

# Cashier Cheat Sheet (POS 1.0)

Last Modified on 06/27/2023 2:33 pm CDT

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

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## Search for Patrons

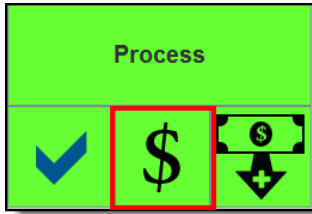
Quick Steps	Example
<ol style="list-style-type: none"> <li>1. Enter the patron's <b>First</b> and/or <b>Last Name</b>.</li> <li>2. Tap <b>Search</b>.</li> <li>3. Tap the patron's name on the Result tab.</li> <li>4. Tap <b>Select</b>.</li> </ol>	

## Charge a Patron's Account

Quick Steps	Example
<ol style="list-style-type: none"> <li>1. Select the patron's purchasable items from the menu.</li> <li>2. Verify the items appear in the white <b>Item Description</b> box in the screen's lower left corner.</li> <li>3. Tap <b>Process</b> to complete check-out.</li> </ol>	

## Cash 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. Tap **Cash (\$)**.



**Result** The Cash Tend window displays.

4. Enter the **Amount Tender(ed)**.

Total Meal Item:	1.75
Total Ala Carte Items:	.25
Total Menu Item:	2.00

Amount Tender:	5
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5. Tap **Submit**.
  - If the cash was for the exact amount, the transaction is complete.
  - If there is change due, tap **Return** to give cash to the patron OR tap **Deposit** to deposit the change into the patron's account.

Change: \$3.00.

<b>RETURN</b>	<b>DEPOSIT</b>
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## Check 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. Tap **Check (✓)**.



**Result** The Check Tend window displays.

4. Enter the **Check** number.
5. Enter the **Amount Tender(ed)**.

Total Meal Item:	1.75
Total Ala Carte Items:	.25
Total Menu Item:	2.00

Check Number:	1234
Amount Tender:	10

6. Tap **Submit**.

- If the check was for the exact amount, the transaction is complete.
- If there is change due, tap **Deposit**.

The screenshot shows the payment interface with a keypad. The keypad has buttons for digits 0-9, a decimal point, and a dollar sign. The total amount is \$10.00. The keypad shows \$10.00 entered. Below the keypad are buttons for 'Cancel', 'Clear', 'Submit', and 'Deposit'. A modal window is open showing 'Change: \$8.00' with 'RETURN' and 'DEPOSIT' buttons. A red arrow points from the 'Deposit' button on the keypad to the 'DEPOSIT' button in the modal.

**Do NOT return money on check payments.** Always deposit additional money left over after a transaction into the patron's account. Returning money to a patron on a check payment will affect end of day drawer counts.

## Combination Payment

Patrons can pay for a transaction with cash OR check AND money from their account.

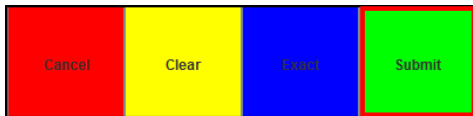
**⚠ It is not possible to pay with both cash and check in the same transaction.**

1. Select the Cash (\$) OR Check (✓) button. **Result** - The Cash Tend or Check Tend window displays.
2. Complete one of the following options.

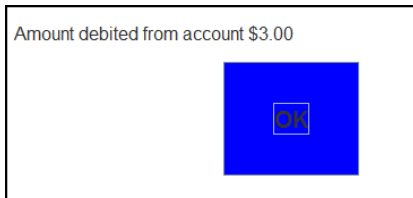
Payment Type	Then...
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Payment Type	Then...
<b>Cash</b>	Enter the exact Amount Tendered. 
<b>Check</b>	Enter the Check Number and the Amount Tendered. 

3. Tap **Submit**.



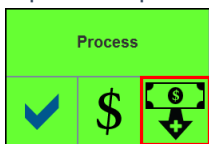
**Result** - A message displays stating how much was debited from the student's account.



4. Tap **OK**. **Result** - The transaction is complete.

## Deposits

1. Tap the Deposit button.



**Result** - The Deposit window displays.

2. Enter the amount of cash OR information about the check being deposited.

**Deposit Type:**

Check
Cash

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Fleischer, Damien  
 Student #: 112840  
 Balance: \$0.00

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Check Number:

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Amount Tender:

**Deposit Type:**

Check
Cash

---

Fleischer, Damien  
 Student #: 112840  
 Balance: \$0.00

---

Check Number:

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Amount Tender:

**Tip:** Orange QuickAdd buttons on the right-hand side of the screen allow you to quickly select an amount.

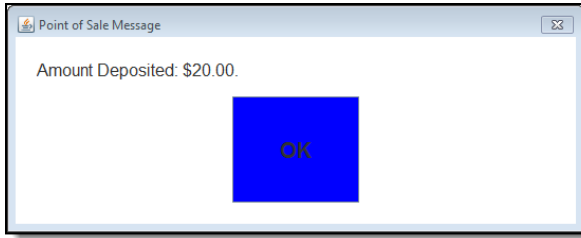
7	8	9	\$20
4	5	6	\$10
1	2	3	\$5
0	.		\$1

3. 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.
4. Tap the **Submit** button to process the deposit and add the amount to the patron's account balance.

