



POINT OF SALE

2012-2013





LOGIN PROCEDURES

REGULAR TERMINALS

LOG ON TO THE SYSTEM

1. The first thing to do is be sure that the screen says "Login" and the curser is blinking. This means that you have a connection to the server.
2. Turn on power
3. Type in your login, which is unique to your particular terminal.
Your login is:
Login:
4. Type in your password.
Password: Your password is:
Type in your second password.
5. PASSWORD Your password is:
6. Type in your 3 initials
OPERATOR INITIALS XXX
7. IS ALL OK? Enter **Y** for Yes
8. Enter **FS** for FOOD SERVICE @ ENTER MENU OPTION
9. Enter **02** for Meal Processing @ ENTER MENU OPTION
10. Enter **01** for Meal Input @ ENTER MENU
11. @ SCHOOL #; Enter your school number
12. @ MEAL TYPE; Enter **B** or **L**
B=breakfast L=Lunch
13. Enter to accept the default of **N**, Or **Y** to accept the change routine Calc Change?
14. @ PROMPT REIM MEAL? Enter **Y** or **N**
15. @ ALL OK? (Y/N) TYPE "Y"
16. @ TYPE, enter 1 for MEAL PROCESSING

LOGIN PROCEDURES

TOUCH SCREEN TERMINALS

LOG ON TO THE SYSTEM

This version of Systems Design will display the student's picture and/or will allow for touch screen operation. When the student's ID is entered, the picture will display next to the input screen.

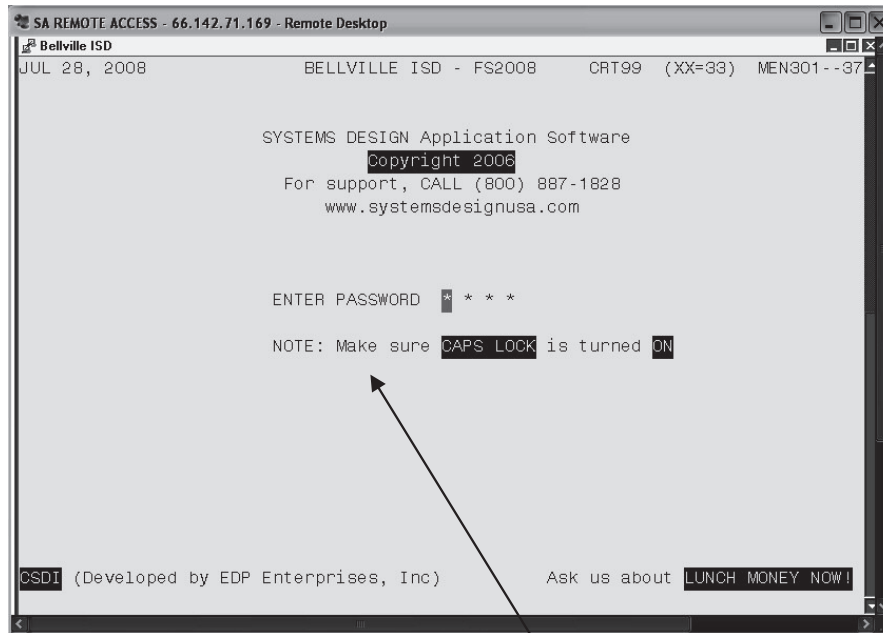
1. Turn on thin client (clear button, behind monitor, left side); clear button turns green. System will boot up.
2. **Note:** If screen displays, "START NEW SESSION"; click.
3. Screen will then display "Click here to open Systems Design POS2 ..."; click.



