

Cashier Cheat Sheet

Last Modified on 10/21/2024 8:20 am CDT

What can I do?	What do I need to know?
<ul style="list-style-type: none"> • Search for Patrons • Charge a Patron's Account • Pin Purchasable Items • Enter a Cash Payment • Enter a Check Payment • Enter a Combination Payment • Void a Purchase • Deposit to an Account • Set up and Use Continuous Serve • Perform a Drawer Count • View Daily Terminal Transactions 	<ul style="list-style-type: none"> • Overview of the Terminal Layout

Search for Patrons

Quick Steps

1. Tap **Search**.
Result: The Search panel displays.
2. Select any of the **Options** available.

Option	Description
Photos	Will display student photos with their personal information in the search results.
Hold Search	Will lock search results in place so the same search results remain in place if the panel is closed and reopened.
Auto Open	Will automatically return cashiers back to the search panel upon processing a patron.
Hide Served	Will hide patrons from the search results if they've already been served.

3. Enter the patron's **First, Last Name, Homeroom, and/or PIN**.
4. Tap the patron's name.
Result: The patron displays on the terminal.

Tips

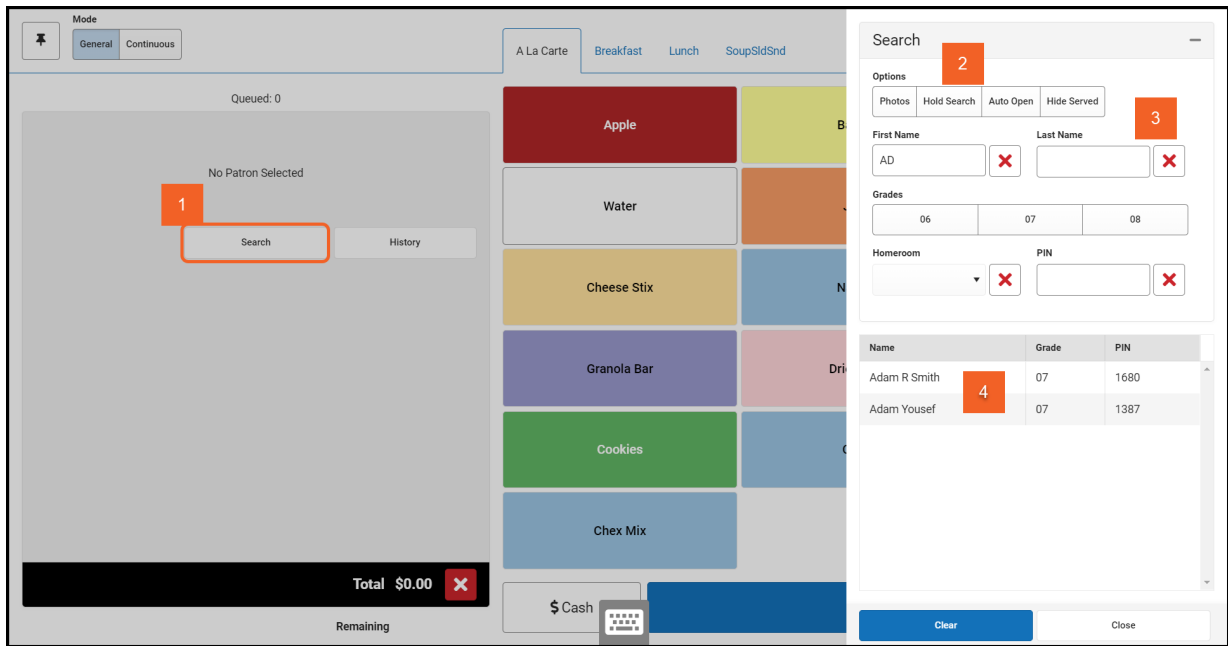
Tap the name fields to display a keyboard. After you enter two letters, patron names start to display.

The checkmark next to the patron's name indicates they had a transaction processed within the last hour.

Select Grade level(s) to narrow results.

Example

Quick Steps



Charge a Patron's Account

Quick Steps

1. Select the patron's purchasable items from the menu.
2. Verify the items appear in the screen's lower left corner.
3. Tap **Account** to complete check-out.

