

# LAUSD

## Food Services Division



**“Nourishing Children to Achieve Excellence”**

# **FRONT OF THE HOUSE**

# **POS GUIDE**

UPDATED: MARCH 2020

**FOR ASSISTANCE OR QUESTIONS, INPUT REMEDY TICKET AT:**

<https://lausd-myit.onbmc.com>



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## SECTION 1: CONTENT OVERVIEW

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Included in this training guide are the following business processes:

- Logging into OneSource
- Opening the Terminal
- Processing Meal Sales
- Closing the Terminal
- Appendices
  - Till Money Audit Form

## SECTION 2: OPEN TERMINAL

### 2.1 LOGIN TO ONESOURCE

A **POS** (Point of Service) terminal is assigned to a cashier and their **Single Sign-On** password will be used to log on to the **POS** terminal. No cashier or cafeteria manager should allow another employee to use the **POS** terminal while he or she logged on to that terminal.

1. If **OneSource** is not already open, double-tap the **OneSource** Icon.
  - *If you the hourglass appears after double-tapping the icon, you have successfully opened the program.*



2. Login to OneSource using the following information:
  - a. **USERNAME:** Last Name, First Name (find your name on list).
  - b. **PASSWORD:** XXXXXXXXXXXX (enter your LAUSD SSO password).
3. If the following message appears, please reset your **SSO** password using the steps outlined in *Section 6: Reset Your SSO Password*.





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## 2.2 OPEN THE TERMINAL

Go to **Front of the House > Point of Service > Open Terminal**

1. Verify that the serving date matches the current date. If the date is correct, touch the **Yes** button. If it is incorrect, touch **No**, and choose the correct date off of the calendar that appears.

The current serving date is 11/14/2012. Is this correct?

Yes No Cancel

2. Enter the Change Fund amount for your terminal by keying in the amount using the on-screen keypad and touching **Enter**. *\*Note: the minimum amount is \$1.00 even if you usually do not take in money on this register.*

Opening Till:

7	8	9	Clear
4	5	6	Back
1	2	3	Enter
0	00		

3. Verify that the serving date matches the current date and select the correct **Serving Period (Breakfast or Lunch only)**. The following screen may take up to 15 seconds to appear. Refrain from touching the **Serving Period** button more than once. The system is now ready to process sales.

Current Serving Date is 11/14/2012  
Please Choose the Serving Period

Breakfast

Lunch

Snack

Special

Change Date Cancel



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## SECTION 3: MEAL SALES & POINT OF SERVICE SCREEN

Prior to selling an item to customer, the cashier must have the customer's account on the screen. There are three ways to access the customer's account to record a sale:

1. **Manual Lookup**- The cashier can search for customer's account by name, PIN number or student ID.
2. **PIN Number** (Secondary Sites)- The customer enters a **PIN** number
3. **Sell by Group** (Elementary Sites)- the customer name and photo (if available) are displayed onscreen.

*\*Note: If a student cannot be found via Manual Lookup, that student is not in the system or is inactive. Write the name down and give it to your manager at the end of the serving period. The student may be new to LAUSD or may have transferred from another LAUSD school. These actions are dependent on SIS and are outside the control of Onesource. Once the information is entered in SIS, it will be in Onesource within 3 days.*



## 3.1 MANUAL LOOKUP

1. From the **Point of Service** screen, tap **Manual Lookup** button. The screen may take a second to appear- do not tap the button twice.

The screenshot shows a mobile application interface for a 'Lunch' screen. At the top, the word 'Lunch' is displayed in a large, bold, black font. Below this, there is a light blue header bar. Underneath the header, the text 'PIN:' is followed by a white text input field. To the right of the input field is a blue button with the text 'Manual Lookup' in white.

2. By default, the system will search active customers at the site by last name. The user is free to change the search criteria by pressing one of the search criteria buttons for **PIN**, **ID**, **Last Name** or **First Name**.

The screenshot shows a keypad interface for selecting search criteria. At the top is a button labeled 'Keypad'. Below it are two columns of buttons. The left column contains: 'All', 'Active', 'InActive', 'Generic', and 'Other Sites'. The right column contains: 'PIN', 'ID', 'Last Name', 'First Name', and a red 'Cancel' button.