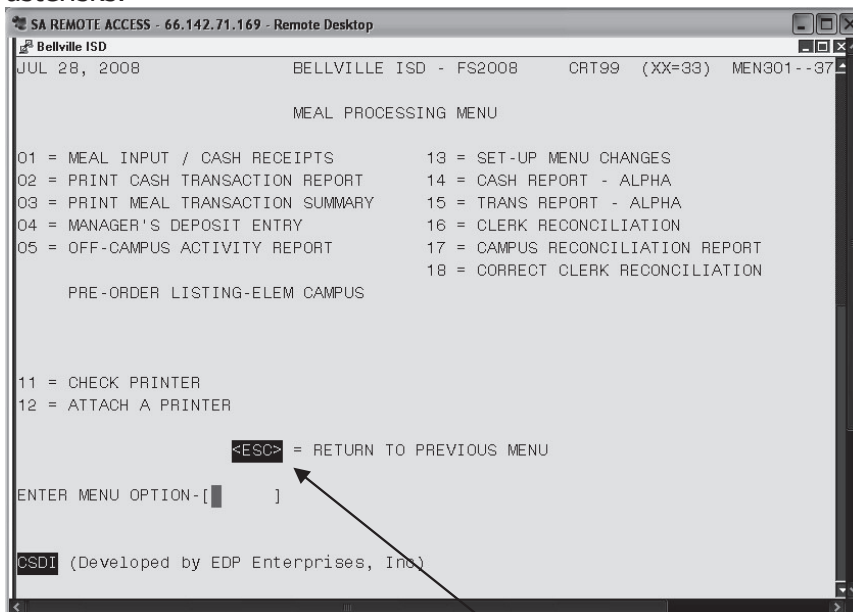
4. Systems Design login window will appear (blue screen). Login as usual. (Steps 3-16 as shown under REGULAR TERMINAL login.)

POS FEATURES FOR CASHIERS/CLERKS

There have been several enhancements to Systems Design POS. Systems Design has added additional instructions and features to make the package easier to use and faster to operate.



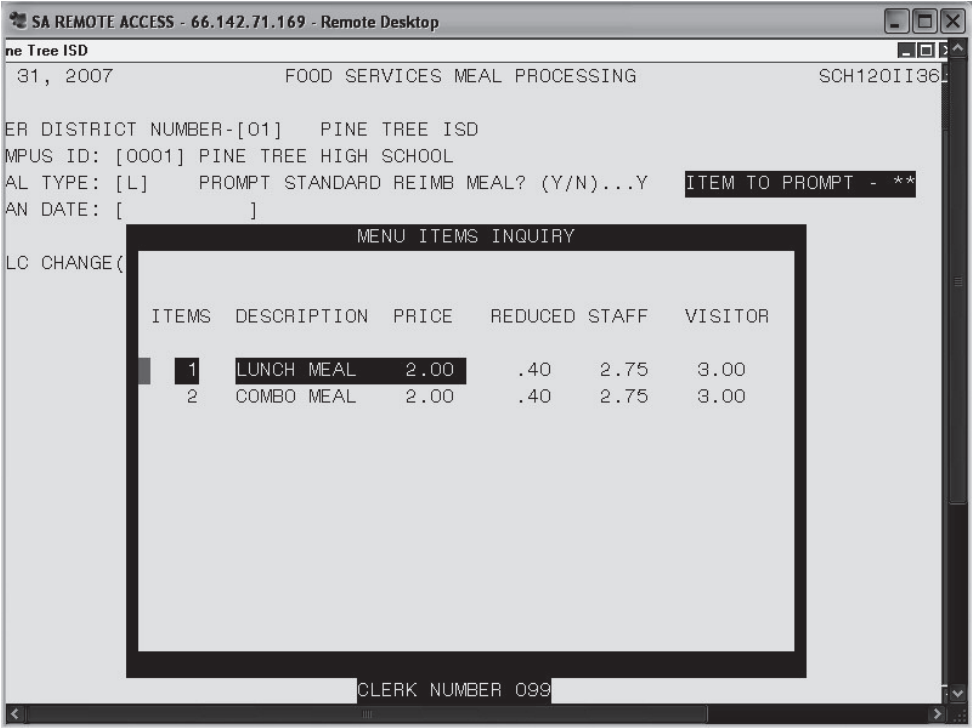
The first feature the clerks will notice is that they are instructed/reminded to use **CAPS LOCK key** and they will be able to see which character they are on when inputting the PASSWORD as indicated by the asterisks.



