

Cafeteria Serve

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This functionality is only available to customers who have purchased Campus Point of Sale as add-on functionality.

Classic View: Point of Sale > Cafeteria Serve

Search Terms: Cafeteria Serve

Cafeteria Serve functionality allows districts to process and track food service transactions.

Required Setup

The following areas must be configured before Cafeteria Serve functionality is possible.

- [Application Manager](#)
- [Patron's Account Information](#)
- [Cafeteria Serve Preferences](#)
- Personal [POS Deposit Account](#) and/or [Household FS Deposit Account](#)

When configuring user accounts, please note that Cafeteria Serve only authenticates with a local Campus or LDAP account; therefore, if enabling [Single Sign-On \(SSO\)](#) please reserve a separate local Campus or LDAP account for access to Cafeteria Serve functionality.

Generating Service Layouts (Menus)

Using the Cafeteria Serve tool will generate service layouts (menus).

1. Verify that the school appearing in the Campus Toolbar **School** field is correct for the application being processed.
2. Select the appropriate **Application** for processing transactions.
3. Select the **Serving Type**:
 - **General Serve** - Used when more than one purchasable item is offered to patrons (*e.g.*, patron can choose between a standard school lunch, ala carte, grill, etc.). When this option is selected, please refer to information in the *Processing General Serve* section after completing the next step.
 - **Continuous Serve** - Used when only one purchasable item is offered to all patrons and no additional choices are available (*e.g.*, when one, standard school lunch is served). When this option is selected, please refer to information in the *Processing Continuous Serve* section after completing the next step.
4. Click **Start**. The service layouts (menus) related to the selected application will be generated. The user may need to allow the Java applet to open.

Searching for Patrons

Several options are available for searching for and selecting patrons for processing within the Cafeteria Serve application.

Cashiers do not need to manually search for a patron within the application if PINs are entered via a PIN pad, or if a barcode scanner is used. Both of these methods require external hardware hooked up to the device running the Cafeteria Serve application.

Cashiers may search for patrons within the Cafeteria Serve application by using the following search options.

General Search

A general search for patrons allows a cashier to search by **First** (name), **Last** (name), **Grade**, or **School** of enrollment (active students) or district assignment (active staff). If necessary, the cashier may see all available patrons by clicking the **Search** button without selecting or entering any criteria in the search fields.

Search by Homeroom Teacher

If necessary, cashiers may search for students based on homeroom teacher. Selecting a teacher from the **HR Teacher** field and clicking the **Search** button will return a list all students who have the selected teacher for homeroom.

Field Logic

The **HR Teacher** search field is populated with the names of teachers who are assigned to the Primary Teacher field of a course [Section](#).

The course section must have the Homeroom checkbox marked and must be active within the current term.

Search by Lunch Assignment

If necessary, cashiers may search for students based on their lunch assignment. Selecting an assignment from the **Lunch** field and clicking the **Search** button will return a list all students associated with the lunch assignment.

