

# MANAGING POS SALES

## Sign In

1. Enter your PIN.
2. Select Sign In.

## Home Screen

The Home screen is displayed when you first open the POS. Use the Home screen to do the following:

- Access the Journal.
- Open the Till.

After you open your till, you might need to return to the Home screen to do the following:

- Switch the order method from Sell by Pin to Sell by Classroom.
- Change the serving period.
- Lock your terminal if you need to walk away from your workstation.

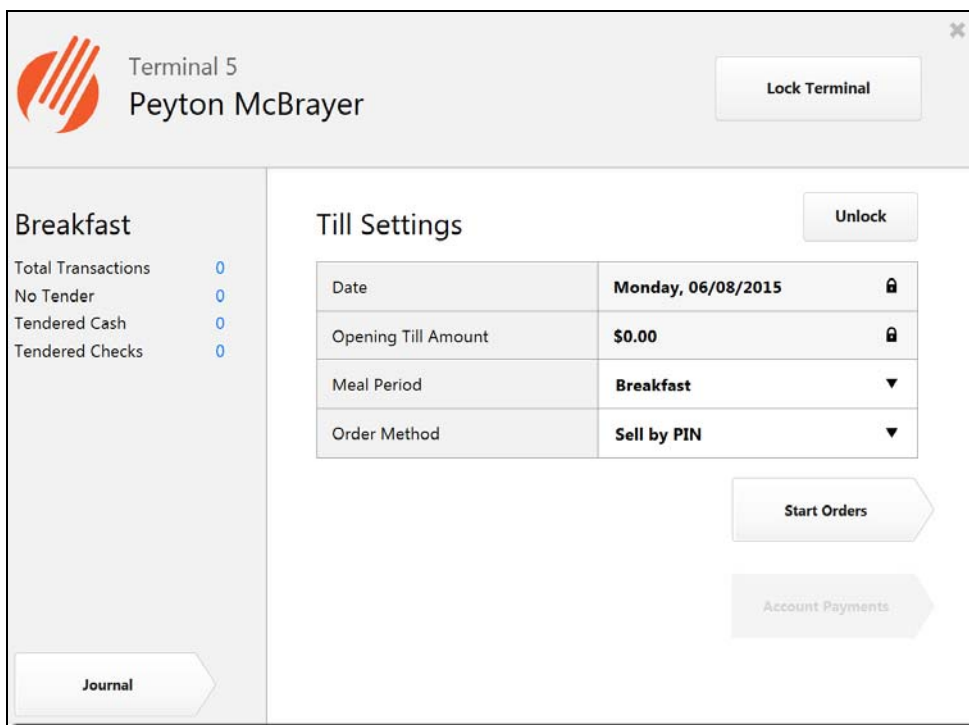


Figure 1: Home screen

## Open the Till

- 📖 To change the Date or Opening Till Amount, you will need to click the Lock and enter your PIN.

1. Verify that the Date is correct.
2. Set the Opening Till Amount.
3. Select the Meal Period.
4. Select the Order Method:  
Sell by PIN or Sell by Classroom.
5. Select Start Orders.

## Order Screen

Click Start Orders on the Home screen to access the Orders screen. The Orders screen consists of the following components:

