

General Preferences (POS Preferences)

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Description of POS Preferences

Classic View: Point of Sale > POS Preferences > General

Search Terms: General Preferences

The General POS Preference tool allows a school and/or district to set preferences for the POS system. POS Preferences should be set prior to using a Point of Sale terminal and creating Point of Sale accounts. Options on this tool determine how accounts are created, how PIN numbers are controlled and if eligibility information is viewable.

General Preferences ☆
[Food Service](#) > [Setup](#) > General Preferences

POS Preferences

General Preferences

Default Family Account <input type="checkbox"/>	Show Eligibility in Deposit <input type="checkbox"/>	Autocorrect Transaction for Backdated Applications <input checked="" type="checkbox"/>	Disconnect Status Time <input type="text" value="10"/>
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PIN Preferences

Auto Creation of Account With New Enrollment <input type="checkbox"/>	Auto Creation of PIN With New Enrollment <input type="checkbox"/>	Set Student Number as PIN ⓘ <input type="checkbox"/>	Allow Student PIN to Show on Printed Student Schedules <input checked="" type="checkbox"/>
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Scheduled Messenger

Only Include Accounts With Activity Since Last Scheduled Message <input checked="" type="checkbox"/>	Minimum Days Between POS Scheduler Messages <input type="text" value="1"/>
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Example General Preferences

Description of POS Preferences

Preference	Description
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Preference	Description
<p>Default Family Account</p>	<p>When this checkbox is marked, Campus only creates family accounts and not individual patron accounts.</p> <p>This preference only applies when</p> <ul style="list-style-type: none"> • the Auto creation of account when enrollment record is added preference is also selected. • there is more than one student in a household with a food service account. <div style="border: 1px solid #add8e6; padding: 10px; margin-top: 10px;"> <p>When both preferences are selected and an existing household has a new family member enrollment entered, Campus adds the new family member to the existing account for patrons in the same household.</p> </div>
<p>Show Eligibility in Deposit</p>	<p>When this checkbox is marked, Campus displays the student's eligibility on the Census > Household > FS Deposit screen.</p>
<p>Autocorrect transactions for backdated applications</p>	<p>Marking this checkbox allows Campus to automatically update eligible meals when the Effective Date on a Household Application or Online Application is earlier than the day the application is processed. This feature gives students access to free/reduced lunches on the date the application was received.</p> <p>When this checkbox is marked, Campus automatically compares the eligibility date to the student's transactions, voids the old transaction(s), and re-enters the transactions using the correct eligibility. This preference also applies when amending household applications.</p> <p>Example</p> <p>The household application was submitted to the district on 5/1 and entered into the Household Applications tool in Campus on 5/9. For the preference to update any eligibility "mischarges" between 5/1 and 5/9, the Effective Date on the household application (once entered into Campus) must be before 5/9. In this example, if you want the auto-corrections to go back to 5/1, enter an Effective Date of 5/1 on the household application.</p> <p>This feature does not apply to applications uploaded via the Eligibility Import Wizard or manually entered eligibility records.</p>

Preference	Description
Auto creation of account when enrollment record is added	<p>When this checkbox is marked, Campus automatically creates a POS account for each new student that enrolls at the school when their enrollment record is created. It will not create duplicate accounts for students who have two enrollments or for students rolled into the next school year.</p> <p>This logic includes support for use of this preference in combination with the Default Family Account preference.</p> <ul style="list-style-type: none"> • If a household already has a family account, a newly enrolled student member in the same household with an active primary membership will be included in the same existing account (i.e., a new sibling enters Kindergarten and older siblings already have an account). • If a student is a primary member of one household and a secondary member of another, the student is assigned to a family account where the primary household membership exists. • If a student is a primary member of two households, the student is placed in the family account where they have the highest memberID assigned (the household where they were most recently assigned as a member). • If a new family account is created for a household and a household includes student memberships that have ended, the students with ended memberships are not included in the household's family account. • If students are enrolled before Households are created and primary membership in a household is indicated, creation of an accurate family account based on primary household membership will not be possible and individual patron accounts will be created instead. • Staff members who have students in the district will be added to family accounts manually or through the Mass Account Creation Wizard. If added manually, users must select the Account Folder and click Add Patron. <div data-bbox="472 1375 1422 1541" style="background-color: #fff9c4; padding: 10px; margin-top: 20px;"> <p>For help in identifying whether a household member is primary or secondary and their household start and end dates, see the Members page.</p> </div>
Auto creation of PIN # when enrollment record is added	<p>When this checkbox is marked, Campus generates a PIN number when a new student is enrolled.</p>

Preference	Description
Auto creation of PIN - Use Student Number as PIN	<p>When this checkbox is marked, Campus automatically uses the student number to create a PIN when a new enrollment record is added. If Campus cannot set the Student Number as PIN on a new enrollment, Campus assigns a new PIN according to the PIN preferences set on the PIN Auto Gen tool and sends a Process Inbox message to the POS Admin.</p> <div style="background-color: #e1f5fe; padding: 10px; margin: 10px 0;"> <p>To avoid creating PINs that conflict with student IDs, the generated PIN should not equal the same number of digits as a student ID. Be sure to check your settings in the Pin Auto Gen tool.</p> </div> <p>If a student was previously enrolled in a district and had a PIN, left the district, then comes back, the student's old PIN does not get updated. As a best practice, remove PINs from inactive students. Doing this tells Campus to assign their student number as their PIN when they are enrolled again. The option Allow access to Student Number as PIN must be enabled in System Preferences to edit this field.</p>
Allow Student PIN to show on printed Student Schedules	<p>When this checkbox is marked, the student's PIN displays on student schedules. This requires the Lunch PIN option to also be marked on the Schedule Report Preferences. This number prints below the schedule grid. When this checkbox is not marked, the student's PIN does not display on student schedules, regardless of whether that option is marked on the Schedule Report Preferences.</p>
Disconnected Status Time in minutes	<p>Indicates how often Campus will ping POS terminals to verify the POS is still communicating with Campus. This affects the refresh rate of the red/green icon displayed on the Terminals tool.</p>
<p>POS Account Messenger Scheduler Preferences This section includes preference settings that determine how the POS Account Messenger Scheduler tool sends scheduled messages.</p>	
Only include accounts with activity since last scheduled message	<p>Marking this checkbox limits message delivery to accounts that show activity since the last scheduled message task was created. Account activity is any credits or debits to the account balance, including voided transactions. Account activity does not include:</p> <ul style="list-style-type: none"> • any free items served on the account, such as Free qualifying meals or ala carte items charged as Free eligible, or • a transaction that results in 0.00 being charged to the account.

Preference	Description
Minimum days between any Scheduler messages for accounts	<p>Entering a number in this field limits message delivery to accounts last contacted after the minimum days entered in this field. Decimal points are not allowed.</p> <p>For example, if you enter 3 in this field and set up an hourly Messenger schedule, accounts will receive one message every 3rd day as long as the account meets the filter criteria on the message template.</p>