Example

Quick Steps

Queued: 0

Barry Ludwig
 Grade 07 PIN 1035
 \$50.00 Clear Patron

Search History

+	Extra Milk	Qty: 1	\$0.25	×
+	Lunch 6-12	Qty: 1	\$3.00	×

Total \$3.25 ×


Remaining \$46.75

Account

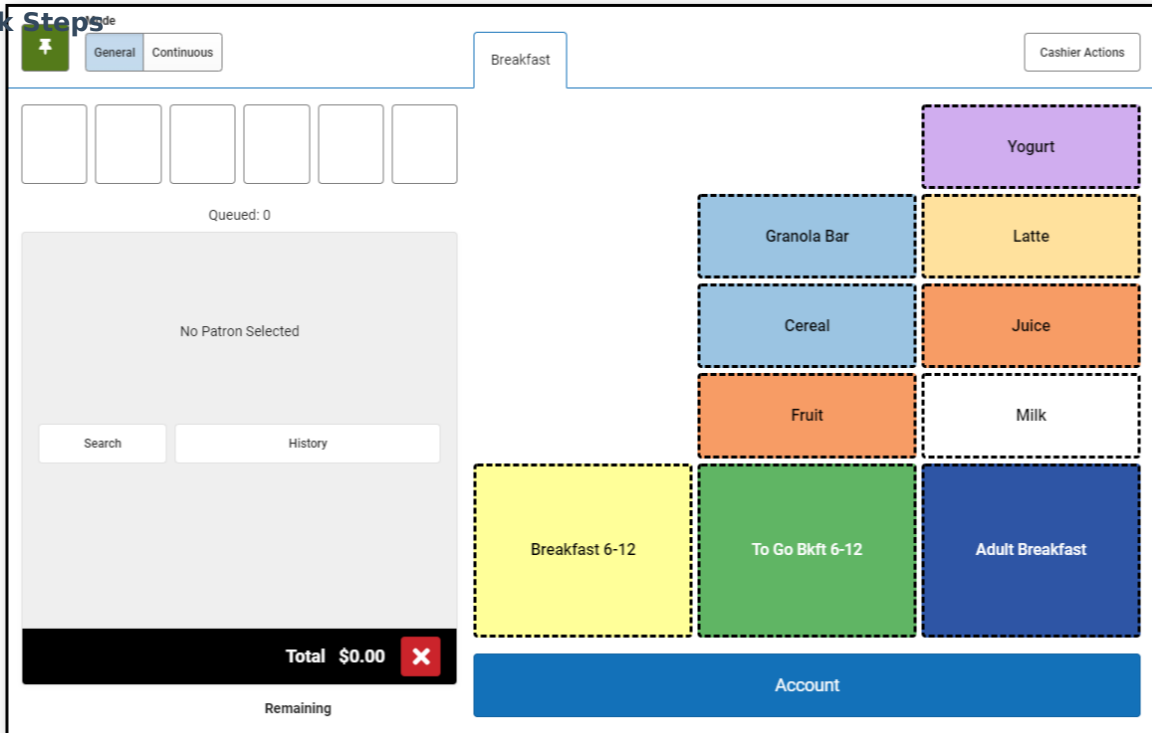
Pin Purchasable Items

- Pinned items are added to every transaction, but they can be removed before a patron is charged.
- Pinned items stay pinned until you unpin them or log out.
- You can pin up to 6 items.
- You can still add non-pinned items to a transaction by selecting purchasable items from the menu.
- Pinned items don't display in the transaction area until a patron is selected.

Quick Steps

1. Tap the  Pin button at the top left-hand side of the screen to enter the pinning mode.
Result: The pinning section displays and the purchasable items display in pinning mode.
 ▶ [Click here to expand...](#)

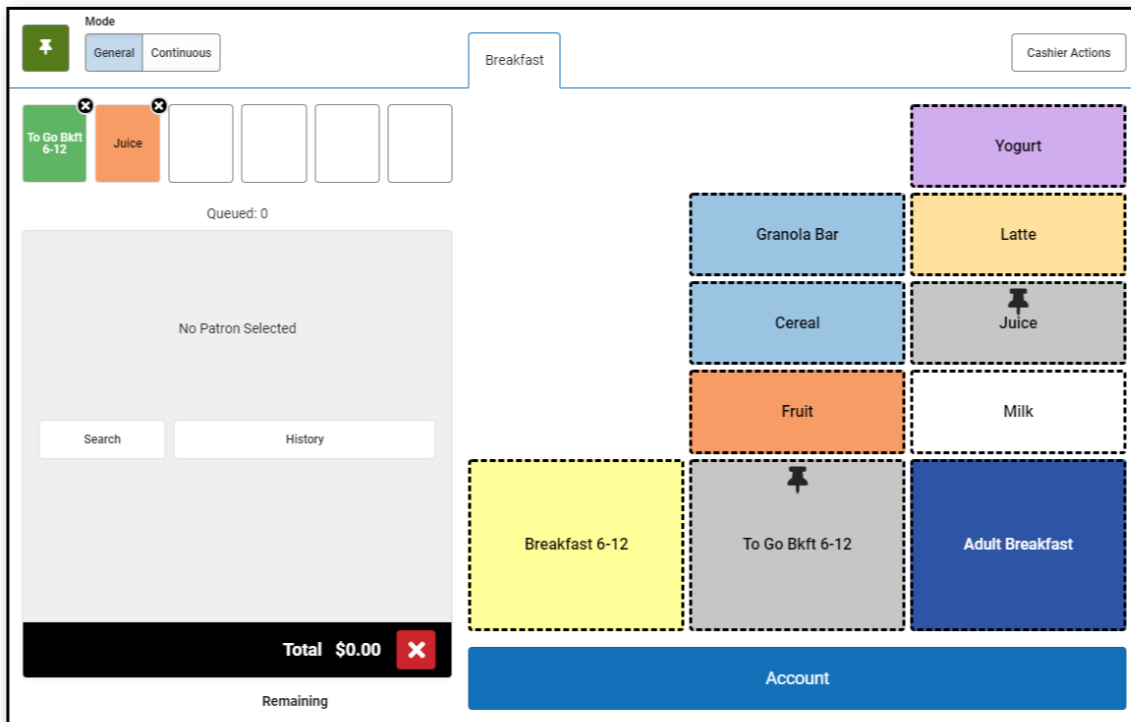
Quick Steps



2. Tap the item(s) that you want to pin.


Result: The item(s) you select display in the pinning section and the pinned purchasable item is marked with a pin.

▶ [Click here to expand...](#)





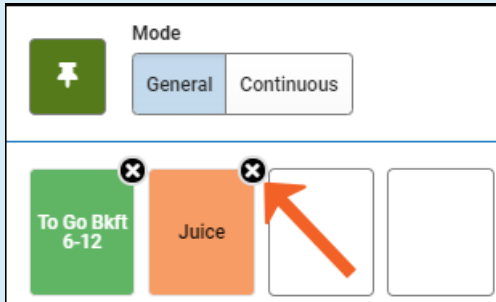
Tip: To pin more than one of the same item, tap the item again. A confirmation message will display.

Quick Steps

When you are done pinning, tap the  Pin button at the top left-hand side of the screen to exit the pinning mode.

Result: Pinned items are added to every transaction, but they can be removed before a patron is charged.

