

Cheat Sheet (Food Service) (Classic)

Last Modified on 10/22/2022 9:49 am CDT

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

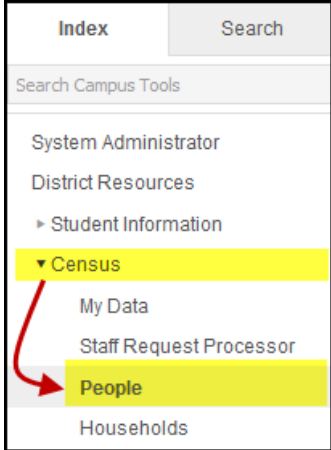
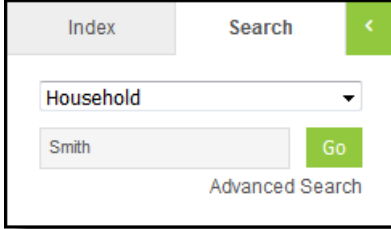
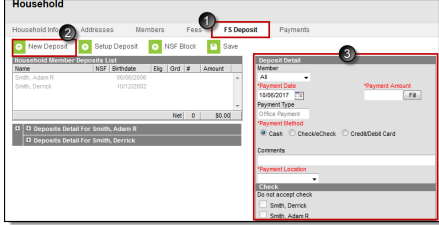
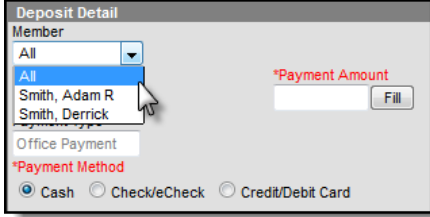
Deposit (Household)

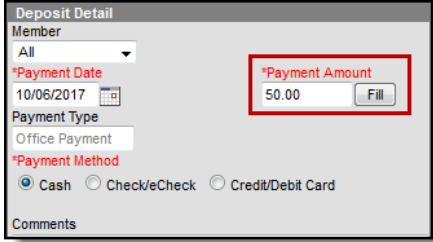
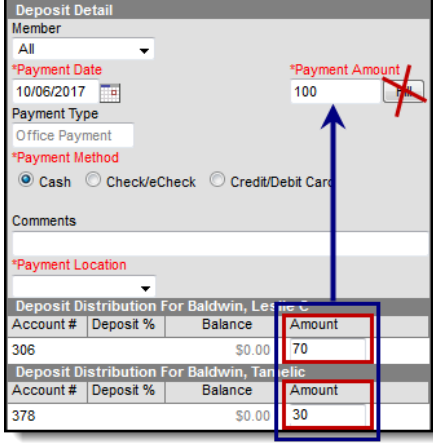
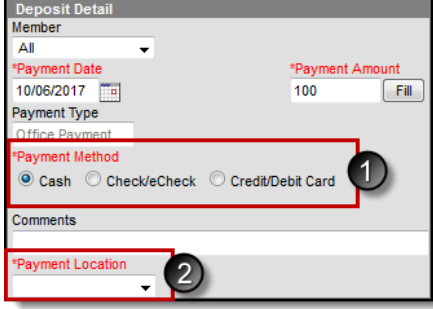
Quick Steps

1. Go to *Census > People*.
2. Select **Household**, enter the name, and click **Go**.
3. Select **FS Deposit** tab and 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.
6. Select the **Payment Method** and **Payment Location**.
7. Click **Save**.

Step	Action	Example
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Detailed Steps

Step	Action	Example
1	Go to <i>Census > People</i> .	
2	Select Household , enter the name, and click Go .	
3	Select FS Deposit tab and click the New Deposit button.	
4	Select All to split the payment evenly or select a household member.	

Step	Action	Example
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	<p>Select the Payment Method and Payment Location.</p>	
7	<p>Click Save.</p>	

Deposit (Single Patron)

Quick Steps

1. Click the **Search** tab.
2. Select **All People**, enter the name, and click **Go**.
3. Select the patrons name then click the **FS Deposit** tab.
4. Click **New Deposit**.
5. Enter the **Amount**.
6. Select the **Payment Method** and **Payment Location**.
7. Click **Save**.