CONTINUE PROCESS ON NEXT PAGE

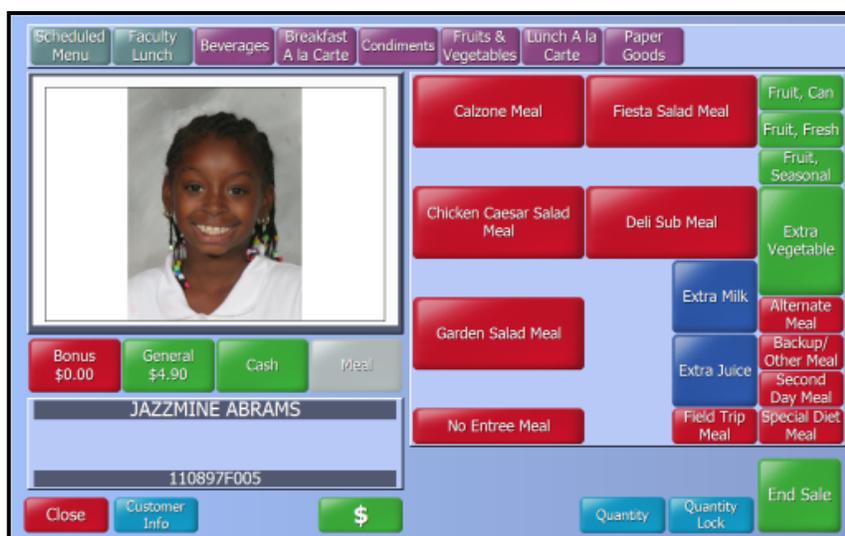


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3. Search for the customer using the on-screen keyboard.
  - a. Enter the first few letters of the customer's last name in the **Search** box
  - b. The results will appear in the list above.
  - c. Use the scrollbar on the right side of the screen to move through the list. If the list is too long, type the customer's entire last name.
  - d. Select the customer name to highlight it in orange and then touch **Enter** button.



4. The **Process Sales** screen will appear. If **Auto Sale** is on, this screen will be skipped and the student will automatically be sold a meal.

