OneSource

Cashier

Daily POS Guide

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Subject Area: **Cashier Daily POS Guide**

Personnel: **Cashiers**

1) CONTENT OVERVIEW

Included in this training guide are the following business processes:

- Logging in to Onesource
- Opening the Terminal
- Processing Meal Sales
- Closing the Terminal
- Appendices:
  - Till Money Audit form

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.

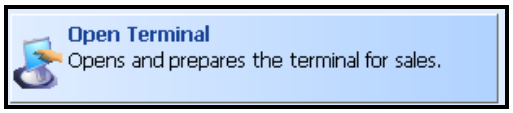
1. If OneSource is not already open, double-touch the **Onesource icon**. **Note: you know you have successfully double-clicked the icon when the hourglass appears*.

2. Login to Onesource –
   Username: Last Name, First Name (find your name on the list)
   Password: XXXXXXXXXX (enter your LAUSD password)
3. If the following messages appear, please reset your SSO password using the steps found in section **6.3, Reset Your SSO Password**.

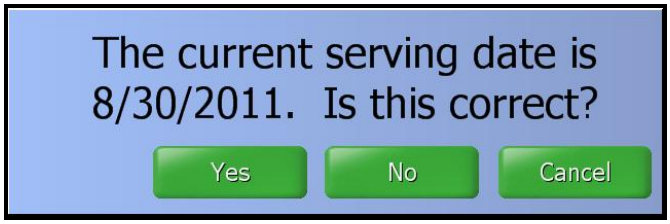
2.2) OPEN THE TERMINAL

1. Touch the **Front of the House** button.

2. Touch the **Open Terminal** button.

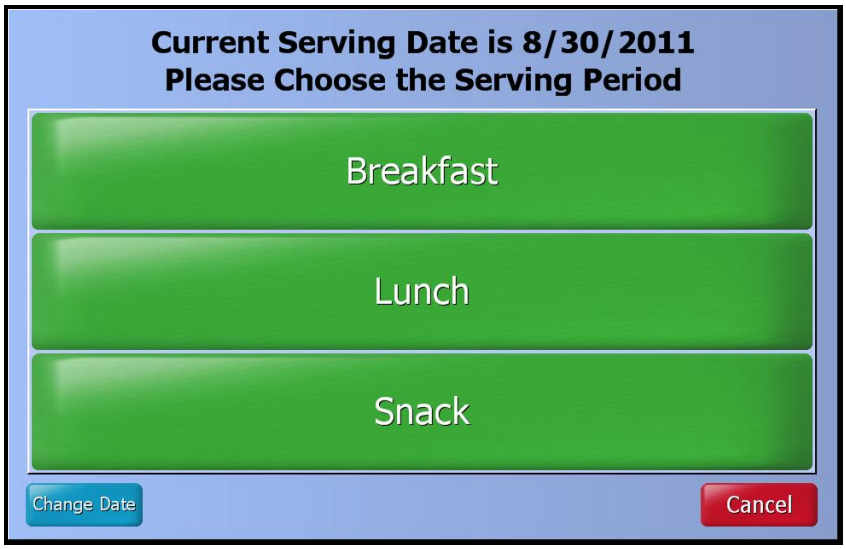


3. Verify that the serving date matches the current date. If the date is correct, touch the **Yes** button. If it is incorrect, touch **No**, and choose the correct date off of the calendar that appears.