Example

FS Deposit School Choice Credentials Overrides Fees ID History

+ New Deposit Save Documents

Date	Description	Type	Credit
10/11/2013		CHECK	\$25.00
10/02/2013		CHECK	\$50.00
Net			\$75.00
Balance			\$46.25

New Deposit Detail

*Date: 05/20/2014 *Amount: \$

Payment Type: Office Payment

Payment Method: Cash Check/eCheck Credit/Debit Card

Comments:

*Payment Location:
 *Default:
 Check:
 Do not accept check:
 Aarons, Samantha L

View One Patron's Transactions

Quick Steps

1. Click the **Search** tab.
2. Select **Account**, enter the name, and click **Go**.

if you don't know the student's last name, enter a comma, space, then the first name.

Example

, Amber

3. Click on Account # (not name).
4. Click the **Journal** tab.

Example

Index Search Account Info **Journal**

+ New Transaction Print Transfer Adjustment

Journal Period: From 7/10/2017 To 08/09/2017 Date Type Post Date

Post	TX	Description	Patron	#	Debit	Credit	Run Balance
08/09/2017	08/09/2017	Roll/Bun /Toast	System Administrator	1	\$0.40		
		Entrée w/Meal		1	\$1.65		\$210.10
08/09/2017	08/09/2017	Entrée w/Meal	System Administrator	1	\$1.65		\$208.45
08/09/2017	08/09/2017	Elementary Lunch	System Administrator	1	\$2.20		\$206.25
08/09/2017	08/09/2017	Elementary Lunch	System Administrator	1	\$2.20		\$204.05
08/09/2017	08/09/2017	Rice w/Vegetable 1/2 cup	System Administrator	1	(\$0.75)		

New Transaction

Quick Steps	Example																								
<ol style="list-style-type: none"> 1. Click the Search tab. 2. Select Account, enter the name, and click Go. 3. Click on Account # (not name). 4. Click the Journal tab. 5. Click New Transaction. 6. Fill in all required fields. 7. Click Save. 	<p>Transaction Detail</p> <p>*Customer: Adam Smith *Application: Middle School *Date: 4/29/2016 Time: []</p> <p>*Location: POS-1 *Service: Lunch 301 Payment Method: [] Reference #: []</p> <p>Description: []</p> <p>Transaction Item List</p> <table border="1"> <thead> <tr> <th>Entry Type</th> <th>Purchasable Item</th> <th>Quantity</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/> Debit <input type="radio"/> Credit</td> <td>Lunch Meal (Sec)</td> <td>1</td> <td></td> </tr> <tr> <td><input type="radio"/> Debit <input checked="" type="radio"/> Credit</td> <td>[]</td> <td></td> <td></td> </tr> <tr> <td><input type="radio"/> Debit <input checked="" type="radio"/> Credit</td> <td>[]</td> <td></td> <td></td> </tr> <tr> <td><input type="radio"/> Debit <input checked="" type="radio"/> Credit</td> <td>[]</td> <td></td> <td></td> </tr> <tr> <td><input type="radio"/> Debit <input checked="" type="radio"/> Credit</td> <td>[]</td> <td></td> <td></td> </tr> </tbody> </table>	Entry Type	Purchasable Item	Quantity	Amount	<input checked="" type="radio"/> Debit <input type="radio"/> Credit	Lunch Meal (Sec)	1		<input type="radio"/> Debit <input checked="" type="radio"/> Credit	[]			<input type="radio"/> Debit <input checked="" type="radio"/> Credit	[]			<input type="radio"/> Debit <input checked="" type="radio"/> Credit	[]			<input type="radio"/> Debit <input checked="" type="radio"/> Credit	[]		
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Void Transactions