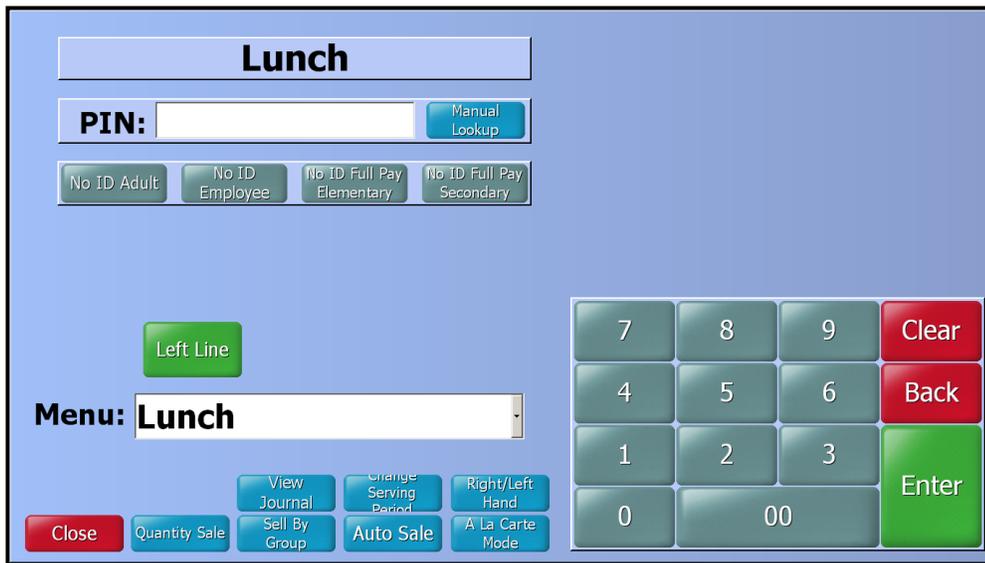




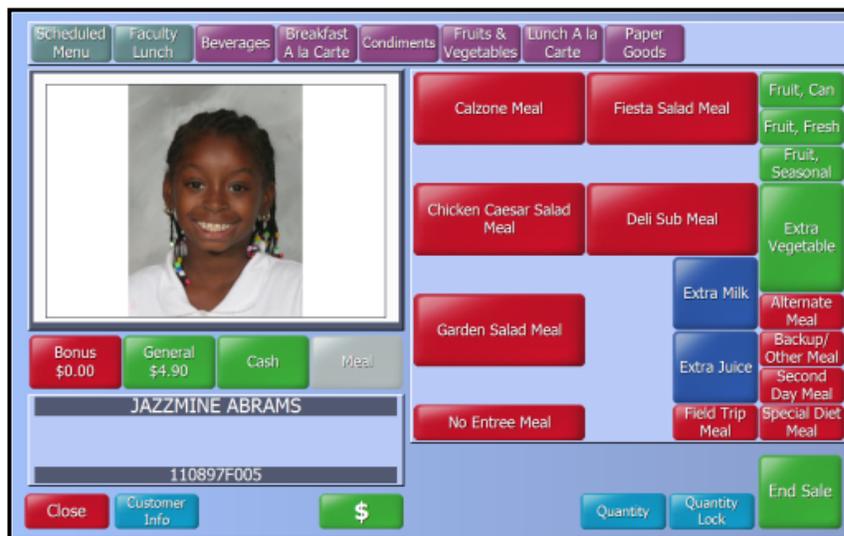
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## 3.2 PIN NUMBERS

1. The customer will type in their **PIN** number and press **Enter**.
2. The **Left Line** or **Right Line** button will turn orange- the cashier will touch this button if **Auto Sale** is not on.
  - a. If the cashier is responsible for 2 serving lines on 1 terminal, there will be both **Left Line** and **Right Line** buttons.



3. The **Process Sales** screen will appear. If **Auto Sale** is on, this screen will be skipped, and the student will automatically be sold a meal.





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## 3.3 SELL BY GROUP (HOMEROOM)

This will be used primarily by sites that serve students in grades K-5. It allows the cashier to display a class list and select the students by name.

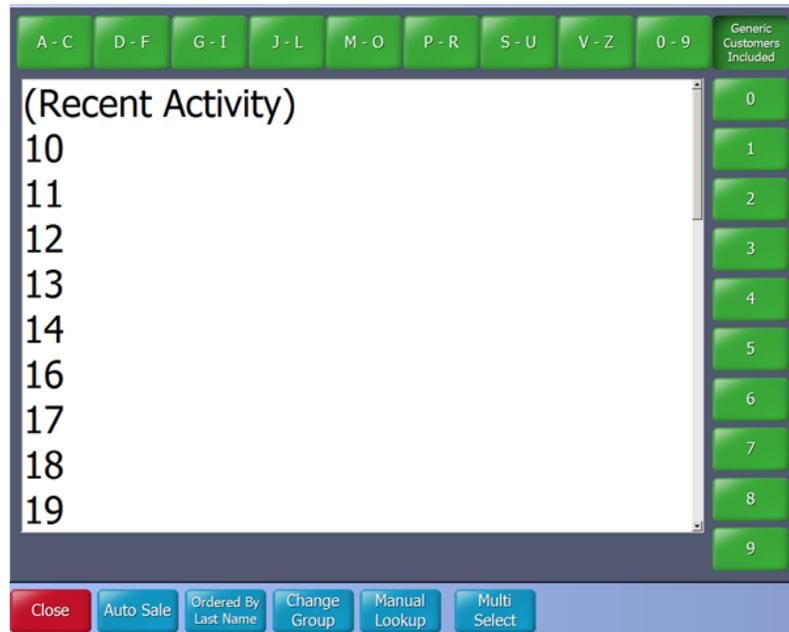
1. Turn **Auto Sale** on by pressing the button. When it is on, it turns into a darker blue.



