Cashier Cheat Sheet

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What can I do?	What do I need to know?
- 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	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.
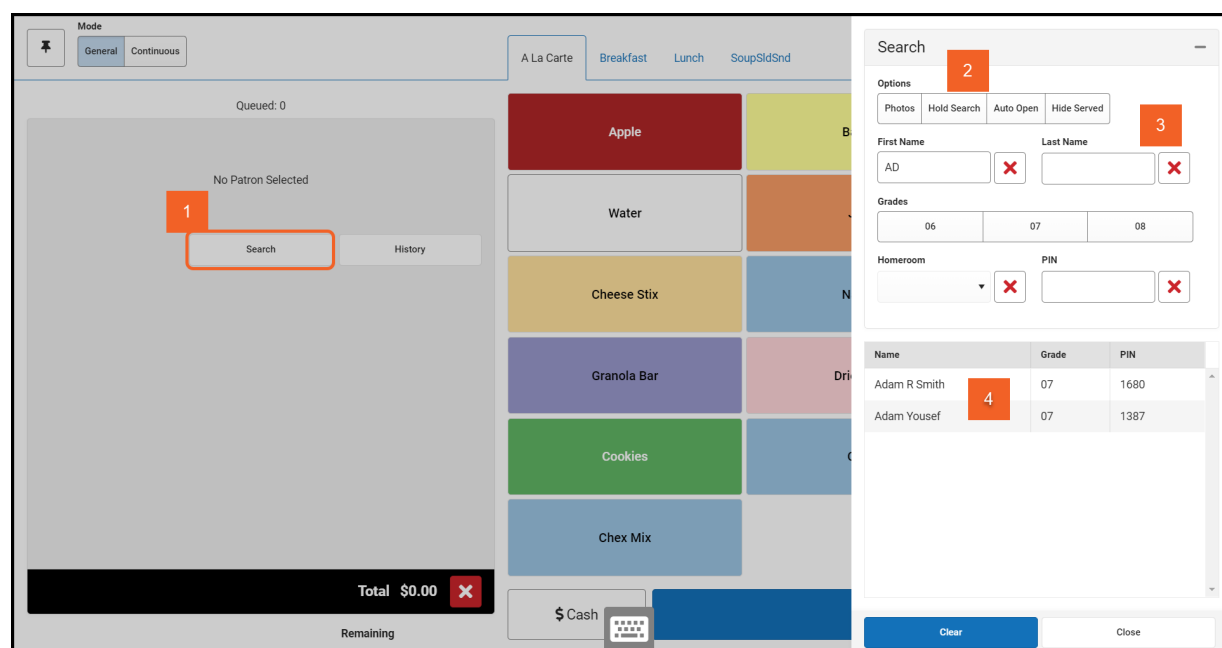   **Result**: The patron displays on the terminal.

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

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

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.
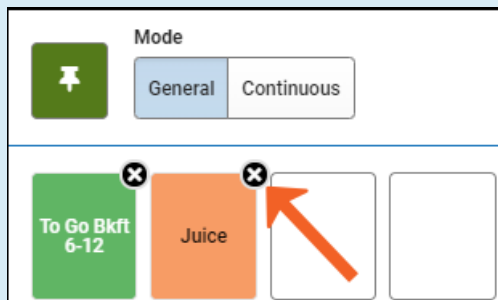
Example

Quick Steps

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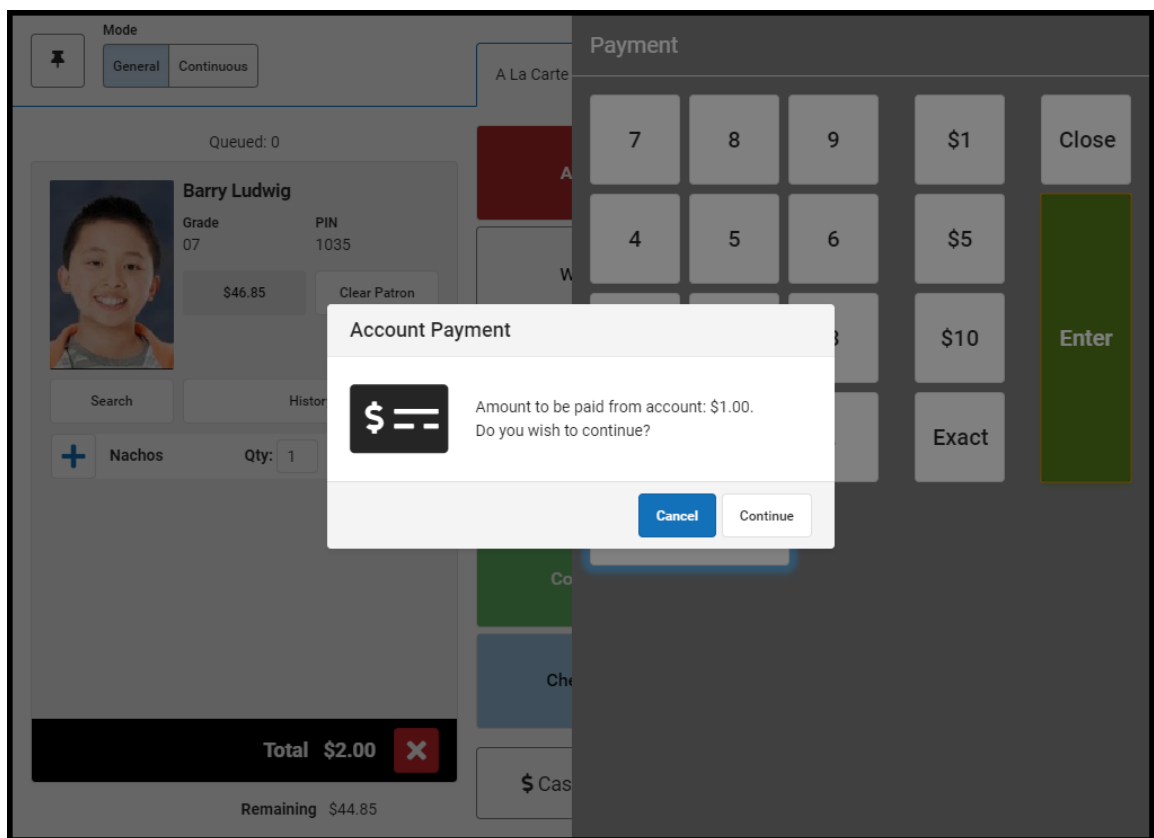
4. Click **Continue**.
   Result: The payment is complete.

