

POS CONFIGURATION HOMEWORK 3

This document contains all tasks to be completed for POS Configuration: Homework 3.

#1 Review Roles (if desired)

System > Management > Roles and Permissions

Standard/common roles are provided. These roles can be used as is and fit the processes for most districts. If you want to create a unique custom role, please reach out to your Project Mentor.

#2 Create Users

Navigate to System > Sites & Users > Users

**User credentials must be created for all staff who need access to SchoolCafé (IT, Managers, Cashiers). We recommend creating accounts closer to the go-live date to ensure they can log in.*

- Click “New”
- Enter Contact Info
 - Enter a Username, First Name, Last Name, and Email
 - A temporary password will be sent to the email provided, prompting the user to finish setting up their account. This link will expire
- Enter Organization & Permissions
 - Select the Sites the User will need access to
 - Select the Role permissions needed
- Click “Save”

#3 Enter Charge Limits

Navigate to Accountability > Settings > Configurations > Charge Limits

If you answer yes to any of the following questions, proceed to setting up charge limits. If no, skip this step.

- I. **Do you allow students or adults to go negative if they don’t have money in their account?**
- II. **Is the amount different for meals vs. A la carte?**
- III. **Typically, visitors don’t have accounts, so this is set to \$0.**

This configuration will indicate the amount a patron’s balance is allowed to go negative.

- Click the Edit Pencil for each Site Type
- Enter Charge Limits by Status and Patron Type

#4 Set Default Restrictions

Navigate to Accountability > Settings > Configurations > Default Restrictions

If you answer yes to the following question, proceed to setting up default restrictions. If no, skip this step.

- I. **Do you have a restriction on the number of A la carte items your students can get?**

- Click the Edit Pencil for each Site Type
- Enter the Maximum number of Ala-carte item sales allowed per day

#5 Student Allergens and Restrictions

Navigate to Account Management > Accounts > Search for and select the student account by clicking the "Account Details" icon

Enter Allergens

Allergens must be indicated on the account and Menu Item to prevent the sale

- Select the Edit Pencil for the Allergens section
 - If the student has no allergies, click the No allergens indicated checkbox
 - If the student does have allergies, use the Common and Custom Allergens dropdowns to add
 - Click "Save"

Enter Special Instructions

Special Instructions are a note on the account that appears for the cashier. These do not prevent an item from being served

- Select the Edit Pencil for the Restrictions section
 - Enter any Special Instructions
 - Please Note: This will not restrict the sale of any Menu Items
 - Click "Save"

Enter A La Carte Restrictions

A La Carte Restrictions can be set up to prevent certain actions for A la carte items.

- Select the Edit Pencil for the Restrictions section
 - Use the dropdowns to specify restrictions for
 - Account
 - Menu Items
 - Cash Purchases
 - Debit Purchases
 - If needed, specify the max A la carte item(s) per day
 - Click "Save"

#6 Edit POS Reminder Letter and ID Card Template

Navigate to System > Management > Templates

- Edit the Letter Template
 - Select the Module, Letter Type, and Language
 - Select the "Show Only Inactive Templates" toggle
 - Click the Edit Pencil of the displayed template
 - Review the populated template in the pop-up
 - If no changes are needed, proceed with setting the template as Active
 - Switch grey toggle to purple in the right-hand corner
 - If changes are needed, edit the template as desired
 - Click "Save As"
 - Enter a new Template Name
 - Click "Save"
- Important Reminders
 - Standard Templates can be edited and "saved as". Once saved, they will become an Active template
 - After updating a template in English, also update it in any other selected languages as well

#7 Enter Officials

Navigate to System > Management > Templates

- Click “More”
- Select “Manage Officials”
- Select “Add Official”
 - Select the specific Official Type
 - Enter their First and Last Name
 - Enter any additional information you would like to display on the letter templates
- Click “Save”

#8 Review System Settings

Navigate to System > Configuration > Settings

The following settings are recommended for review. Depending on your district processes, additional settings may also need to be reviewed. Please consult with your Project Mentor if you have any questions.

Module: Accountability

Category: Administration

- Reconciliation – Maximum Over/Under Amount Allowed
 - *This is the amount a session can be reconciled without requiring override permissions.*
 - Do you allow POS sessions to have a variance when closing out? The default is \$10.00. It will allow managers to reconcile \$10.00 over/under.

Category: POS

- Account Balance Below Charge Limit
 - Select one of the following:
 - Decision to allow sale with user
 - The cashier can decide whether to proceed with the sale
 - Sale only with some cash
 - No sale without sufficient funds
 - Charge limits – can students or adults go negative for any reason?
 - If a patron has met the charge limit, how would you like to proceed? No sale without sufficient funds, sale with some cash, or decision to allow sale with user (cashier)?

There are additional internal settings that the Project Mentor will review during your Weekly Meeting to ensure we have the proper configurations.