

# Point of Sale Best Practices

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[Terminal Setup](#) | [Application Manager](#) | [Item Categories](#) | [Purchasable Items](#)

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

The Point of Sale Best Practices describe the preferred setup of Point of Sale tools as they relate to Campus Food Service.

## Terminal Setup

Two options are provided for Terminal setup.

See the [Terminals](#) page for detailed information on creating terminals.

### Option 1 - Terminal Setup

This options is best for the following cafeteria structure:

- Each school has a physical building
- Each physical building has a cafeteria.
- Each cafeteria may have one or more terminals.

### Terminal Structure

1. Create terminal(s) for each cafeteria.
2. Keep the terminal name short or use an abbreviated form. Terminal names should be under eight (8) characters.
3. Name the terminal something that signifies where the terminal is located and the type of serving line in which the terminal will be used.

The school assigned to the terminal determines which student enrollments will appear on the terminal and how the items purchased appear on the reports.

Only one school should be assigned to a terminal.

If there is one school type and one terminal at each site (Main High School, Main Middle School, Main Elementary), the terminal names should be abbreviated to the school type - HS\_01, MS\_01, EL\_01. If another terminal is added in the future, additions should be named HS\_02, MS\_02, EL\_02, etc.

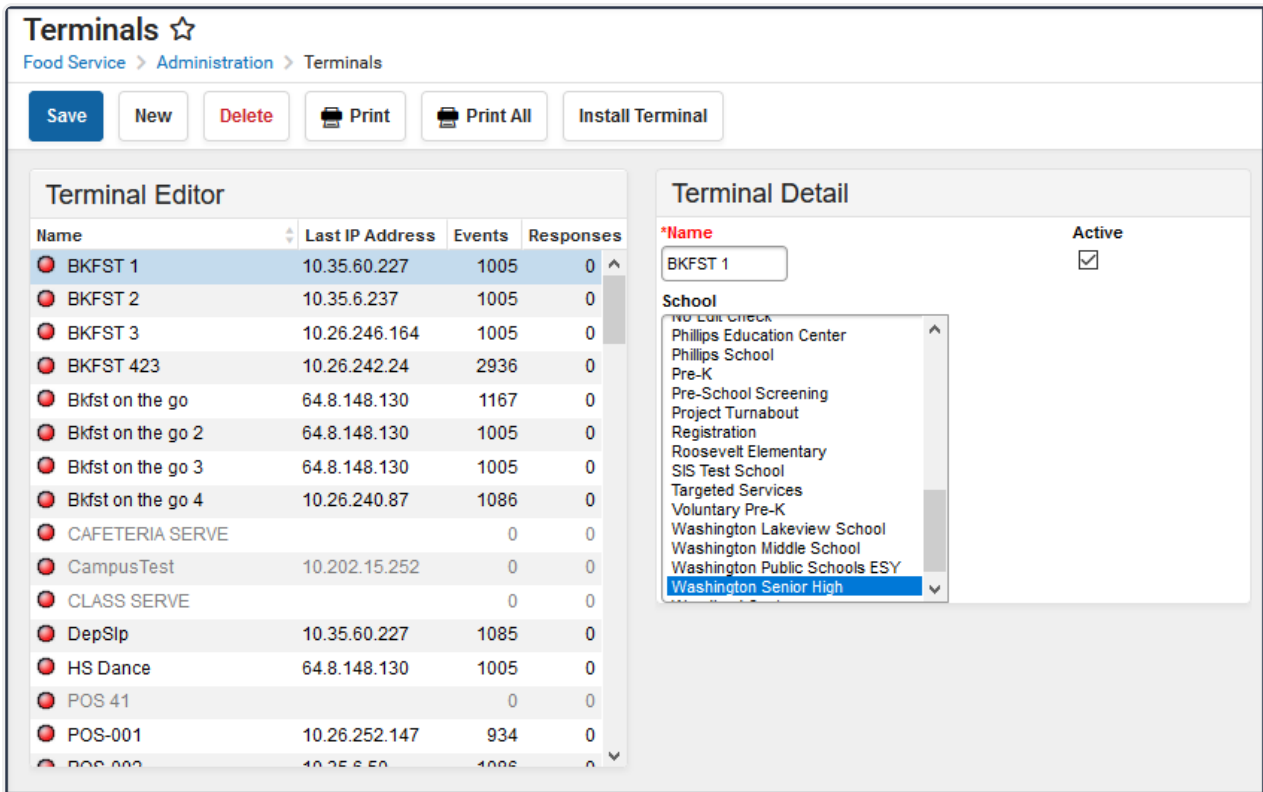


Image 1: One school type, One terminal

If there are two or more school types and only one terminal at each site, such as East Elementary and West Elementary, the terminal names could be East\_01 and West\_01.

If there is only one school type and more than one terminal at that site, the terminal names could be HSPizza, HSGrill, HSAC, MSGrill, MSPizza, which would indicate the physical location of the terminal within the cafeteria.

## Option 2 - Terminal Setup

This options is best for the following cafeteria structure:

