

POS CONFIGURATION HOMEWORK 2

This document contains all tasks to be completed for POS Configuration: Homework 2

Before completing these tasks, the Project Mentor will provide a brief demo of the POS. The demo will highlight multiple ways Menu Grids and Menu Items can be configured. The Project Mentor will make recommendations based on your district processes to provide the most efficient serving lines.

#1 Create Menu Item Categories

Navigate to Item Management > Item Configuration

- Select “Menu Item Categories” from the dropdown
- Review the populated Menu Item Categories and edit as desired
 - Click the Edit Pencil for a Category
 - Review the Menu Item Category name, Category Type, and Selected Color as needed
- To add additional Menu Item Categories
 - Click “New”
 - Enter the Menu Item Category name
 - Select the POS Item Type, Color, and enter the Display Order number
 - Click “Save”

#2 Create Custom Allergens

Navigate to Item Management > Item Configuration

- Select “Custom Allergens” from the dropdown
- Review the populated Custom Allergens and edit as desired
 - Click the Edit Pencil for a Custom Allergen
 - Review the Custom Allergen Description and if the allergen is available on Family Hub menus
- To add additional Custom Allergens
 - Click “New”
 - Enter the Custom Allergen Description
 - Select the toggle if the allergen will be available on Family Hub menus
 - Click “Save”

#3 Create POS Only Menu Items

Navigate to *Item Management > Menu Items*

- Click “New”
- Select “POS Only”
- Enter the Menu Item information
 - POS Item Name: Name of the POS Item
 - POS Button Name (English): Name that will be displayed on the POS
 - POS Item Category: Category for organization of the buttons displayed on the POS
 - Select the POS Entree option to make the item Reimbursable
 - Click “Save”
- Enter all pricing for Students and Adults
 - For the POS Pricing section, click the Edit Pencil to edit
 - Use the grid to enter pricing for Students
 - Based on Site Type and Status
 - Click Adults to enter pricing for Adult Types
 - Based on Site Type and Patron Type
 - Click “Save”
- Add Allergens
 - For the Allergen Info card, select the 3 dots to edit
 - Select Allergens as needed
 - Click Add Custom Allergen if there is an allergen that is not a part of the Standard Allergen list
 - Click No allergens indicated if there are no allergens
 - Click “Save”

Please Note: Menu Items with an allergen indicated will only be restricted on the POS if the student also has their allergen information entered in their account. Student Allergens/Restrictions will be covered in POS Configuration Homework 3.

#4 Create Menu Grids

Navigate to *Accountability > Settings > Menu Grids*

- Click “New”
- Enter the Menu Name and Meal Type
- Switch the “Enabled” toggle on
- Select the Site Type(s)
- Select the Days Allowed
- Complete the Menu Grid Layout
 - Select the number of Rows and Columns
 - Drag and drop Menu Items and Categories as desired
 - To add a Default Menu Item:
 - Click the 3 dots and select “Edit” to open the “Edit Button” pop-up
 - Switch the “Set as Default Item” toggle on
 - Click “Save”
- Click “Save”

**You can also make additional edits to the button format.*

#5 Set Default Menu Grids

Navigate to *Accountability > Settings > Default Menu Grids*

When a cashier logs in, the Default Menu Grid will populate based on Meal Timings. (Meal Timings should have been configured during Part 1 configuration). If the Default Menu Grid is not configured, the cashier must select the appropriate grid after logging in.

- Click “New”
- Select the Site Types, Sites, and Device
- Select the Meal Type, Menu Grid Name, and Days For Use
- Click “Save”