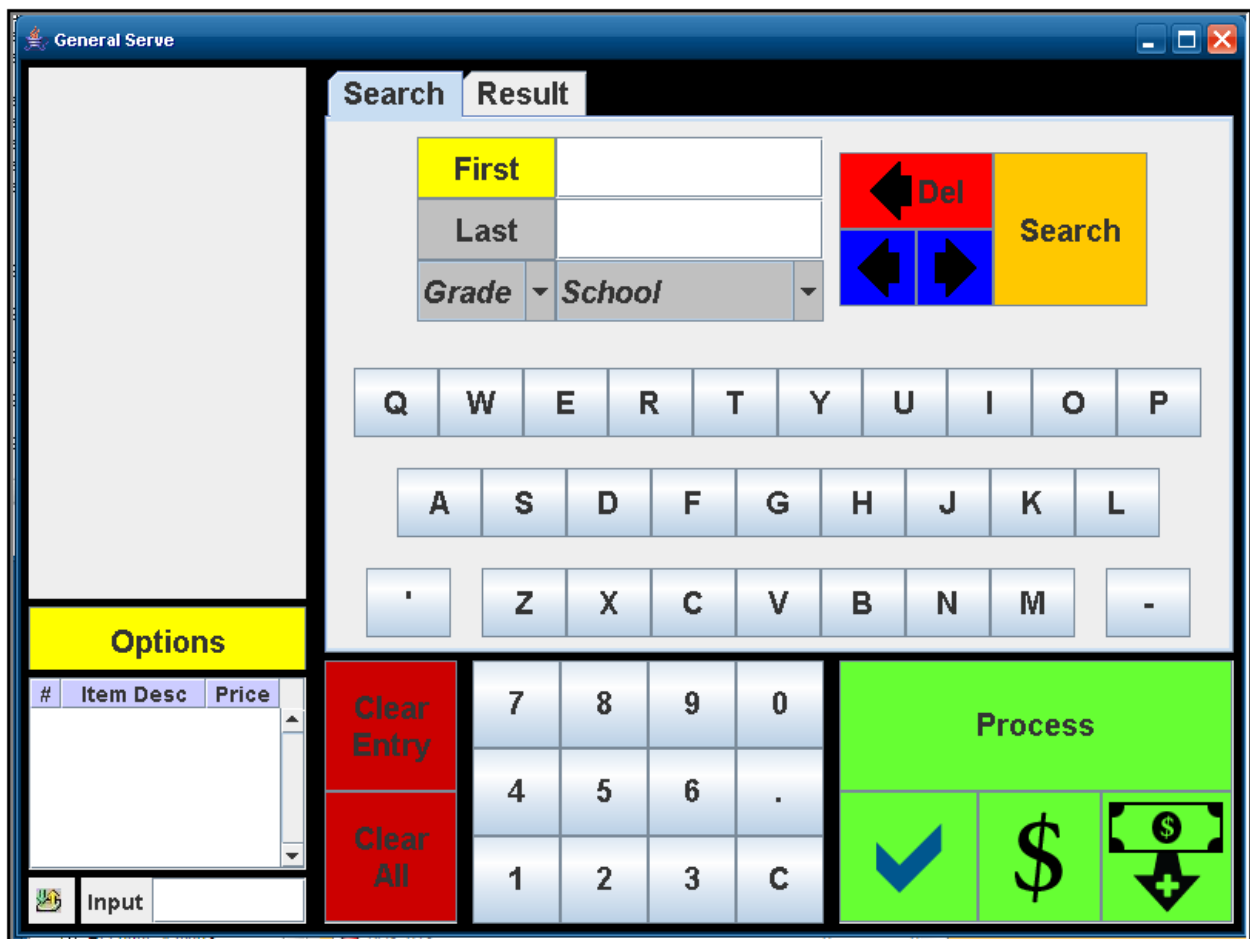
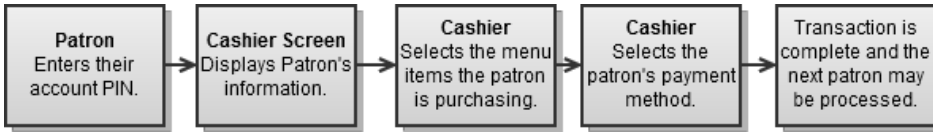


Image 1: General Serve Touch Screen

General Serve Transaction Process

Overview



Searching for Patrons

If necessary, the cashier may search for the patron by entering his/her name, selecting the **Search** button and selecting the patron from a list of results.

