

# General Preferences (POS Preferences)

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## Tool Search: General Preferences

The General POS Preference tool allows a school and/or district to set preferences for the POS system. POS Preferences should be set before using a Point of Sale terminal and creating Point of Sale accounts. Options on this tool determine how accounts are created, how PINs are controlled and if eligibility information is viewable.

General Preferences

General Preferences

Default Family Account	Show Eligibility in Deposit	Autocorrect Transaction for Backdated Applications	Disconnect Status Time 1
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PIN Preferences

Auto Creation of Account With New Enrollment	Auto Creation of PIN With New Enrollment	Set Student Number as PIN 1	Allow Student PIN to Show on Printed Student Schedules
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Scheduled Messenger

Only Include Accounts With Activity Since Last Scheduled Message	Minimum Days Between POS Scheduler Messages 2
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POS Features

POS Display Flag and Comments Auto Open General Serve Continuous Serve
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Patron Preference Portal Display Controls

For any option selected below, patrons' saved settings (Food Service>Account Details>Patron Preferences) will display in the portal Food Service tab. Students will have view only access; parents will have the ability to update based on options selected.

Block Concessions Student Portal (view only) Parent Portal	Single Purchase Restriction Student Portal (view only) Parent Portal	Daily Limit Student Portal (view only) Parent Portal	Block a la Carte Purchases Student Portal (view only) Parent Portal
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Portal Instructions

Save

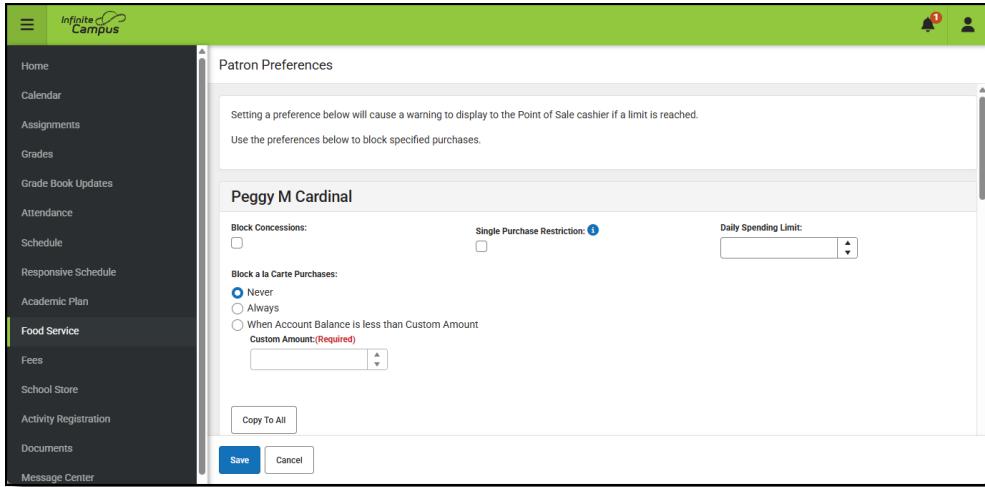
## Description of POS Preferences

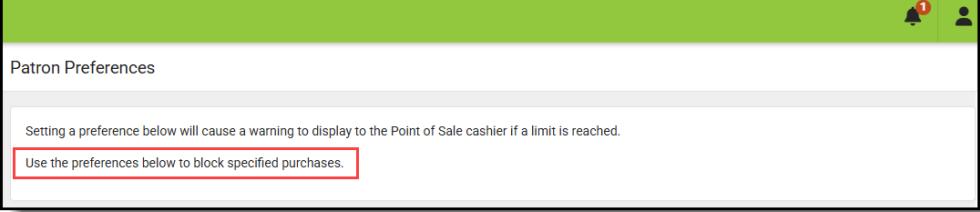
Preference	Description
<b>Default Family Account</b>	<p>When this checkbox is marked, Campus only creates family accounts and not individual patron accounts.</p> <p>This preference only applies when:</p> <ul style="list-style-type: none"> <li>• The <b>Auto Creation of Account With New Enrollment</b> preference is also selected.</li> <li>• There is more than one student in a household with a food service account.</li> </ul> <div style="background-color: #e0f2f1; padding: 10px; border-radius: 10px;"> <p>When both preferences are selected and an existing household has a new family member enrollment entered, Campus adds the new family member to the existing account for patrons in the same household.</p> </div>