2. From the **Point of Service** screen, touch **Sell by Group** located at the bottom of screen.



3. Select the student's classroom number from the list on the right side of the screen.

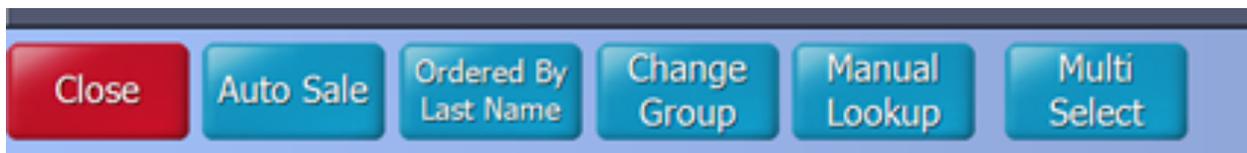


CONTINUE PROCESS ON NEXT PAGE

4. Each student's name and photo (if available) will appear.
5. If the student's name is green, they have not had a reimbursable meal. Red means the student has already been served their reimbursable meal.
6. Select the name of the student and the **Process Sales** screen will appear.



7. For breakfast and nutrition services, it is easier to display all the students on the screen at one time. Follow these steps:
  - a. From the **Homeroom Selection** screen, tap button **Multi Select**.
  - b. Touch **Select All** (to select all homerooms) and then press **Sell Selected**. Be patient, it will take a few seconds to process.



*\* If a student is not in the correct homeroom, use manual Lookup to find the student and record the meal.*

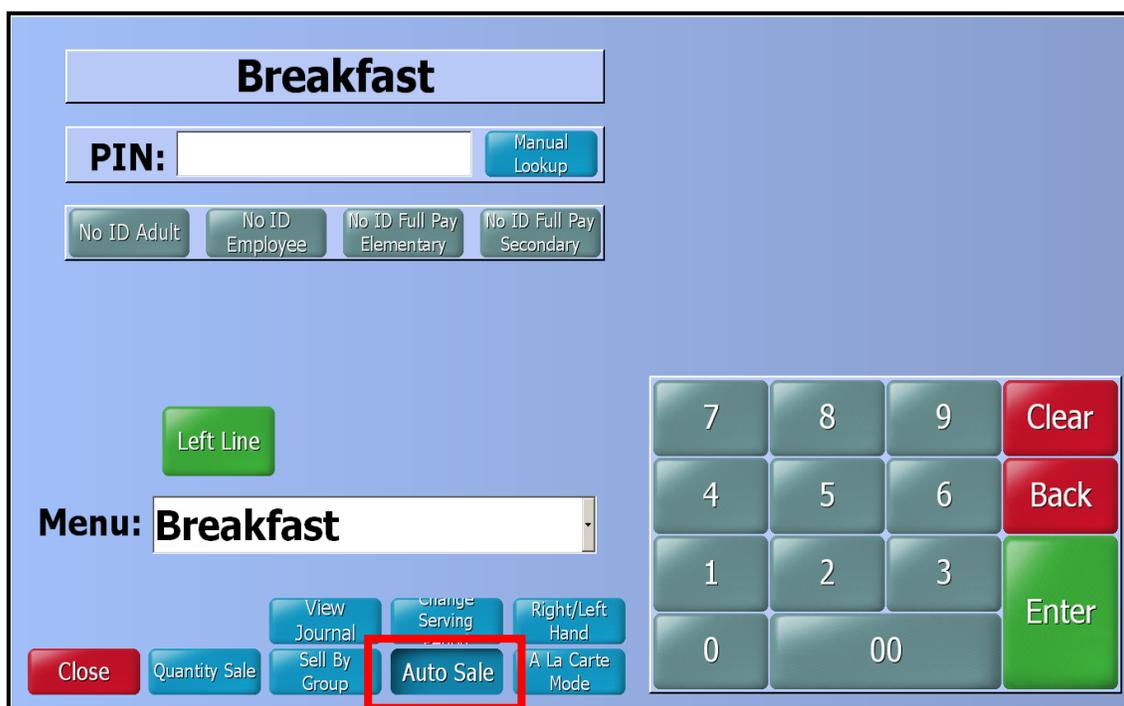


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## 3.4 MEAL SALES WITH AUTO SALE

By having **Auto Sale** on, you will be able to quickly and efficiently process students. **Auto Sale** means that students are automatically given a reimbursable meal when selected. By using Auto Sale an additional **Process Sales** screen will be skipped. Your **CMS** trainer will inform you if your school uses **Auto Sale** for meal services.

1. Once you have a terminal open and the **Process Sales** screen is visible, select **Auto Sale**.



2. After selecting **Auto Sale**, continue with the process for selling during breakfast or lunch service.



## 3.5 NO ID MEALS

If a **Manual Lookup** was performed and customer was not found, it is necessary to record that customer's meal as a **No ID** sale. Depending on the situation, there are a few different **No ID** sale types. It is important to follow up on the cause of the **No ID** sales at the end of the day.

