



YOUR LINK BETWEEN TECHNOLOGY AND CHILD NUTRITION



QUICK START MANUAL
BACK OFFICE OPERATIONS

School year 2005=2006



SYSTEMS DESIGN
FOOD SERVICE MANAGEMENT SYSTEMS

SMART SOLUTIONS

WELCOME TO SYSTEMS DESIGN



TO OUR NEW USERS

We have assembled this quick start manual to assist you in getting acquainted with the very basics of the Systems Design point of sale back office procedures. This manual will provide you with the step by step processes by which you may accomplish the minimum requirements to administer the system until you become more familiar with what you need to do and how you do the more comprehensive operations in the back office of the food service department. Most software applications are alike in the fact that the best way to learn the program is to explore and search on your own and then do some of the operations so that you become familiar with the capabilities of the system. Doing this coupled with the study of the main manual and asking questions of our software support people will certainly enable you to rapidly become proficient in taking advantage of all the features of this powerful food service management tool.



OPERATORS

Here are the items we have included in this manual and that are the most important things for you to know when you first start administering the system.



STANDARD CONVENTIONS

1

Some of the basics on how the system works within the various menus and the standard keystrokes



LOG ONTO THE SYSTEM

2

How to log onto the system at the back office



END OF DAY

3

The end of day procedures, what they mean and how to do them.



END OF MONTH

4

The routine that must be done at the end of every month



ADD A STUDENT TO THE MASTERFILE

5

Entering a new student into the student data base



CHANGE STUDENT INFORMATION IN THE MASTERFILE

6

Editing and changing student information in the student data base



ADD MENU ITEMS TO BE SOLD

7

Entering new menu items and prices to be sold at a school



CHANGING EXISTING MENU ITEMS

8

Changing the description, item numbers, and pricing of existing menu items



PRINTING AN INDIVUALS ID CARD

9

How to print an ID card for a single or just a few students



MAKING CORRECTIONS TO STUDENTS ACCOUNTS

10

The steps to take and the importance of making corrections when necessary to a students account



CORRECTIONS TO A STUDENTS MEAL RECORDS

11

Making corrections when an error is found in a students record of meals served, quantity or status.



CORRECTIONS TO A STUDENTS CASH ACCOUNTS

12

Making corrections when there is an error in the cash records of a student.



A FEW TROUBLE SHOOTING TIPS

13

Some basic hints on what to do if there is a problem with the system.



INFORMATION

SYSTEMS DESIGN uses certain standard conventions in all applications

This means that some key strokes and answers to questions presented on the screen are repetitive and are used in the pathways to different functions and programs within the applications. Some of those are listed below. The understanding of these conventions will speed up the understanding of elements of this manual.

When asked for the district number it will be 01 unless there are multiple districts operating on the same central server. Some systems do not present this option.

the cursor blinks in the block
ENTER MENU OPTION ()
which is the prompt for the operator to enter the appropriate selection of programs. If the selection has an = sign it may be selected.

Most of the time the operator will be presented with a selection of
ALL OK (Y,N,C) or
ARE YOU SURE (Y,N)
which gives one the opportunity to indicate Y for yes(accept the entry, N for no (go back and re-enter data) at which time it will take you to the indicated field, or C for cancel (everything goes away)

Most selections present a subsequent sequence of options which are generally are sorts that are available to the operator either in the way that screens will call up data or in the way that data will be printed. This manual may not list all sort available but they are easily understood in a logical process as the various selections are made.

One will notice that the 99=RETURN TO PREVIOUS MENU prompt appears on most screens. 99 is the escape entry and is also used when the programs as for the district number when the operator wishes to return to the previous menu.

When printing options are selected the printer number will be asked for and it should be remembered that in a real time system that print jobs may be sent to any printer attached to the system. Care should be exercised in selecting a printer. Once the printer is selected and the print job sent, then the screen will return to the menu from which selected and a brief message "end of listing" will appear on the screen.

A menu driven system is very easy and logical to operate. One may just read the present screen to determine what operation to select. If the desired operation is not displayed then the entry 99 will return to the previous menu where the search for the desired operation may be found.

Explore the system. It's the best way to learn. You will be given the opportunity to cancel any operation or entry that you do not wish to affect.



INFORMATION

There may be several ways to log into the main system. We have provided space here for you to write down your exact procedures.

LOGIN FROM THE MAIN SERVER CONSOLE

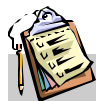
If you are at the main console then you may log in with the following entries.

