

Cheat Sheet (Food Service) (New Look)

Last Modified on 09/26/2024 3:49 pm CDT

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

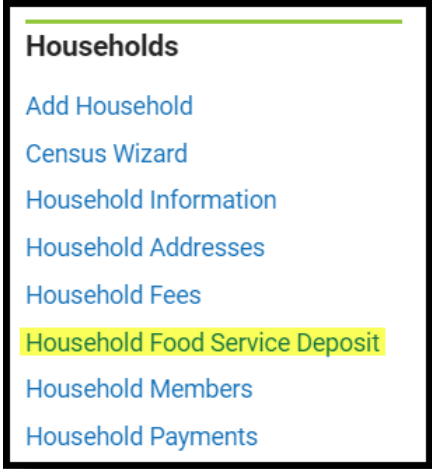
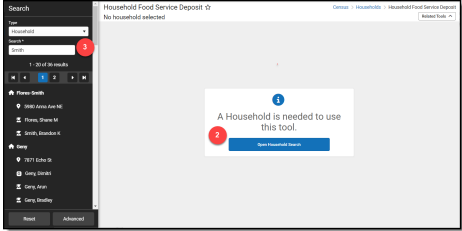
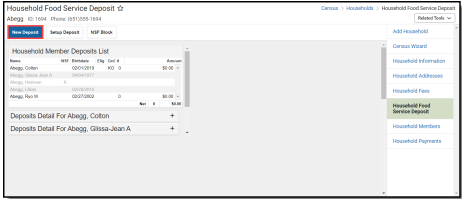
Deposit (Household)

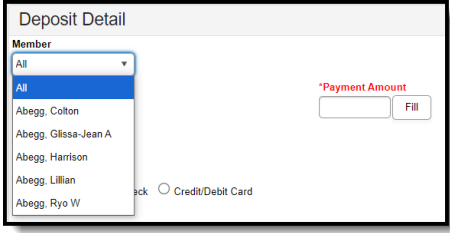
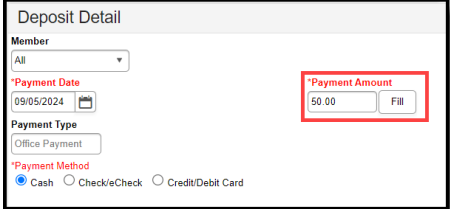
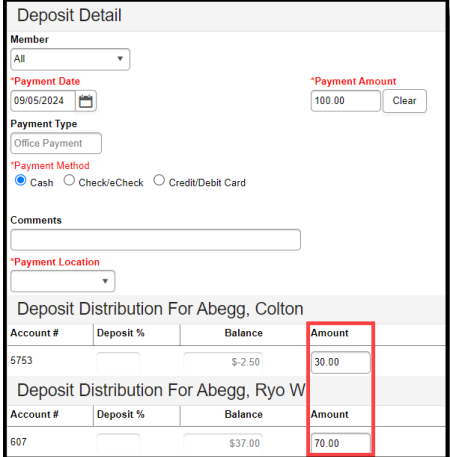
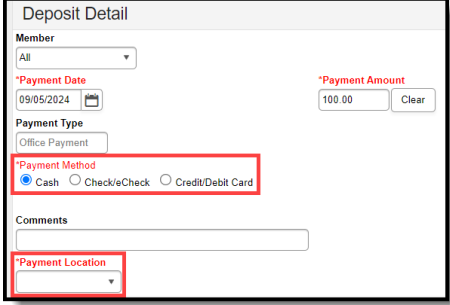
Quick Steps

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
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Detailed Steps