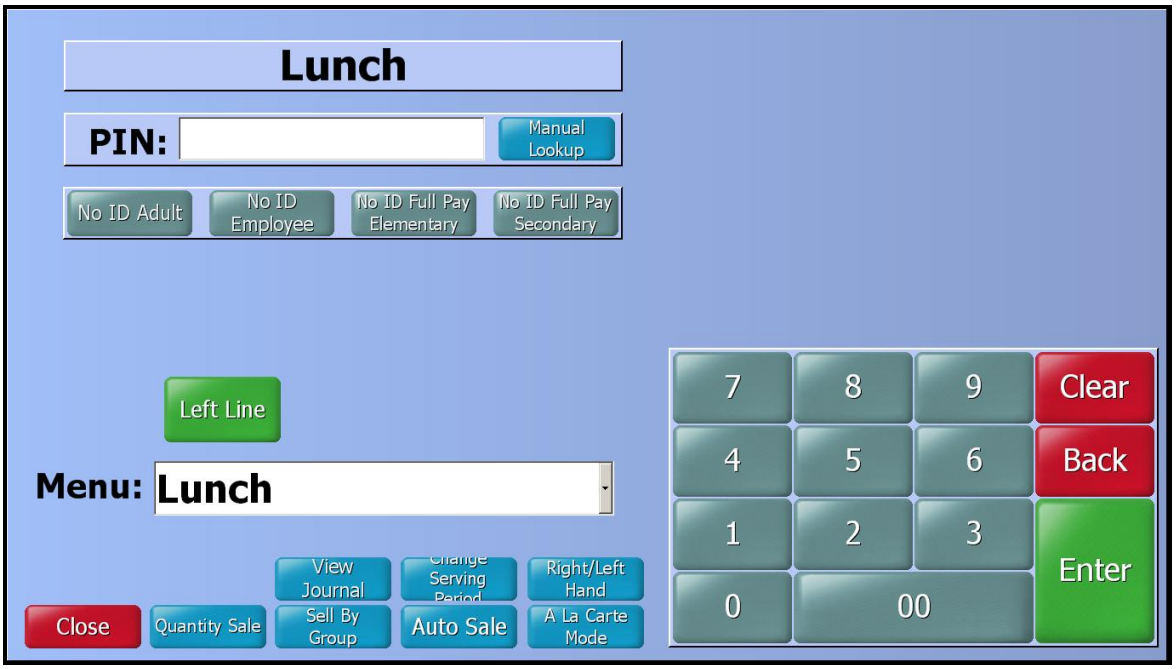


4. Enter the Change Fund amount for your terminal by keying in the amount using the on-screen keypad and touching **Enter**. **Note: the minimum amount is $1.00 even if you usually do not take in money on this register*

5. 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.



3) MEAL SALES & THE POINT OF SERVICE SCREEN



Prior to selling an item to a 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:

- **Manual Lookup** – The cashier can search for customer's account by name, PIN number or student ID.
- **PIN Number (Secondary sites)** – The customer enters a PIN number.
- **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.*

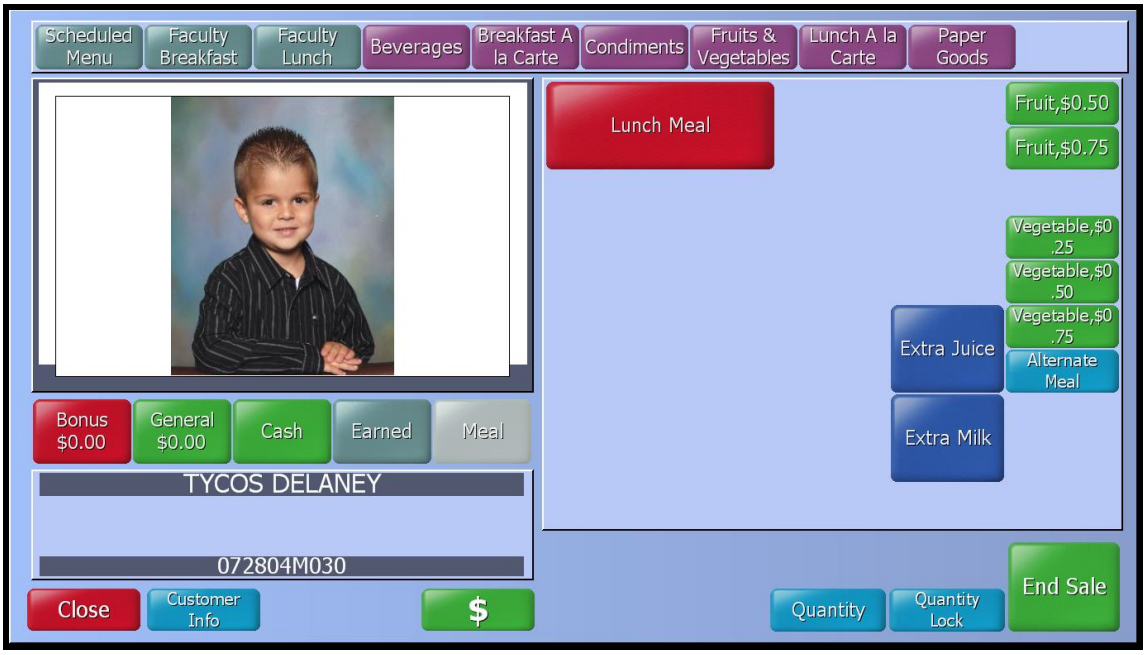
3.1) MANUAL LOOKUP

1. From the *Point of Service* screen, touch **Manual Lookup**. The screen may take a second to appear – don't touch the button twice.

