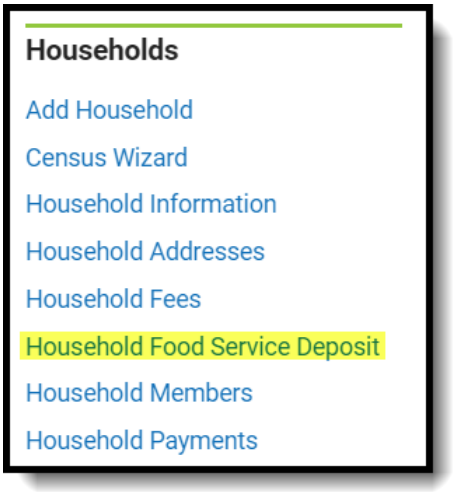
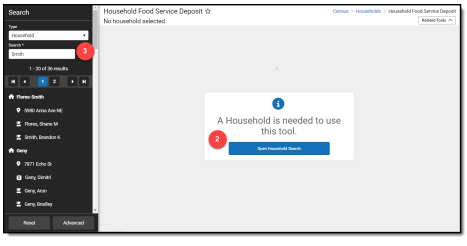
Cheat Sheet (Food Service)

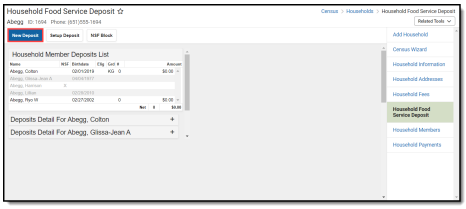
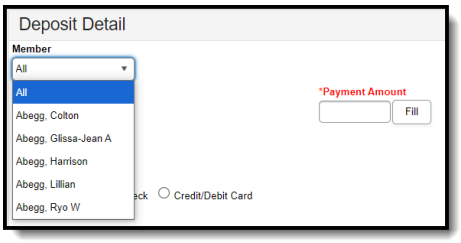
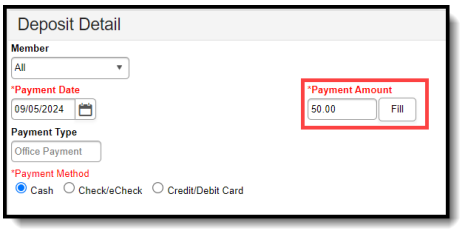
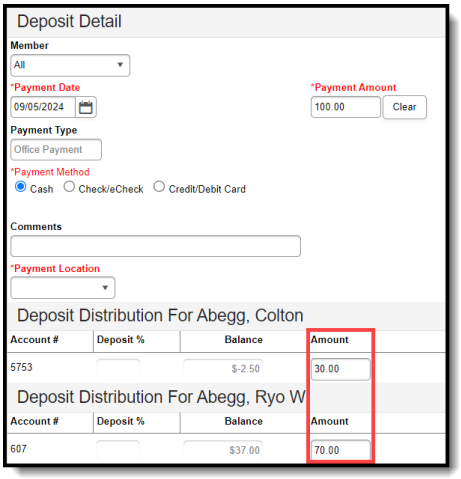
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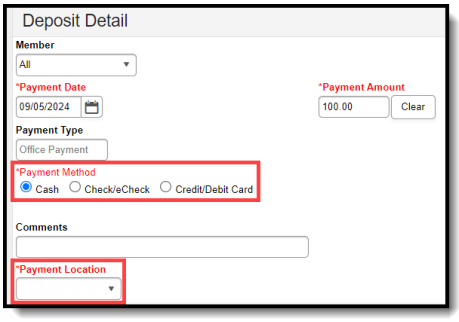
Deposit (Household)

Quick Steps

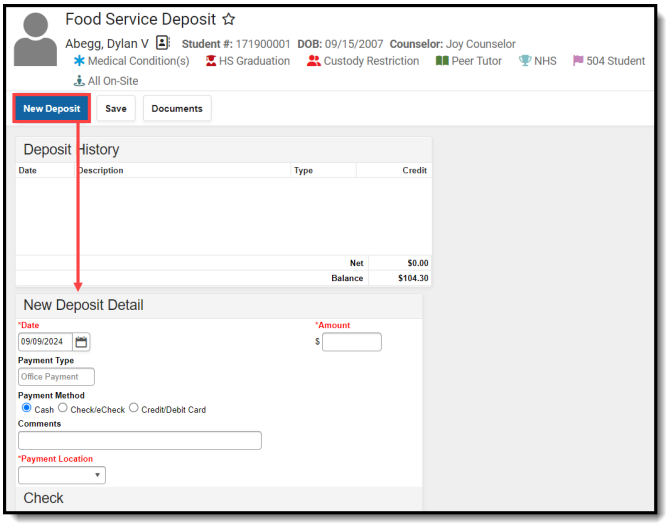
1. Go to *Census > Households > Household Food Service Deposit.*
2. Click Open Household Search.
3. Enter and then select the name of the Household.
4. Click the **New Deposit** button.
5. In the Member field, select **All** to split the payment evenly or select a household member.
6. Enter the **Payment 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 *Census > Households > Household Food Service Deposit.*	
2 & 3	Enter and then select the name of the Household.	