Step	Action	Example
1	Go to <i>Census > Households > Household Food Service Deposit</i> .	 <p>The screenshot shows a sidebar menu titled 'Households'. The items listed are: Add Household, Census Wizard, Household Information, Household Addresses, Household Fees, Household Food Service Deposit (highlighted in yellow), Household Members, and Household Payments.</p>
2 & 3	Enter and then select the name of the Household.	 <p>The screenshot shows the 'Household Food Service Deposit' page. A search bar is visible on the left. A message box in the center states: 'A Household is needed to use this tool.' with a 'Select Household Search' button below it.</p>
3	Click the New Deposit button.	 <p>The screenshot shows the 'Household Food Service Deposit' page with the 'New Deposit' button highlighted in blue. Below the button is a table titled 'Household Member Deposits List' with columns for Name, MF, Balance, Ftg, Cur, and Fee. The table contains two rows of data for Abagay, Colton and Abagay, Glissa-Jean A.</p>

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

Deposit (Single Patron)

Quick Steps

1. Go to *Census > People > Food Service Deposit*.
2. Click **Open Person Search**. If the search has already been used, it will automatically open.
3. Enter and then select the name of the student.
4. Click **New Deposit**.
5. Enter the **Amount**.
6. Select the **Payment Method** and **Payment Location**.
7. Click **Save**.

Example

View One Patron's 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. The Account Journal screen will appear with the Transaction List.

Example

Post	TX	Description	Patron	Debit	Credit	Run Balance
9/12/2024	9/12/2024	Starting Balance			\$104.20	

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
9/27/2024	9/27/2024	Starting Balance				\$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

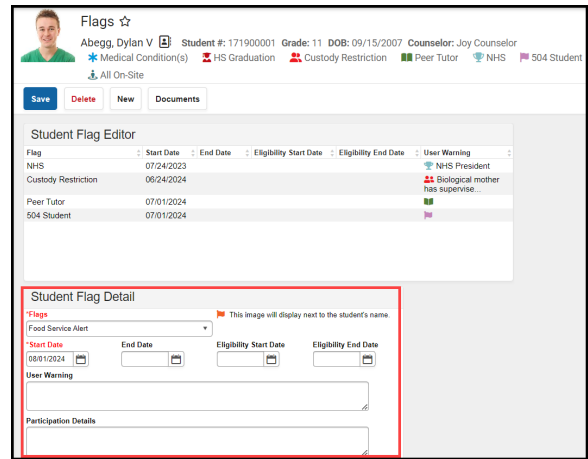
*Transfer To Account # *Amount

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

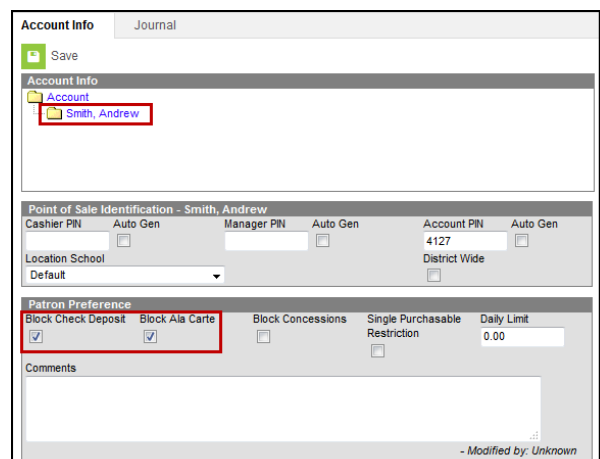


Block Ala Carte Items or Checks on the POS Terminal

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 *Point of Sale > Reports > PIN Report*
2. Select **PIN Report**.
3. Select your **School**.
4. Select one of the following **Sort Options**.
 - **Patron Name** - Pick this option if you want a master list.
 - **Homerroom 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 *Point of Sale > Reports > Patron Balance*.
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)