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**.

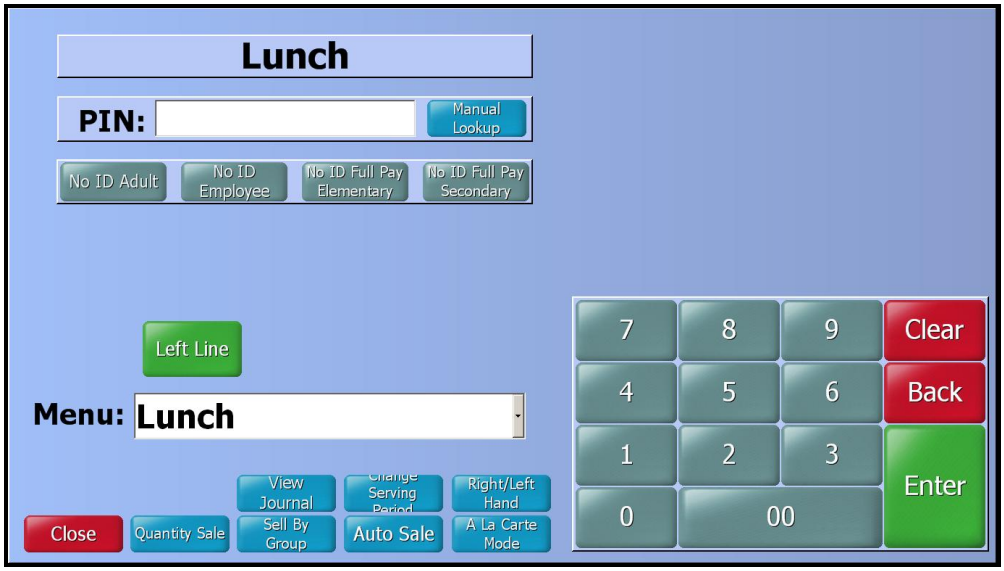
3. Search for the customer using the on-screen keyboard.
   a. Enter the first few letters of the customer's last name in the **Search** box.
   b. The results will appear in the list above.
   c. Use the scrollbar on the right side of the screen to move through the list. If the list is too long, type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

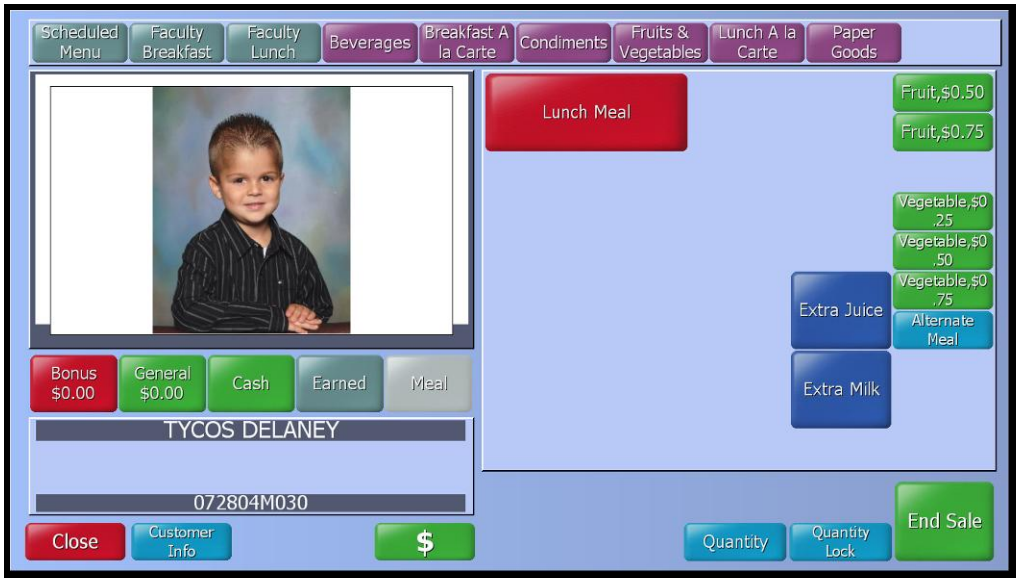


3.2) PIN NUMBERS

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.



