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Inactivate Graduated Student Accounts | Remove Student PINs | Inactivate Graduated Student Accounts and Remove Student PINs | Adjust Inactive Student Account Balances | Run the Adjustment Report | Send Letters to Households | Terminal Maintenance | Deactivating Terminals

This article provides some step-by-step recommendations and best practice instructions for Food Service end of school year processes. This includes student account and PIN processes, mailing letters to households concerning student balances, and terminal maintenance.

Please note that the following processes may not align with your district's end of year processes.

# **Inactivate Graduated Student Accounts**

#### **PATH:** *Point of Sale > Account Maintenance > Account Management Wizard*

Students must be marked as inactive after they have graduated from school. The student's PIN numbers can be removed and returned to Campus for future use by other students. The **Mode** options under the **Account Management Wizard** provide options for users to manage student account information and balances.

- 1. Select Inactive accounts from the Mode dropdown.
- 2. Choose the **Student** option as the **Type**.
- 3. Optional: select an Ad Hoc Filter.
- 4. Scroll down the Enrollment End Status field and select Graduated from High School.
- 5. Select the appropriate grade (e.g., 12) from the Grade field.
- 6. Mark the Use Ended Enrollments box.
- 7. Select the current **School Year** that is ending.
- 8. Mark the **Include Patron Detail** box to view student names with the total numbers of graduated students.
- 9. Click the **Test** button to view the results of the report prior to making changes to the database. To finalize these changes, click on **Run Update**. The results appear in another window.



Mode: Inactive Accounts Editor

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### **Remove Student PINs**

- 1. Select **Remove PINs** from the **Mode** dropdown.
- 2. Choose the **Student** option as the **Type**.
- 3. Select the **Ad Hoc Filter** from the dropdown options to narrow the number of students whose PINs will be removed.
- 4. Mark the Include Patron Detail box to view student names instead of just total numbers of graduated students.
- 5. Click the **Test** button to view the results of the report prior to making changes to the database. To finalize these changes, click on **Run Update**. The results appear in another window.

Index	Search Help	<	Acco	unt Management	tWizard
► Messe					unts from which to remove PINs. Selection of a Student or Staff Type will remove PINs from all current inactive st to preview changes before Run Update.
<ul> <li>Point o</li> </ul>	fSale		Mod		
▶ Reports		Mode	e Remove PIN	s <b>v</b>	
▼ A	ccount Maintenance		Тур	e	$\odot$ Student $\bigcirc$ Staff $\bigcirc$ Students and Staff
	Account		Ad	loc Filter	T
	POS Preferences		Inclu	ide Patron Detail	•
	POS Account Messenge	r			
	POS Account Messenge	r Sche	Test	Run Update	
	Add Account				
	Mass Account Creation				
	Reminder/Restriction W	izard			
	Account Management \	Nizard			
►A	dministration				

Mode: Remove Pins Editor

# **Inactivate Graduated Student Accounts**



## and Remove Student PINs

You can also mark graduating student accounts as inactive and remove their PINs from the system at once by selecting **Inactive accounts and Remove PINs** from the **Mode** dropdown and completing the report editor. With this option, an **Ad Hoc Filter** is not necessary to remove PINs the student's PINs that are removed are those with the selected **Enrollment End Status**. For end of year purposes, this is due to graduation. This option is used most often by districts.

Account Management V	Vizard					
· · ·	Select Type of accounts to inactivate. Student accounts will be inactivated based on criteria selected. Selec changes before Run Update.					
Mode Inactivate accounts and Remove PINs V						
Type   Student  Staff  Students and Staff						
Ad Hoc Filter	•					
Enrollment End Status	00: Used for Fall reporting 01: Change in grade level 02: Transfer to another school in district 03: Transfer to approved nonpublic school 04: Hourd to other UN opport district	Grade	All  01 02 03 04			

Mode: Inactive Accounts and Remove Pins Editor

### Adjust Inactive Student Account Balances

Inactive student accounts with positive or negative balances at the end of the school year can be adjusted. This leaves a description of the adjustment on the student's Journal tab.

- 1. Select Adjust balances on inactive accounts option from the Mode dropdown.
- 2. Choose the **Student** option as the **Type**.
- 3. Select an Ad Hoc Filter. (Optional)
- 4. Mark either **Positive Balance** or **Negative Balance** as the Account Balance option.
- 5. Choose an Adjustment Type. Default options include: Bad Debt, Refund, and Write-Off.
- 6. Include a **Description** of the adjustment.

This description can be seen on the Portal by parents as well as on the student's Journal tab.

- 7. Mark the Include Patron Detail box to view student names instead of just total numbers.
- 8. Click the **Test** button to view the results of the report prior to making changes to the database. To finalize these changes, click on **Run Update**. The results appear in another window.



Mode: Adjust Balances on Inactive Accounts Editor

### **Run the Adjustment Report**

#### **PATH:** *Point of Sale > Reports*

After student accounts have been adjusted, districts can reference these changes by running an **Adjustment Report** to view these records.