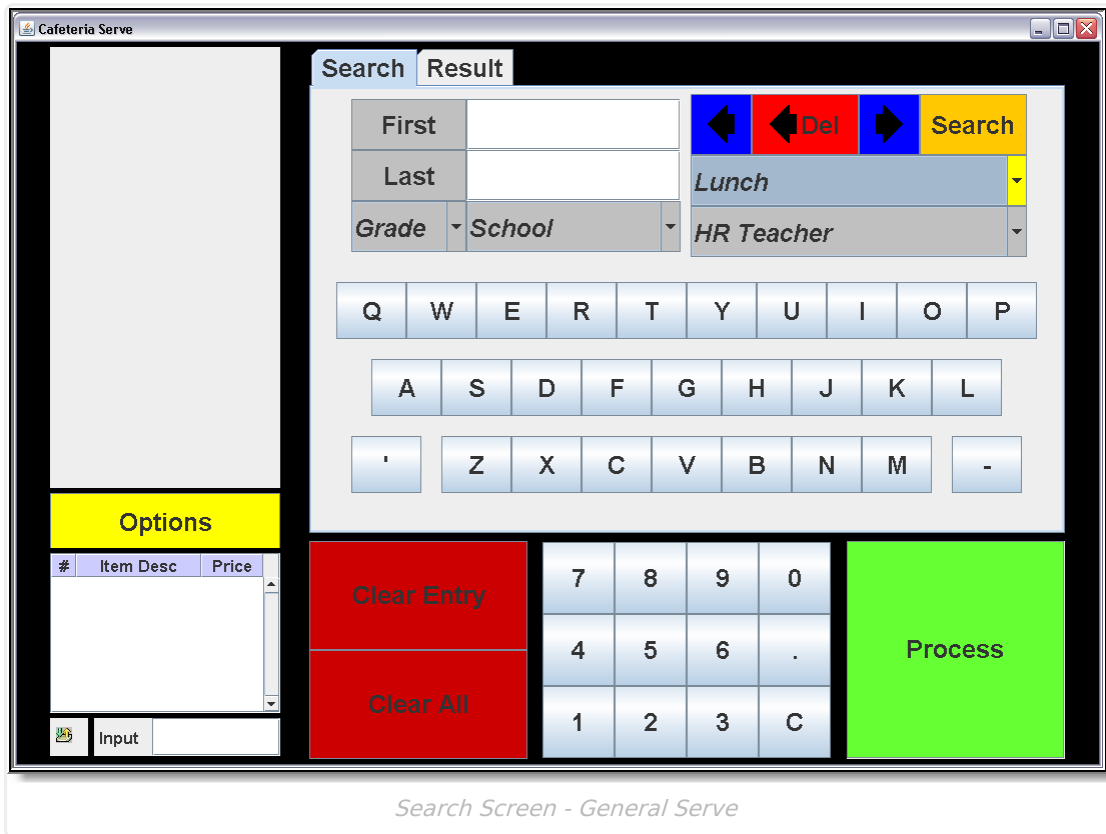
Field Logic

The **Lunch** search field is populated with all lunch assignments attached to the Lunch field of an active course [Section](#).

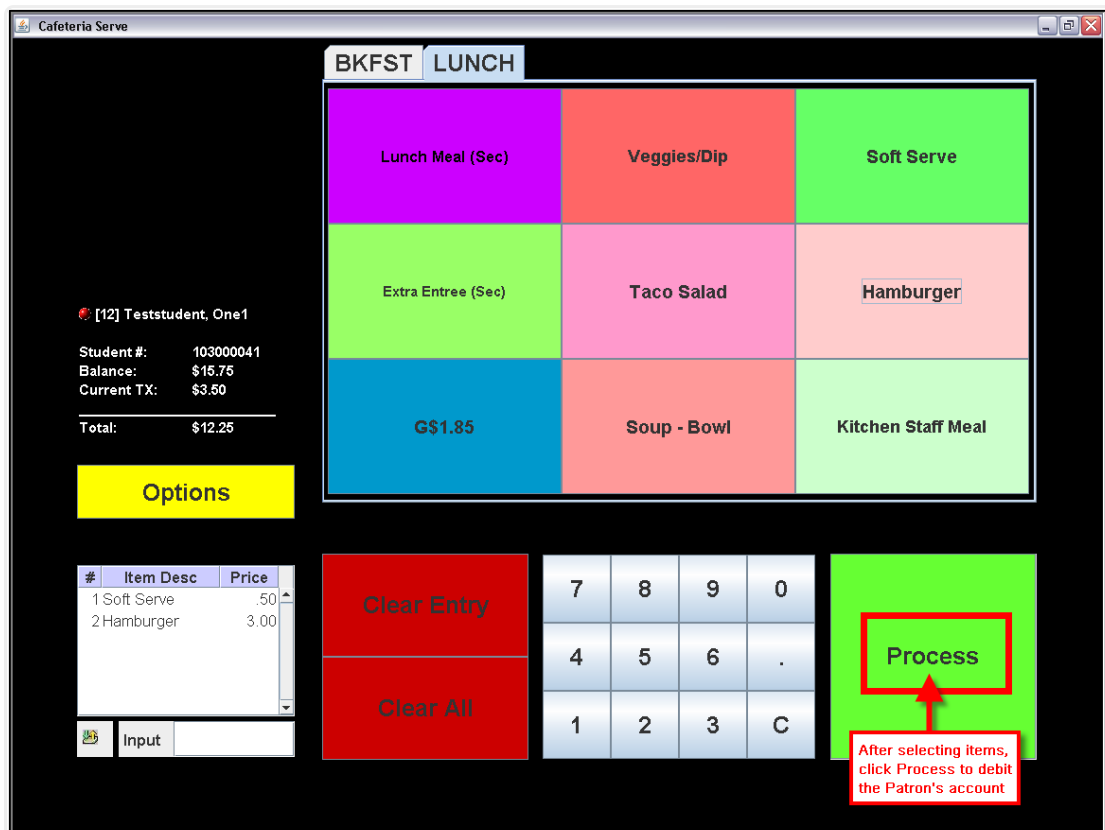
All students who are actively enrolled in a roster of a course section with a lunch assignment will be returned by the search.