Tip: To unpin items, tap the  Pin button then tap the X on the item(s) you want to remove. Tap the  Pin button again when you are done.



Example

Quick Steps

1/3

Patron Continuous

A La Carte
Breakfast
Lunch
SoupSldSnd

Cashier Actions

To Go Bkft 6-12

Juice

Queued: 0

Barry Ludwig

Grade 07 PIN 1035

\$50.00 Clear Patron

Search

History

+	Juice	Qty: 1	\$0.75	✕
+	To Go Bkft 6-12	Qty: 1	\$2.40	✕

Total \$3.15
✕

Remaining \$46.85

2

Adult Breakfast

Account

Enter a Cash Payment

Quick Steps

1. After selecting the purchasable items, tap the **Cash** button at the bottom of the screen.
Result: The Payment panel displays.

2. Enter the **Amount**.

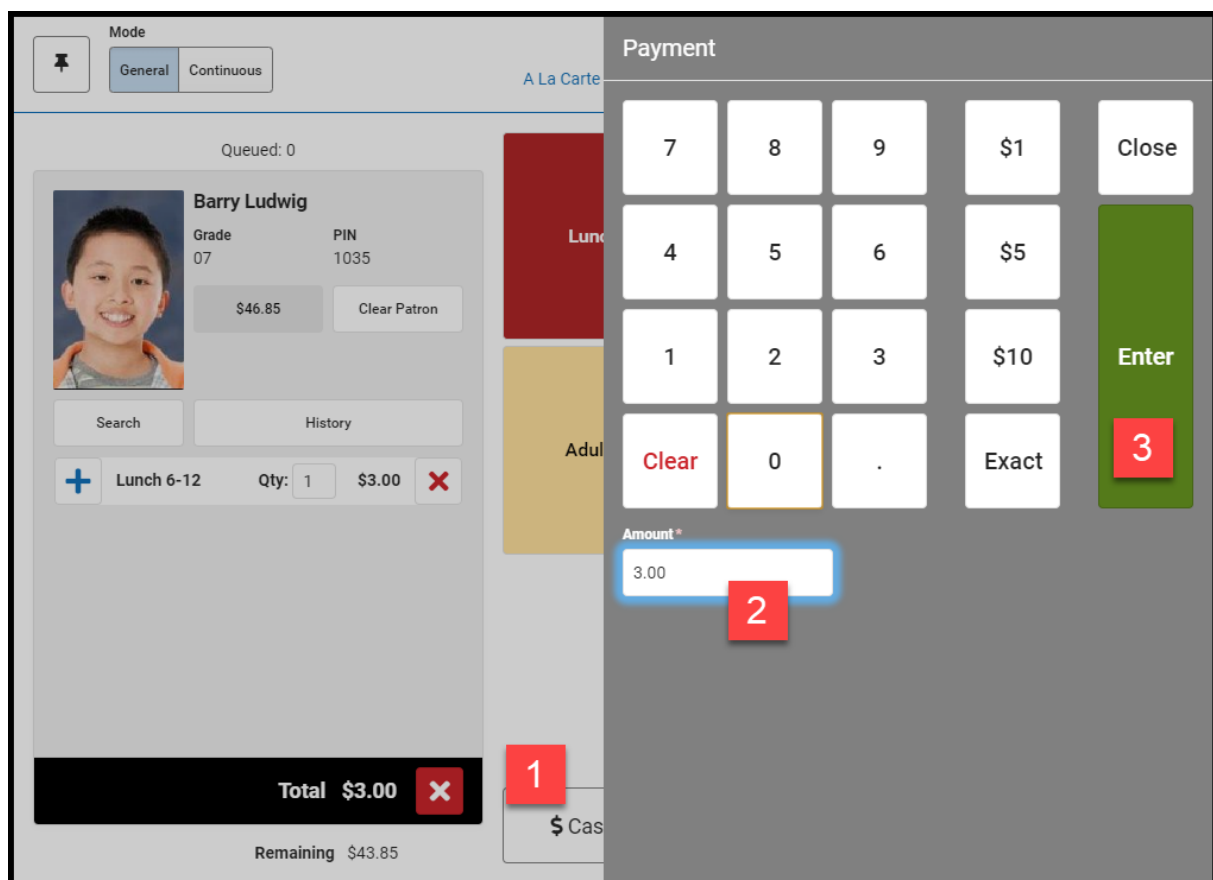
Tip: Tap **Exact** if the payment is exactly the amount due. Use the \$1, \$5, and \$10 buttons to quickly add to the payment.

3. Tap **Enter**.

Result

- If the cash was for the exact amount due, the transaction is complete.
- If there is change due a **Change Due** message displays. Tap **Return** to give cash to the patron OR tap **Deposit** to deposit the change into the patron's account. The option to deposit change may not be available on your terminal. See your Food Service Director/Manager if you have questions about your terminal's options.

Example



Enter a Check Payment

Quick Steps

1. After selecting the purchasable items, tap the **Check** button at the bottom of the screen.
Result: The Payment panel displays.

2. Enter the **Amount**.

Tip: Tap **Exact** if the check payment is exactly the amount due. Use the \$1, \$5, and \$10 buttons to quickly add to the payment.