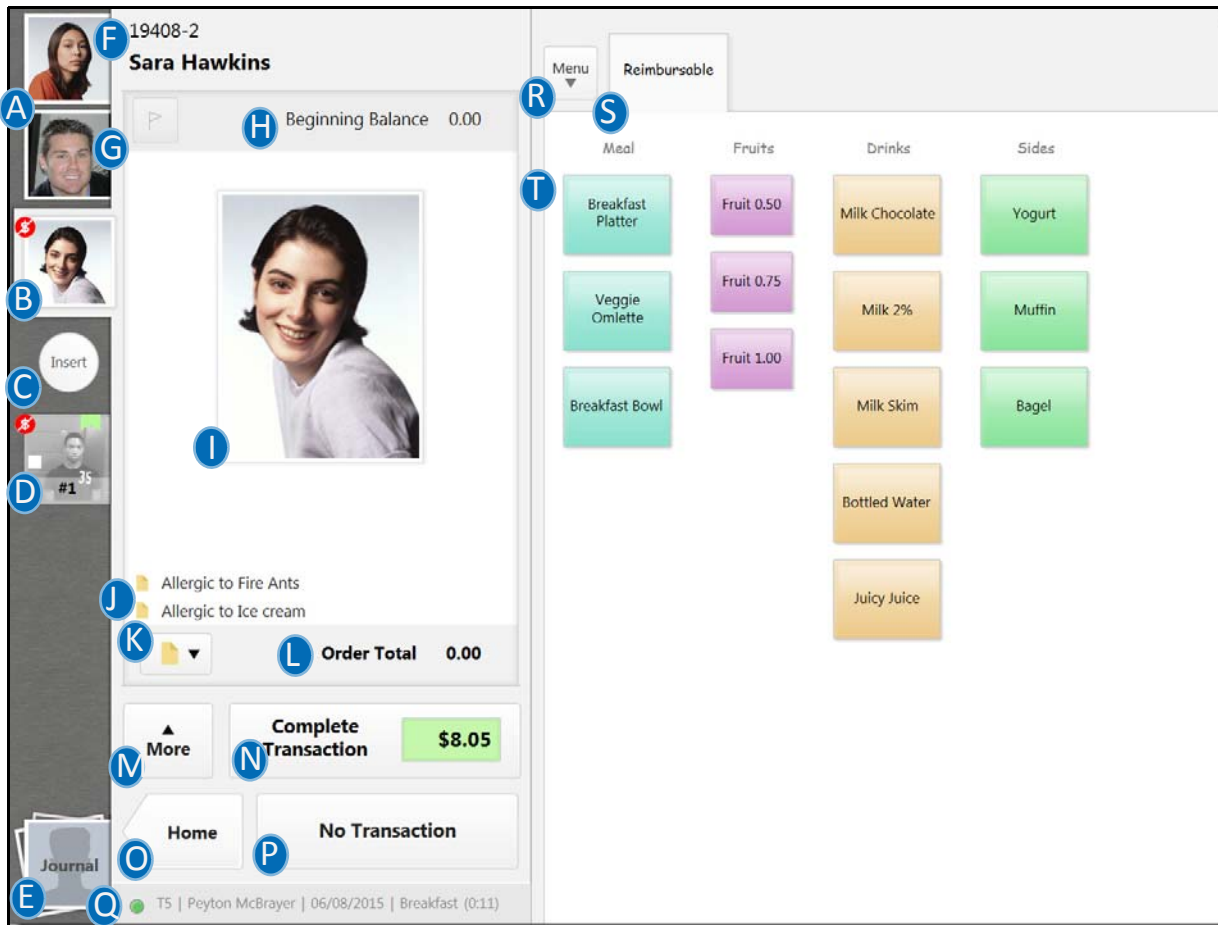


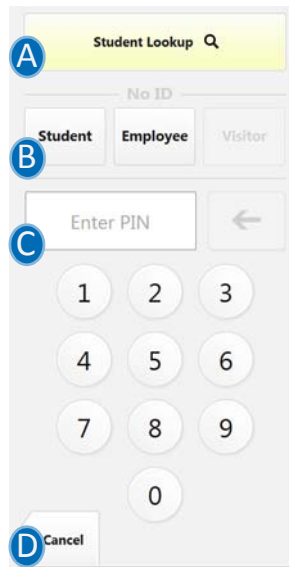
Figure 2: Orders Screen

- A. Queue—Displays the queued students. Click a student to serve them in any order.
- B. Highlighted Photo—Displays the current student.
- C. Insert—Click to display the Student Lookup to search for a student to place in the queue.
- D. Recent Transactions—Displays recent patrons.
- E. Journal—Click to display the journal. You can void transactions on this screen.
- F. Student ID - Eligibility - Student Name—Displays the information for the current student.
- G. Flag—Click to flag the transaction for review.
- H. Balance—Displays the student's account balance.
- I. Photo—Displays the current student's photo.
- J. Allergies—Displays all of the student's allergies.
- K. Notes—Click to display the parent and administrative notes on the student's account.
- L. Order Total—Displays the transaction total.
- M. More—Click to make Account Payments.
- N. Complete Transaction/Tender—Shows the amount due. If \$0.00, click to complete the sale. If there is an amount shown, the Tender screen is displayed.
- O. Home—Click to return to the Home screen.
- P. No Transaction—Click to cancel the current transaction.
- Q. Connectivity Status/Till Information—Displays connection indicator terminal, cashier, date, and serving period. If the indicator is red, you will only be able to complete sales for local students (not students from other sites).
- R. Menu—Click to the switch menus.
- S. Tabs—Displays the various menus that are available as part of the main menu.
- T. Menu Items—Click the menu items to add items to the order.