Quick Steps	Example																								
<ol style="list-style-type: none"> 1. Click the Search tab. 2. Select Account, enter the name, and click Go. 3. Click on Account # (not name). 4. Click the Journal tab. 5. Click the transaction you want to void. <p>You must select the transaction. After you select the transaction, the Void TX button displays.</p> <ol style="list-style-type: none"> 6. Click Save. 	<p>Transaction List</p> <table border="1"> <thead> <tr> <th>Post</th> <th>TX</th> <th>Description</th> <th>Patron</th> <th>#</th> <th>Debit</th> <th>Credit</th> <th>Run Balance</th> </tr> </thead> <tbody> <tr> <td>9/11/2017</td> <td>9/11/2017</td> <td>Starting Balance</td> <td></td> <td>1</td> <td></td> <td>\$75.00</td> <td></td> </tr> <tr> <td>10/11/2017</td> <td>10/11/2017</td> <td>Lunch 7-12</td> <td>Andrew Smith</td> <td>1</td> <td>\$2.50</td> <td></td> <td>\$72.50</td> </tr> </tbody> </table> <p>Transaction Detail</p> <p>Void Reason: Scanner Reconciliation</p> <p>Description: Meal entered in error.</p>	Post	TX	Description	Patron	#	Debit	Credit	Run Balance	9/11/2017	9/11/2017	Starting Balance		1		\$75.00		10/11/2017	10/11/2017	Lunch 7-12	Andrew Smith	1	\$2.50		\$72.50
Post	TX	Description	Patron	#	Debit	Credit	Run Balance																		
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10/11/2017	10/11/2017	Lunch 7-12	Andrew Smith	1	\$2.50		\$72.50																		

Adjustments

Quick Steps

1. Click the **Search** tab.
2. Select **Account**, enter the name, and click **Go**.
3. Click on Account # (not name).
4. Click the **Journal** tab.
5. Click **Adjustment**.
6. Fill in all required fields.
7. Click **Save**.

Example

Account Info **Journal**

New Transaction Print Transfer **Adjustment**

Journal Period
From 08/17/2016 To 08/17/2016 Date Type Post Date

Post	TX	Description	Patron	#	Debit	Credit	Run Balance
08/17/2016	08/17/2016	Starting Balance		1		\$0.00	
		Balance	ben smith				
08/17/2016	08/17/2016	Yogurt		1	\$0.75		-\$0.75
					Net	0.75	0
					Current Balance		-0.75

Adjustment

*Customer: smith, ben *Type: Write-Off *Date: 08/17/2016 *Amount: \$ 0.75

*Description: Cashier error

Balance Transfers

Quick Steps

1. Click the **Search** tab.
2. Select **Account**, enter the name, and click **Go**.
3. Click on Account # (not name).
4. Click the **Journal** tab.
5. Click **Transfer**.
6. Enter the **Account #** of the person RECEIVING the money and the **Amount**.
7. Click **Save**.

Example

Account Info **Journal**

New Transaction Print **Transfer** Adjustment

Journal Period
From 5/01/2016 To 05/26/2016 Date Type Post Date

Post	TX	Description	Patron	#	Debit	Credit	Run Balance
05/01/2016	05/01/2016	Starting Balance				50.00	
					Net	0	50.00
					Current Balance		50.00

Transaction Detail

*Transfer To Account # *Amount

Flags

Quick Steps

1. Go to *Student Information > General*.
2. Select **Student**, enter the name, and click **Go**.
3. Select the student then click the **Flags** tab.
4. Click **New**.
5. Select **Food Service Alert** in the Flags dropdown list.
6. Enter in a Start Date as 7/1/YYYY or 8/1/YYYY.
7. Enter a **User Warning**. (40 character max)
8. Click **Save**.

Example

The screenshot shows the Infinite Campus interface for student Austin Howe. The 'Flags' tab is selected, and a 'Food Service Alert' flag is visible with a start date of 08/01/2017. A callout box on the right highlights several key pieces of information: the student's picture, grade (2), name (Austin Howe), eligibility indicator (Allergic to peanuts), and student number (128460006) along with balance information (\$54.70 current TX, \$2.65 total).