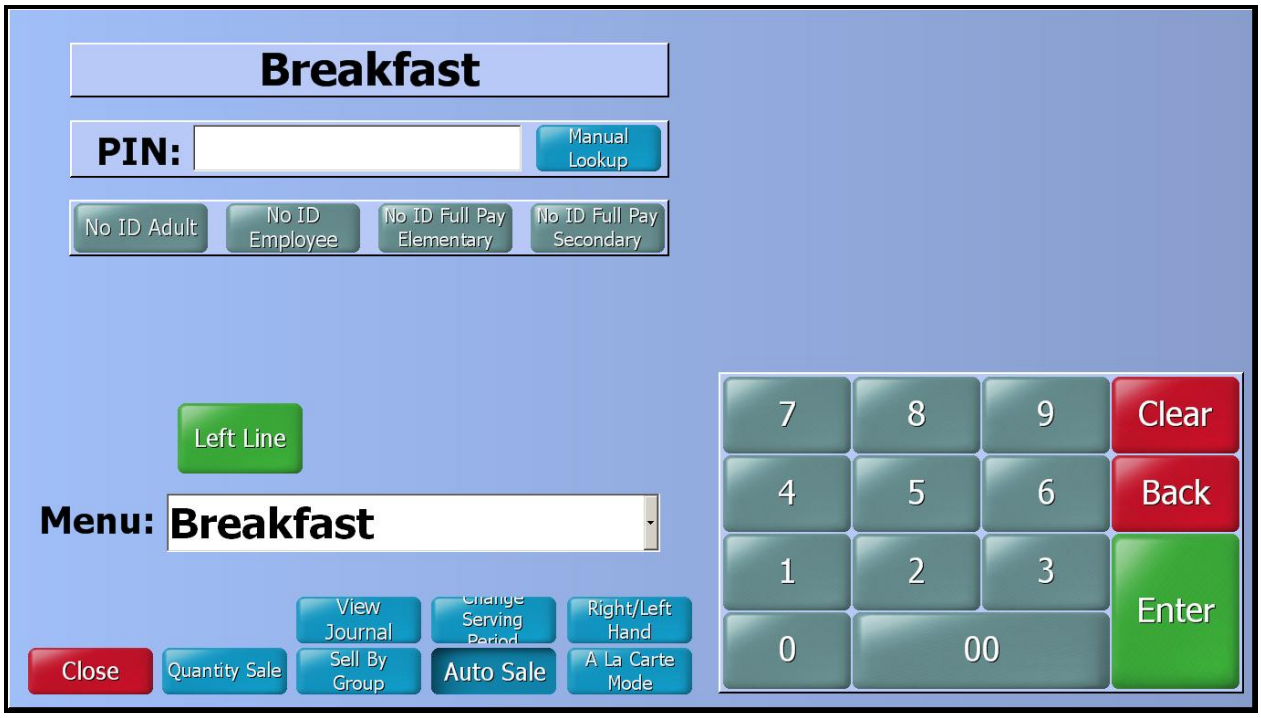
3. The *Process Sales* screen will appear. If **Auto Sale** is on, this screen will be skipped, and the student will automatically be sold a meal.



3.3) SELL BY GROUP (HOMEROOM)

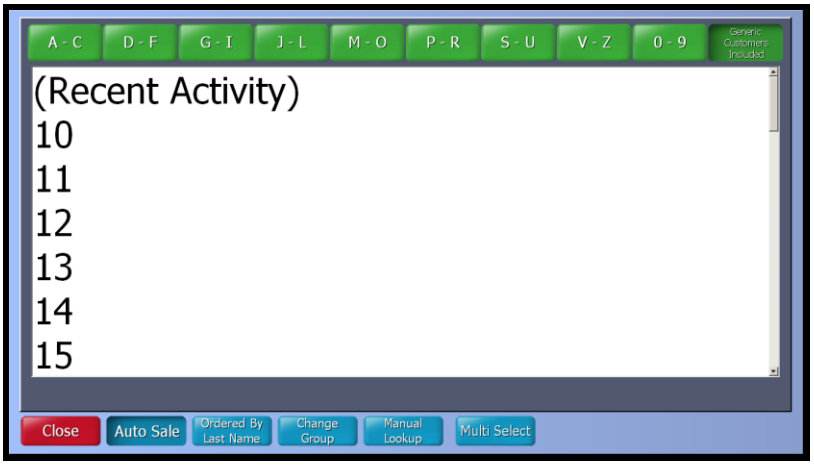
This will be used primarily by sites that serve students in grades K-5. It allows the cashier to display a class list and select the students by name.