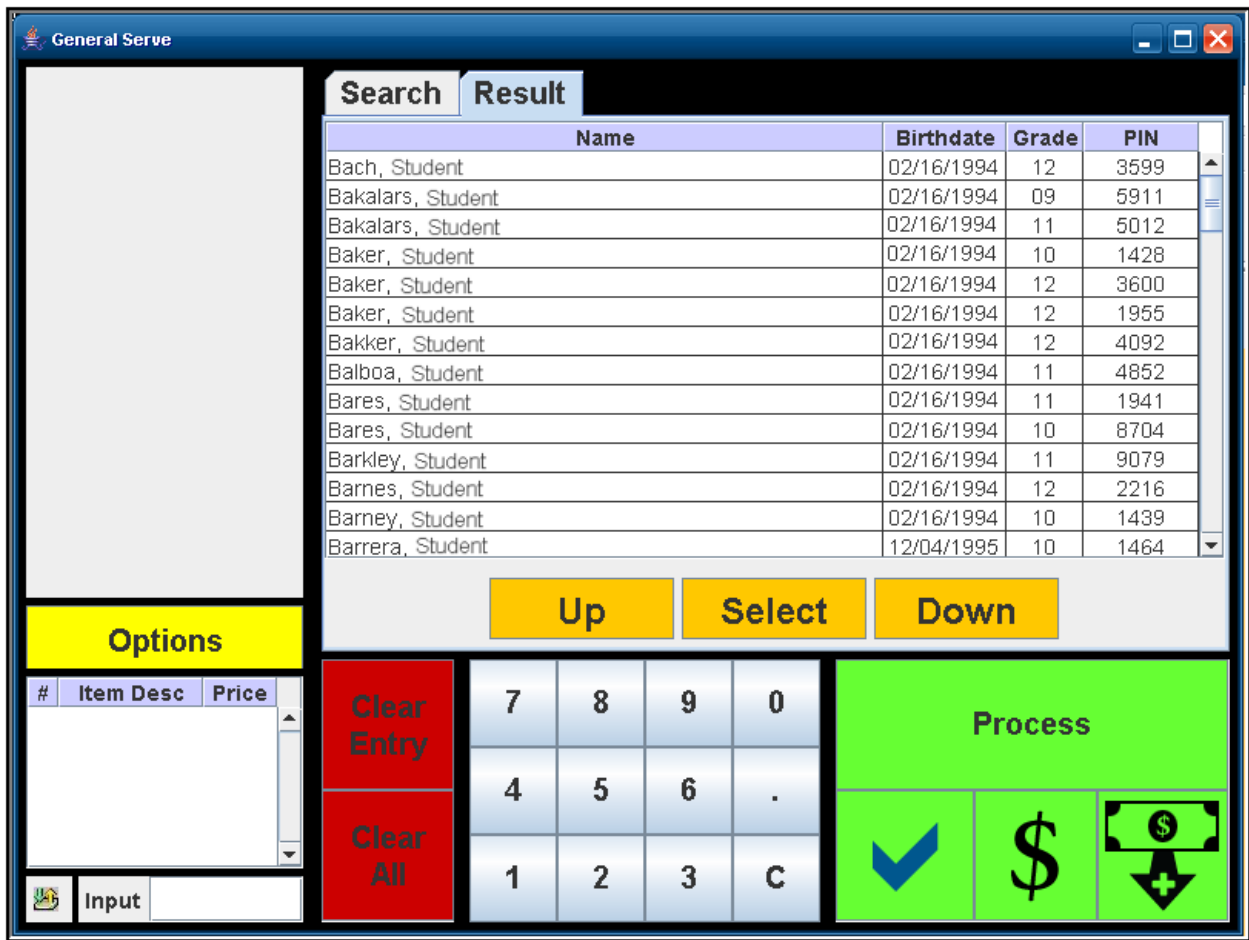


Image 2: Result Tab Showing Patron Search Results

Processing Payments

This section provides instructions for processing different types of patron payments.

Payments on Account

To process a payment made from a patron's account:

1. Select the patron's purchasable items from the menu.
2. Verify the items appear in the white **Item Description** box in the screen's lower left corner.
3. Select **Process** to complete check-out. Patron account is debited normally and the transaction is complete.

See the [Terminal Screen Layout](#) article for detailed information about each available button/field.

Cash or Check Payments

Cashiers have the ability to process cash or check payments for item transactions.