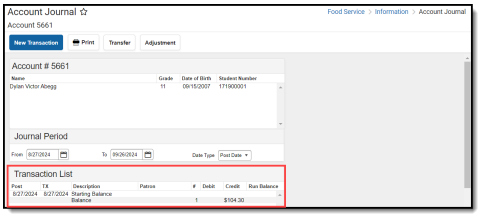
Step	Action	Example
3	Click the **New Deposit** button.	
4	Select **All** to split the payment evenly or select a household member.	
5	Enter the **Payment Amount**, then complete one of the following tasks • To split the payment evenly between patrons, click **Fill**. • If there is a student in the household 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.	 OR 

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

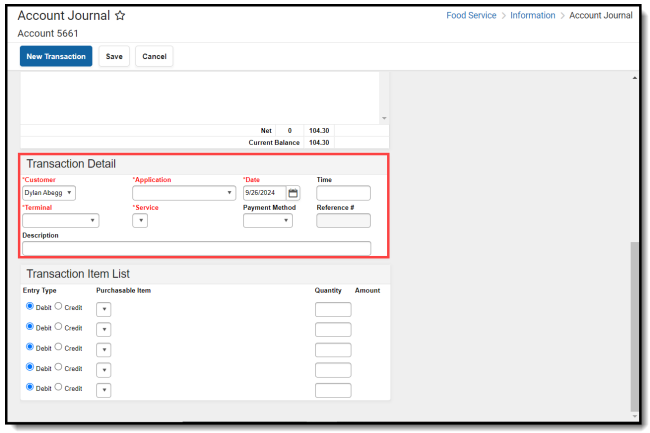
Deposit (Single Patron)

Quick Steps	Example
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**.	

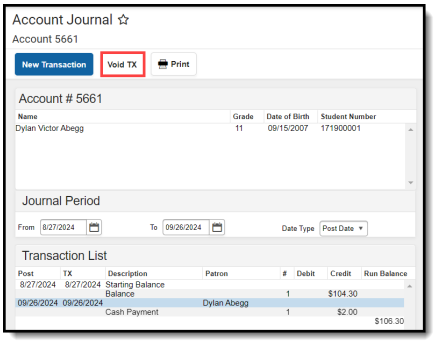
View One Patron's Transactions

Quick Steps	Example
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.	

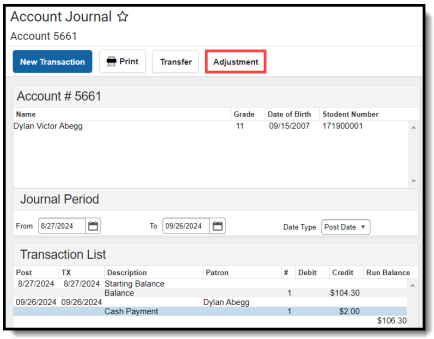
New Transaction

Quick Steps	Example
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**.	

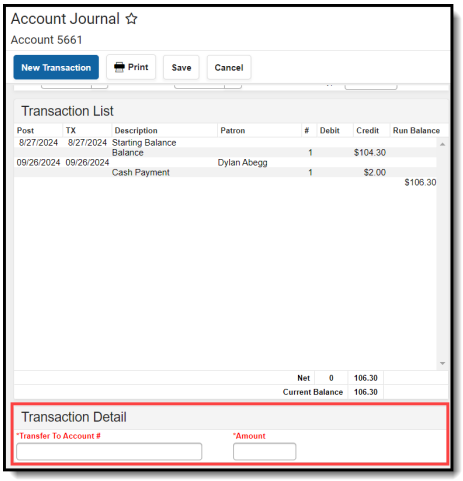
Void Transactions

Quick Steps	Example
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**.	

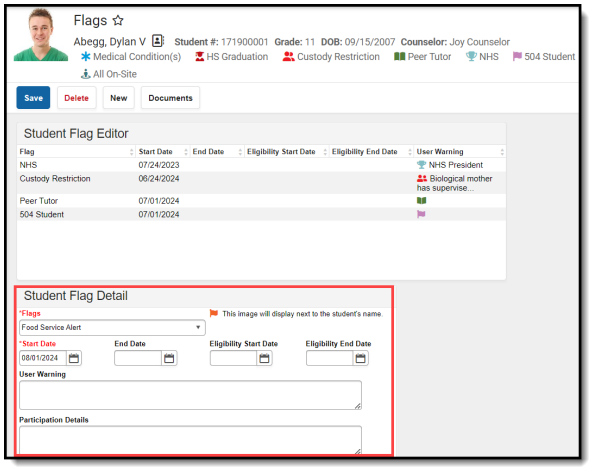
Adjustments

Quick Steps	Example
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**.	