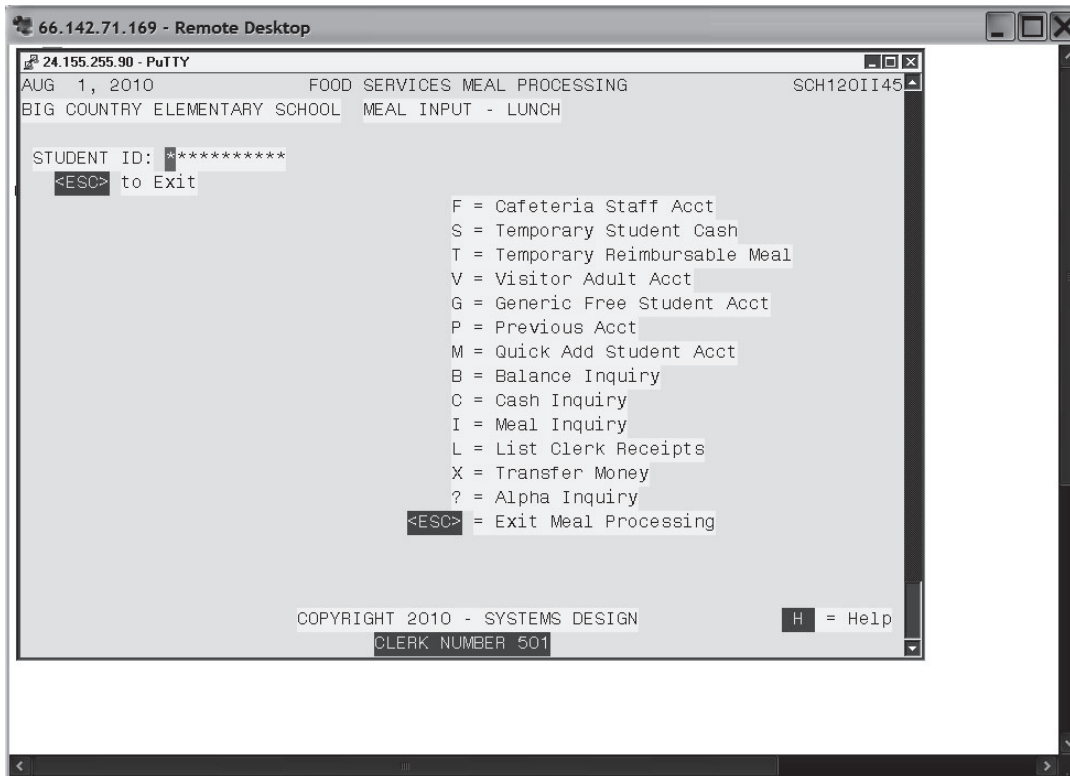
The next major difference is that the **"Esc key"** or Escape key will be used through out the system to exit all programs. This key is located in the upper left-hand corner of the keyboard just to the left of the **"F1 key"**

REIMBURSABLE MEAL SELECTION

Accessing the MEAL INPUT screen now has new features. The operator will notice the ability to select the type of reimbursable meal to be prompted at each serving line. When the system prompts the cashier "PROMPT STANDARD REIM MEAL? (Y/N); and "Y" is selected; the cashier will then select from a pop up screen the meal to be prompted on that particular serving line. If the line is non-reimbursable, such as on a Snack Bar line, At "PROMPT STANDARD REIM MEAL? (Y/N): the cashier will select "N" and no meal will be prompted in the student's accounts.



HELP MENU



Another major enhancement to the POS system that the clerk will notice is in meal processing. Several additional options are now available to the clerk at the STUDENT ID prompt. "H" option has been added for a help screen to show all the procedures available from the Meal Input screen. The image above displays these various options. To access the HELP menu, type H, then press enter.