1. At the prompt "login:" you will type in lower case "root" and press enter.
2. At the prompt "password" you will type in lower case "blue91" and press enter.
3. You will be at the # sign then type "ishell" and press enter
4. At the prompt ?000 (or some number after the ?) type EX CRT000 (000= the number after the ?) and press enter.
5. At the next prompt "PASSWORD" you will enter in upper case "FOOD"
6. At the prompt "enter operator initials" you will type in your three initials.
7. At the prompt "is all OK" type "Y"
8. You will then be at the MASTER MENU and into the program.

LOGIN FROM YOUR OWN PC OR TERMINAL

If you are at your own terminal or PC then you may log in with the following entries.

1. At the prompt "login:" you will type in lower case your own assigned login (_____) and press enter.
2. At the prompt "password" you will type in lower case "usda92" and press enter.
3. At the next prompt "PASSWORD" you will enter in upper case "FOOD"
4. At the prompt "enter operator initials" you will type in your three initials.
5. At the prompt "is all OK" type "Y"
6. You will then be at the MASTER MENU and into the program.



NOTES

Please note that one must be careful and accurate in the login process. If mistakes are made in the entries or in being in upper or lower case at the wrong time, then the system will not let you in. Be sure to make all entries carefully and accurately.

FROM THE MASTER MENU ENTER MENU OPTION ()

GET THERE QUICK

- | | | |
|---|---------------|----------------------|
| 1 | TYPE FS ENTER | SELECTS FOOD SERVICE |
| 2 | TYPE 07 ENTER | SELECTS END OF DAY |



FUNCTION

Prepares files for next days activity , causes certain files to merge and be placed in correct sequences, and backs up data for the day. This is an essential operation.

SCREEN MENU SELECTIONS

- 01 = BACKUP CURRENT DATA TO TAPE *
- 03 = CLEAR CLERK DAILY CASH FILES
- 04 = UPDATE ACCUCLAIM DATA
- 05 = OFF-CAMPUS ACTIVITY REPORT
- 06 = MERGE MEAL & CASH TRANSACTIONS
- 09 = PRINT DISTRICT ELIGIBILITY REPORT
- 10 = PRINT MANAGERS DAILY SUMMARY
- 11 = MANAGERS DEPOSIT AUDIT REPORT
- 12 = PRINT CANCELED TRANSACTION REPORT
- 99 = RETURN TO PREVIOUS MENU

ENTER MENU OPTION ()



OPTION 01 *

backs up data to disk—you will see a list of files go by on the screen and then you will be returned to the menu. this may take a few minutes so be patient. if you are returned to C to continue or X to log off refer to the trouble shooting section.

OPTION 03

clears the cash files for each clerk.. if you don't do this each day the previous days cash will print out the next day in addition to the current day. when finished you are returned to the menu

OPTION 04

updates the accuclaim files by putting all information in the correct places and qualifies the students for that day. the following questions will be asked—and here are the answers.

DISTRICT NO	TYPE 01
ENTER DATE	TYPE todays date
ALL OK	TYPE Y

you are then returned to the menu

OPTION 99

Returns the operator to the previous menu.

OPTION 05

Prints the off campus activity report. when selected the following questions will be asked.

WHICH PRINTER	TYPE (printer #)
ARE YOU SURE	TYPE Y
DISTRICT NO	TYPE 01
ENTER RUN DATE	TYPE todays date
ALL OK	TYPE Y

the report prints and you are returned to the menu.

OPTION 06

updates and merges the meal history files for all studens and staff. when finished you are returned to the menu



IMPORTANT TO KNOW

1. If the screen does not return to the menu after completing option 06 then you should call the software support center.
2. End of day should be run every day. If not the cash files will not be cleared and the back up will not be made. Every effort should be made to complete the end of the day routine.

* NOTE: your system may have an automatic nightly backup—if so you will disregard this step. Check with the software support office to verify your backup options.

OPTION 09

Prints the district eligibility report. This report is a summary of the numbers of students in each status category , ie Free, Reduced, and Paid totaled for the entire district. The numbers are a representation of the numbers in the food service system for that date and are the numbers used for the accuclaim reporting for each day.

OPTION 10

Prints the Managers Daily Summary Report. This is the same report that may be printed from the special reports option. The report is a summary of all activities for the day that occurred at the point of sale. The report is a mini accuclaim and daily report of income. (see next page.)