1. From **Point of Service** screen, select the appropriate **No ID** button:

The screenshot shows a software interface for a Point of Service screen. At the top, there is a label 'PIN:' followed by a white text input field. To the right of the input field is a blue button labeled 'Manual Lookup'. Below this section, there are three green buttons arranged horizontally: 'No ID Adult', 'No ID Full Pay Elementary', and 'No ID Full Pay Secondary'.

2. A common example of the use of each button is listed below:
  - a. **No ID Adult**- used for an adult that does not wish to open a CMS account.
  - b. **No ID Full Pay Elementary**- an elementary student whose eligibility is unknown or is a new student not yet in the system.
  - c. **No ID Full Pay Secondary**- a secondary student whose eligibility is unknown or is a new student not yet in the system.
3. Once on the **Process Sales** screen, any meals or items entered will use the correct pricing for that eligibility.



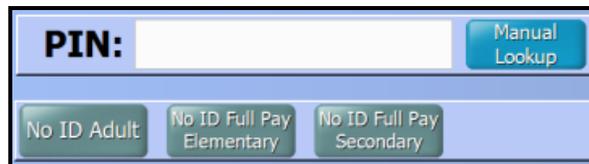
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## 3.6 FACULTY MENU SALES

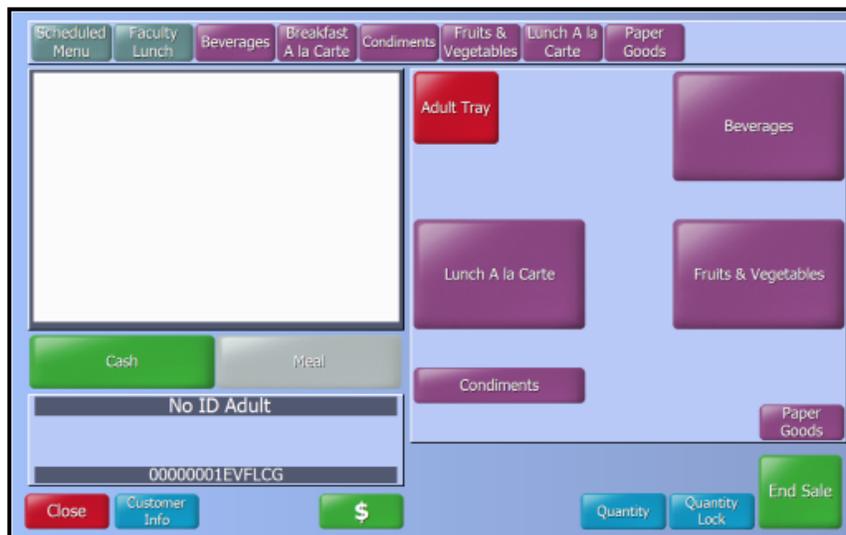
1. Any cashier selling items from the faculty menu must select either the **Faculty Breakfast** or **Faculty Lunch** from the **Menu** drop-down list.
2. Select the drop-down arrow button in the **Menu** box
3. A list of **POS** menus will display; choose the correct Faculty menu. This will be either **Faculty Breakfast** or **Faculty Lunch**.



4. After selecting the appropriate meal service, select **No ID Adult** button.



5. The **Process Sales** screen will appear which will then allow to select the menu item.





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## 3.7 BREAKFAST IN THE CLASSROOM (BIC) - PRICING SITES

The basic steps required to enter **BIC** meal for pricing sites are outlined in the following steps:

1. Open a terminal and select **Breakfast** for serving period. Verify that the serving date matches the current date and select the correct **Serving Period** (Breakfast). Once selecting, be patient, do not select button twice.

**Current Serving Date is 3/2/2020**  
**Please Choose the Serving Period**

Breakfast  
Lunch  
Snack  
Supper  
Special

Change Date Cancel

2. After verifying serving period is for **Breakfast**, system is now ready to process sales. **Menu** must be **Breakfast**.