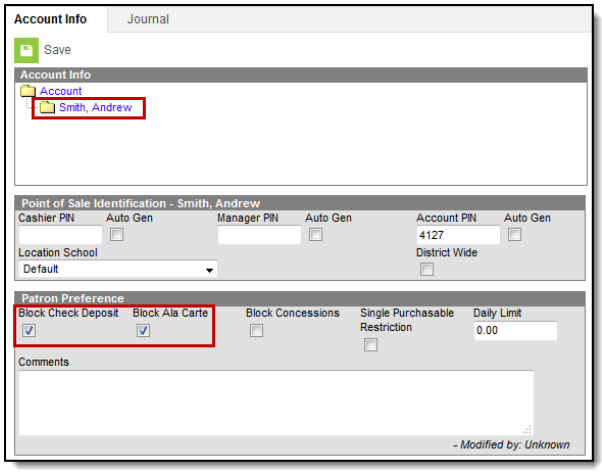
Balance Transfers

Quick Steps	Example
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**.	

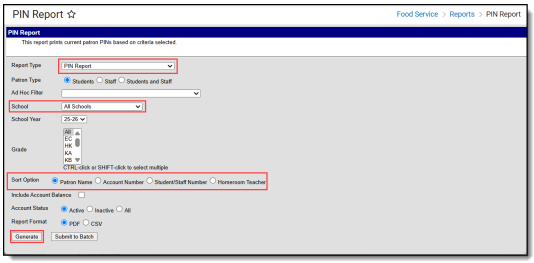
Flags

Quick Steps	Example
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**.	

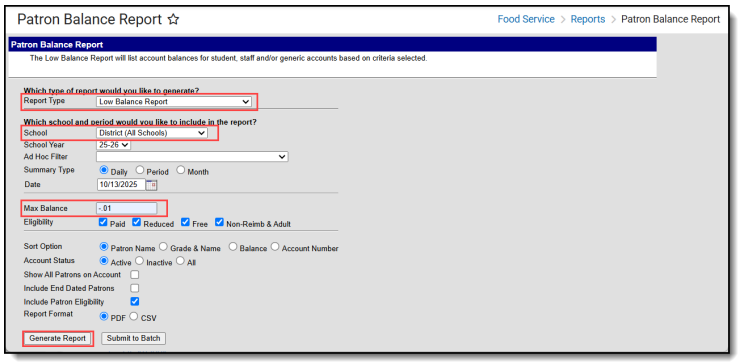
Block Ala Carte Items or Checks on the POS Terminal

Quick Steps	Example
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**.	

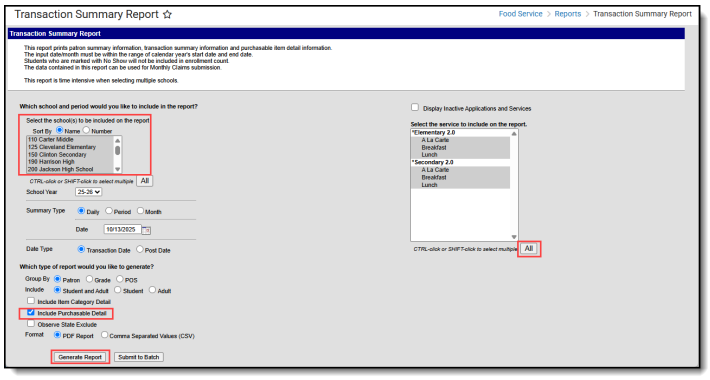
PIN Report

Quick Steps	Example
1. Go to *Food Service > 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. ◦ **Homeroom Teacher** - Pick this option if you have homerooms in your school to get a list sorted by teacher. 5. Click **Generate**.	