OPTION 11

Prints the Managers Deposit Audit Report. This report prints a list of campuses indicating the amount of the deposit for each campus and the outage (over or short). A campus that has a 0 under the deposit column did not complete the managers daily deposit entry which is the last step in there close out routine.

FROM THE MASTER MENU ENTER MENU OPTION ()

GET THERE QUICK

- | | | |
|---|---------------|----------------------|
| 1 | TYPE FS ENTER | SELECTS FOOD SERVICE |
| 2 | TYPE 08 ENTER | SELECTS END OF MONTH |



FUNCTION

Backs up all data for the month and creates new files in preparation for the next months data. This is an essential operation.

OPTION 01

Creates all new files in which to put data for the new month. You will be prompted to enter a date in this routine and you should be sure to enter the last day of the next month. Example: if you are running end of month for September then enter October 31st (10/31/2001)

OPTION 02

Creates new meal files for the coming month. This is where all the data on the students will be filed.

OPTION 04

Backs up data to disk—you will see a list of files go by on the screen and then you will be returned to the menu. this may take a few minutes so be patient. if you are returned to C to continue or X to log off refer to the trouble shooting section.

OPTION 99

Returns the operator to the previous menu.

SCREEN MENU SELECTIONS

01 = CREATE SUMMARY FILES-NEW MONTH
02 = CREATE NEW MEAL FILES

04 = BACKUP HISTORY FILES

99 = RETURN TO PREVIOUS MENU

ENTER MENU OPTION ()



INFORMATION

1. Be sure that you have run end of day for the last day of the month before you do this end of day routine.
2. You must also be sure that you have the correct end of month backup tape in the processor.



INFORMATION

You will want to print the end of month reports, accuclaim, reimbursement, and daily report of income . Please refer to the main back office manual for information on printing these reports.



IMPORTANT TO KNOW

Be sure to run this routine only once at the end of the month. There may be some lost information is run multiple times.

Some versions do not require step 04=Backup History Files. Backup functions are programmed. Check with the software support office to verify your status.

FROM THE MASTER MENU ENTER MENU OPTION ()

GET THERE QUICK

1	TYPE FS ENTER	SELECTS FOOD SERVICE
2	TYPE 01 ENTER	SELECTS MASTERFILE MAINT
3	TYPE 01 ENTER	SELECTS STUDENT MASTER
4	TYPE A	SELECTS ADD OPTION



FUNCTION

This routine will establish a new student in the masterfile. This screen permits the entry of the new student information in the appropriate fields. Note that you must enter a student ID number and a family code. Certain fields may be left blank but there are some fields that must contain data. The program will prompt the completion of those fields. If a mistake is made select the N option at ALL OK and indicate the field to be changed at which time the program will allow a change to be made. Once the ALL OK Y is selected the new name is recorded in the master file. To exit this screen, depress ENTER KEY when the cursor is blinking on the first space in the STUDENT ID NUMBER field.



INFORMATION

* the grade for students and E for employees and teachers
 ** current status may be:
 F=free
 R=reduced
 P=paid
 D=denied
 C=cash (for temp student)
 T=temporary
 X=free employees
 Y=paid employees
 Z=visitor
 *** must have a Y or the POS will not display the account as active

ALL OK (Y,N,C)

Y=CONFIRMS THE ENTRY AND ACCEPTS
 N=CHANGES TO CORRECTION MODE
 C=CANCEL AND START OVER

SCREEN MENU SELECTIONS

STUDENT ID# (*****)
 20=FAMILY CODE (*****)
 01=STD LAST NAME
 02=STD FIRST NAME
 03=STD MDDL NAME
 04=STD TITLE
 05=SCHOOL#
 06=GRADE
 07=CURR STATUS
 08=PREV STATUS
 09=STATUS CNG DT
 10=LAST BREAK DT
 11=LAST LUNCH DT
 12=CURRENT BALANCE
 13=ACTIVE? (Y/N)
 14=WITHDRAWAL DT
 15=BIRTH DATE
 16=CASH ONLY FLG
 21=GURADIAN NAME
 22=GRD ADDRESS 1
 23=GRD ADDRESS 2
 24=GRD CITY ST
 25=GRD ZIP
 26=PERSONAL PIN#
 27=ASSOC D/CERT
 28=ETHNIC CODE
 29=TELEPHONE #
 30=CARD REPLACE
 31=BALANCE USAGE
 32=DIRECT CERT
 33=SOC SEC NBR
 34=ALERT MESS
 35=HOME ROOM
 36=USER CODE
 PREV ID

ALL OK (Y,N,C)



NOTES

Refer to the masterfile field explanation page for details on each field.