3. Enter the **Check #**.

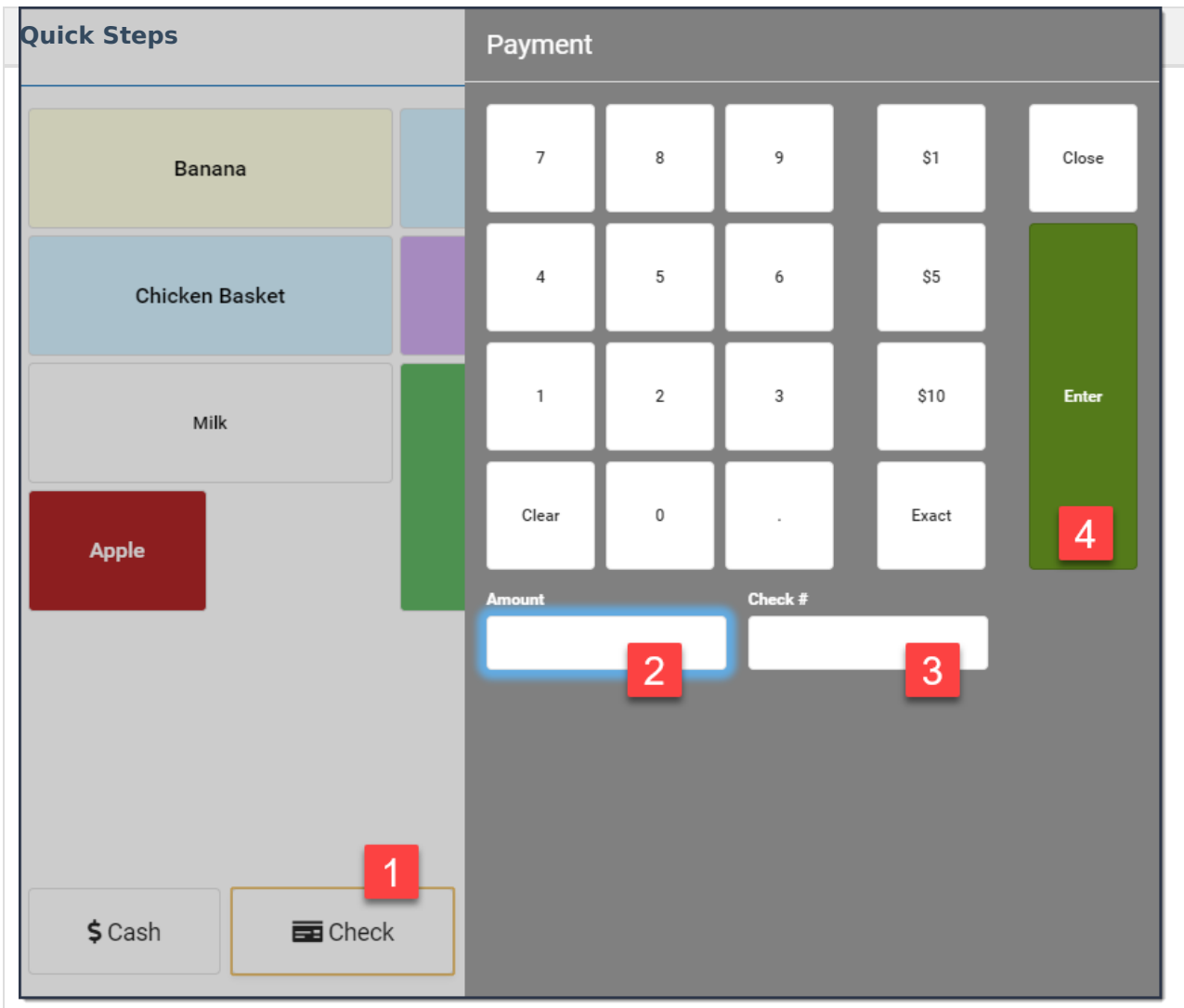
4. Tap **Enter**.

Result

- If the check was for the exact amount due, the transaction is complete.
- If there is change due a **Change Due** message displays. Tap **Deposit** to deposit the change into the patron's account.

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.

Example



Enter a Combination Payment

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

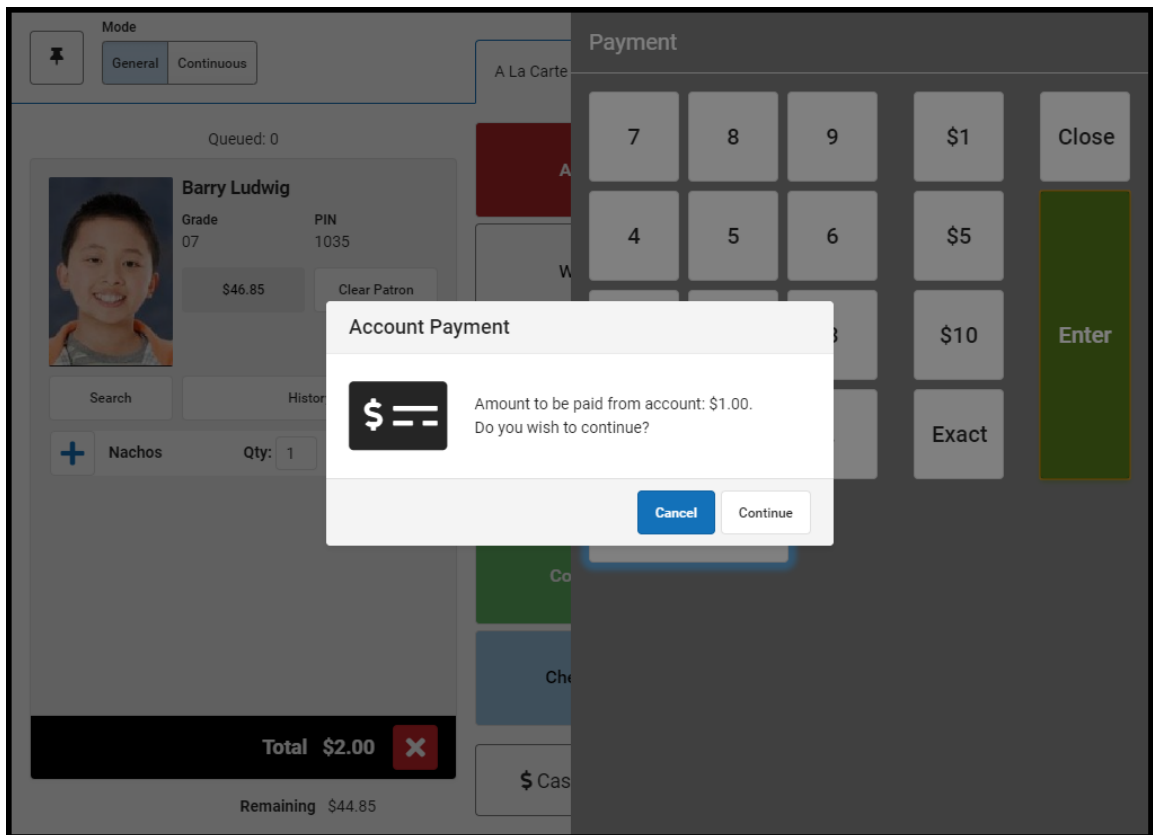
It is not possible to pay with cash AND check in the same transaction.

