

Cheat Sheet (Food Service)


Last Modified on 10/13/2025 12:40 pm CDT

The instructions in this cheat sheet apply to the New Look look of Campus.

Deposit (Household)

Quick Steps

1. Go to *Census > Households > Household Food Service Deposit*.
2. Click Open Household Search.
3. Enter and then select the name of the Household.
4. Click the **New Deposit** button.
5. In the Member field, select **All** to split the payment evenly or select a household member.
6. Enter the **Payment Amount**, then complete one of the following tasks
 - To split the payment evenly between patrons, click **Fill**.
 - If there is a student in the household that is not receiving part of the deposit or the deposit is split unevenly, manually enter the amounts.
Do NOT Click FILL. The amount entered for each patron must equal the amount entered in the Payment Amount field.
7. Select the **Payment Method** and **Payment Location**.
8. Click **Save**.

| Step | Action | Example |
|-----------------------|---|--|
| Detailed Steps | | |
| 1 | Go to <i>Census > Households > Household Food Service Deposit</i> . |  <p>Households</p> <ul style="list-style-type: none"> Add Household Census Wizard Household Information Household Addresses Household Fees Household Food Service Deposit Household Members Household Payments |

| Step | Action | Example | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---|---|--|--|--|--|-----------|-----------|---------|--------|------|--|---------|-------|---------------------------------------|--|--|--|-----------|-----------|---------|--------|-----|--|---------|-------|
| 2 & 3 | Enter and then select the name of the Household. | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 | Click the New Deposit button. | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 | Select All to split the payment evenly or select a household member. | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5 | <p>Enter the Payment Amount, then complete one of the following tasks</p> <ul style="list-style-type: none"> To split the payment evenly between patrons, click Fill. If there is a student in the household that is not receiving part of the deposit or the deposit is split unevenly, manually enter the amounts. Do NOT Click FILL. <p>The amount entered for each patron must equal the amount entered in the Payment Amount field.</p> | <p>OR</p> <table border="1"> <thead> <tr> <th colspan="4">Deposit Distribution For Abegg, Colton</th> </tr> <tr> <th>Account #</th> <th>Deposit %</th> <th>Balance</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>5753</td> <td></td> <td>\$-2.50</td> <td>30.00</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="4">Deposit Distribution For Abegg, Ryo W</th> </tr> <tr> <th>Account #</th> <th>Deposit %</th> <th>Balance</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>607</td> <td></td> <td>\$37.00</td> <td>70.00</td> </tr> </tbody> </table> | Deposit Distribution For Abegg, Colton | | | | Account # | Deposit % | Balance | Amount | 5753 | | \$-2.50 | 30.00 | Deposit Distribution For Abegg, Ryo W | | | | Account # | Deposit % | Balance | Amount | 607 | | \$37.00 | 70.00 |
| Deposit Distribution For Abegg, Colton | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Account # | Deposit % | Balance | Amount | | | | | | | | | | | | | | | | | | | | | | | |
| 5753 | | \$-2.50 | 30.00 | | | | | | | | | | | | | | | | | | | | | | | |
| Deposit Distribution For Abegg, Ryo W | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Account # | Deposit % | Balance | Amount | | | | | | | | | | | | | | | | | | | | | | | |
| 607 | | \$37.00 | 70.00 | | | | | | | | | | | | | | | | | | | | | | | |

| Step | Action | Example |
|------|--|---------|
| 6 | Select the Payment Method and Payment Location . | |
| 7 | Click Save . | |

Deposit (Single Patron)

| Quick Steps | Example |
|---|---------|
| <ol style="list-style-type: none"> Go to <i>Census > People > Food Service Deposit</i>. Click Open Person Search. If the search has already been used, it will automatically open. Enter and then select the name of the student. Click New Deposit. Enter the Amount. Select the Payment Method and Payment Location. Click Save. | |

View One Patron's Transactions

| Quick Steps | Example |
|--|---------|
| <ol style="list-style-type: none"> Go to <i>Food Service > Information > Account Journal</i>. Click Open POS Account Search. If the search has already been used, it will automatically open. Enter and then select the name of the student. If you don't know the student's last name, enter a comma, space, and then the first name. Click the Account. The Account Journal screen will appear with the Transaction List. | |

New Transaction

Quick Steps

1. Go to *Food Service > Information > Account Journal*.
2. Click **Open POS Account Search**. If the search has already been used, it will automatically open.
3. Enter and then select the name of the student. If you don't know the student's last name, enter a comma, space, and then the first name.
4. Click the Account.
5. Click **New Transaction**.
6. Fill in the required fields within Transaction Detail.
7. Click **Save**.