IMPORTANT TO KNOW

THE FIELDS THAT MUST BE FILLED IN:

01 LAST NAME
 02 FIRST NAME
 05 SCHOOL NUMBER
 06 GRADE *
 07 CURRENT STATUS**
 13 ACTIVE ***
 21 GUARDIAN

FROM THE MASTER MENU ENTER MENU OPTION ()

GET THERE QUICK

1	TYPE FS ENTER	SELECTS FOOD SERVICE
2	TYPE 01 ENTER	SELECTS MASTERFILE MAINT
3	TYPE 01 ENTER	SELECTS STUDENT MASTER
4	TYPE C	SELECTS CHANGE OPTION



FUNCTION

This screen allows the operator to change an existing student or staff master file record. The fields may be changed one at a time by selecting N at ALL OK and indicating the field to be changed. The fields are designated by the numbers to the left of the = signs. The cursor will then go to that field and the new information may be entered. After all changes are made, enter Y at ALL OK at which time all changes are recorded. To exit this screen, depress ENTER KEY when the cursor is blinking on the first space in the STUDENT ID NUMBER field.



INFORMATION

* the grade for students and E for employees and teachers
 ** current status may be:
 F=free
 R=reduced
 P=paid
 D=denied
 C=cash (for temp student)
 T=temporary
 X=free employees
 Y=paid employees
 Z=misc employees
 *** must have a Y or the POS will not display the account as active

ALL OK (Y,N,C)

Y=CONFIRMS THE ENTRY AND ACCEPTS
 N=CHANGES TO CORRECTION MODE
 C=CANCEL AND START OVER

SCREEN MENU SELECTIONS

STUDENT ID# (*****)
 20=FAMILY CODE (*****)
 01=STD LAST NAME
 02=STD FIRST NAME
 03=STD MDDL NAME
 04=STD TITLE
 05=SCHOOL#
 06=GRADE
 07=CURR STATUS
 08=PREV STATUS
 09=STATUS CNG DT
 10=LAST BREAK DT
 11=LAST LUNCH DT
 12=CURRENT BALANCE
 13=ACTIVE? (Y/N)
 14=WITHDRAWAL DT
 15=BIRTH DATE
 16=CASH ONLY FLG
 21=GURADIAN NAME
 22=GRD ADDRESS 1
 23=GRD ADDRESS 2
 24=GRD CITY ST
 25=GRD ZIP
 26=PERSONAL PIN#
 27=ASSOC D/CERT
 28=ETHNIC CODE
 29=TELEPHONE #
 30=CARD REPLACE
 31=BALANCE USAGE
 32=DIRECT CERT
 33=SOC SEC NBR
 34=ALERT MESS
 35=HOME ROOM
 36=USER CODE
 PREV ID

ALL OK (Y,N,C)



NOTES

Refer to the masterfile field explanation page for details on each field.



IMPORTANT TO KNOW

THE FIELDS THAT MUST BE FILLED IN:

01 LAST NAME
 02 FIRST NAME
 05 SCHOOL NUMBER
 06 GRADE *
 07 CURRENT STATUS**
 13 ACTIVE ***
 21 GUARDIAN

FROM THE MASTER MENU ENTER MENU OPTION ()

GET THERE QUICK

1	TYPE FS ENTER	SELECTS FOOD SERVICE
2	TYPE 01 ENTER	SELECTS MASTERFILE MAINT
3	TYPE 02 ENTER	SELECTS MENU MASTERFILE
4	TYPE 1	SELECTS MENU MAINTENANCE
5	TYPE A	SELECTS ADD ITEM

SCREEN MENU SELECTIONS

SCHOOL NUMBER
MEAL TYPE
MEAL ITEM NUMBER

01=ITEM DESCR
02=MEAT QUAL
03=VEGE QUAL
04=FRUIT QUAL
05=BREAD QUAL
06=DAIRY QUAL
07=CLASS STATUS
08=ITEM PRICE
09=REDUCED PRICE
10=STAFF PRICE
11=VISITOR PRICE

ALL OK(Y,N,C)



ENTRIES

Explanation of entries:

Enter the 4 digit school number of the affected school.