The functionality of accepting cash and check is determined by the food service administrator and set on the Admin POS Options menu.

Processing Exact Change

These steps should be used when a patron makes an exact payment.

1. Select the patron's purchasable items from the menu.
2. Verify the items display in the white **Item Description** box in the screen's lower left corner.
3. Select the **Cash (\$)** or **Check (v)** button. A dialog box appears.
4. Complete one of the following options.

Payment Type	Then...
Cash (\$)	Select Exact and then Submit . The transaction is complete.
Check (v)	<ol style="list-style-type: none"> a. Enter the Check number. b. Select Amount Tender. c. Select Exact and then Submit. The transaction is complete.

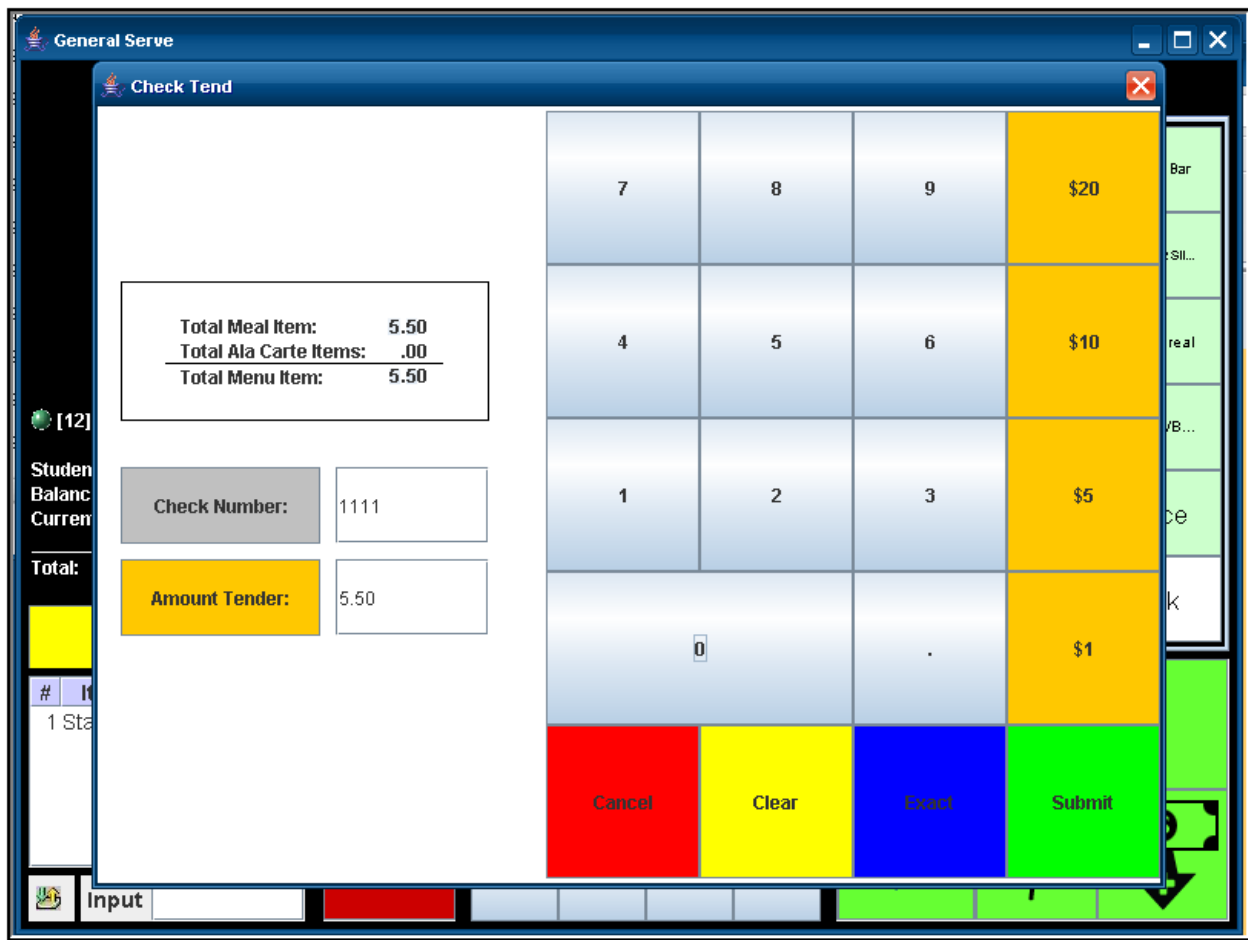


Image 3: Processing a Check payment with Exact Change


Processing Change Returned

When change should be returned to a patron, it may be physically returned or deposited to their account.