Example

| Entry Type | Purchasable Item | Quantity | Amount |
|---|------------------|----------|--------|
| <input checked="" type="radio"/> Debit <input type="radio"/> Credit | | | |
| <input checked="" type="radio"/> Debit <input type="radio"/> Credit | | | |
| <input checked="" type="radio"/> Debit <input type="radio"/> Credit | | | |
| <input checked="" type="radio"/> Debit <input type="radio"/> Credit | | | |

Void Transactions

Quick Steps

1. Go to *Food Service > Information > Account Journal*.
2. Click **Open POS Account Search**. If the search has already been used, it will automatically open.
3. Enter and then select the name of the student. If you don't know the student's last name, enter a comma, space, and then the first name.
4. Click the Account.
5. Click the transaction you want to void. You must select the transaction. After you select the transaction, the **Void TX** button displays.
6. Click **Save**.

Example

| Post | TX | Description | Patron | # | Debit | Credit | Run Balance |
|------------|------------|------------------|-------------|---|----------|--------|-------------|
| 8/27/2024 | 8/27/2024 | Starting Balance | | 1 | \$104.30 | | |
| 09/26/2024 | 09/26/2024 | Cash Payment | Dylan Abegg | 1 | \$2.00 | | \$106.30 |

Adjustments

Quick Steps

1. Go to *Food Service > Information > Account Journal*.
2. Click **Open POS Account Search**. If the search has already been used, it will automatically open.
3. Enter and then select the name of the student. If you don't know the student's last name, enter a comma, space, and then the first name.
4. Click the Account.
5. Click **Adjustment**.
6. Fill in the required fields within the Adjustment section.
7. Click **Save**.

Example

Account Journal ☆
Account 5661

New Transaction Print Transfer **Adjustment**

Account # 5661

| Name | Grade | Date of Birth | Student Number |
|--------------------|-------|---------------|----------------|
| Dylan Victor Abegg | 11 | 09/15/2007 | 171900001 |

Journal Period
From: 8/27/2024 To: 09/26/2024 Date Type Post Date

Transaction List

| Post | TX | Description | Patron | # | Debit | Credit | Run Balance |
|------------|------------|------------------|-------------|---|--------|----------|-------------|
| 8/27/2024 | | Starting Balance | | 1 | | \$104.30 | |
| 09/26/2024 | 09/26/2024 | Cash Payment | Dylan Abegg | 1 | \$2.00 | | \$106.30 |

Balance Transfers

Quick Steps

1. Go to *Food Service > Information > Account Journal*.
2. Click **Open POS Account Search**. If the search has already been used, it will automatically open.
3. Enter and then select the name of the student. If you don't know the student's last name, enter a comma, space, and then the first name.
4. Click the Account.
5. Click **Transfer**.
6. Enter the **Account #** of the person receiving the money and the **Amount**.
7. Click **Save**.

Example

Account Journal ☆
Account 5661

New Transaction Print Save Cancel

Transaction List

| Post | TX | Description | Patron | # | Debit | Credit | Run Balance |
|------------|------------|------------------|-------------|---|--------|----------|-------------|
| 8/27/2024 | | Starting Balance | | 1 | | \$104.30 | |
| 09/26/2024 | 09/26/2024 | Cash Payment | Dylan Abegg | 1 | \$2.00 | | \$106.30 |

Net 0 106.30
Current Balance 106.30

Transaction Detail

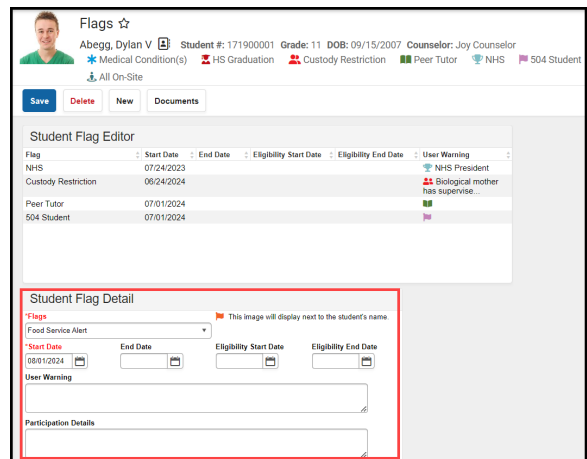
Transfer To Account # Amount

Flags

Quick Steps

1. Go to *Student Information > General > Flags*.
2. Click **Open Student Search**. If the search has already been used, it will automatically open.
3. Enter and then select the name of the student. If you don't know the student's last name, enter a comma, space, and then the first name.
4. Click the student's name.
5. Click **New**.
6. Select **Food Service Alert** in the Flags dropdown list.
7. Enter in a Start Date as 7/1/YYYY or 8/1/YYYY.
8. Enter a **User Warning**. (40 character max)
9. Click **Save**.