Enter the meal type which will be B for breakfast, L for lunch, S for snack bar, J for junk line, A for after school or any other letter that may correspond to a particular line at that campus.

(01) Item description will be the name of the particular food such as lunch 01 or the name of an a la carte item such as french fries.

(02-06) Place an N by the "QUAL" items as this is not in use at this time.

(7) Leave the Class Status field blank.

(8) Enter the price of the item.

The first 14 menu items are designated as reimbursable meals. Enter

ENTRIES

whatever reimbursable meals you may have up to a total of 14 using item numbers 1-14. Start your a la carte items with item number 16.

(9) For items 1-14 enter the reduced price for a meal.

(10) For items 1-14 enter the paid adult price for a meal.

(11) For items 1-14 enter the paid visitor price for a meal.

(12) When entering the a la carte item prices—enter through the fields for reduced, paid adult, and visitor.

The program pulls the appropriate price from this menu for each type of account that is prompted. The status codes in the masterfile determines the price for the items 1-14.



FUNCTION

The purpose of this routine is to permit the entry of new menu items. The screen prompts the operator to enter the appropriate information in the corresponding fields.



NOTES

Note that upon completing the entries and the cursor is blinking on the School Number field, depress enter to return to the Menu Masterfile Maintenance screen.



INFORMATION

Class Status (entry 08) indicates the classification of item a particular menu item. The various classifications are:

F=Free Student Status

R=Reduced Student Status

P=Paid Student Status

X=Free Adult Status

Y=Paid Adult Status

Z=Paid Visitor Status

ALL OK (Y,N,C)

Y=CONFIRMS THE ENTRY AND ACCEPTS

N=CHANGES TO CORRECTION MODE

C=CANCEL AND START OVER



NOTES

It is a good idea to keep an up to date printed menu for each meal at each school to assist in the administration of items served and uniform pricing.

FROM THE MASTER MENU ENTER MENU OPTION ()

GET THERE QUICK

1	TYPE FS ENTER	SELECTS FOOD SERVICE
2	TYPE 01 ENTER	SELECTS MASTERFILE MAINT
3	TYPE 02ENTER	SELECTS MENU MASTERFILE
4	TYPE 1	SELECTS MENU MAINTENANCE
5	TYPE C	SELECTS CHANGE AN ITEM

SCREEN MENU SELECTIONS

SCHOOL NUMBER
MEAL TYPE
MEAL ITEM NUMBER

01=ITEM DESCR
02=MEAT QUAL
03=VEGE QUAL
04=FRUIT QUAL
05=BREAD QUAL
06=DAIRY QUAL
07=CLASS STATUS
08=ITEM PRICE
09=REDUCED PRICE
10=STAFF PRICE
11=VISITOR PRICE

ALL OK(Y,N,C)



ENTRIES

Explanation of entries:

Enter the 4 digit school number of the affected school.

Enter the meal type which will be B for breakfast, L for lunch, S for snack bar, J for junk line, A for after school or any other letter that may correspond to a particular line at that campus.

(01) Item description will be the name of the particular food such as lunch 01 or the name of an a la carte item such as french fries.

(02-06) Place an N by the "QUAL" items as this is not in use at this time.

(7) Leave the Class Status field blank.

(8) Enter the price of the item.

The first 14 menu items are designated as reimbursable meals. Enter

ENTRIES

whatever reimbursable meals you may have up to a total of 14 using item numbers 1-14. Start your a la carte items with item number 16.

(9) For items 1-14 enter the reduced price for a meal.

(10) For items 1-14 enter the paid adult price for a meal.

(11) For items 1-14 enter the paid visitor price for a meal.

(12) When entering the a la carte item prices—enter through the fields for reduced, paid adult, and visitor.

The program pulls the appropriate price from this menu for each type of account that is prompted. The status codes in the masterfile determines the price for the items 1-14.



FUNCTION

The purpose of this routine is to permit the entry of changes to menu items and the changing of prices. The screen prompts the operator to enter the appropriate information in the corresponding fields.



INFORMATION

The fields may be edited by selecting the N (no) at the prompt ALL OK (YNC) and then selecting a field from 01 through 08. The cursor jumps to the selected field, removes the current value and permits the entry of new data.