Block Ala Carte Items or Checks on the POS Terminal

Quick Steps

Example

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

Account Info Journal

Save

Account Info

Account
Smith, Andrew

Point of Sale Identification - Smith, Andrew

Cashier PIN	Auto Gen	Manager PIN	Auto Gen	Account PIN	Auto Gen
	<input type="checkbox"/>		<input type="checkbox"/>	4127	<input type="checkbox"/>

Location School: Default

District Wide:

Patron Preference

Block Check Deposit	Block Ala Carte	Block Concessions	Single Purchasable Restriction	Daily Limit
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00

Comments

- Modified by: Unknown

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**.
 - 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

PIN Report

This report prints current patron PINs based on criteria selected.

Report Type: PIN Report

Patron Type: Students Staff Students and Staff

Ad Hoc Filter: School: Arthur Elementary

School Year: 17-18

Grade: EC, HK, KG, D1

Sort Option: Patron Name Account Number Student/Staff Number Homeroom Teacher

Include Account Balance:

Account Status: Active Inactive All

Report Format: pdf csv

Generate Submit to Batch

Negative Account Balance Report

Quick Steps	Example
<ol style="list-style-type: none"> 1. Go to <i>Point of Sale > Reports > Patron Balance</i>. 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)

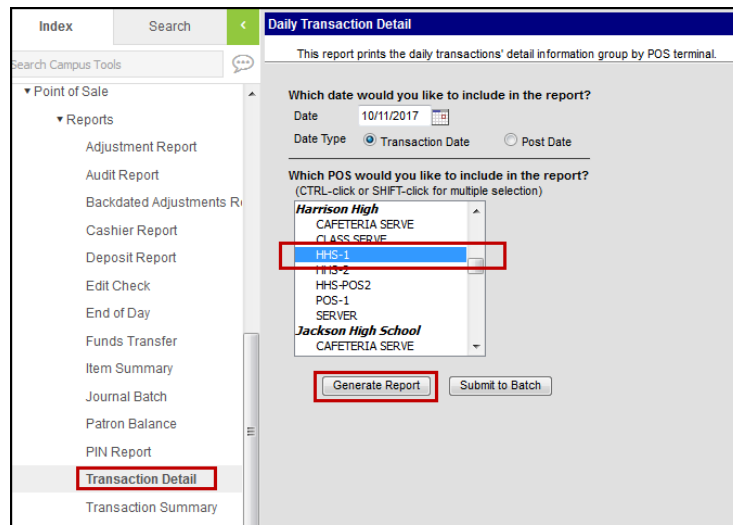
Quick Steps	Example
<ol style="list-style-type: none"> 1. Go to <i>Point of Sale > Reports > Transaction Summary</i>. 2. Select your School. 3. Select All Services. 4. Mark the Include Purchasable Detail checkbox. 5. Click Generate Report. 	

Transaction Detail Report (Journal of Transactions)

Quick Steps

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

Example

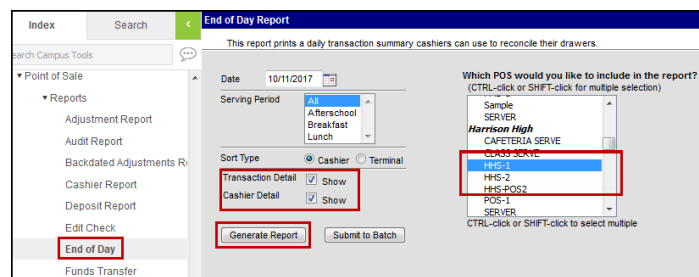


End of Day Report (Drawer Counts)

Quick Steps

1. Go to *Point of Sale > Reports > End of Day*.
2. Select the Terminal on the right side.
3. Mark the **Transaction Detail** and **Cashier Detail** checkboxes.
4. Click **Generate Report**.

Example



Deposit Report (View Entered Checks, etc.)