- ☆ The **A** key will allow the clerk to use the Adult Cash Account to serve Teachers and Staff
- ☆ **The F key** will allow the clerk to record the meals of the Cafeteria Staff workers
- ☆ The **S** key allows a student to purchase non-reimbursable meal or Ala cart items
- ☆ The **T** key will allow clerks to serve a student reimbursable meal to a student that presently does not have a ID number (The student name must be written down also, in a spiral notebook per TDA rulers)
- ☆ The **V** key allows the serving of meals and Ala cart items to non-district staff or Visitors
- ☆ The **G** will allow clerks to serve summer feeding and Provision 2 meals
- ☆ The **P** key allows the clerk to bring back up the previous student/ adult account and transactions so that they can edit them.
- ☆ The **M** key allows clerks to use the Quick Enter for assigning temporary account # to students not currently in the districts PEIMS system. This screen has an additional password and is restricted from use by most districts.
- ☆ The **B** key will allow clerks to simply display the current balance of a student/ adult.
- ☆ The **C** key will allow clerks to see the historical cash transactions of a student/ adult.
- ☆ The **I** key will allow clerks to see the historical meal transactions of a student/ adult.
- ☆ **The L key** will allow the clerk to all cash and or check transactions with a time stamp and total money received that day without printing it out
- ☆ **The X key** will allow the clerk to Transfer money from one student account to another without leaving meal processing
- ☆ The **?** key can used in conjunction with the others keys to search the entire districts database of student and adult accounts.

☆ The **<ESC>** is the only key that will allow the clerk to exist the meal serving process!