INFORMATION

Class Status (entry 08) indicates the classification of item a particular menu item. The various classifications are:

F=Free Student Status

R=Reduced Student Status

P=Paid Student Status

X=Free Adult Status

Y=Paid Adult Status

Z=Paid Visitor Status

ALL OK (Y,N,C)

Y=CONFIRMS THE ENTRY AND ACCEPTS

N=CHANGES TO CORRECTION MODE

C=CANCEL AND START OVER



NOTES

Note that upon completing the entries and the cursor is blinking on the School Number field, depress enter to return to the Menu Masterfile Maintenance screen.



NOTES

It is a good idea to keep an up to date printed menu for each meal at each school to assist in the administration of items served and uniform pricing.

FROM THE MASTER MENU ENTER MENU OPTION ()

GET THERE QUICK

1	TYPE FS ENTER	SELECTS FOOD SERVICE
2	TYPE 15ENTER	SELECTS BAR CODE PRINT
3	TYPE 14 ENTER	SELECTS STUDENT INDV CARD
4	TYPE XXX	XXX=PRINTER NUMBER
5	TYPE Y	CONFIRMS ALL IS OK *
6	TYPE Y or N	TO ADD TO PREVIOUS FILE *
7	TYPE Y	CONFIRMS ALL IS OK



FUNCTION

Prints student individual bar code cards on special pre-printed stock that are ready to be laminated. This routine is generally used to produce cards for new students or for replacement cards.



INFORMATION

When the active screen appears a prompt to enter the student ID number is presented. The number may be entered if known or the ? jump to alpha look up may be used.

The next entries are First Name, Middle Name, Last Name, School Number, and Student Grade. These entries appear when the Student Name is entered as this info comes from the masterfile.

Note that the program indicates the number of student ID cards entered during the session as each entry is made. This is a running total.

After each entry you may depress enter at the ID prompt at which time you will be ask "DO YOU WISH TO END INPUT?" If Y is entered then you are prompted "DO YOU WISH TO PRINT BAR CODES NOW? (see note 2) If Y is entered then the instructions to "PLEASE PLACE XXX ID CARD SHEETS IN PRINTER" appears. Pressing enter will send the print job to the printer.

TO EXIT

Press enter at the student ID prompt. Print cards and menu will return.

ENTRY SEQUENCE

ENTER THE STUDENT ID NUMBER

DEFAULT ENTRIES

STD-FNAME
STD-MNAME
STD-LNAME
SCHOOL NO
STUDENT GRD

YOUR ENTRY

TYPE Y TO END ENTRY

YOUR ENTRY

TYPE Y TO PRINT CARDS NOW

YOUR ENTRY

PRESS ENTER WHEN STOCK IS IN PRINTER



NOTES

THE OPERATOR MAY ELECT TO ADD TO AN EXISTING WORK FILE CONSISTING OF ID CARDS ENTERED TO BE PRINTED BUT NOT PRINTED AT THE TIME OF ENTRY. IF THE ELECTION IS N OR NO THEN ANY WORK FILES WILL BE DELETED. THIS FEATURE IS HELPFUL IN THAT BUILDING A FILE OF A NUMBER OF CARDS TO PRINT MAY BE MORE EFFICIENT.



NOTES

*If N (no) is elected at this prompt then the Student ID cards to be printed will be added to the work file and retained until the next group of cards is entered. This file will be available for printing at a future time.



IMPORTANT TO KNOW

1. Be sure to learn how to properly place the special ID Card Paper in the printer.
2. The special paper may be re-ordered by calling the support office.

FROM THE MASTER MENU ENTER MENU OPTION ()

GET THERE QUICK

1	TYPE FS ENTER	SELECTS FOOD SERVICE
2	TYPE 01 ENTER	SELECTS MASTERFILE MAINT
3	TYPE 09 ENTER	SELECTS MEAL CORRECTIONS
4	TYPE 4 DIGIT SCHOOL NUMBER	SELECTS SCHOOL
5	TYPE MEAL TYPE B OR L	SELECTS MEAL AFFECTED
6	TYPE Y	CONFIRMS ALL IS OK

SCREEN MENU SELECTIONS

- 1= MEAL PROCESSING
- 2= CASH RECEIPTS POSTING
- 3= ALPHA INQUIRY
- 4= MENU ITEM INQUIRY
- 5= TIME CARD INPUT
- 9= EXIT PROGRAM



FUNCTION

The corrections program is used to correct meal and money entries due to several circumstances. This program provides the opportunity to correct entries on a given day within the current month due to status corrections, clerk errors not corrected on the entry date, and other reasons which may occur. This routine allows one to fully edit any previous transaction that has been recorded by any clerk or cashier.