Example

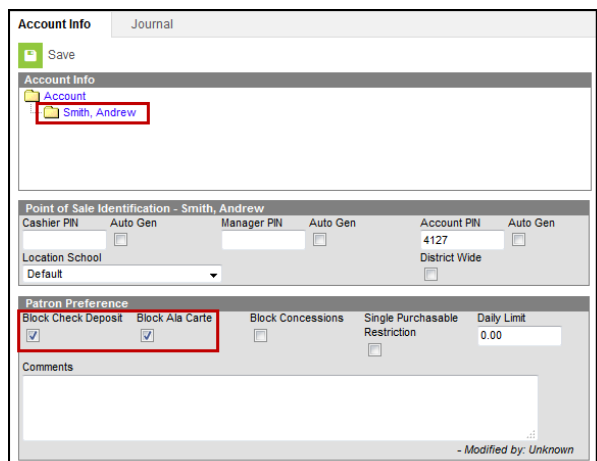


Block Ala Carte Items or Checks on the POS Terminal

Quick Steps

1. Click the **Search** tab.
2. Select **Account**, enter the student's last name, and click **Go**
3. Click on Account # (not name).
4. Click the **Account Info** tab.
5. Select the patron's name.
6. Mark the **Block Check Deposit** and/or **Block Ala Carte** checkboxes.
7. Click **Save**.

Example

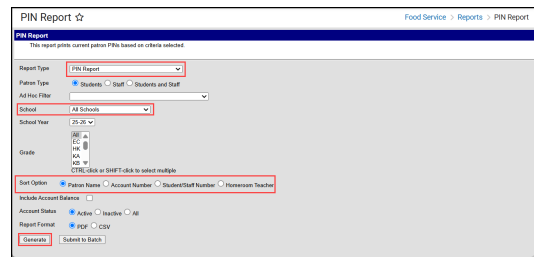


PIN Report

Quick Steps

1. Go to *Food Service > Reports > PIN Report*.
2. Select **PIN Report**.
3. Select your **School**.
4. Select one of the following **Sort Options**.
 - o **Patron Name** - Pick this option if you want a master list.
 - o **Homeroom Teacher** - Pick this option if you have homerooms in your school to get a list sorted by teacher.
5. Click **Generate**.

Example

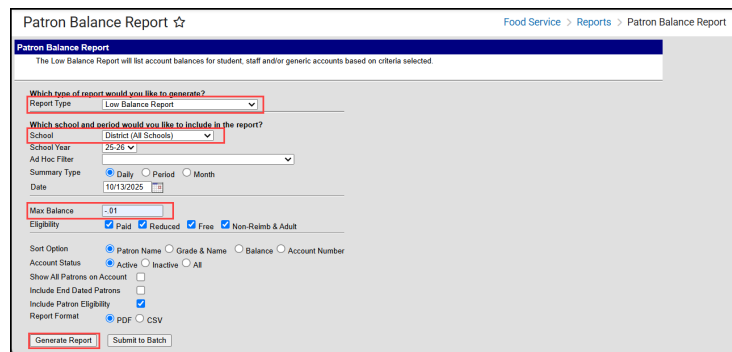


Negative Account Balance Report

Quick Steps

1. Go to *Food Service > Reports > Patron Balance Report*.
2. Select **Low Balance Report**.
3. Select your **School**.
4. Enter **-.01** as the **Max Balance**.
5. Click **Generate Report**.

Example

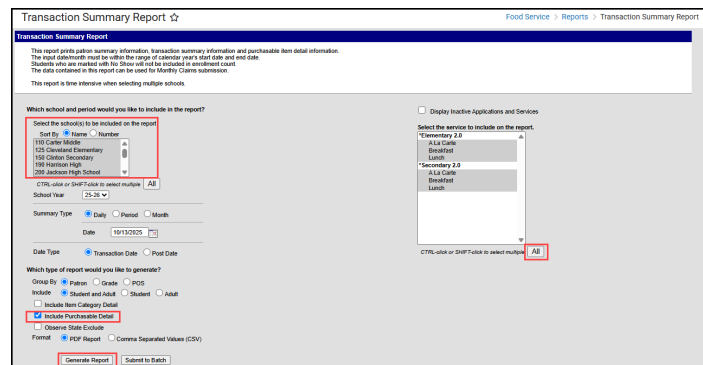


Transaction Summary Report (Production Counts)

Quick Steps

1. Go to *Food Service > Reports > Transaction Summary Report*.
2. Select your **School**.
3. Select **All Services**.
4. Mark the **Include Purchasable Detail** checkbox.
5. Click **Generate Report**.