Cancel
Clear
Exact
Submit

**Result** - A confirmation displays.

5. Tap **OK**. The deposit is complete.



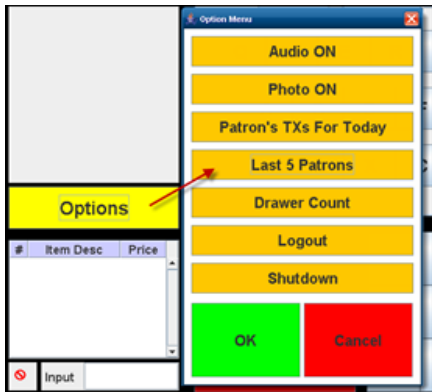
## Voids

With the assistance of a head cashier or other administrator who has been assigned a Manager PIN, cashiers may void transactions at the POS terminal after they have been processed.

Voiding transactions through the POS terminal must take place BEFORE the terminal is shut down. If a mistake is found after the terminal has been shut down, it must be voided on the patron's account Journal tab within the Campus application.

### Void a Transaction for Patron within Last 5 Patrons

1. Tap **Options** > **Last 5 Patrons**.



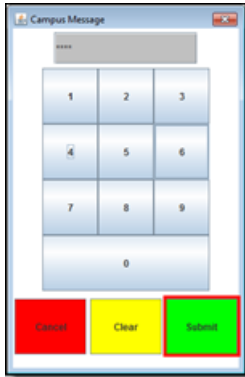
#### Result

The Historical TX window displays.

2. Select the patron's incorrect transaction then tap VOID TX.



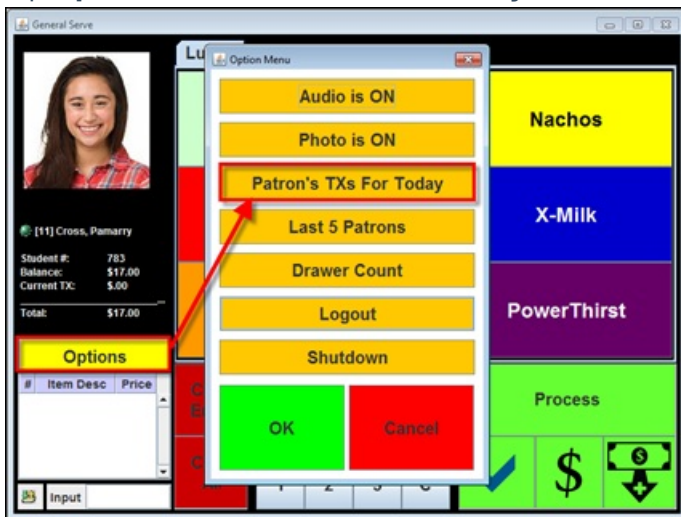
3. Enter a **Manager PIN** and tap **Submit**. A cashier PIN will NOT work.



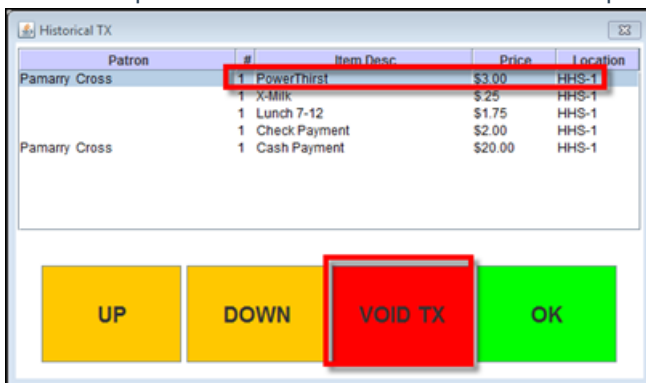
4. Tap **OK** on the confirmation window. The void is complete.