General Serve

When the General Serve radio button is selected on the Cafeteria Serve tool, cashiers will need to process each purchasable item individually, as patrons go through the line. This Search screen tab will load when the General Serve option is selected:



Cashiers must use a mouse to search for patrons, select items on the service layout (menu) and process transactions. Keyboard commands will not work. If a separate PIN pad is connected, patrons may enter their PINs.



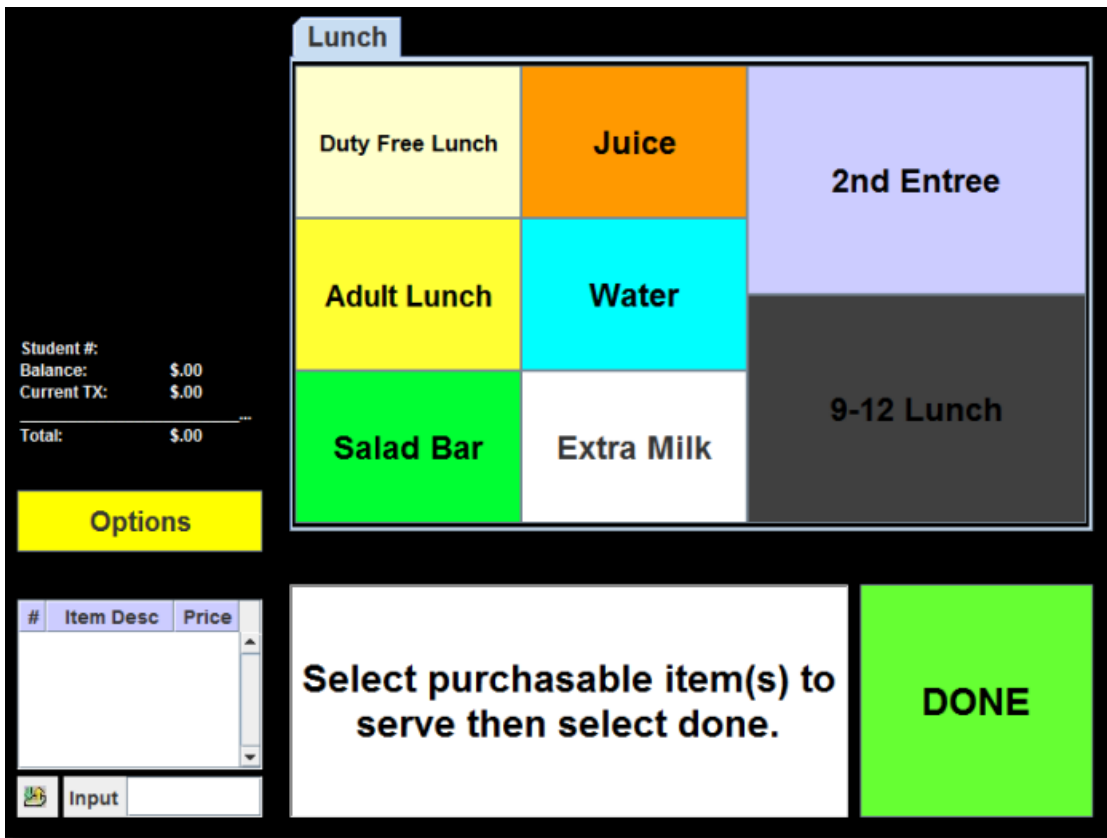
General Serve - Service Layout Menu

1. On the Search tab, search for a patron by entering search criteria (First, Last, Grade, School, etc.) and clicking **Search**. The view will switch to the Result tab to display results.
2. On the Result tab, click the name of the patron. This will highlight the patron in yellow.
3. Click the **Select** button to process a transaction for the highlighted patron. The view will switch to the service layout (menu).
4. Select the appropriate service layout (menu) tab, if multiple tabs exist.
5. If more than one quantity of the same item is being purchased, click the appropriate number(s) on the number pad. The quantity entered will appear in the **Input** field in the lower-left corner of the screen.
6. Select the item(s) to be purchased.
7. Verify the purchase in the **Item Desc** box in the lower-left corner of the screen.
8. Click **Process** to select all items in the Item Desc box and debit the cost to the patron's account. The cashier will be redirected to the Result tab to process the next patron.