## Insert Panel

To access the Insert panel, click Insert on the Order screen. Use the Insert panel to access the following features:

- A. Customer Lookup - Click to display the Customer Lookup screen.
- B. No ID Options—Select Student to display the No ID Student Pop-Up and have students enter their information. Selecting Employee or Visitor immediately returns you to the ticket, ready to enter the order.
- C. PIN Entry—When you enter a PIN, a search is initiated. When a match is found, a button appears with the student's name and picture.
- D. Cancel—Select to return to the previous state of the screen.



## Customer Lookup

Use the Customer Lookup to find customers to process sales, apply payments, and review transactions. On the screen, you can search by Name, ID or PIN.

1. On the Insert panel, click Customer Lookup.
2. Enter the student's name or PIN. As you key in letters or numbers, the best matches are displayed.
3. Select the student.

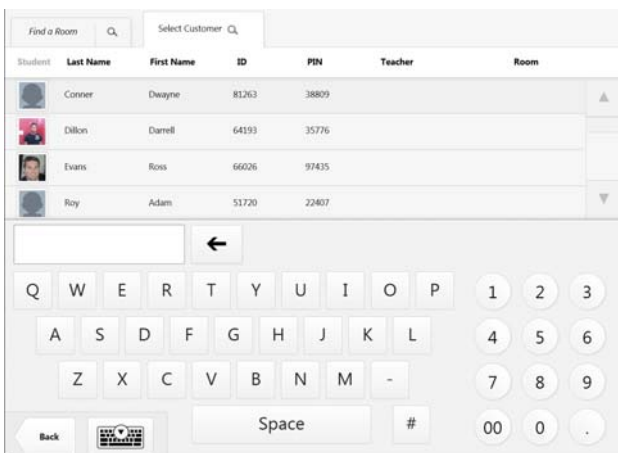
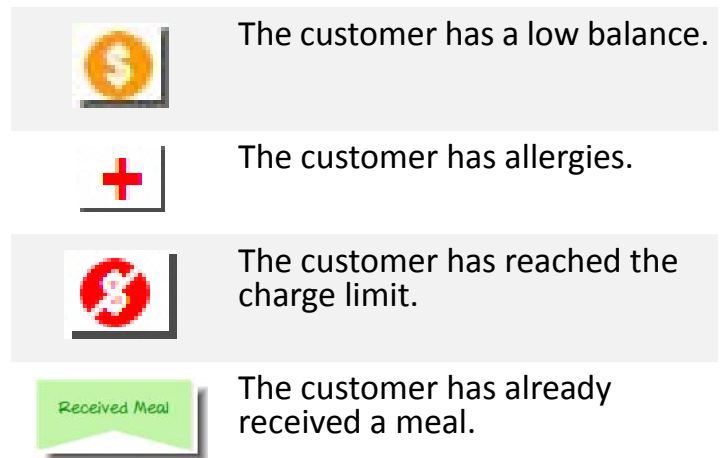


Figure 3: Customer Lookup screen

## Cashier Tips

The following tips are used throughout the POS system to help you identify a customer's status.

### This Symbol Means...



## Sell by Classroom

1. On the Home screen, select Order Method: Select Sell by Classroom.
2. Click Start Orders. The Student Lookup - Find a Room tab is displayed.
3. Locate the teacher of the classroom.

### Single-Select Option

1. Select a student.
2. Enter the transaction.
3. Click Complete Transaction.
4. Select the next student.

### Multi-Select Option

Multi-Select allows you to issue the same meal to multiple or all students in a classroom.

1. Select Multi-Select to turn it On.
2. Select each student, or from the Multi-Select dropdown, select Select All.
3. Click Start Orders.
4. Enter the transaction.
5. Click Complete Transaction.