## Void a Transaction for Patron NOT within Last 5 Patrons

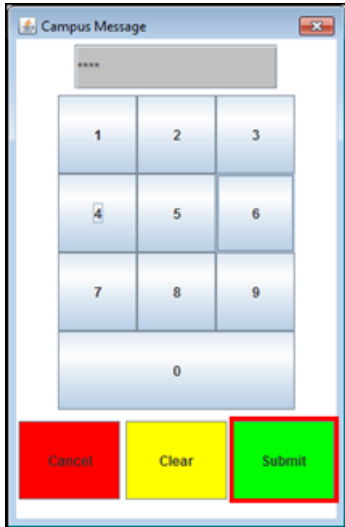
1. Search for patron and tap Select.
2. Tap **Options > Patron's TX For Today**.



3. Select the patron's incorrect transaction and tap **Void TX**.



4. Enter a **Manager PIN** and tap **Submit**. A cashier PIN will NOT work.

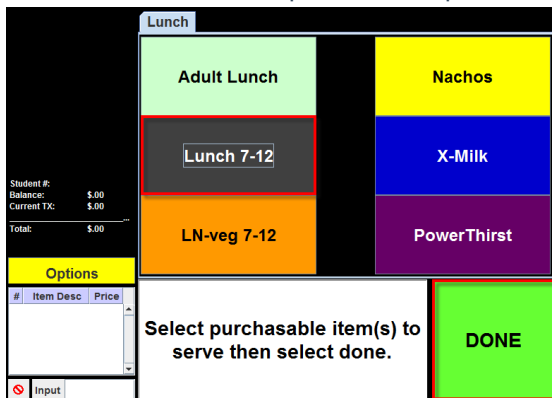


5. Tap **OK** on the confirmation window. The void is complete.

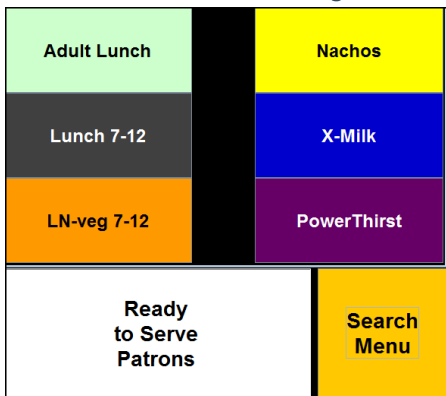
## Continuous Serve

Continuous Serve is used when all patrons are purchasing the same menu item. Select the menu items one time, before serving the first patron.

1. Choose the item(s) ALL patrons are purchasing then tap **Done**.



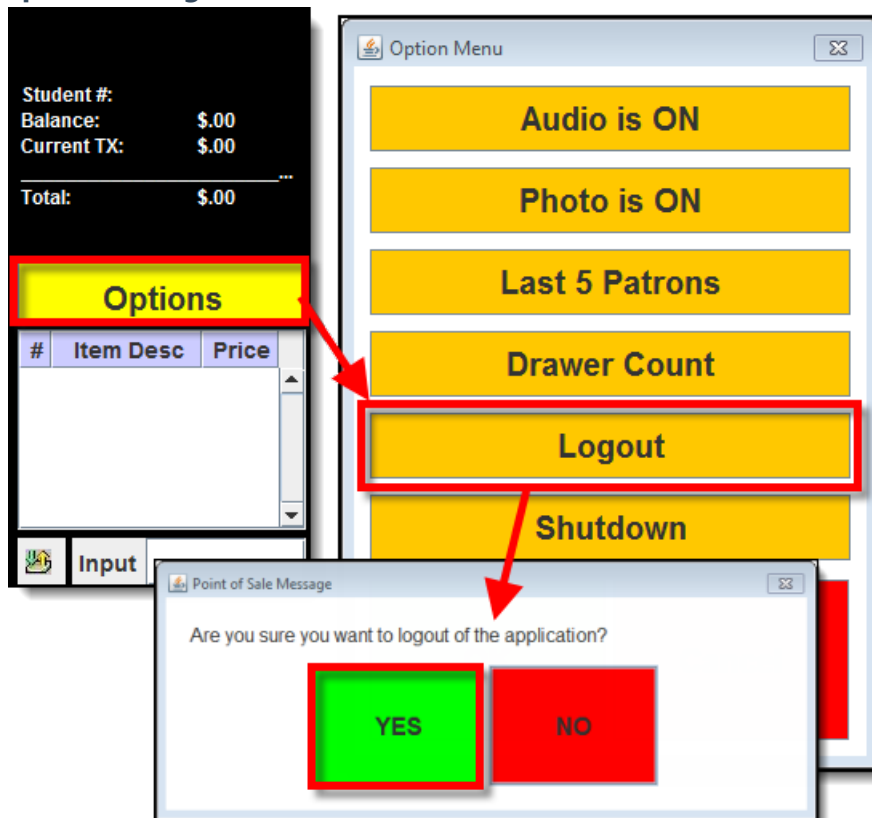
**Result** - The screen changes to say "Ready to Serve Patrons."