OPTION 1

Will take the operator to the screen that will permit the correction of mistakes made in meals served. These corrections may be made in the item served or the quantity of items served.

OPTION 2

This will take the operator to the cash receipts screen where the corrections may be made to the cash account. Corrections may be made as adjustments or other transaction categories.

SELECT 9 TO EXIT

Returns the operator to the previous menu.



INFORMATION

The back office has the responsibility to oversee the accuracy of cashiers. Each cashier is instructed on how to find mistakes made on a daily basis and how to effect the corrections of any mistakes in meals served or cash received. Sometimes cashiers overlook mistakes and the back office must detect and make the corrections. Cashiers can only make corrections on the date that the mistake is made. Thereafter corrections are made in the food service office.



NOTES

Mistakes are detected in the back office by carefully looking at the managers daily summary report. Look for odd pennies and unusual amounts in the cash section.



INFORMATION

THE THREE MOST COMMON MISTAKES ARE:

1. SERVING THE WRONG NUMBER OF MENU ITEMS
2. PUTTING IN THE WRONG AMOUNT OF CASH RECEIVED
3. STUDENT IS SERVED IN THE WRONG STATUS.

Look to the following pages for a continuation of this routine



FROM THE MAIN OPERATORS SCREEN

GET THERE QUICK

1 TYPE 1

SELECTS MEAL INPUT



FUNCTION

Permits the correction of improperly recorded meals to a customer account



INFORMATION

MISTAKES IN SERVING MENU ITEMS

Most mistakes in serving the correct amount of menu items occur because of over-scanning an ID CARD. This means that the card is scanned twice or transaction is not completed before another students ID CARD is scanned.

You may see this as the mistake occurs and be able to back out the entry as the students record is on the screen which is the first method of correcting this type of mistake.

You are most likely to find menu items mistakes on the menu item transaction report. This is one of the main reasons that we print this report out after every meal. The way you scan this report is to look down the QTY column and check for a reasonable quantity of items served. If you see, for example, that 235 milks were served to one student it is probably a mistake.



INFORMATION

CORRECTING MENU ITEM MISTAKES

Write down the students ID Number from the MENU ITEM TRANSACTION REPORT or other source data.

Write down the correction to be made__example__
item 06 235- beside the mistake

This means that student #XXXXX needs to have 235 of the item#06 taken off his account.

Go to the MEAL INPUT screen put in the student ID Number

Put in the item number__Put in 235-__depress the enter key completing that line__depress the enter key which gets you to the money line__press enter placing 00.00 in the money field__press enter again which puts you at the acceptance line and enter again which accepts the correction.

ENTRY SEQUENCE

ENTER STUDENT ID NUMBER

ENTER THE EFFECTED DATE

ENTER ITEM NUMBER

ENTER QUANTITY

SELECT Y FOR ALL OK



NOTES

This is the meal input screen at which meal corrections will be made



JAN 1 2001		FOOD SERVICES MEAL PROCESSING		SCH 000-00	
MEAL INPUT -X					
STUDENT ID: 9090909 JOE JONES				BALANCE .00	
TRAN DATE: 09/09/97					
LINE	ITEM	DESCRIPTION	QTY	AMT	
-01-	06	MILK	235-	82.25-	
-02-					
-03-					
-04-					
-05-					
-06-					
-07-					
-08-					
-09-					
TOTAL DUE:			82.25-		
-10-MATTENDERED					
-11-ID CARD? (Y/N) ..Y					



IMPORTANT TO KNOW

Note: If there is a mistake in the number of items sold, there will be a big money mistake also. Don't correct the money because the correction you make in the menu item will correct the money also. Try it and see what happens to the money and the students account balance.

FROM THE MAIN OPERATORS SCREEN

GET THERE QUICK

1 TYPE 2

SELECTS CASH RECEIPTS



FUNCTION

Permits the correction of improperly recorded cash to a customer account



INFORMATION

MISTAKES MADE IN CASH TRANSACTIONS

The most common cash mistake is made when the cashier fails to record the money paid by the student. This makes two bad things happen. 1. The students account is charged as if they did not pay for the items served and 2. The cashier will be over in cash for that day. The cash mistakes may also be caused by simply entering the incorrect amount and by overscanning an ID CARD.