Quick Steps

1. Tap the **Cash OR Check** button.
Result: The Payment panel displays.
2. Complete one of the following options.

Option	Description
Cash	Enter the Amount .
Check	Enter the Amount and the Check # .

3. Tap **Enter**.
Result: A message displays stating how much will be paid from the student's account.



4. Click **Continue**.
Result: The payment is complete.

Void a Purchase

With the assistance of a head cashier or other administrator who has been assigned a Manager PIN, transactions can be made void at the terminal after a purchase is made.

A transaction can only be voided on the same terminal and on the same day as the transaction occurred.

Quick Steps

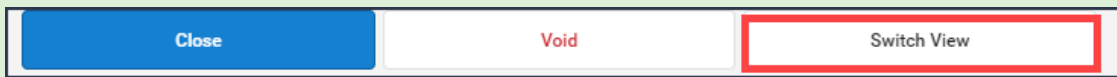
1. Tap the **History** button.

Result: The Daily Terminal Transactions panel displays.

Daily Terminal Transactions		May 27, 2021					
Terminal CM							
Time ↓	Name	Qty	Items	Unit Price	Total	Reimbursable	Status
12:12 PM	Ryan Backstrom	1	Juice	\$0.75	\$1.25		
		1	Banana	\$0.50			
12:11 PM	Geoff Dannock	1	Lunch 6-12	\$2.50	\$2.50	✓	
12:11 PM	Rosie Castell	1	Lunch 6-12	\$2.50	\$2.75	✓	
		1	Milk	\$0.25			
11:53 AM	Ryan Backstrom	1	Lunch 6-12	\$2.50	\$2.50	✓	

Buttons: Close, Void, Switch View

Tip: Click the Switch View button if you are only seeing one patron's purchases and you need to see all transactions or vice versa.



2. Select the transaction you want to void then tap **Void**.

Result: The Manager Login panel displays.

Daily Terminal Transactions		May 27, 2021						Manager Login			
Terminal CM											
Time ↓	Name	Qty	Items	Un							
12:12 PM	Ryan Backstrom	1	Juice	\$0	\$0						
		1	Banana	\$0							
12:11 PM	Geoff Dannock	1	Lunch 6-12	\$2	\$2						
12:11 PM	Rosie Castell	1	Lunch 6-12	\$2	\$0						
		1	Milk	\$0							
11:53 AM	Ryan Backstrom	1	Lunch 6-12	\$2	\$2						

Buttons: Close, Void

Manager Login Panel: 7, 8, 9, Close, 4, 5, 6, Enter, 1, 2, 3, Clear, 0, [Input Field]

3. Have the head cashier or other administrator who has been assigned a Manager PIN enter

Quick Steps their PIN and tap **Enter**.

Result: The Daily Terminal Transactions panel displays again and the transaction's status changes to **Voided**.

Daily Terminal Transactions May 27, 2021							
Terminal CM							
Time ↓	Name	Qty	Items	Unit Price	Total	Reimbursable	Status
12:12 PM	Ryan Backstrom	1	Juice	\$0.75	\$1.25		VOIDED
		1	Banana	\$0.50			
12:11 PM	Geoff Dannock	1	Lunch 6-12	\$2.50	\$2.50	✓	
12:11 PM	Rosie Castell	1	Lunch 6-12	\$2.50	\$2.75	✓	
		1	Milk	\$0.25			
11:53 AM	Ryan Backstrom	1	Lunch 6-12	\$2.50	\$2.50	✓	

Deposit to an Account

Use the following steps to deposit money into an account. To use this method, do **not** select items for purchase. The option to deposit money may not be available on your terminal. See your Food Service Director/Manager if you have questions about your terminal's options.

Quick Steps

1. Tap the **Cash OR Check** button.
Result: The Deposit panel displays.
2. Enter the **Amount** to deposit and the **Check #** if depositing a check.
3. Tap **Enter**.
Result: A confirmation message displays.
4. Tap **OK**.

Example

Quick Steps

Set up and Use Continuous Serve

Continuous Serve is used when all patrons are purchasing the same menu item(s). As a best practice, set up Continuous Serve before you serve your first patron.

Set up Continuous Serve

To set up Continuous Serve, use the instructions for pinning purchasable items found in the **Pin Purchasable Items** section of this article. Pinned items are automatically charged to the patron's account while you are using Continuous Mode. Be sure to choose all of the items that ALL patrons will be purchasing.

Use Continuous Serve

Set up Continuous Serve

- Patrons enter their PINs as they go through the line. You can also search for patrons or scan patron bar codes to select the patron for processing. You do not need to select purchasable items each time.
- As soon as a patron loads in Continuous Serve, they are charged for the items in the transaction. Since they've already been charged for the items, the patron clears automatically after a short period of time.