**Breakfast**

PIN:  Manual Lookup

No ID Adult No ID Employee No ID Full Pay Elementary No ID Full Pay Secondary

Menu: **Breakfast**

7 8 9 Clear  
4 5 6 Back  
1 2 3 Enter  
0 00

Close View Journal Change Serving Period Right/Left Hand  
Quantity Sale Sell By Group Auto Sale A La Carte Mode

CONTINUE STEPS ON NEXT PAGE



# CAFETERIA MANAGEMENT SYSTEM TRAINING



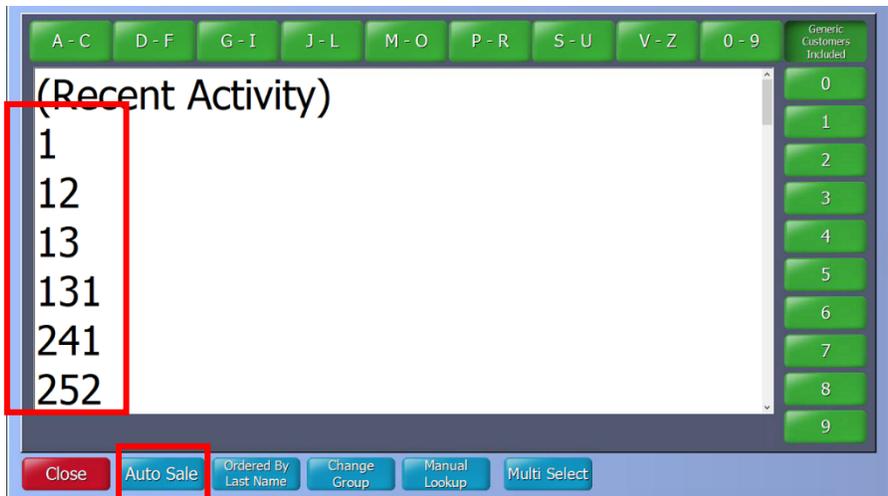
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### 3. Select **Sell By Group**



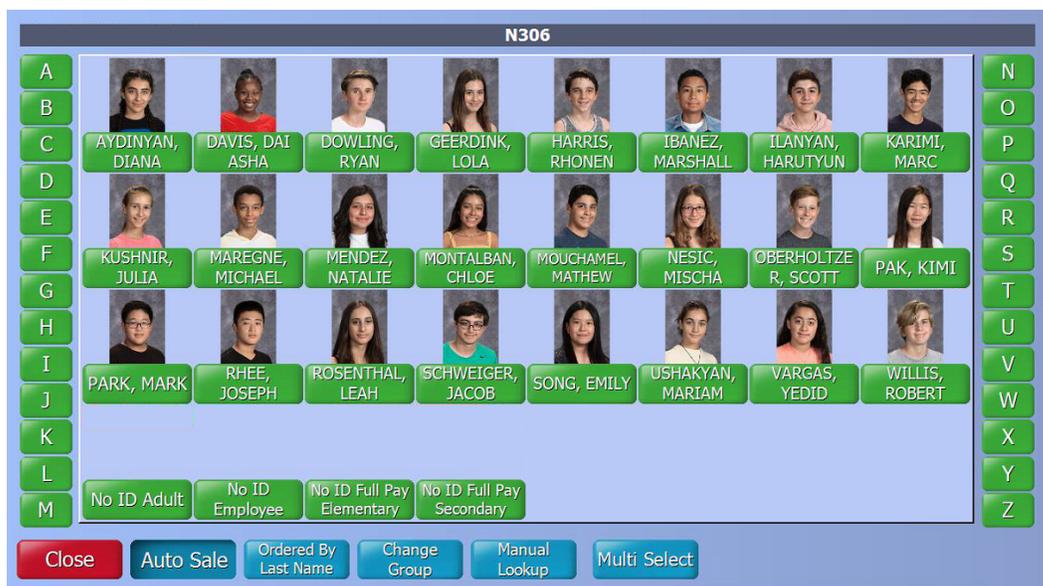
### 4. Select **Auto Sale**

### 5. Choose a **Homeroom**



6. Before entering all **BIC** participating students, compare student's names on the **MISIS Five Column Rosters** to Group on the screen and ensure you select only the names that are checked are entered in **CMS**.