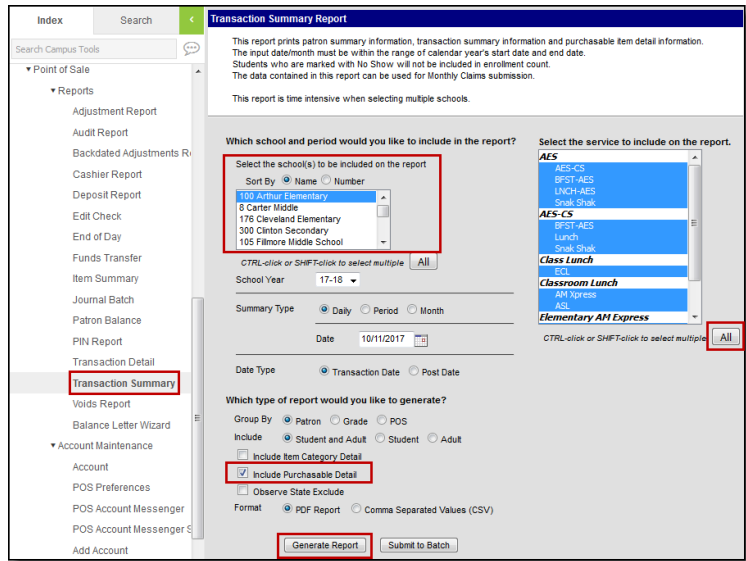
Quick Steps

Example

Quick Steps

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

Example

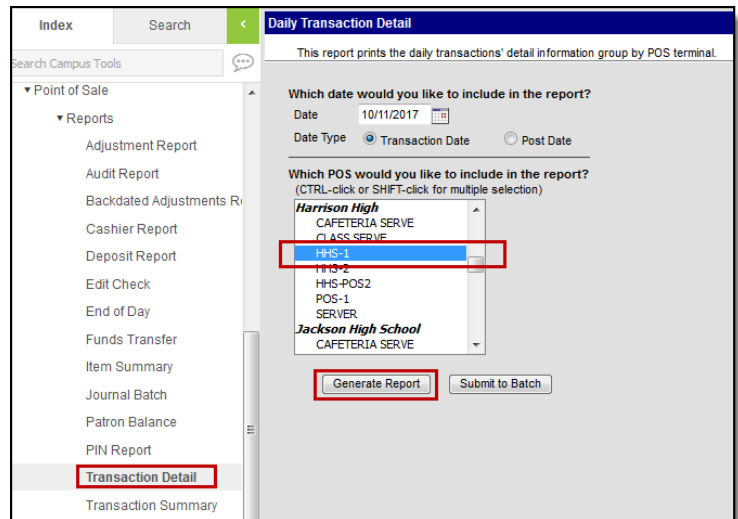


Transaction Detail Report (Journal of Transactions)

Quick Steps

1. Go to *Point of Sale > Reports > Transaction Detail*.
2. Choose the Terminal.
3. Click **Generate Report**.

Example



End of Day Report (Drawer Counts)

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

Deposit Report (View Entered Checks, etc.)

Quick Steps	Example
<ol style="list-style-type: none"> Go to <i>Point of Sale > Reports > Deposit Report</i>. Select your School. Clear the Online Payments checkbox. Click Generate Report. 	

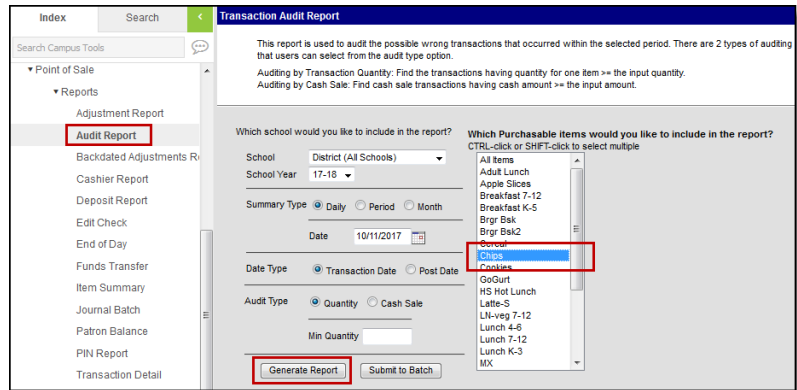
Audit Report (When Transactions Look Wrong)

Quick Steps	Example

Quick Steps

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

Example



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