2. Patrons enter their PINs as they go through the line. You do not need to select purchasable items each time. You can search for patrons, allow patrons to enter their PINs, or scan patron bar codes to select the patron for processing.




3. At the end of the serving period, log out of the Continuous Serve application by tapping **Options > Logout > Yes.**



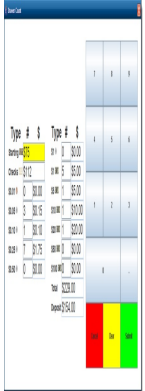
## Drawer Count

The Drawer Count should be performed at the end of each serving period.

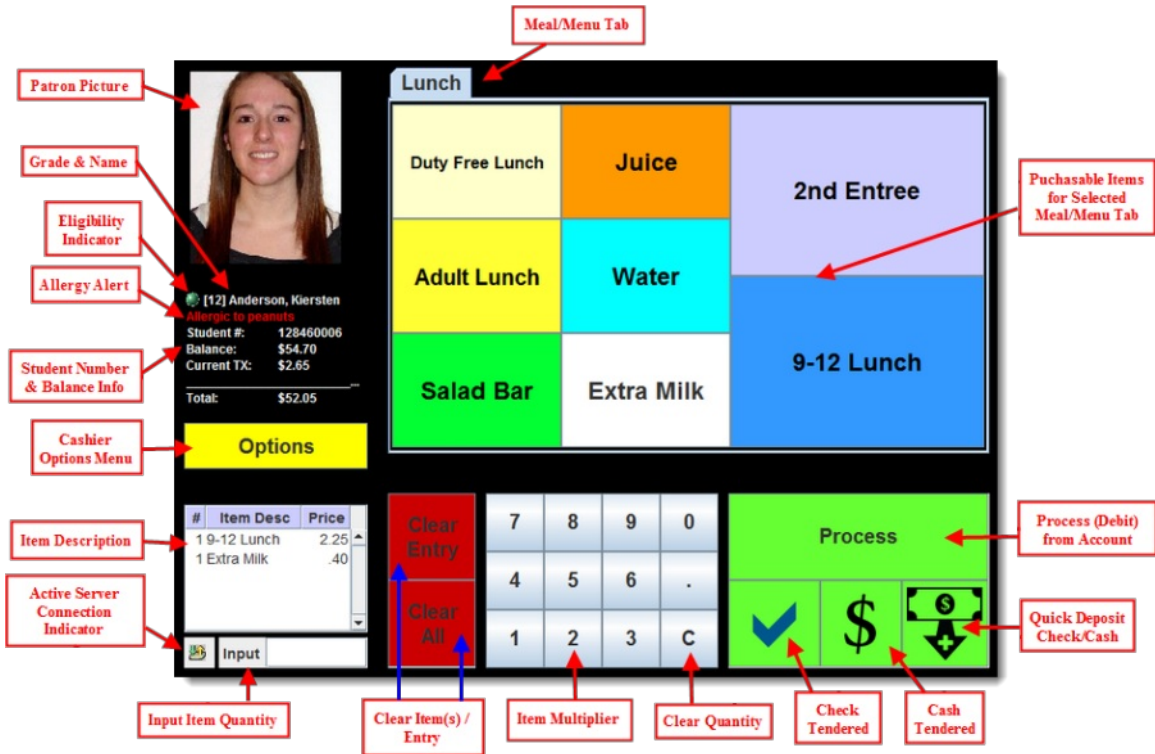
### Start the Drawer Count

Quick Steps	Example				
<ol style="list-style-type: none"> <li>1. Select the <b>Options</b> menu.</li> <li>2. Select <b>Drawer Count</b> from the Options Menu. This should only be done at the end of the serving period.</li> <li>3. Select <b>Yes</b> when the “<b>Do you want to perform the end of serving drawer count?</b>” verification message displays.</li> </ol> <p><b>Result</b> The main Drawer Count screen then appears.</p> <table border="1" data-bbox="242 548 1214 943"> <tr> <td data-bbox="242 548 389 689"><b>Total</b></td> <td data-bbox="389 548 1214 689">The amount displayed in the <b>Total</b> field indicates everything in the drawer, including the total of starting cash, checks and cash. This value is calculated automatically.</td> </tr> <tr> <td data-bbox="242 689 389 943"><b>Deposit</b></td> <td data-bbox="389 689 1214 943"> <p>The amount displayed in the <b>Deposit</b> field indicates how much was taken in during the serving period.</p> <p>This is the value of the total cash in the drawer minus the starting cash.</p> <p>This value is calculated automatically.</p> </td> </tr> </table>	<b>Total</b>	The amount displayed in the <b>Total</b> field indicates everything in the drawer, including the total of starting cash, checks and cash. This value is calculated automatically.	<b>Deposit</b>	<p>The amount displayed in the <b>Deposit</b> field indicates how much was taken in during the serving period.</p> <p>This is the value of the total cash in the drawer minus the starting cash.</p> <p>This value is calculated automatically.</p>	
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## Enter the Drawer Count