- Each school may or may not have a physical building.
- One or more schools share a cafeteria (i.e., the high school and middle school share a cafeteria).
- The cafeteria is shared by multiple schools yet housed at one school building.
- All schools shares a cafeteria located at one physical site.
- The cafeteria may have one or more terminals.
- Students are processed at any terminal.

### Terminal Structure

1. Create terminal(s) for each cafeteria.
2. Keep the terminal name short or use an abbreviated form. Terminal names should be under eight (8) characters.
3. Name the terminal something that signifies where the terminal is located and the type of serving line in which the terminal will be used.

- If there is one physical cafeteria with one or more terminals where all students are served, assign all schools to the terminal(s).
  - Terminal naming conventions would be the same as noted for Option 1 setup.
- If there are two physical cafeterias where students from one school type are served and another cafeteria where students from another school type are served, assign the terminal to the appropriate school type.
  - Terminal naming conventions would be the same as noted for Option 1 setup.

If more than one school is assigned to a terminal, each school's enrollments will appear on the terminal. This will also allow students to be charged at their correct eligibility.

## Application Manager

Provided are two options for Application Manager setup.

See the [Application Manager](#) for detailed information on creating applications.

### Option 1 - Application Manager

Create a separate application for each school in the district.

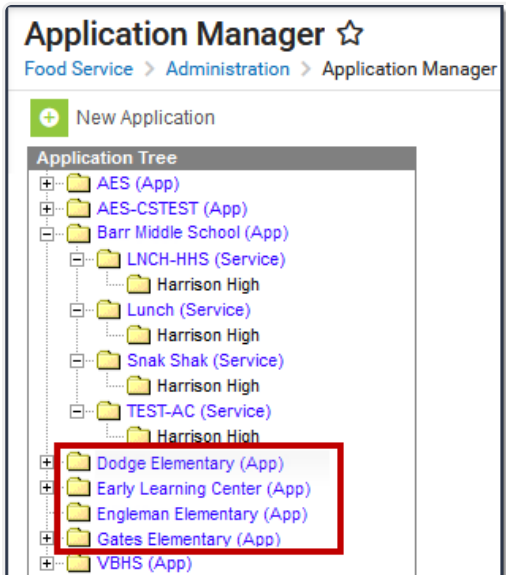


Image 2: Application manager - One Application per School

### Option 2 - Application Manager

Create one application for each school.

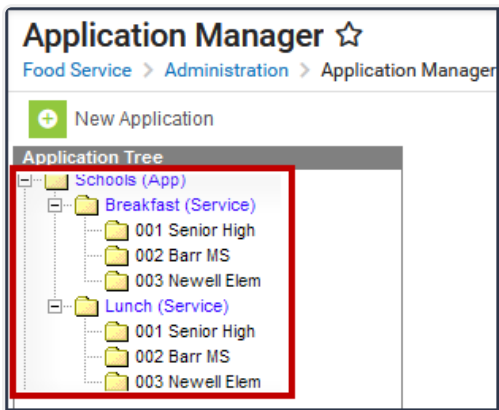


Image 3: Application Manager - One cafeteria, multiple schools

Applications can also be created to show the cafeteria of the schools, designating which students will eat where. This is useful for schools that share cafeterias.