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.

> **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.

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

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 1	Juice Banana	$0.75 $0.50	$1.25		VOIDED	
12:11 PM	Geoff Dannock	1	Lunch 6-12	$2.50	$2.50	✔		
12:11 PM	Rosie Castell	1 1	Lunch 6-12 Milk	$2.50 $0.25	$2.75	✔		
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
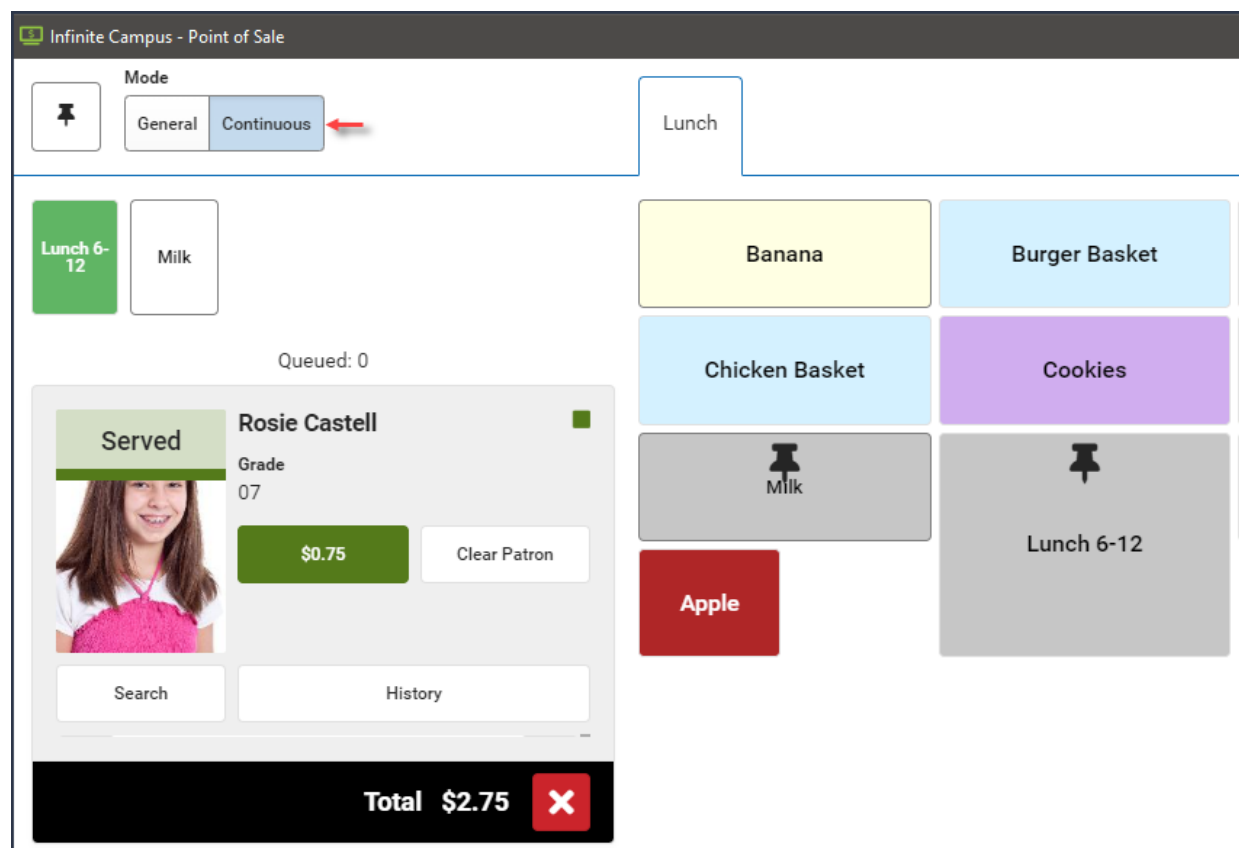
Drawer Count

The Drawer Count should be performed at the end of each serving period. Starting cash is included in the Drawer Count, and it must be counted at the end of the serving period, even if no cash or checks were received.

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
50	$40.40	Smith, Bethany

Coin Count

1¢		$0.00
5¢		$0.00
10¢		$0.00
25¢		$0.00
50¢		$0.00
$1		$0.00

Bill Count

$1		$0.00
$5		$0.00
$10		$0.00
$20		$0.00
$50		$0.00
$100		$0.00

Validate Checks

	Validated Check Total	$0.00
+	Cash Total	$0.00
	Drawer Total	$0.00

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

Submit   Clear All   Close

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.

Transactions from other locations, including online payments by parents to add lunch money, can be viewed on the patron's History. Transactions processed using Quick Serve appear with a Quick Serve label, and transactions entered elsewhere, such as Food Service Deposit, Food Service Journal, or online payments (such as parents adding lunch money), will be labeled "Journal."

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**.

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. • **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