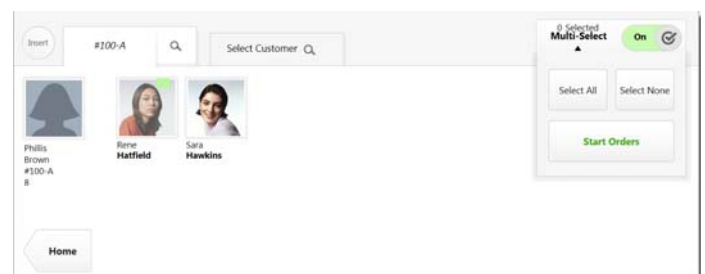


Figure 4: Classroom tab

## Processing Sales

1. Select the Menu.
2. Click Insert and select a patron.
3. Select the menu items.
4. Complete the sale:
  - If no money is owed, click Complete Transaction. The transaction is completed, and you can ring the next patron.
  - For all other patrons, click Tender.
5. On the Tender Screen, select or enter the Tender Amount.
6. Select the Tender type.
  - 📄 If the student's charge limit has been reached, Charge is not available.
7. For checks, enter the Check Number and select Finish.

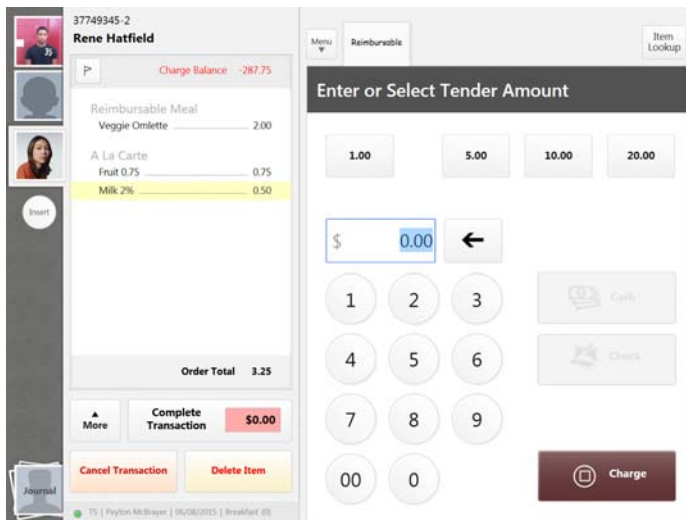


Figure 5: Tender screen

## Remove single item from the order list

1. Click item in list.
2. Click Delete Item.

## Cancel sale

1. Click No Transaction.
2. Click OK to confirm.

## No ID sale

1. Click Insert.
2. Click NO ID and select Student, Employee, or Visitor.
3. For students, enter the First Name and Last name.
4. Click Free, Reduced, or Full Pay.
5. Complete the sale.

## Tender Sales

This section provides information to process payments on the Tender screen.

### Display Tender screen

Click Tender.

### Tender payment

1. Collect cash/check.
2. Click Tender.
3. Enter the cash/check amount.
4. Click Cash or Check.
5. For checks, enter the Check Number when prompted.

### Cash deposit

1. On the ticket, click More.
2. Click Account Payment.
3. Collect cash.
4. Enter the cash amount.
5. Click Cash.

### Check deposit

1. On the ticket, click More.
2. Click Account Payment.
3. Collect cash.
4. Enter the cash amount.
5. Click Check.
6. Enter the Check Number.

### Charge entire sale

1. Click Tender.
2. Enter the amount.
3. Click Charge.

### Charge part of sale

1. Collect cash.
  2. Click Tender.
  3. Enter the cash amount, and click Cash.
- For the remainder of the balance, click Charge.

# Journal

The journal represents all transactions for a particular terminal over the last six days - the previous five school days plus the current day. By default, transactions are sorted newest to oldest.