The Cash Tender setting of the Admin POS menu sets the allowed mode for returning change. Three options are available: Cash Returned, Cash Deposited, or Both (Change Returned or Deposited).

Option	Description
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Option	Description
<p>Cash Returned</p>	<p>These steps should be used when change is physically handed back to the patron.</p> <p>Users should not return money on a check. Any additional money left over after a transaction should be deposited into the patron's account.</p> <p>Select the patron's purchasables from the menu.</p> <ol style="list-style-type: none"> 1. Verify the items in the white Item Description box in the screen's lower left corner. 2. Select the Cash (\$) or Check (v) button. A dialog box will appear. 3. Enter the Check number and Select Amount Tender. (checks only) 4. Enter the Amount Tender(ed). 5. Select Submit. <p>Result</p> <p>A dialog box will display, showing the amount of change to return to the patron.</p>
<p>Change Deposited</p>	<p>These steps should be used when change is returned for deposit into patron's account.</p> <p>When this mode is selected, all change will be deposited. No change will be returned to the patron.</p> <p>Select the patron's purchasable items from the menu.</p> <ol style="list-style-type: none"> 1. Verify the items in the white Item Description box in the screen's lower left corner. 2. Select the Cash (\$) or Check (v) button. A dialog box will appear. 3. Enter the Check number and Select Amount Tender. (checks only) 4. Enter the Amount Tender(ed). 5. Select Submit. <p>Result</p> <p>A dialog box displays, showing the amount of change to be deposited into the patron's account.</p>

Option	Description
Both (Change Returned or Deposited)	<p>When this mode is selected, the cashier can choose to return or deposit change as necessary.</p> <p>Cashiers should not return money on check payments. Additional money left over after a transaction should be deposited into the patron's account. Returning money to a patron on a check payment will affect end of day drawer counts.</p> <ol style="list-style-type: none"> 1. Select the patron's purchasable items from the menu. 2. Verify the items in the white Item Description box in the screen's lower left corner. 3. Select the Cash (\$) or Check (v) button. 4. Enter the Check number and Select Amount Tender. (checks only) 5. Enter the Amount Tender(ed). 6. Select Submit. <p>Result</p> <p>A dialog box will display, showing the amount of change due to the patron. The cashier may choose to Return the change or Deposit it into the patron's account.</p> 

Combination Payment Using Cash/Check and Account

A patron may want to pay for a transaction with a combination of cash/check and money from their account.

It is not possible to pay with both cash and check in the same transaction.

1. Select the **Cash (\$)** or **Check (v)** button. A dialog box appears.
2. Complete one of the following options.

Payment Type	Then...
Cash (\$)	<ol style="list-style-type: none"> a. Enter the exact amount of funds tendered. b. Select Submit. <p>A confirmation message displays.</p>

Payment Type	Then...
Check (v)	a. Enter the Check number. b. Select Amount Tender . c. Enter the exact amount of funds tendered. d. Select Submit . A confirmation message displays.

3. Select **OK**.

Result

The remaining balance will be debited from the patron's account.

Depositing Check/Cash into a Patron's Account

Cashiers can deposit money (via cash or check) into a patron's account using the quick deposit button (see Image 4).

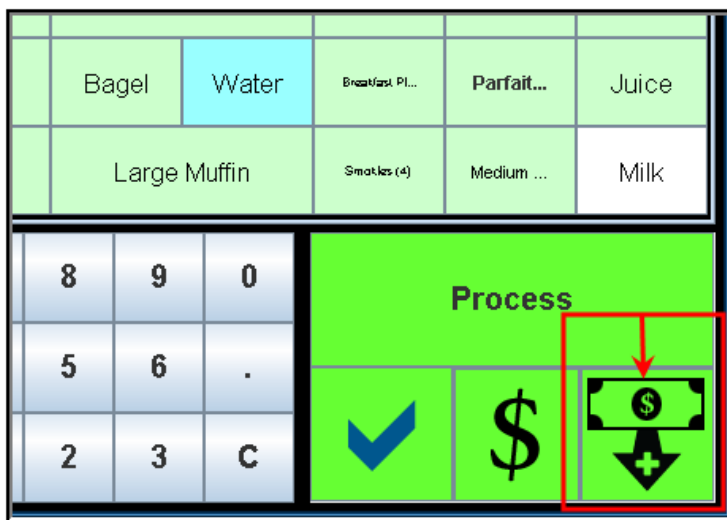


Image 4: Quick Deposit Button

When selected, the **Deposit** editor appears, allowing the cashier to enter the amount of cash being deposited (Image 5) or information about the check being deposited (Image 6).