Example



Transaction Detail Report (Journal of Transactions)

| Quick Steps | Example |
|---|---------|
| <ol style="list-style-type: none"> 1. Go to <i>Food Service > Reports > Transaction Detail Report.</i> 2. Choose the Terminal. 3. Click Export. | |

End of Day Report (Drawer Counts)

| Quick Steps | Example |
|---|---------|
| <ol style="list-style-type: none"> 1. Go to <i>Food Service > Reports > End of Day Report.</i> 2. Select the Terminal on the right side. 3. Mark the Transaction Detail and Cashier Detail checkboxes. 4. Click Generate Report. | |

Deposit Report (View Entered Checks, etc.)

Quick Steps

1. Go to *Food Service > Reports > Deposit Report.*
2. Select your **School**.
3. Clear the **Online Payments** checkbox.
4. Click **Generate Report.**

Example

Deposit Detail Report

This report prints the deposit transaction details from the date selected. There are three sources where deposits are made: online, in office and meal serving line. Deposit location is not used to report POS Deposits. POS Deposits are reported based on the location of the serving line where the deposit was made.

Which school and period would you like to include in the report?
 School: District (All Schools)
 School Year: 25-26

Summary Type: Daily Period Month
 Date: 10/13/2025

Date Type: Transaction Date Post Date

Which type of report would you like to generate?
 Group By: Location Household

Sort Option: Deposit Type Transaction Time
 Site: School Terminal

Payment: Online In Office POS Deposit

Snapshot for Deposit Slip:
 Deposit Slip:
 Deposit Actual Amount: \$

Select an export format.
 Report Format: PDF CSV

Generate Report Submit to Batch

Select Deposit Locations:
 All Locations
 *Default
 Clinton Secondary
 CS-OFFICE
 Mountainview High School
 VBHS Office
 Harrison High
 HHS Office
 HHS-Pay Station1
 HHS-Pay Station2
 Mountainview Elementary
 AES Office
 AES-Drop Box

Which POS would you like to include in the report?
 (CTRL-click or SHIFT-click for multiple selection)
 All POS Terminals
 Jackson High School
 CAFETERIA SERVE
 CLASS SERVE
 SERVER
 Mountainview High School
 CAFETERIA SERVE
 CLASS SERVE
 SERVER
 VBHS-1
 Harrison High
 CAFETERIA SERVE
 CLASS SERVE
 CM
 CM 2.0

Audit Report (When Transactions Look Wrong)

Quick Steps

1. Go to *Food Service > Reports > Audit Report.*
2. Select the Item(s) you want to report.
3. Click **Generate Report.**

Example

Transaction Audit Report

This report is used to audit the possible wrong transactions that occurred within the selected period. There are 2 types of auditing that users can select from the audit type option.
 Auditing by Transaction Quantity: Find the transactions having quantity for one item >= the input quantity.
 Auditing by Cash Sale: Find cash sale transactions having cash amount >= the input amount.

Which school would you like to include in the report?
 School: District (All Schools)
 School Year: 25-26

Summary Type: Daily Period Month
 Date: 10/13/2025

Date Type: Transaction Date Post Date

Audit Type: Quantity Cash Sale
 Min Quantity:

Select an export format.
 Report Format: PDF report Comma Separated Values (CSV)

Generate Report Submit to Batch

Which Purchasable items would you like to include in the report?
 (CTRL-click or SHIFT-click to select multiple)
 All Items
 Adult Breakfast
 Adult Lunch
 Apple
 Banana
 Breakfast 3-5
 Breakfast 6-12
 Breakfast K-2
 Breakfast K-5
 Burger Basket
 CEP BFAST
 Cereal
 Cheese Stix
 Cheer Mix
 Chicken Basket
 Chips
 Cookies
 Dried Fruit

View Student Details (Phone Numbers, etc.)

Quick Steps

1. Go to *Student Information > General > Summary*.
2. Click **Open Student Search**. If the search has already been used, it will automatically open.
3. Enter and then select the name of the student. If you don't know the student's last name, enter a comma, space, and then the first name.
4. Click the student's name.

Example