If you need to add or remove items for a single patron's transaction, switch to **General Mode** *before* the patron loads.

Example

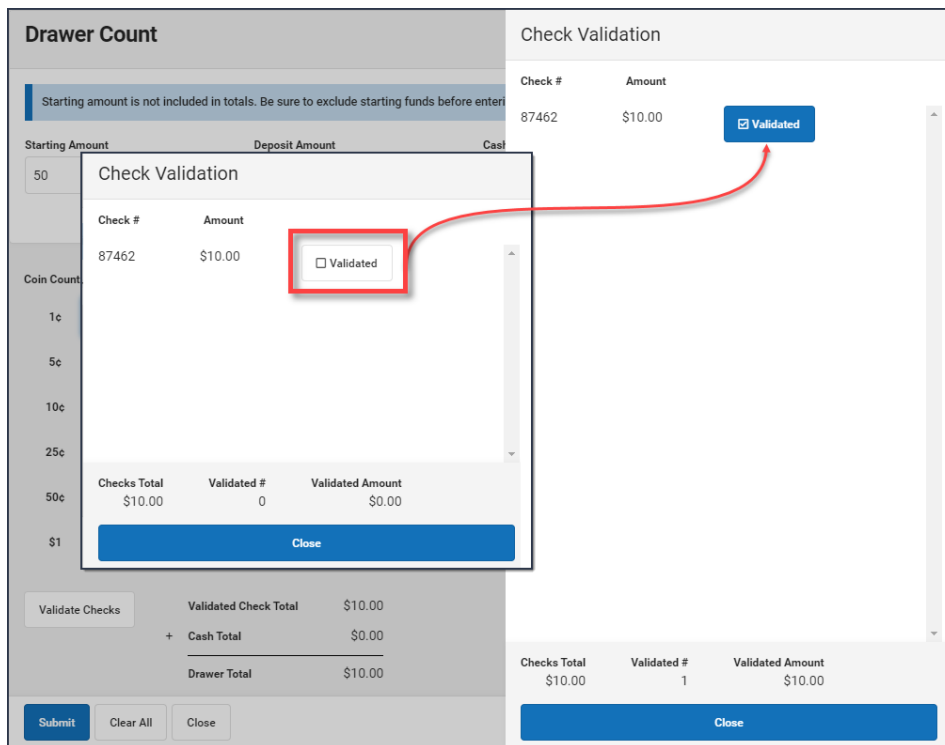
The screenshot shows the Infinite Campus Point of Sale interface. At the top, the title bar reads "Infinite Campus - Point of Sale". Below this, there is a "Mode" section with two buttons: "General" and "Continuous". The "Continuous" button is highlighted in blue, and a red arrow points to it from the right. To the right of the mode buttons is a "Lunch" button. Below the mode buttons, there are two columns of item buttons. The left column has "Lunch 6-12" (green) and "Milk" (white). The right column has "Banana" (yellow), "Burger Basket" (light blue), "Chicken Basket" (light blue), "Cookies" (purple), "Milk" (grey with a pin icon), and "Lunch 6-12" (grey with a pin icon). Below the item buttons, there is a "Queued: 0" label. In the center, there is a patron card for "Rosie Castell", Grade 07, with a photo and a green "\$0.75" button. To the right of the patron card is a "Clear Patron" button. Below the patron card are "Search" and "History" buttons. At the bottom of the interface, there is a black bar with "Total \$2.75" and a red "X" button.

Drawer Count

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

Quick Steps

1. Tap **Cashier Actions** in the upper right-hand corner.
Result: The Cashier Actions panel displays.
2. Tap **Logout**.
Result: The **Drawer Count** screen displays.
The amount displayed in the **Starting Amount** field indicates the initial cash amount that was in the drawer. The **Deposit Amount** indicates how much was taken in during the serving period.
3. Tap **Validate Checks** if you accepted checks during the serving period.
Result: The Check Validation panel displays. Mark the **Validated** checkbox after ensuring all check information is accurate then tap **Close**.
▶ [Click here to expand...](#)



4. Enter the quantity of each cash denomination in the appropriate field (e.g., 1¢, 50¢, \$20, \$100).
5. Tap **Submit**.
Result: Depending on your terminal's configuration, a message may display to notify you whether your checks and drawer count are balanced. This message may not be available on your terminal. See your Food Service Director/Manager if you have questions about your terminal's options.
6. Tap **Close** to close the drawer.

Example

Drawer Count

Starting amount is not included in totals. Be sure to exclude starting funds before entering drawer counts.

Starting Amount	Deposit Amount	Cashier
<input type="text" value="50"/>	\$40.40	Smith, Bethany

Coin Count		Bill Count			
1¢	<input type="text"/>	\$0.00	\$1	<input type="text"/>	\$0.00
5¢	<input type="text"/>	\$0.00	\$5	<input type="text"/>	\$0.00
10¢	<input type="text"/>	\$0.00	\$10	<input type="text"/>	\$0.00
25¢	<input type="text"/>	\$0.00	\$20	<input type="text"/>	\$0.00
50¢	<input type="text"/>	\$0.00	\$50	<input type="text"/>	\$0.00
\$1	<input type="text"/>	\$0.00	\$100	<input type="text"/>	\$0.00

7	8	9	Enter
4	5	6	
1	2	3	
Clear	0		

<input type="button" value="Validate Checks"/>	Validated Check Total	\$0.00
	+ Cash Total	\$0.00
	Drawer Total	\$0.00