Quick Steps

Example

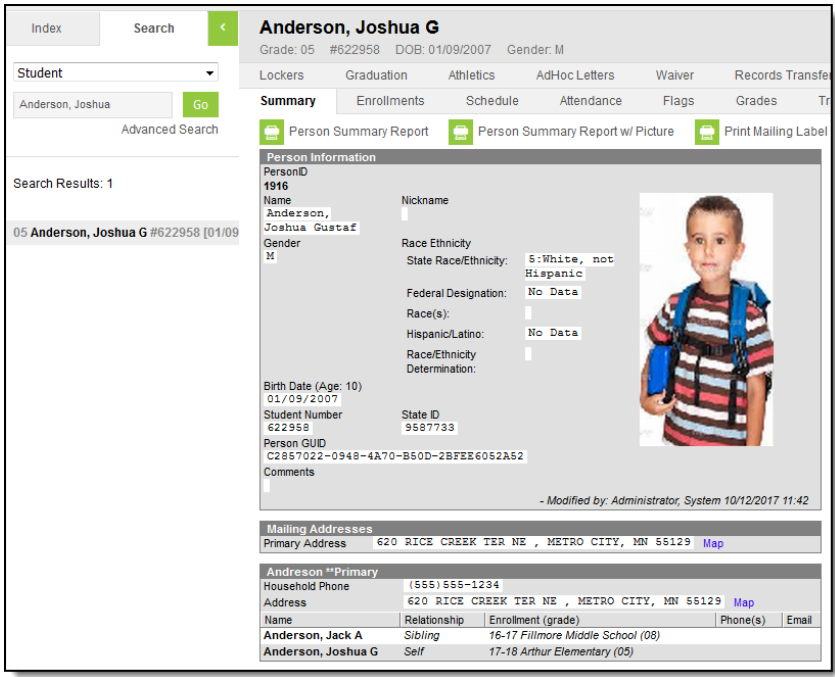
Quick Steps	Example
<ol style="list-style-type: none"> 1. Go to <i>Point of Sale > Reports > Deposit Report.</i> 2. Select your School. 3. Clear the Online Payments checkbox. 4. Click Generate Report. 	

Audit Report (When Transactions Look Wrong)

Quick Steps	Example
<ol style="list-style-type: none"> 1. Go to <i>Point of Sale > Reports > Audit Report.</i> 2. Select the Item(s) you want to report. 3. Click Generate Report. 	

View Student Details (Phone Numbers,

etc.)

Quick Steps	Example															
<ol style="list-style-type: none"> Go to <i>Student Information > General</i>. Search for the student and click Go. Click the student's name. 	 <p>Anderson, Joshua G Grade: 05 #622958 DOB: 01/09/2007 Gender: M</p> <p>Search Results: 1 05 Anderson, Joshua G #622958 [01/09]</p> <p>Person Information PersonID: 1916 Name: Anderson, Joshua Gustaf Nickname: Gender: M Race Ethnicity: State Race/Ethnicity: S:White, not Hispanic Federal Designation: No Data Race(s): Hispanic/Latino: No Data Race/Ethnicity Determination: Birth Date (Age: 10): 01/09/2007 Student Number: 622958 State ID: 9587733 Person GUID: C2857022-0948-4A70-B50D-2BFE6052A52 Comments: - Modified by: Administrator, System 10/12/2017 11:42</p> <p>Mailing Addresses Primary Address: 620 RICE CREEK TER NE , METRO CITY, MN 55129 Map</p> <p>Anderson **Primary Household Phone: (555) 555-1234 Address: 620 RICE CREEK TER NE , METRO CITY, MN 55129 Map</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Relationship</th> <th>Enrollment (grade)</th> <th>Phone(s)</th> <th>Email</th> </tr> </thead> <tbody> <tr> <td>Anderson, Jack A</td> <td>Sibling</td> <td>16-17 Fillmore Middle School (08)</td> <td></td> <td></td> </tr> <tr> <td>Anderson, Joshua G</td> <td>Self</td> <td>17-18 Arthur Elementary (05)</td> <td></td> <td></td> </tr> </tbody> </table>	Name	Relationship	Enrollment (grade)	Phone(s)	Email	Anderson, Jack A	Sibling	16-17 Fillmore Middle School (08)			Anderson, Joshua G	Self	17-18 Arthur Elementary (05)		
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