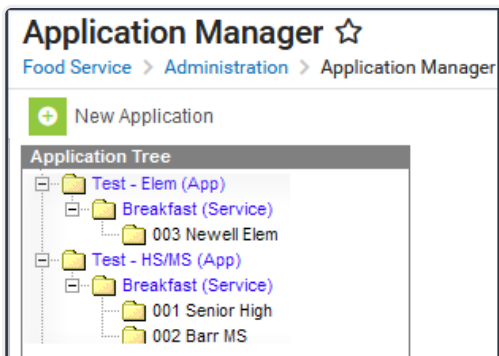


Image 4: Application Manager - Shared Cafeteria

## Item Categories

Districts can create as many item categories as needed. The three main categories that must be created are:

- A la Carte
- Breakfast Meal
- Lunch Meal

These categories can be used to track all purchasable items a district may need to report.

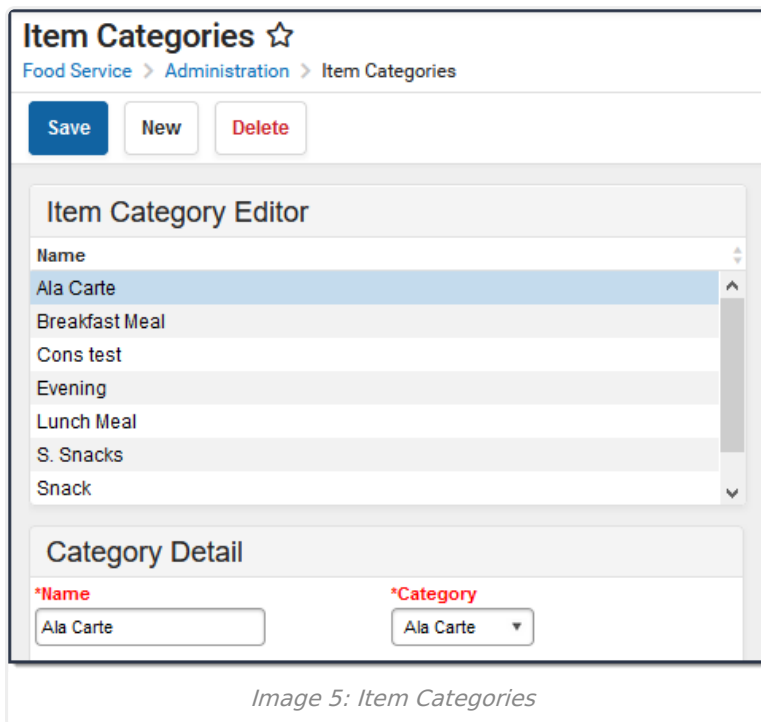


Image 5: Item Categories

It is critical that the Meal Category only be assigned to a category that is reimbursable.

See [Item Categories](#) for detailed information.

## Purchasable Items

The following section contains the suggested best practices for creating purchasable items. See [Purchasable Items](#) for detailed information.

## Item Setup

If an item is sold for the same price throughout the district, it only needs to be created once and assigned to the applicable service layouts (menus). There is no need to create the same item for specific schools/serving locations. For example, if milk is sold for .50 cents throughout the district, only one milk item needs to be created.

## Item Price Changes

When the price of purchasable items changes (*e.g.*, the price of a candy bar from .50 to .75 cents), a new purchasable item should be created and activated, reflecting the new price. The old item should then be inactivated (by clearing the **Active** checkbox). Handling price changes in this manner will prevent reporting issues related to items purchased in previous transactions.