View Daily Terminal Transactions

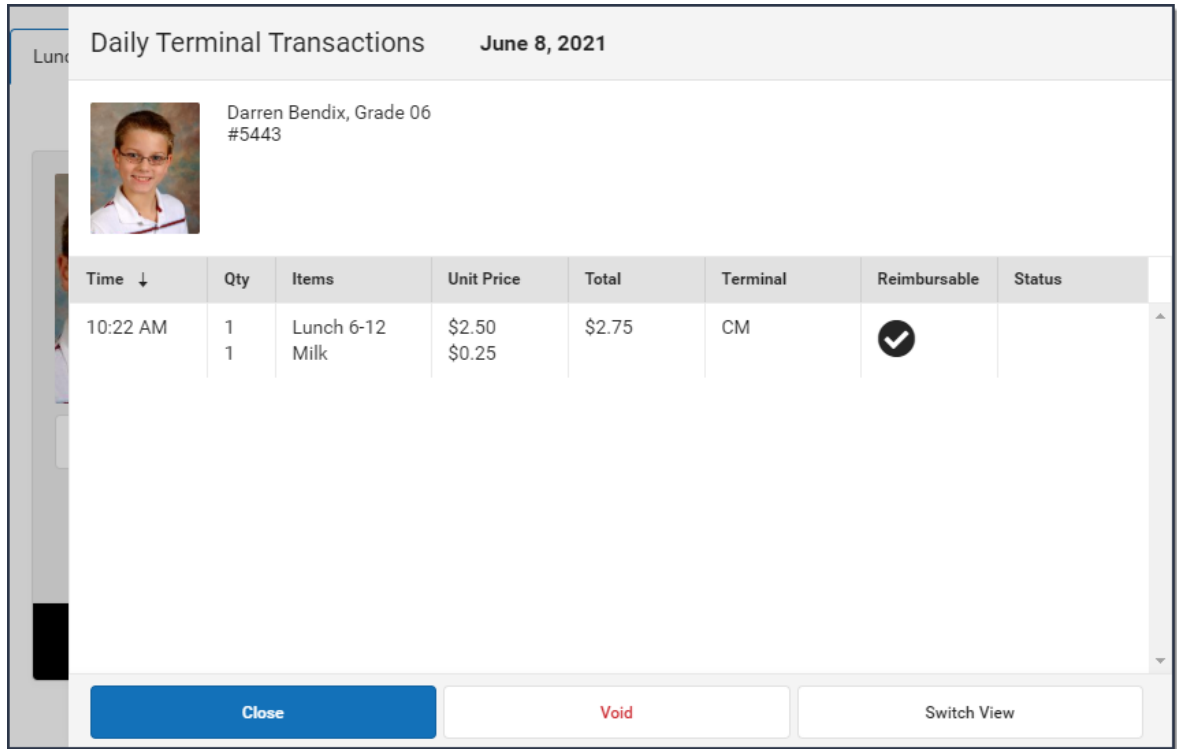
There are two options for viewing a single day's transactions on one terminal:

- You can view transactions for one student.
or
- You can view all transactions for all students.

Quick Steps - View transactions for one student

1. Search for the patron if they are not already displayed on the terminal.
2. Tap **History**.

Result: The Daily Terminal Transactions panel displays the one student's transactions. From here, you can void transactions or switch the view to view all transactions for all students.



Quick Steps - View all transactions for all students.

Quick Steps - View transactions for one student

1. Tap **Clear Patron** if a patron is displaying on the terminal.
2. Tap **History**.

Result: The Daily Terminal Transactions panel displays transactions for all students that were processed on this terminal. From here, you can void transactions or switch the view to view all transactions for a single student. To switch the view, select a student's transaction and tap **Switch View**.

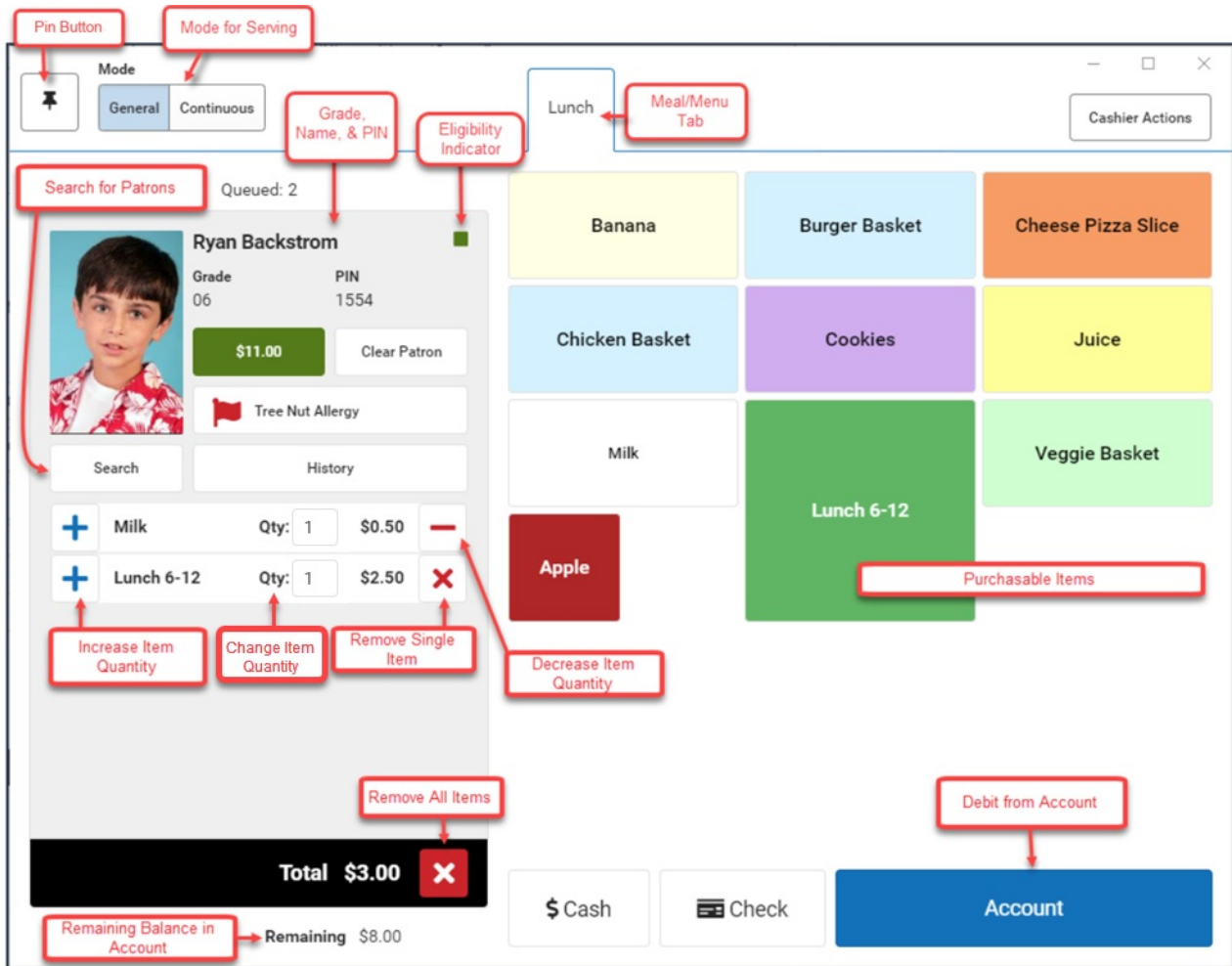
Lunch Daily Terminal Transactions June 8, 2021