Preference	Description
<b>Show Eligibility in Deposit</b>	When this checkbox is marked, Campus displays the student's eligibility on the Census > Household > FS Deposit screen.
<b>Autocorrect Transactions for Backdated Applications</b>	<p>Marking this checkbox allows Infinite Campus to automatically update eligible meals when the Effective Date on a <a href="#">Household Application</a> or <a href="#">Online Application</a> is earlier than the day the application is processed. This feature gives students access to free/reduced lunches on the date the application was received. When this checkbox is marked, Campus automatically compares the eligibility date to the student's transactions, voids the old transaction(s), and re-enters the transactions using the correct eligibility. This preference also applies when amending household applications.</p> <p><b>Example</b></p> <p>The household application was submitted to the district on 5/1 and entered into the Household Applications tool in Infinite Campus on 5/9. For the preference to update any eligibility "mischarges" between 5/1 and 5/9, the Effective Date on the household application (once entered into Campus) must be before 5/9. In this example, if you want the auto-corrections to go back to 5/1, enter an Effective Date of 5/1 on the household application.</p> <p>This feature does <b>not</b> apply to applications uploaded via the <a href="#">Eligibility Import Wizard</a> or <a href="#">manually entered eligibility records</a>.</p>
<b>Disconnected Status Time in minutes</b>	Indicates how often Campus will ping POS terminals to verify the POS is still communicating with Campus. This affects the refresh rate of the Connection column displayed on the <a href="#">Terminals</a> tool.

Preference	Description
<b>Auto Creation of Account With New Enrollment</b>	<p>When this checkbox is marked, Campus automatically creates a POS account for each new student who enrolls at the school when their enrollment record is created. It will not create duplicate accounts for students who have two enrollments or for students rolled into the next school year.</p> <p>This logic includes support for the use of this preference in combination with the Default Family Account preference.</p> <ul style="list-style-type: none"> <li>• If a household already has a family account, a newly enrolled student member in the same household with an active primary membership will be included in the same existing account (i.e., a new sibling enters Kindergarten and older siblings already have an account).</li> <li>• If a student is a primary member of one household and a secondary member of another, the student is assigned to a family account where the primary household membership exists.</li> <li>• If a student is a primary member of two households, the student is placed in the family account where they have the highest memberID assigned (the household where they were most recently assigned as a member).</li> <li>• If a new family account is created for a household and a household includes student memberships that have ended, the students with ended memberships are not included in the household's family account.</li> <li>• If students are enrolled before Households are created and primary membership in a household is indicated, creation of an accurate family account based on primary household membership will not be possible and individual patron accounts will be created instead.</li> <li>• Staff members who have students in the district will be added to family accounts <a href="#">manually</a> or through the <a href="#">Mass Account Creation Wizard</a>. If added <a href="#">manually</a>, users must select the Account Folder and click Add Patron.</li> </ul> <div data-bbox="489 1394 1356 1513" style="border: 1px solid #f0e68c; padding: 10px; background-color: #fff;"> <p>For help in identifying whether a household member is primary or secondary and their household start and end dates, see the Members page.</p> </div>
<b>Auto Creation of PIN With New Enrollment</b>	<p>When this checkbox is marked, Campus generates a PIN when a new student is enrolled.</p>