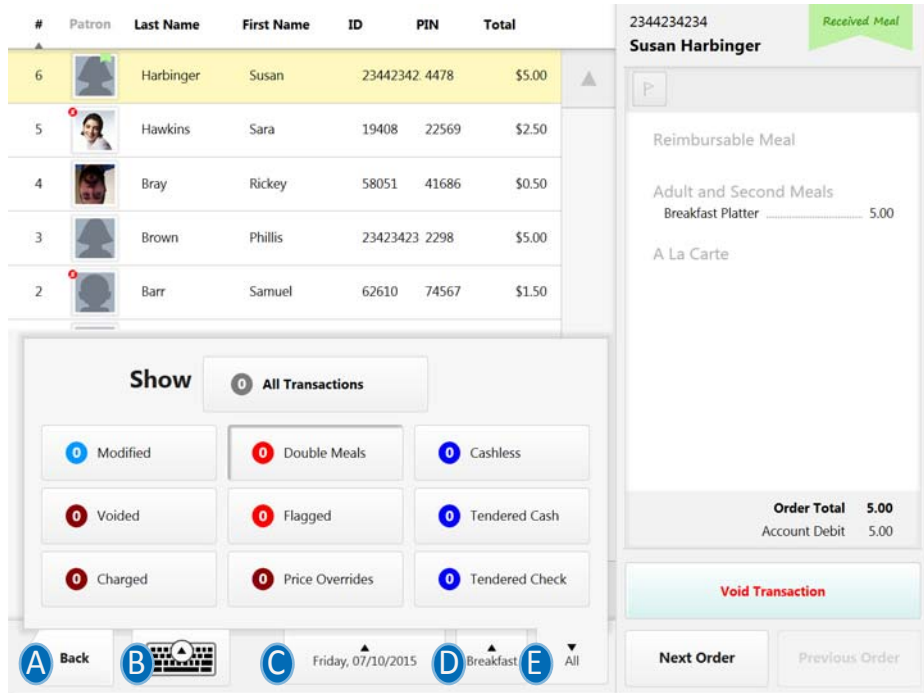


Figure 6: Journal screen

## Journal Filters

- A. Select to return to the previous screen.
- B. Select to show/hide the onscreen keyboard to search for a patron.
- C. Select to select the date. Only transactions for the last seven days are available.
- D. Select to select the serving period.
- E. Select to filter the transactions based on type. Select the filter that you want to use.

## Void Transactions

1. Click Journal.
2. If applicable, use the Journal filters to search for the transactions that you need to address.
3. Select the patron.
4. On the ticket, select the item that you want to void.
5. Click void Transaction.
6. Click Next Order to go to the next ticket.

## Journal Indicators

If a transaction has been	It is indicated by...
Flagged	A red flag and a bold red transaction number
Modified	A blue dot and a bold blue transaction number
Flagged & Modified	A red flag, bold red transaction number, and a blue dot
Voided	Crossed-out text

## Enter Account Payments

Account payments affect the bank deposit so make them BEFORE you save the bank deposit.

1. On the Home screen, select Account Payments.—OR—  
On the Ticket, select More > Account Payment.
2. Search for and select a Student.