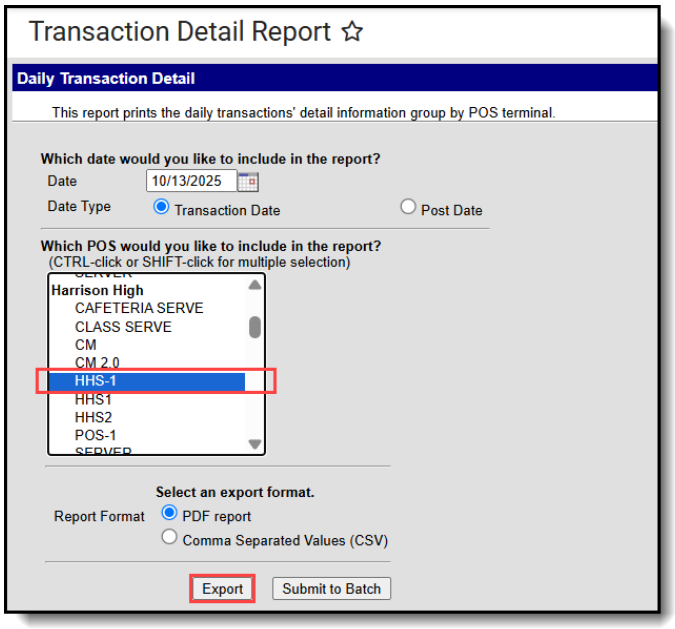
Negative Account Balance Report

Quick Steps	Example
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**.	

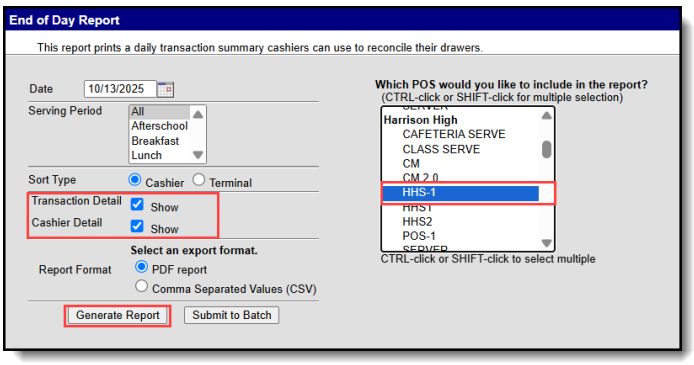
Transaction Summary Report (Production Counts)

Quick Steps	Example
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**.	

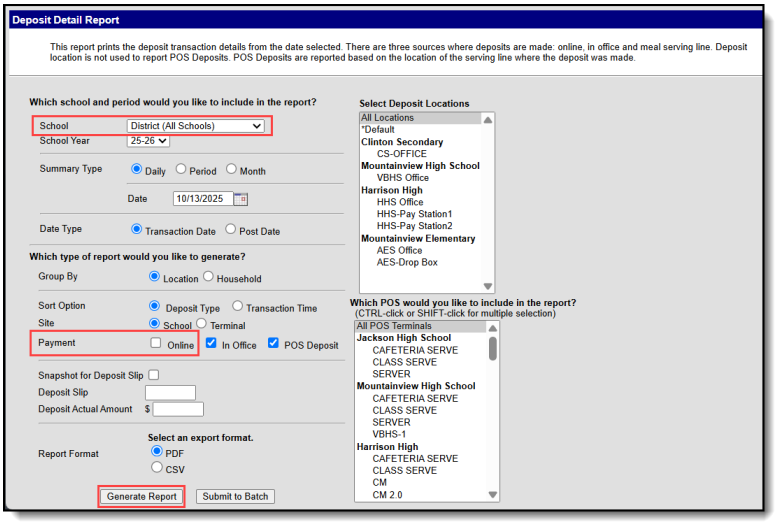
Transaction Detail Report (Journal of Transactions)

Quick Steps	Example
1. Go to *Food Service > Reports > Transaction Detail Report.* 2. Choose the Terminal. 3. Click **Export**.	

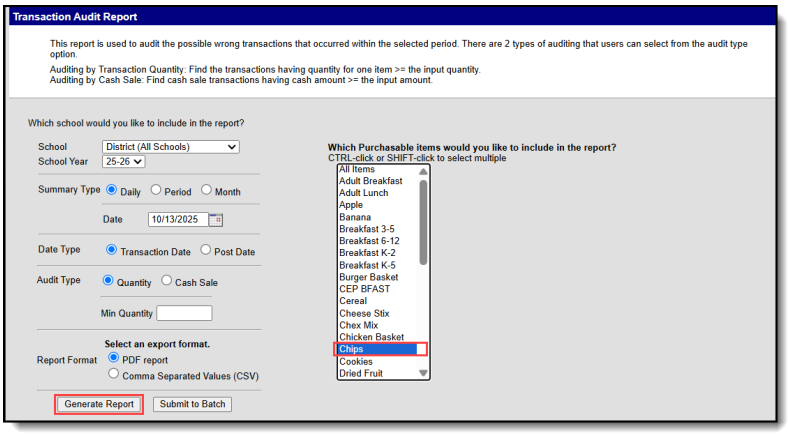
End of Day Report (Drawer Counts)

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

Audit Report (When Transactions Look Wrong)

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

View Student Details (Phone Numbers, etc.)

Quick Steps	Example
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.	