Preference	Description
<b>Set Student Number as PIN</b>	<p>When this checkbox is marked, Campus automatically uses the student number to create a PIN when a new enrollment record is added. If Campus cannot set the Student Number as PIN on a new enrollment, Campus assigns a new PIN according to the PIN preferences set on the <a href="#">PIN Auto Gen</a> tool and sends a Process Inbox message to the POS Admin.</p> <div data-bbox="425 473 1351 586" style="border: 1px solid #80B080; padding: 10px; background-color: #D0F0D0;"> <p>To avoid creating PINs that conflict with student IDs, the generated PIN should not equal the same number of digits as a student ID. Be sure to check your settings in the <a href="#">Pin Auto Gen</a> tool.</p> </div> <p>If a student was previously enrolled in a district and had a PIN, left the district, and then comes back, the student's old PIN does not get updated. As a best practice, remove PINs from inactive students. Doing this tells Infinite Campus to assign their student number as their PIN when they are enrolled again.</p> <p>The option Allow access to Student Number as PIN must be enabled in <a href="#">System Preferences</a> to edit this field.</p>
<b>Allow Student PIN to Show on Printed Student Schedules</b>	<p>When this checkbox is marked, the student's PIN is displayed on student schedules. This requires the Lunch PIN option to also be marked on the <a href="#">Schedule Report Preferences</a>. This number prints below the schedule grid. When this checkbox is not marked, the student's PIN does not display on student schedules, regardless of whether that option is marked on the Schedule Report Preferences.</p>
<b>POS Account Messenger Scheduler Preferences</b>	<p>This section includes preference settings that determine how the <a href="#">POS Account Messenger Scheduler</a> tool sends scheduled messages.</p>
<b>Only Include Accounts With Activity Since Last Scheduled message</b>	<p>Marking this checkbox limits message delivery to accounts that show activity since the last scheduled message task was created.</p> <p>Account activity is any credits or debits to the account balance, including voided transactions.</p> <p>Account activity does not include:</p> <ul style="list-style-type: none"> <li>• Any free items served on the account, such as Free qualifying meals or ala carte items charged as Free eligible, or</li> <li>• A transaction that results in 0.00 being charged to the account.</li> </ul>
<b>MinimumDays Between POS Scheduler Messages</b>	<p>Entering a number in this field limits message delivery to accounts last contacted after the minimum days entered in this field. Decimal points are not allowed.</p> <p>For example, if you enter 3 in this field and set up an hourly Messenger schedule, accounts will receive one message every 3rd day as long as the account meets the filter criteria on the message template.</p>

Preference	Description
<b>POS Display Flag and Comments Auto Open</b>	<p>Selecting General Serve and/or Continuous Serve will enable the POS display flag information to automatically be open when a patron with a flag is loaded onto the terminal.</p> <p>The POS application must be closed and relaunched to register changes to POS Display Flag Auto Open fields.</p>
<b>Patron Preference Portal Display Controls</b>	<p>These preference settings allow districts to configure preferences that allow guardians to manage selected Food Service account restrictions in Campus Parent and to provide a view-only preference in Campus Student.</p> 
<b>Block Concessions</b>	<p>If marked, this checkbox indicates that the patron is not supposed to purchase concessions. If the patron attempts to purchase concessions, a warning message will appear to the cashier.</p>
<b>Single Purchase Restriction</b>	<p>If marked, this checkbox indicates the patron cannot purchase more than one of the same item, regardless of whether it is a meal or an à la carte item. If the patron attempts to purchase multiple quantities of the same item, a warning message will appear to the cashier.</p>
<b>Daily Limit</b>	<p>The amount (dollar.cent) entered in this field is the maximum amount the patron is supposed to spend in one day. If the patron attempts a purchase exceeding this amount, a warning message will appear to the cashier.</p> <p>If the Actual Purchasable Cost option is not enabled on the terminal, the Daily Limit will include the paid price of the purchasable meal regardless of eligibility and the actual cost of the item.</p>
<b>Block a la Carte Purchases</b>	<p>Based on the selection made, it determines if the patron can purchase a la carte items. If the patron attempts an a la carte item purchase, a warning message will appear to the cashier.</p>

Preference	Description
<b>Portal Instructions</b>	<p>This message accompanies the Patron Preference Controls to help users understand how to interact with and configure their preferences.</p>  <p>The screenshot shows a 'Patron Preferences' page with a green header. Below the header, a message states: 'Setting a preference below will cause a warning to display to the Point of Sale cashier if a limit is reached.' A red box highlights a button labeled 'Use the preferences below to block specified purchases.' in a red-bordered box.</p>