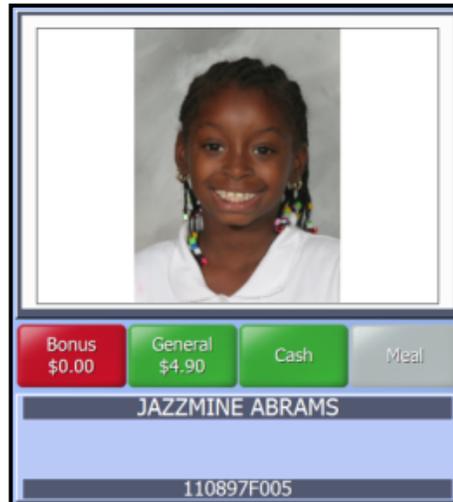
7. Make sure **Auto Sale** is activated.



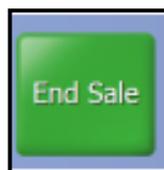
## SECTION 4: COMPLETE MEAL SALES

### 4.1 MEAL SALES

1. After selecting the student, student may be **No Charge** or may owe money due to charging meals and meal eligibility and account balances.



2. Enter the items that the customer would like to purchase:
  - a. **Reimbursable Meal**- select the appropriate meal button. Meal buttons are always red. This button includes all meal components, so it is not necessary to add any components (milk or sides) to the order.
3. Once all items have been entered, select the **End Sale** button.



4. If the customer is required to pay, the **Tender Cash** screen will appear.
5. If the customer is entitled to a fee meal or has enough on account to pay for the meal, the system will complete the sale and return to the **Point of Service** screen.



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## 4.2 A LA CARTE SALES

1. If a student photo is available, make sure the photo matches the customer
2. If no photo is available, review the customer's name
3. Look at the customer's balance -- the customer may have money on account or may owe money due to charging meals
4. Menu items are considered **A La Carte** if:
  - a. The items are taken in addition to the standard reimbursable meal
  - b. The items do not have enough components to make a reimbursable meal
5. **A La Carte** items must be paid for by **ALL students and adults**
6. Depending on the a la carte item, it may be visible on the menu or it may be in a category
  - a. If the item is visible on the menu, select the item and it will be added to the sale
  - b. If the item is in a category, touch the correct purple category button at the top of the screen to find the appropriate item.



7. Select the correct item to add it to the sale
8. To return to the scheduled menu, click the **Close** button
9. Once all items have been entered, touch the **End Sale** button
  - a. If the customer is required to pay, the **Tender Cash** screen will appear
  - b. If the customer is entitled to a fee meal or has enough on account to pay for the meal, the system will complete the sale and return to the **Point of Service** screen





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## 4.3 REMOVE ITEMS FROM A SALE

To remove an item from an order, follow the steps below. If multiple items were incorrectly added to the order, it is also possible to remove all items from the order and start over.

1. To remove a single item, select the item name to highlight it
2. Select the **Remove Item** button to remove only that item
3. To remove all items from the order, select the **Clear Sale** button



## 4.4 PROCESS SALES SCREEN OVERVIEW

1. **Menu Grid:** Shows menus, menu items or item groups.
2. **Auto Sale Position:** Shows the reimbursable meal that is automatically sold if only **End Sale** is selected.
3. **Photo/Sales Items List:** Shows the customer photo or lists all items selected for the sale, and identifies the following:
  - a. **R:** Reimbursable Meal (1 per serving period)
  - b. **M:** A la Carte Meal
  - c. **Numeric Value:** Quantity of a la carte menu items selected.
4. **Account Buttons:** Shows all accounts and balances for the customer.
  - a. **Bonus:** Only used for reimbursable meals.
  - b. **General:** 1 meal per serving period and a la carte items.
  - c. **Green:** Enabled and available for use.
  - d. **Yellow:** Below the low balance threshold. This color is a warning to the user.
  - e. **Red:** Account is not available for use. The spending or charge limit may be reached, a reimbursable meal has already been purchased, or the account balance is zero (if no limitations are set on the account).
5. **Sales Item List Controls:**
  - a. **Clear Sale:** Click to remove all items from list.
  - b. **Remove Item:** Click to remove selected item from list.
  - c. **Details:** Click to show or hide item payment method details.
6. **Total:** Shows sum of all items being purchased.
7. **Account:** Shows sales amount being paid from customer account.
8. **Owed:** Shows total cash amount due.
9. **End Sale:** Click to process the sale. If money is owed, the Tender screen displays.
10. **Quantity:** Click to quickly sell more than one of an item.
11. **Quantity Lock:** Click to lock the Quantity feature to continuously sell more than one of an item.
12. **Customer Info:** Shows the customer's name, ID, and comments.
13. **Message Field:** Shows messages about the current customer.
14. **Deposit (\$):** Use to make a deposit.
15. **Close:** Click to cancel the sale and close.