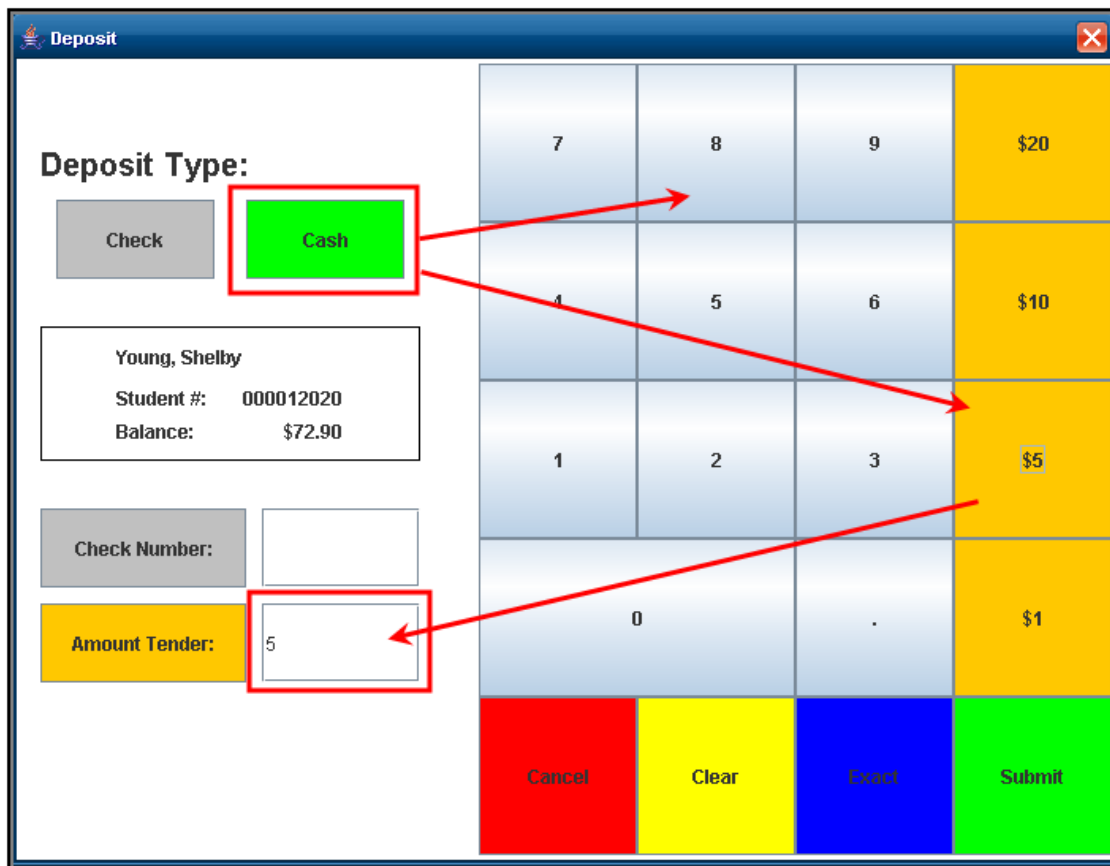


Image 5: Depositing Cash into a Patron's Account

To deposit cash into the patron's account:

1. Select the **Cash** button. Orange cash amount buttons will become active on the right-hand side of the screen, allowing the cashier to quickly select a cash amount. The cashier may also enter the cash amount using the number pad.
2. Verify the total cash amount in the **Amount Tender** field is correct. This field indicates how much cash will be deposited into the patron's account.
3. Select the **Submit** button to process the deposit and add the amount to the patron's account balance.

Cashiers may also deposit checks into a patron's account by selecting the **Check** button (see Image 6).