Terminal CM

Time ↓	Name	Qty	Items	Unit Price	Total	Reimbursable	Status
10:23 AM	Rosie Castell	1	Lunch 6-12	\$2.50	\$2.75	✓	
		1	Milk	\$0.25			
10:22 AM	Darren Bendix	1	Lunch 6-12	\$2.50	\$2.75	✓	
		1	Milk	\$0.25			
10:22 AM	Nicky Bausch	1	Lunch 6-12	\$0.40	\$0.65	✓	
		1	Milk	\$0.25			
10:22 AM	Ryan Backstrom	1	Lunch 6-12	\$2.50	\$2.75	✓	
		1	Milk	\$0.25			
10:21 AM	Charla Abraham	1	Lunch 6-12	\$2.50	\$2.75	✓	
		1	Milk	\$0.25			
10:20 AM	Caitlin M Garbo	1	Lunch 6-12	\$2.50	\$5.25	✓	
		1	Milk	\$0.25			
		1	Chicken Basket	\$2.50			
10:20 AM	Andrew Kruc	1	Lunch 6-12	\$2.50	\$2.75	✓	
		1	Milk	\$0.25			
10:20 AM	Adam Yousef	1	Lunch 6-12	\$2.50	\$2.75	✓	
		1	Milk	\$0.25			

Close Void Switch View

Overview of the Terminal Layout



Button/Field Area	Description
Pin Button	This button is used to turn the pinning mode on and off. Pinning mode allows you to pin purchasable items .
Mode	Two modes are available for processing meal transactions. <ul style="list-style-type: none"> • General - Use when several menu options are offered to patrons; e.g., patron has choice of Lunch and/or Ala Carte items. • Continuous - Use when there is only ONE menu option offered to all patrons; e.g., when the lunch option for all patrons is the same.
Meal/Menu Tabs	Each tab contains the menu needed for a specific meal/serviceable time.
Patron Picture	The picture of the patron being served.
Grade & Name	Indicates the patron's name and current grade.

Button/Field Area	Description
Eligibility Indicator	Indicates the patron is eligible for Free or Reduced meals. The following describes each color: Gray X - Adult/Staff Member Green square - Paid Student Yellow triangle - Reduced Student Red circle- Free Student
Allergy Alert	Indicates the patron's allergy(s). Description of allergy visible. If description is more than will fit on button, the description will end with “...” indicating there is more information. Clicking on the Allergy alert button will open a side panel with full allergy description.
Account Balance	Indicates the patron's current account balance. Background colors defaults to green, but changes if account is low - yellow, negative - red. Low balance threshold comes from patron account detail, Reminder value. If patron does not have a reminder amount, balance will not display with a low balance color.
Search	Opens a side panel allowing cashier to search for a patron by last name, first name, and grade
History	Opens a slide out with a list of all patron's transactions for the current terminal for the current date. Can void transaction from this slide out.
Item Description	Describes each item added to the patron's order. Once the current transaction is completed, the item section will be cleared for next transaction.
Qty	Editable quantity that can be changed using the pop-up key pad or by tapping the increase/decrease buttons.
Increase quantity	Clicking on the plus icon will increase the quantity of an item in the transaction by 1. If item quantity is greater than 1, the Qty value will show in the item description line.
Decrease quantity	If item quantity is greater than 1, the X (delete) icon on the item transaction will change to a “-“. Clicking on the “-“ will decrease the quantity of an item in the transaction by one. Once the quantity of the item gets to 1, the “-“ will change to a delete icon.
Item Total	Item price X quantity of item in transaction
Transaction Total	Sum of all item totals in transaction
Remaining Balance	Patron account balance - Transaction total

Button/Field Area	Description
Delete Item	If the delete icon is selected for an item in the transaction, that item will be removed from the transaction.
Clear Transaction	If the Clear transaction icon is selected, all of the items in the transaction list will be removed
Account (Debit from Account)	Charges (debits) the patron's order to their account.
Purchasable Items for Selected Meal/Menu Tab	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 transaction has been paid for.
Cashier Actions	This button displays the Cashier Actions panel where cashiers can complete a drawer count, view the Meals Served and the Daily Transaction Count, and log out of the terminal