At the end of the serving period, cashiers should log out of the Cafeteria Serve application by selecting the **Options** button, clicking **Logout** and clicking **OK**. This will close the Cafeteria Serve application.

Continuous Serve

Continuous Serve is used when all patrons are purchasing the same menu item. The meal only needs to be selected once; i.e., before serving the first patron.



1. Choose the item(s) ALL patrons are purchasing then select **Done**.



2. Patrons enter their PINs as they go through the line. The cashier does not need to select purchasable items each time.

Cashier's can search for patrons, allow patrons to enter their PINs or scan patron bar codes to select the patron for processing.

3. At the end of the serving period, log out of the Cafeteria Serve application by selecting the **Options** button, clicking **Logout** and clicking **OK** to close the Cafeteria Serve application.

Exiting Service Layouts (Menus) Before Processing

If the cashier is currently viewing the service layout (menu) screen and has selected the wrong patron by accident, or otherwise wishes to exit this screen BEFORE a transaction has been processed for the current patron:

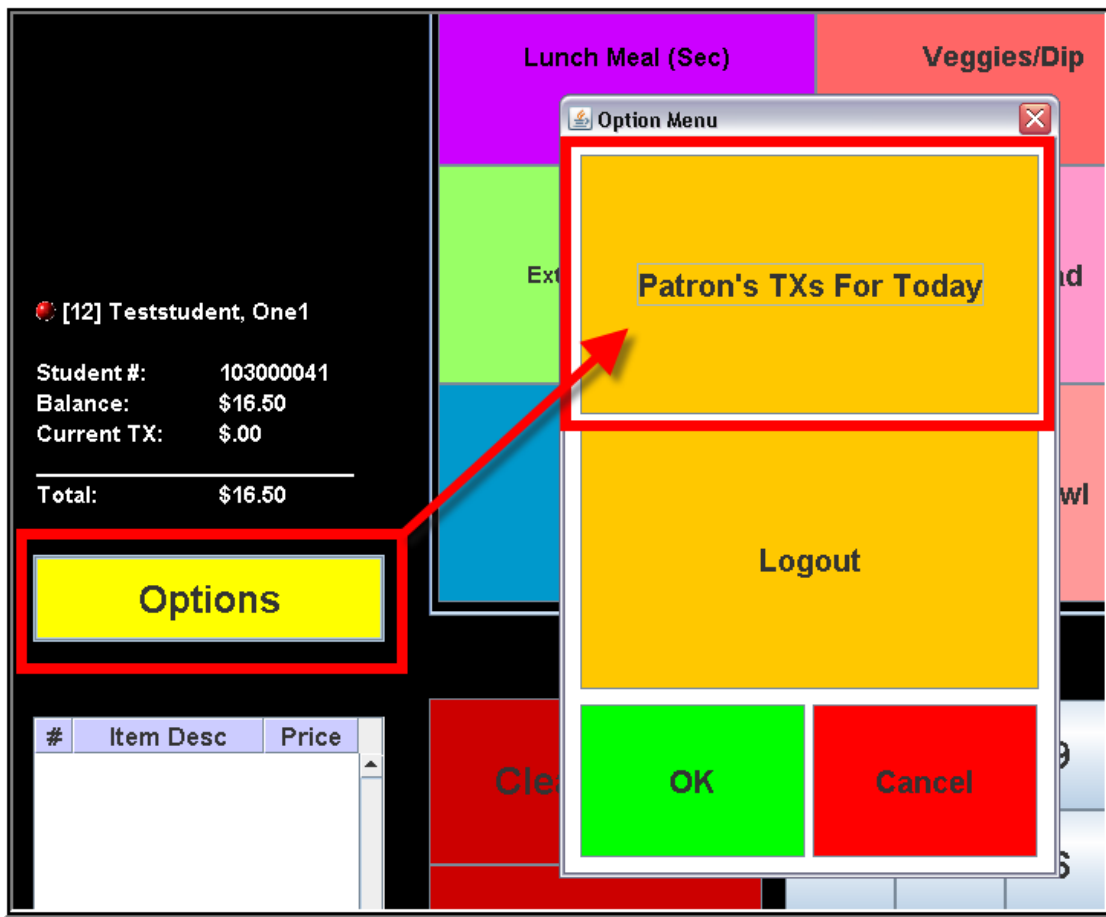
- If items have not been selected (*i.e.*, nothing appears in the Item Desc box):
 1. Click the **Process** button.
 2. Click **Yes** on the pop-up box to cancel the transaction. The cashier will be returned to the Result tab.
- If items have been selected (*i.e.*, items appear in the Item Desc box, but they should not be processed):
 1. Click the **Clear All** button to remove all items from the Item Desc box.
 2. Click the **Process** button.
 3. Click **Yes** on the pop-up box to cancel the transaction. The cashier will be returned to the Result tab.