Quick Steps	Example
<ol style="list-style-type: none"> <li>1. Enter the total balance of the drawer, as it existed at the start of the serving period before transactions occurred, in the <b>Starting Cash</b> field. For an accurate count of the cash drawer, the starting cash must be excluded from the amount of money taken in during the serving period.</li> <li>2. Enter the total value of all checks collected in the <b>Check</b> field.</li> <li>3. Enter the quantity of each cash denomination in the appropriate field (e.g., \$0.01, \$0.50, \$20, \$100).</li> <li>4. Verify the amounts entered.</li> <li>5. Select <b>Submit</b> to end the drawer count and the serving period.</li> </ol> <p>The drawer count can be performed as many times as needed. This is so a cashier may re-open a drawer to allow late transactions to still be included in the same drawer count.</p> <ol style="list-style-type: none"> <li>6. Log out or shut down the terminal.</li> </ol>	

## Terminal Screen Layout



Button/Field Area	Description
<b>Meal/Menu Tabs</b>	Each tab contains the menu needed for a specific meal/serviceable time.
<b>Patron Picture</b>	The picture of the patron being served.
<b>Grade &amp; Name</b>	Indicates the patron's name and current grade.
<b>Eligibility Indicator</b>	Indicates the patron is eligible for Free or Reduced meals. The following describes each color: Gray - Adult/Staff Member Green - Paid Student Yellow - Reduced Student Red - Free Student
<b>Allergy Alert</b>	Indicates the patron's allergy(s).
<b>Student Number &amp; Balance Info</b>	Indicates the patron's Local Student Number and current account balance.

Button/Field Area	Description
<b>Cashier Options Menu</b>	Opens the Options Menu, containing options for assisting the cashier including control over audio, display of patron pictures, a list of a patron's transactions for the current date, the last 5 patrons served, drawer count, the ability to log out as cashier and the ability to shutdown the terminal.
<b>Item Description</b>	Describes each item added to the patron's order. These are charged to the patron's account unless cleared via the Clear Entry or Clear All button.
<b>Active Server Connection Indicator</b>	Indicates whether the terminal is properly connected to the server. A red circle with a line through it indicates the Point of Sale is not currently connected to the server. Green and gold arrows pointing up and down indicate the Point of Sale is currently connected to the server.
<b>Input Item Quantity</b>	Indicates how many items are in the patron's current order (corresponding to the items listed in the Item Description box).
<b>Clear Item(s) / Entry</b>	If the Clear Entry button is tapped, the most recent item added to the patron's order (corresponding to the items listed in the Item Description box) is removed and not charged to the patron's account. If the Clear All button is selected, all data entered during a patron's order (including items listed in the Item Description box) are removed.
<b>Item Multiplier</b>	Allows the cashier to enter item quantities and perform other actions which require number entry.
<b>Clear Quantity</b>	Clears the quantity entered via the Item Multiplier.
<b>Check Tendered</b>	Opens the Check Tend editor, allowing patrons to pay for the meal order via check. This is an optional button made available by the Admin on the Point of Sale.
<b>Cash Tendered</b>	Opens the Cash Tend editor, allowing patrons to pay for the meal order via cash. The Cash Tendered button is also used to open the cash drawer for a No Sale transaction or activity. This is an optional button made available by the Admin on the Point of Sale.
<b>Quick Deposit Check/Cash</b>	Opens the Deposit editor, allowing cashiers to deposit checks or cash to the patron's account in real time. Cashiers cannot deposit money into a patron's account until all items have been cleared from the patron's order (via the Clear Entry or Clear All buttons). This is an optional button made available by the Admin on the Point of Sale.
<b>Process (Debit) from Account</b>	Charges (debits) the patron's order to their account.

<b>Button/Field Area</b>	<b>Description</b>
<b>Purchasable Items for Selected Meal/Menu Tab</b>	Selectable items which are added to a patron's order when touched. These items will not be charged to the patron's account until the Process button is selected.

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