

Category: **TRAINING**Document Type: **Outline**Author: **Training Team**

Updated: 05/09/2024

## COURSE 1 – CASHIER/POS

### OPEN SERVICE

- Discuss starting balance options
- Review touch screen enter method

### SELECT MENU GRID

- Review Menu Items, Categories, and Default Menu Items

### ACCESSING PATRONS

- Patron enters ID / Scans Barcode / Scans Fingerprint
- Cashier enters Patron ID manually
- Lookup
  - Name (First / Last Name)
  - Homeroom
  - Special Roster

### TRANSACTIONS

- Adding and Removing Items from Transaction
- Payment Methods
  - Charge
  - Cash (Give change back/Deposit Change)
  - Check
  - Add Funds without purchasing items
- Allergens and Restrictions
- Student's 2<sup>nd</sup> time through the line – view previously served items/meals
- Mark Transaction for Review
  - Used when a mistake is made after the transaction has been completed
- Visiting Patron
- Previous Patron
- Generic Patrons (Cash Only Accounts)
  - Student
  - Staff
  - Visitor
  - Program Adult

## SWITCH HANDS

Flips the orientation of the screen

## BULK SALES

*Does not consider Allergens, Restrictions, Balances or Charge Limits; Can only serve first reimbursable meal per meal type; Used for Field trips or Breakfast in Classroom*

- By Homeroom
- By Special Roster

## PAYMENTS

*Used for payments outside of serving window to add funds to student balance*

- Lookup Student
  - ID
  - Name
  - Homeroom
  - Special Roster
- Process Payment
  - Cash
  - Check

## TRANSACTIONS

- View Previous Transactions
- Search for Transactions
- View Transaction Details
- Mark Transactions for Review

## CLOSE SERVICE

- Count Cash
- Enter amounts in denomination fields
- Verify Checks
- Close Session

## DEVICE INFORMATION