Voiding Patron Transactions

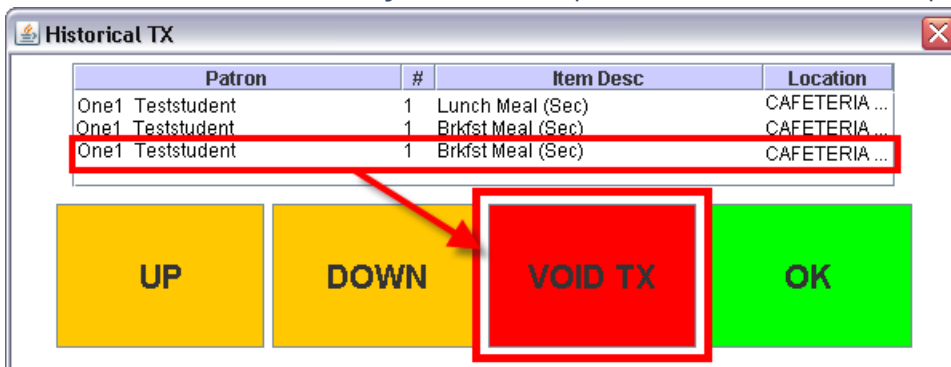
If the cashier needs to modify or remove a previously posted transaction while working within the Cafeteria Serve application, he/she may do so through the following steps:

Transactions may be voided at any time within the Campus application, through the patron's Journal tab.

1. Search for the patron.
2. Click the patron's name from the Result tab (student should be highlighted in yellow).
3. Click **Select**. The view will switch to the Processing service layout (menu).



4. Click the **Options** button. The Option menu will appear:
5. Click **Patron's TXs For Today**. A list of the posted transactions for the patron will appear.



6. Select the transaction(s) that should be voided. Items cannot be voided individually.
7. Click **Void TX**. A number pad window will appear.

8. A manager must enter his/her Manager PIN and click **Submit** to allow the transaction to be voided. Cashier PINs will not work.
9. Click **OK** on the Transaction Voided message to complete the process. The original transaction will appear in yellow and the voided transaction will appear underneath it in red
10. Click **OK**. This information will be accurately reflected within the patron's [Journal](#).

Patron	#	Item Desc	Location
One1 Teststudent	1	Lunch Meal (Sec)	CAFETERIA ...
One1 Teststudent	1	Brkfst Meal (Sec)	CAFETERIA ...
One1 Teststudent	1	Brkfst Meal (Sec)	CAFETERIA ...
One1 Teststudent	1	Brkfst Meal (Sec)	CAFETERIA ...

COLOR KEY:
 Regularly Posted Item (not voided)
 Originally Item that was Voided
 Verification Item was Voided

UP
DOWN
VOID TX
OK