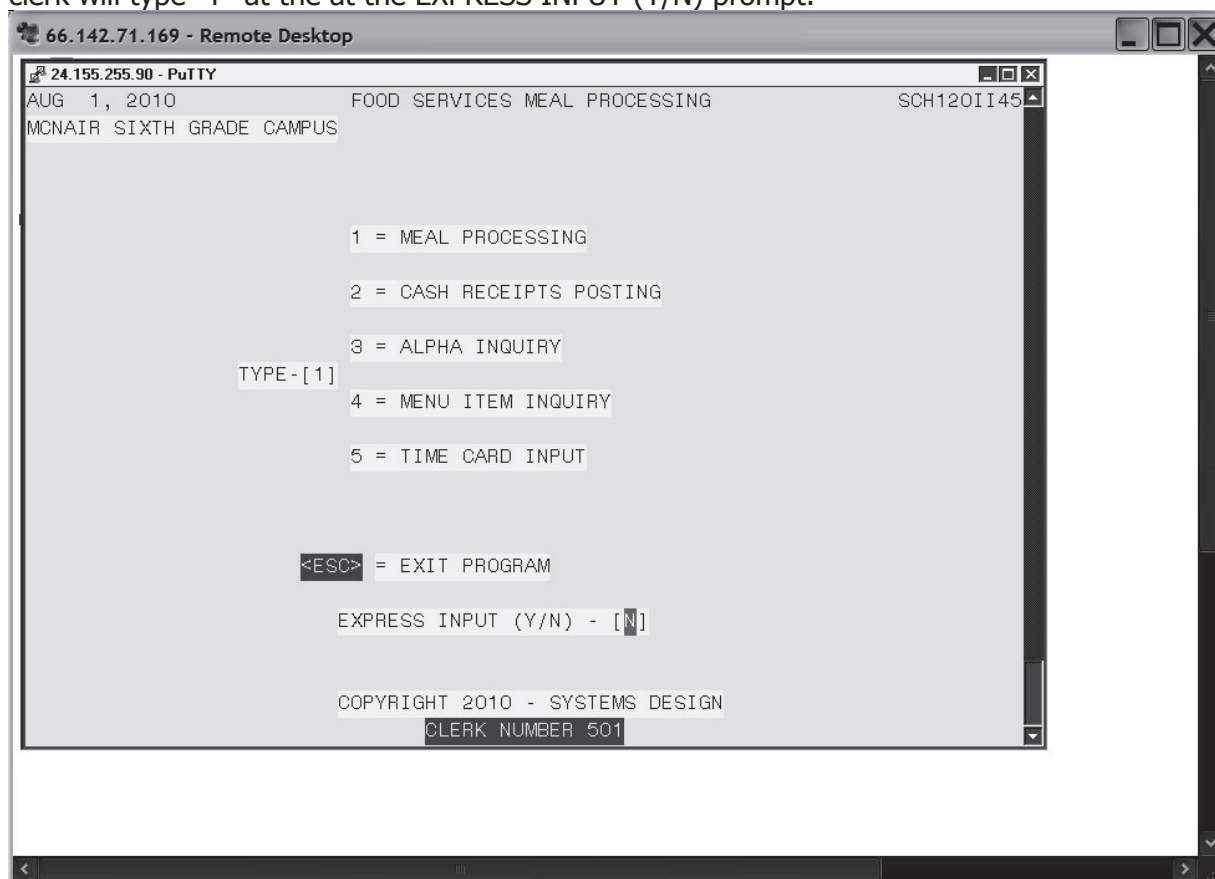
EXPRESS INPUT OPTION

There is a new feature available to allow express input of standard reimbursable meals to expedite acceptance of a meal input transaction. It is designed for situations where a reimbursable meal is prompted over and over with little or no ala Carte sales or cash entries. To invoke this EXPRESS MEAL option, it must first be set up in the school master file under FS-01-03 and flag 18 must be set with a "Y" for yes. The food service office performs this step.

FS-01-03

18= EXPRESS INPUT [Y]

Once the global flag is set as described above; then in the MEAL PROCESSING MENU the clerk will be prompted with EXPRESS INPUT (Y/N) as indicated below. To utilize the EXPRESS INPUT option: the clerk will type "Y" at the at the EXPRESS INPUT (Y/N) prompt.



NOTE: At the PROMPT A STANDARD REIMBURSABLE MEAL? Prompt: the clerk must answer "Y" for this option to be activated. At this point the clerk can either press "Y" or the "Enter Key" to invoke this option. The clerk must enter "N" if they do not want to use the EXPRESS MEAL INPUT. Once EXPRESS INPUT is selected; then each time the student ID number is entered or scanned a meal will be served with out the clerk pressing the "Enter Key" three additional times. The EXPRESS INPUT does stop at all alert messages. Negative charging limits and all alert messages will apply to that campus and student accounts the same as before based on the parameter settings. Should a clerk decide to serve an additional menu item (like milk or juice), at STUDENT ID, the clerk need only press "P" to bring up the previous student or adult served and add the item to their account. The EXPRESS INPUT option is exceptionally useful in districts that are on Provision 2 and/or serve Breakfast in the Classroom.

MANAGER/CASHIER END OF DAY CHECKLIST

After each meal serving cashiers and/or managers should follow the steps below to insure all necessary corrections and reports are satisfied.

AFTER BREAKFAST & LUNCH

- 1 From the meal input screen press **ESC**
- 2 Press **ESC** to EXIT the program
- 3 Print 02 Cash Transaction Report
- 4 Print **03** Meal Transaction Report

AFTER LUNCH ONLY

- 1 Do 16 Clerk Reconciliation
- 2 Look at Reports and Correct Any Mistakes
- 3 Do **17** Campus Reconciliation
- 4 Do **04** Managers Daily Deposit

Be sure that each cashier counts the beginning cash and that this amount is known before cash transactions are made. Cash stays in the drawer after breakfast and is counted at one time after lunch. Balancing of the cash drawer is done after lunch and will account for the transactions for both breakfast and lunch. After lunch the manager will organize the reports and check them for errors. Each cashier is normally responsible for correcting his or her individual mistakes. Mistakes found on the cash report will be corrected in **cash receipts**. Mistakes found on the meal report will be corrected in **meal input**.

CLERK RECONCILIATION REPORT

Each clerk will be responsible to complete the CLERK RECONCILIATION at the end of the day. See the example below.