- 1. Select an individual school or choose District (All Schools) from the School dropdown.
- 2. Select a **School Year**.
- 3. Select a Summary Type. Options include: Daily, Period, and Month.
- 4. Select a Date Type. Options include the Transaction Date or the Post Date.
- 5. Choose an **Adjustment Type** for the report. Default options include: **Bad Debt**, **Refund**, and **Write-Off**.

The **Date** options depend on the **Summary Type** selected. For any date, the input date must be within the range of calendar year's start date and end date. Input a day, start date and end date, or month in which to run the report.

- 6. Mark the Adjustment Detail box.
- Select how you would like to sort the report from the Sort by options: Adjustment Type or Student Name.
- 8. Select Generate Report. The results appear in another window.

Index	Search Help <	Adjustment Report
▼ Point	of Sale	This report prints adjustment summary and detail information. The input date/month must be within the range of calendar year's start date and en
•	Reports	date.
	Adjustment Report	
	Audit Report	Which school and period would you like to include in the report?
	Cashier Report	School District (All Schools)
	Deposit Report	School Year 14-15 🔻
	Edit Check	Summary Type   Daily  Period  Month
	End of Day	Summary type Bally O Period O Month
	Funds Transfer	Date 07/22/2014 n
	Item Summary	
	Journal Batch	Date Type
	Patron Balance	Which type of report would you like to generate?
	PIN Report	Bad Debt
	Transaction Detail	Adjustment Type Refund Write-Off
	Transaction Summary	
	Voids Report	
	Balance Letter Wizard	Adjustment Detail Show
Þ	Account Maintenance	Sort By
Þ	Administration	
Ca	afeteria Serve	Generate Report
Te	rminal Manager	Output Report

Adjustment Report Editor

## **Send Letters to Households**

Districts can send out letters to households notifying them of the student's account current balance through the **Patron Balance** report. Districts can also send a letter with the use of the **Balance Letter Wizard** or through **POS Account Messenger**.

To send a letter to a household regarding an account's low balance through the **Patron Balance** report:

- 1. Select Low Balance Letter from the Report Type dropdown.
- Choose a Household Letter Print Option. Select Multiple Accounts per Letter if there are multiple students with Food Service accounts residing in the same household or select One Account per Letter.
- 3. Mark the Print Letters for Secondary Households check box. (Optional)
- 4. Reports can be run for individual schools and for all schools in the district. Select a school or choose **District (All Schools)** from the **School** dropdown.
- 5. Select a School Year.
- 6. Select an Ad Hoc Filter. (Optional)
- 7. Input a Maximum Balance value. (Optional)
- 8. Select **Eligibility** options. Check box options include: **Paid**, **Reduced**, **Free**, and **Non-reimb** & **Adult**.
- 9. Select Sort Options. Options include: Patron Name, Grade & Name, and Homeroom Teacher.
- 10. Select an Account Status. Options include: Active, Inactive, and All.
- 11. Mark the Include End Dated Patrons check box. (Optional)
- Select an existing template from the Select a letter template options or create a new template by selecting New Letter without selecting a template. Complete one of the following options:



Option	Procedure		
Select a letter template	If a template is selected, click <b>Edit</b> . A template letter detail will appear.		
	Anything in a white text box will print as it shows in the detail editor.		
New Letter	If a template is not selected, click <b>New Letter</b> and create a new template.		

13. After the letter editor detail is modified to fit your specifications, click **Save, Copy, Print Sample,** or **Back** to further edit the letter options.

14. Select Print Letter.

For more details about Patron Balance information and reporting, see the Patron Balance page.

Index	Search Help <		Patron Balance Report			
⊳ Messe	nger	•	The Low Balance Letter report will create account balance selected. The balance is based on the date and time transa			
• Point o	fSale					
▼ R	eports		Which type of report would you like to generate? Report Type	Household Lette Option	er Print   Multiple Accounts per Letter  One Account per Letter	
	Adjustment Report		Low Balance Letter	Print Letters for	Secondary Households	
	Audit Report		Select a letter template			
	Cashier Report		Harrison High Low Balance	Which school School	and period would you like to include in the report?	
	Deposit Report					
	Edit Check			School Year	14-15 🔻	
	End of Day			Ad Hoc Filter	•	
	Funds Transfer			Max Balance		
	Item Summary			Eligibilty	Paid Reduced Free Non-Reimb & Adult	
	Journal Batch					
	Patron Balance			Sort Option	Patron Name      Grade & Name      Homeroom	
	PIN Report	н	Edit Delete	Account	Teacher	
	Transaction Detail		New Letter	Status	Active      Inactive      All	
	Transaction Summary			Include End Dat	ed Patrons	
	Voids Report			Print Letter		
	Balance Letter Wizard					