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## 4.5 TENDER CASH SCREEN

- Cashier will collect cash from the customer and select the method to apply payment to the sale (ex. Charge the meal, apply the change to account, or return the change to customer). Remember- NO CHECKS
  - Exact Change**- Select to complete the sale if exact change was received.
  - Charge**- Select to charge the amount owed to the **General** account. Use this when the student does not have any money to pay.
  - Change to Customer**- Select the button that corresponds to the amount received. The amount due to the customer appears in the **Change** field.
  - Cancel**- Select to return to the **Process Sales** screen and add or remove items.
  - General**- Select to apply change to the **General** account
  - Change to Account**- Select the button that corresponds to the amount received. The amount due to the customer will be applied to the **General** Account
- Select **Enter** to complete the sale and return to the **Point of Service** screen.

Exact Change **a** Owed: **\$2.15** Change: **\$0.00**

Cash: **\$0.00** General **e** **\$0.00**

Charge **b** Check: **\$0.00** Chk#:

Change to Customer: **c** \$3.00 \$5.00 \$10.00 \$20.00

Change to Account: **f** \$3.00 \$5.00 \$10.00 \$20.00

Current Customer	
Kyle Kolleda	
Bonus	\$0.00
General	\$0.00
Meal	\$0.00

Cancel **d**

7 8 9 Clear

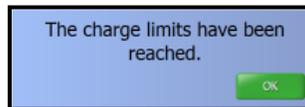
4 5 6 Back

1 2 3 Enter

0 00 **2**

## 4.6 EXCEPTIONS

1. If the student account has reached the charge limit, the system will not allow the cashier to complete the sale. Refer to **Policy 6.3** for additional details.
  - a. Full pay students with no cash or money in their account will be allowed to accumulate a negative lunch balance of \$2.00 (two lunches) at the elementary level and \$3.00 (two lunches) at the secondary level.
  - b. Reduced students with no cash co-payment will continue to receive a meal at no charge.
  - c. If the student has reached the charge limit, the following message will appear- select OK to continue



- d. To record the **Alternate Meal** that the student will receive, select **Cancel**



- e. Select the **Clear Sale** button to clear the sale
  - f. Select the red **Alternate meal** button
  - g. Select **End Sale**



## SECTION 5: END OF MEAL SERVICE

### 5.1 CLOSE THE TERMINAL

1. Go to **Front of the House > Point of Service > Close Terminal**
2. Enter the amount of money collected in the fields on the **Close Terminal** screen. The money should be entered as a **quantity**, not the actual value (ex: \$1.00 in quarters should be entered as “4” in the quarters box).
3. Select **Total Register**- the system will calculate and total the amounts entered.
4. Record the closing amount on the **Till Money Audit** form.
5. Select **Close** to finish and return to the **Point of Service** menu.



6. Exit out of OneSource using the **Red X** button in top right corner of the screen.
7. Restart the POS terminal by touching Start and then Restart.



## SECTION 6 MISCELLANEOUS

### 6.1 CLEANING THE TOUCHSCREEN

1. When cleaning the touchscreen, **ONLY USE WATER**
2. Use a damp cloth or paper towel to remove any smudges and debris from the screen
3. There is a thin layer of plastic over the screen- do not attempt to peel this off

### 6.2 RESET YOUR SSO PASSWORD

1. On the manager PC, go to the LAUSD home page
2. Hold the mouse over the **Home** link in the top left corner of the page
3. Click **Inside LAUSD** link that appears
4. Click the small **Reset Your SSO Password** link (it is below the login boxes).
5. Click **Accept**
6. Follow the directions to reset your password
7. Your password will be updated in OneSource the morning after it is reset
8. If your password has been reset and it is not updated in OneSource the following morning, please contact the CMS Help Desk.