JUL 27, 2004 CLERK DAILY RECONCILIATION SCH131--22

	COUNT	AMOUNT		AMOUNT
01 - HUNDREDS	[01]	[.00]	21 - BEGINNING CASH	+ [50.00]
02 - FIFTIES	[01]	[.00]	22 - P O S CASH	[117.55]
03 - TWENTIES	[21]	[40.00]	23 - P O S CHECKS	[.00]
04 - TENS	[31]	[30.00]	24 - P O S TOTAL	+ [117.55]
05 - FIVES	[61]	[30.00]	25 - ENDING CASH & CHECKS=	[167.55]
06 - TWOS	[01]	[.00]	26 - TOTAL \$ ONHAND(16)	- [167.55]
07 - ONES	[51]	[51.00]	27 - DIFF(OVER/UNDER)	= [.00]
08 - \$1.00 COIN	[01]	[.00]		
09 - .50 COIN	[01]	[.00]	29 - RETAINED CASH	[50.00]
10 - .25 COIN	[43]	[10.75]	30 - DEPOSIT (26 - 29)	= [117.55]
11 - .10 COIN	[26]	[2.60]		
12 - .05 COIN	[64]	[3.20]		
13 - .01 COIN	[01]	[.00]		
14 - TOTAL CASH		+ [167.55]	34 - CASH OVER/UNDER	[.00]
15 - TOTAL CHECKS		+ [.00]	35 - CHECKS OVER/UNDER	[.00]
16 - TOTAL \$ ONHAND		= [167.55]	36 - COUNTS (CASH - 0)	
			(SALES- 0)	

WHAT?
ALL OK?(Y,N,C,D). N LINE-[**]
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The clerk reconciliation assists the cashier to balance all revenues received for that particular day. There are several indicators that there is a data entry error, a miscount of money, or a problem with the revenue for that day. These indicators are:

1. LINES 15 AND 23 MUST MATCH-line 15 TOTAL CHECKS= total dollar amount of actual checks on hand. LINE 23 POS CHECKS= total dollar amount of checks entered at Point of Sale. If lines 15

and 23 do not match, you must go to the cash transaction report to locate the error and make the appropriate correction.

2. LINES 21 AND 29 MUST BE ENTERED-Line 21=BEGINNING CASH. This is the documentation of the starting fund. Line 29= RETAINED CASH. This is simply the money you will keep on hand to start the next day). If you do not have a starting fund, then enter "0" in both fields.
3. LINE 27 DIFF (OVER/UNDER)= the over/short for the day. Generally, any over/short of \$2.00 or less is acceptable.
4. Another indicator of a data entry error would be on LINES 22-30. If any of these end in a number other than "0" or "5" this would be a red flag that a data entry error has occurred and has not been corrected. Again, you would go to the cash transaction report to locate this error and correct it.

NOTE: In the event a clerk needs to make changes to all the fields on the left side of the screen (fields 1-13) then an "A" is entered at ALL OK? and the system will then allow for changes to be made to Fields 1-13.

PRINTING A RECEIPT ON THE SERVING LINE

You can print a receipt on the Serving Line. Follow the steps below:

Go to Meal Processing as usual (FS-02-01)

ENTER your school number and Meal type as usual (L for Lunch B for breakfast)

Once in meal processing as shown below, and the clerk has completed a transaction and the student or staff wants a receipt; then At ALL OK? (Y,N,C,M,R,E)ENTER "P". This will print a receipt on the printer assigned to that campus.

66.142.71.169 - Remote Desktop

24.155.255.90 - PuTTY

AUG 1, 2010 FOOD SERVICES MEAL PROCESSING SCH120II45

S.D. High School MEAL INPUT - LUNCH

STUDENT ID: 65747 TYSON LABOWSKI GRD: 12 BALANCE: 7.85

LINE	ITEM	DESCRIPTION	QTY	AMT
-01-	01	CHEZ BURGER	1	1.50
-02-	15	MILK	1	.25
-03-				
-04-				
-05-				
-06-				
-07-				
-08-				
-09-				

TOTAL DUE: 1.75

-10- AMT TENDERED: 10.00

-12- REF/CK# [001234]

ALL OK?(Y,N,C,M,R,E) *

13

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CLERK NUMBER 501

NOTE: Be sure to enter the "P" for the last step instead of <ENTER> Key or "Y" for yes to accept the transaction

POS SHORTCUTS AND HELPFUL HINTS

The following are shortcuts and helpful hints designed to minimize keystrokes for cashiers and assist in troubleshooting minor issues.