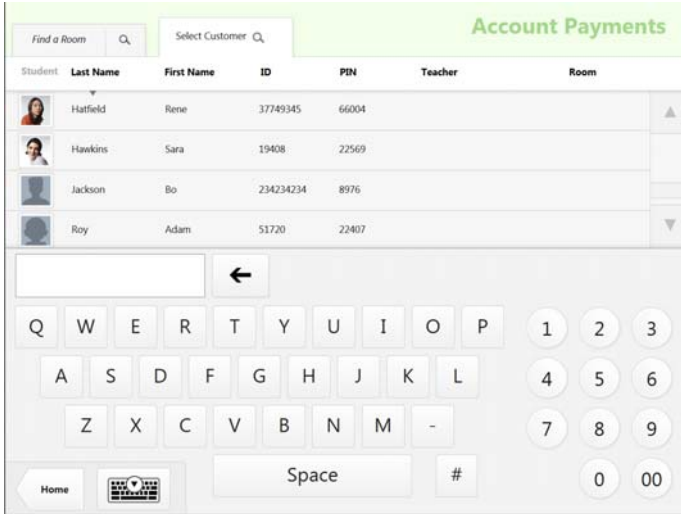


Figure 7: Account Payments screen

3. Enter the amount.
4. Click Cash or Check.

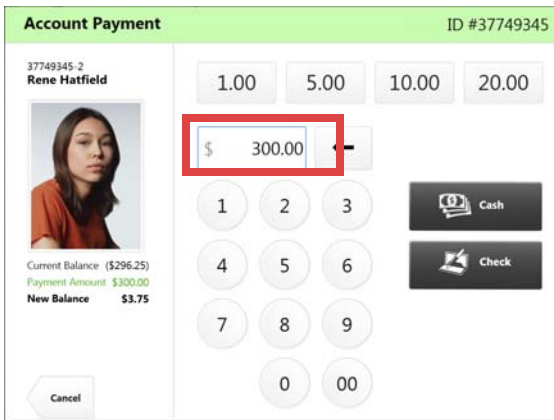


Figure 8: Tender and Check Number screens

5. For checks, enter the Check Number and select Finish.

## Close your Till

1. On the Home screen, click Close Till.
2. Count and enter the currency quantities. Select a field or select Next Item to go to the next field.
3. Verify that all amounts are correct.
4. Click Next.

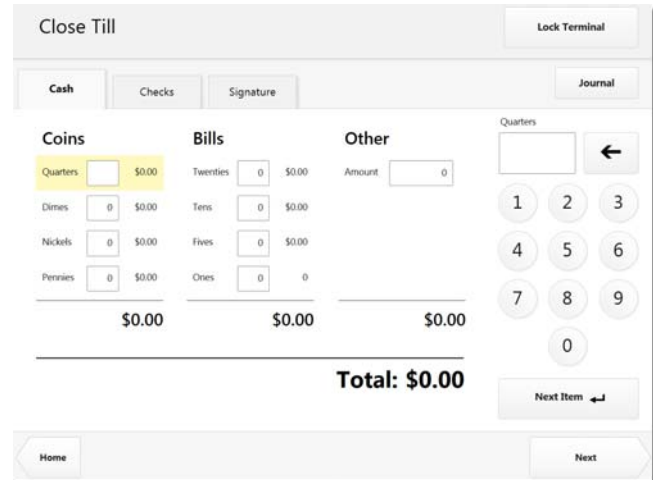


Figure 9: Close Till - Cash

5. Verify each check received. Click Next.

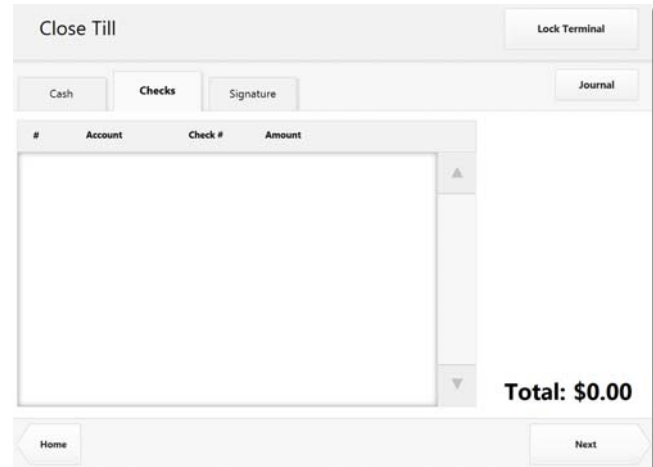


Figure 10: Close Till - Checks

6. Select the Acknowledgement and click Finish & Sign Out.

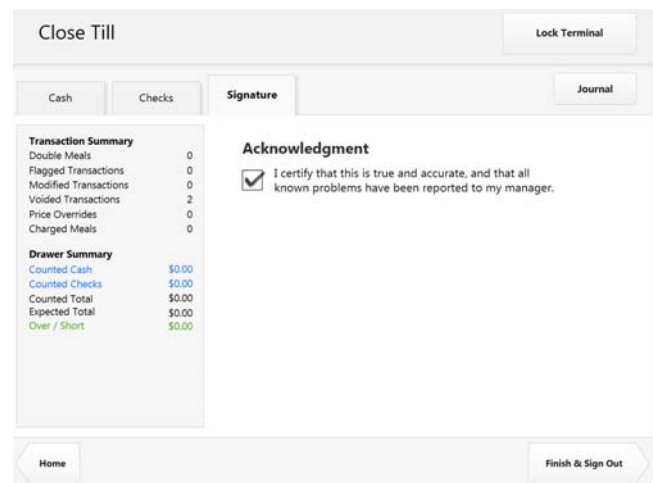


Figure 11: Close Till - Signature