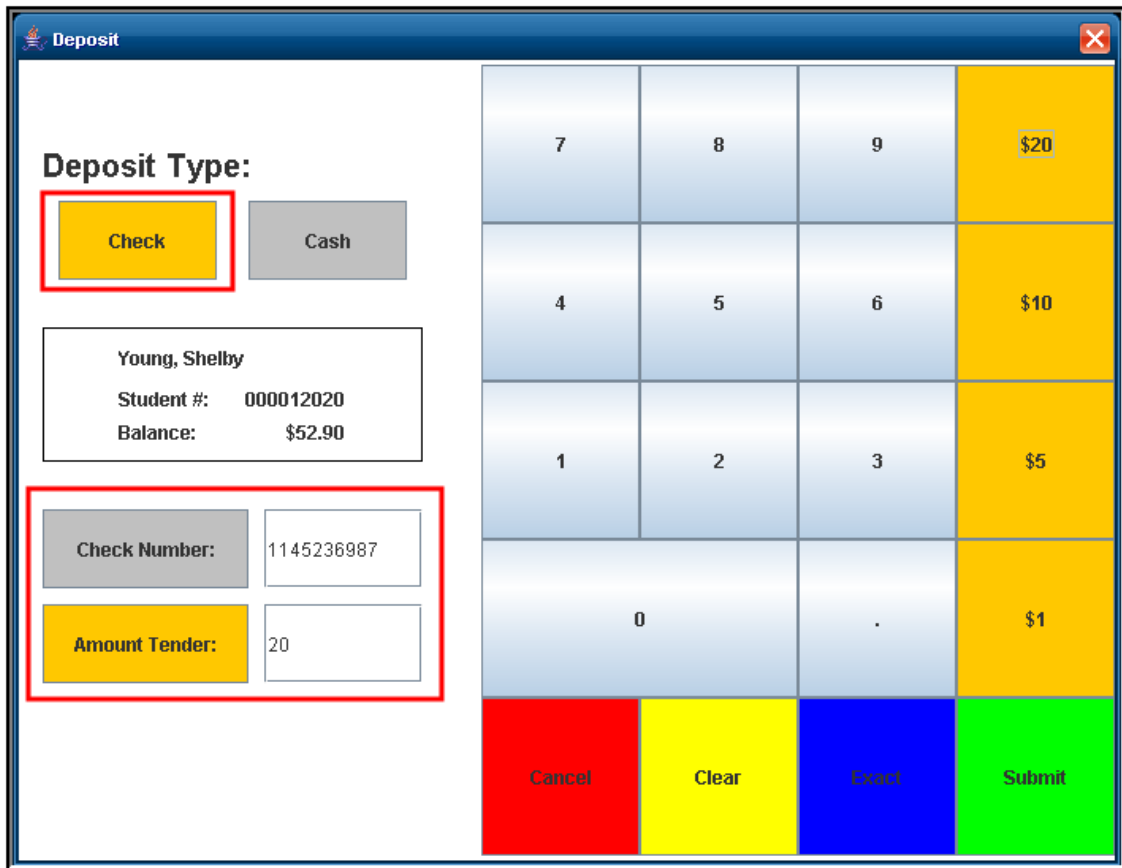


Image 6: Depositing a Check into a Patron's Account

To deposit a check into a patron's account:

1. Select the **Check** button. The **Check Number** field will appear.
2. Enter the **Check Number** by using the keypad.
3. Enter the **Amount Tender** by either selecting the Orange amount buttons on the right-hand side of the screen or entering the check amount using the keypad.
4. Verify the **Check Number** and **Amount Tender** is correct and select the **Submit** button to deposit the check amount into the patron's account in real time.

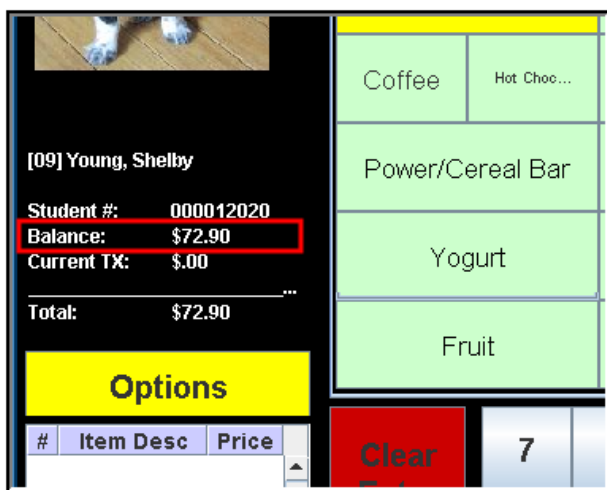


Image 7: Patron Balance After Deposited Check

The example above (Image 7), a twenty dollar check was deposited into the patron's account (see Image 6) and immediately added to the patron's balance (see the Balance in both Image 6 and 7).