POS SHORTCUTS

All of these are utilized in the meal input screen

1. To serve a PARENT MEAL on their child's account-
 - a. Input student ID
 - b. Serve student meal and ala cart items

C. Then on the next entry line, type **P1** (for Parent Meal) and press enter, the system will then prompt you for the quantity of Adult Visitor meals you want to serve at the visitor price which is deducted from the child's account

2. If cursor is blinking at the amount tendered line (line 10) and you need to go back up to serve additional items—Simply press the arrow up key
3. If you pull up the wrong student's account, simply press the ESC (escape) key to go back to Student ID

4. To make a meal data entry error correction; use the REVERSAL option. Type **"R"** on line 1 of the meal input screen to bring up the Reversal Screen.

5. Pay close attention to the on screen ALERT messages. Alert messages appear highlighted on screen when a clerk is about to perform a function that is questionable. The clerk **MUST** answer the ALERT message by typing "y" to accept, or "N" to decline. There is also a new MEMO message that will display for a student with a long allergic message. This MEMO will display up to 180 characters of information but the clerk only has to press the enter key to remove the MEMO message.

HELPFUL HINTS

1. ATTACH A PRINTER—If the printer does not print, first check the power and cables are securely attached. Then clerks can use Option FS-02-11 to check the status of their printer and Option FS-02-12 to attach their printer.

2. UNLOCK A TERMINAL--In the event a terminal freezes or displays on screen 'PROCESS IS RUNNING', clerks can unlock the terminal. If you are logged into the system; at the ENTER MENU OPTION type **[UNLOCK]**, then enter your password. The system will prompt the clerk to enter the clerk number to be unlocked. This allows clerks to unlock each other.

3. To UNLOCK your own TERMINAL--There is a method to "Unlock "yourself when "I-Shell is already running ". You can perform this operation by entering the following at the login prompt:

At Login: **unlock** (press enter)

At Password: **usda92** (which is not displayed on the screen)(press enter)

The operator will be prompted to enter the clerk number to be unlocked. You need only enter your **3 digit clerk number then press the enter key.** The program will then unlock the desired clerk and return the operator back to their original login screen, where the operator can now login.

LOGGING OFF THE SYSTEM

REGULAR TERMINALS

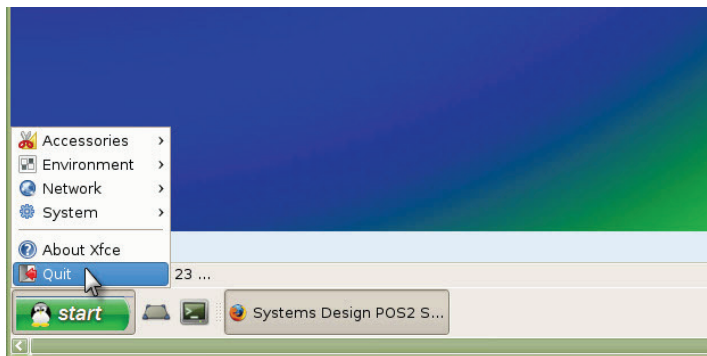
LOG OFF THE SYSTEM

1. At ENTER MENU OPTION; type QU and press Enter.
4. At ENTER "C" TO CONTINUE OR "X" TO LOG OFF; type X and press Enter.
5. Power off.

TOUCH SCREEN TERMINALS

LOG OFF THE SYSTEM

1. At ENTER MENU OPTION; type QU and press Enter.
2. At ENTER "C" TO CONTINUE OR "X" TO LOG OFF; type X and press Enter.
3. **Close the window by clicking the X in the upper right hand corner of the window.**
4. Go to Start.
5. Go to Quit.



6. Click Shut down. (This will automatically shut down the system and power off.)



Note: Do NOT choose "Switch user" or "Log out".