Report Type: Low Balance Letter Editor

etter Detail etter Name		*Font Type	Avial	-	_	
nor manio	Harrison High Low Baland	r ont type	Arial	•		
1	Allow Margin for Letter Head					
Har Francisk						
etter Format					_	
Low / Negative Account Balance Reminder						
Low / Negative Account Balance Reminder						
	Low / Nega	tive Account Balance Reminder				
		tive Account Balance Reminder				
Date: MN	Low / Nega	tive Account Balance Reminder				
Date: MN		tive Account Balance Reminder				
Date: MN Guardian Name	ו/DD/YYYY	tive Account Balance Reminder				
	ו/DD/YYYY	tive Account Balance Reminder				
Guardian Name	ו/DD/YYYY	tive Account Balance Reminder				
Guardian Name Address	ו/DD/YYYY	tive Account Balance Reminder				
Guardian Name Address	M/DD/YYYY ?(\$)	tive Account Balance Reminder				

#### Low Balance Letter Template Detail

Save C Back				
*Letter Name		*Font Type	Arial	
	Allow Margin for Letter Head			

#### Low Balance Letter Detail

Infinite Campus

Index	Search Help <	Balance Letter Wizard	
▼ Point o		This wizard will walk you through the creation of an account balance letter format. The students basic information, accour and mailing address will be printed automatically.	nt balance
▼ R	Reports		
	Adjustment Report	Balance Letter Templates Which students would you like to include in the report?	
	Audit Report	which stadents would you like to include in the report.	
	Cashier Report	Grade     All Students     EC	
	Deposit Report	нк	
	Edit Check	КВ 💌	
	End of Day	Ad Hoc Filter	
	Funds Transfer	Enrollment Effective Date 07/21/2014	
	Item Summary		
	Journal Batch	Summary Date* 07/21/2014	
	Patron Balance	Edit Delete	
	PIN Report	New Letter Sort Option   Name  Grade  Balance  Homeroo	m Teacher
	Transaction Detail		
	Transaction Summary	Print Letter	
	Voids Report		
	Balance Letter Wizard		
►A	ccount Maintenance		

#### Balance Letter Wizard



Index Search Help	POS Account Messenger
▶ Behavior	POS Account Messenger sends Point of Sale account related messages to Messenger contacts for student an
▶ Health	recipients, select an Ad Hoc filter.
▶ Attendance	The Template Name and User/Group can be changed after selecting Save or Copy.
▶ Scheduling	
▶ Fees	User/Group User ▼ Template <new> ▼ Save Copy Delete</new>
Grading & Standards	
▶ Medicaid	Enter the filter criteria for POS Account Messenger:
▶ Programs	School Grade Eligibility All Schools All Grades All Eligibilities
Ad Hoc Reporting	0000 Adams Elementary ALC 01 Paid
▶ Transcripts	988 Alternative Learning Center 02 Reduced 555 Appleby Middle 03 Free
User Communication	1 Arthur Elementary 04 Non-Reimb & Adult
▶ Assessment	019 Buchanan Middle School 05 8 Carter Middle 06
System Administration	176 Cleveland Elementary         07           300 Clinton Secondary         08
► FRAM	0197 Coolidge Elementary  09
▶ Messenger	CTRL-click or SHIFT-click to select multiple
▼ Point of Sale	Balance Account
▶ Reports	All      Range      Use Account Reminder Setting      All      Active      Inactive
<ul> <li>Account Maintenance</li> </ul>	Ad Hoc Filter (Further narrows criteria)
Account	Effective Date Limit delivery to contacts that speak
POS Preferences	07/22/2014 No Language Preference V
POS Account Messenger	
POS Account Messenger S	Delivery Devices: Inbox I Email Voice Text
Add Account	Sender's Email: messenger.ieentropymaster@infinitecam
Mass Account Creation	
Reminder/Restriction Wiza	Message Subject
Account Management Wiza	Message Body
Administration	Cutting and pasting from third party products, e.g., Microsoft Word, is not recommended.
Cafeteria Serve	B Z U 注 ⊟ ∉ ∉ ≡ ≡ ≡ Ø 🙈 📓 🔳 🗑 🕅
Terminal Manager	Font Size A
<ul> <li>Staff Evaluations</li> </ul>	
▶ Surveys	

Account Maintenance > POS Account Messenger

# **Terminal Maintenance**

#### **PATH:** *Point of Sale > Administration > Terminals*

The Events column of the **Terminals** editor of Point of Sales Administration should be at or very close to 0 (zero) for all terminals on or after the last day of serving.



#### Terminals

Best practices for verifying that the Event column is accurate for the Point of Sale terminals:

- It is recommended that cashiers write down the name of the last student that went through their lunch line on the last day of school.
- Generate a Daily Transaction Detail Report for the last day of school and check for the name of the student who went through the lunch lines last to verify the last transaction has posted successfully.



Daily Transaction Detail Report

# **Deactivating Terminals**

Once the last transaction has been verified to have posted successfully, the terminals that will not be used until the following school year can be inactivated.

This can be done by:

- 1. Going to **Point of Sale > Administration > Terminals**.
- 2. Select a Terminal; a Terminal Detail will appear for that terminal.
- 3. Unmark the Active check box.
- 4. Save.

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When the next school year is about to begin, mark the terminal as Active once more and complete a POS Data Reload. For instructions on the POS Data Reload process, see the Terminal Manager page.



Terminal Detail

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