We find cash mistakes by carefully looking at the CASH TRANSACTION REPORT. Each cashier is responsible for looking at their own cash report. The cashier looks at the AMOUNT RECEIVED column to detect any odd amounts of cash or any unreasonable amounts of cash. Don't look at the sales column because any cash mistakes will be found in the AMOUNT RECEIVED column. For example you see that student #XXXXXX has \$534.00 in the AMOUNT RECEIVED column. If this is not correct and it probably would not be then the mistake must be corrected.



INFORMATION

HOW DO WE CORRECT CASH MISTAKES

Write down the students ID Number from the CASH REPORT or other source data

Write down the correction to be made beside the students name for example \$534.00- which means that we need to take \$534.00 from this students account.

Go to the CASH RECEIPTS POSTING screen and enter the students ID Number and the appropriate date.

Depress the enter key to put 00.00 in the check # field enter 534.00- (no decimals) in the AMOUNT field__depress enter to get to the ALL OK line__depress enter to accept the transaction. You will notice the appropriate changes in the student balance at the top of the screen.

ENTRY SEQUENCE

ENTER STUDENT ID NUMBER

ENTER THE EFFECTED DATE

PRESS ENTER IF NO CHECK INVOLVED

CASH CORRECTION

SELECT Y FOR ALL OK



NOTES

This is the cash receipts screen at which cash corrections will be made



JAN 1 1995 FOOD SERVICES MEAL PROCESSING SCH
000--00

CASH RECEIPTS

STUDENT ID: 9090909.JOE JONES BALANCE .00

-01-DATE: 09/09/97

-02-REF/CK# 0000

-03-TYPE: R

-04-AMOUNT: 1.00

VALID CODES ARE
A - ADJUSTMENT
R - CASH RECEIPT
N - RETURNED CK
B - BALANCE FWD

ALL OK (Y,N,C)N LINE (93)

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IMPORTANT TO KNOW

The entries to be made are prompted on the screen. Enter the student ID number, the appropriate date of the correction, the reference number if applicable which is the check number, the R indicates receipt, and the amount which may be a positive or negative number depending upon the correction the operator desired to make. The operator may wish to make an adjustment entry in which case the selection at ALL OK (Y,N,C) will be N and the entry 93 made in line number. The operator then selects the type of entry to be made from the pop up list on the right of the screen at which time the code is place on line - 03- and will be so indicated on any reports.

**TROUBLE SHOOTING TIPS**

We recognize that computers have a problem now and then. You should know however that we have designed our systems to be a maintenance and worry free as any on the market today. We have also designed into the system certain features that make it easy for you to get up and going when and if glitches occur. Just be patient and keep calm if something goes wrong and we will help you get going again.

We have listed a few of the most common problems and what to do about them

BLANK SCREEN ON THE POINT OF SALE TERMINAL

Check the power connections. You would be surprised how power cables get disconnected. Also see if the power switch is on at the terminal, the monitor, or the power strip. You may also see if the scanner has a light flashing.

JUST A BLINKING CURSER ON THE MONITOR

This means that there is no connection to the network device. First you may check the wire that connects the terminal to the network connection. If the wires are properly connected you should contact the person designated by Your supervisor.

TERMINAL DISPLAYS "TRYING (THEN A NUMBER)"

There is no connection to the network. The terminal is probably communicating to the network but the terminal is not getting a response from the server. Check with your designated contact so they can see if there is a problem with the network at that location.

PRINTERS DON'T PRINT

First check power to the printer, see if the proper lights are displayed on the printer, then the communications connections to the printer. If all these are ok then the printer may be detached. Look in the main manual to see procedures on how to detach and attach printers. Look under Line Printer Controller.

CANNOT ENTER MANAGERS DEPOSIT AT THE POS

You did not do the end of month properly. Call the software support office.

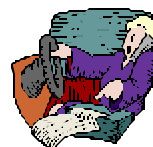
ALL SCHOOLS ARE DOWN

There is a problem with the wide area network or a problem with a main server. Call our software support office.

Most problems are solved easily and quickly. Please know that we understand the urgency and importance of being up and running at all times during the meal serving times. We try hard to do the best we can to keep your system up. Ours is the most reliable system and we strive to improve performance in our computing systems and hardware every day. Remember we really want to help. When you find that simple corrective steps have not solved your problem and need help then call our offices.



Help and Support
1.800.887.1828



Page Somebody
361.851.2401