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



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

3. Select the student's classroom number from the list.



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. Touch the name of the student and the **Process Sales** screen will appear.

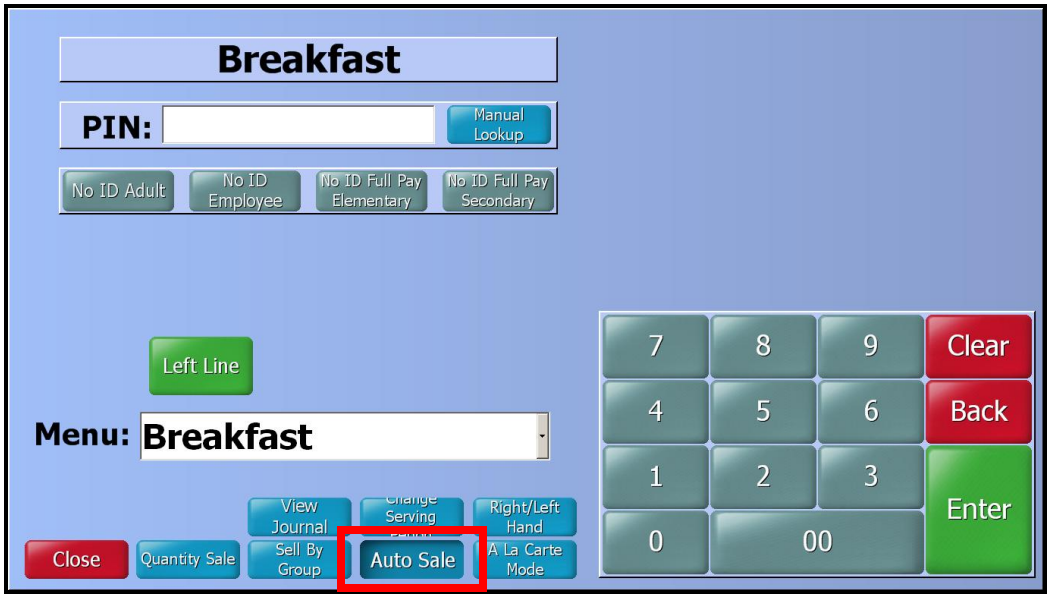
7. For breakfast and nutrition services, it is easier to display all the students on the screen at one time. To do this:
   a. From the **Homeroom Selection** screen, touch **Multi Select**.
   b. Touch **Select All** (to select all homerooms) and then **Sell Selected**. Be patient–it will take a few seconds.

**Note: If a student is not in the correct homeroom, use Manual Lookup to find the student and record the meal.*

3.4) MEAL SALES WITH AUTO SALE

By having **Auto Sale** on, you will be able to quickly and efficiently process students. What **Auto Sale** means is that you are automatically giving the student a reimbursable meal; by doing this, you skip an additional screen. Your CMS trainer will let you know whether your school uses **Auto Sale** for meal services.

1. Once you have a terminal open and the process sales screen is visible, press the **Auto Sale** button.



2. You will continue on with setting up the screen for breakfast or lunch normally.

3.5) NO ID MEALS

If a **Manual Lookup** was performed and the 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 the **Point of Service** screen, touch the correct **No ID** button.

2. A common example of the use of each 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.
   c. **No ID Full Pay Secondary** – a secondary student whose eligibility is unknown or is a new student.
3. Once on the **Process Sales** screen, any meals or items entered will use the correct pricing for that eligibility.

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 box.
2. Touch the drop-down arrow 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. Touch the **No ID Adult** button.

5. The Process Sales screen will appear.

4) COMPLETE MEAL SALES

4.1) MEAL SALES

The basic steps required to sell a meal are outlined in the steps below. For additional detail, refer to the *Process Sales* screen example on the following page.

1. If a student photo is available, make sure the photo matches the customer. This will only appear if the **Auto Sale** button is off (light blue).
2. If no photo is available, review the customer's name.
3. Look at the customer's **General** balance. The customer may have money on account or may owe money due to charging meals.

4. Enter the items that the customer would like to purchase:
   a. **Reimbursable meal** -- Touch 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.
5. 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 free meal or has enough money on account to pay for the meal, the system will complete the sale and return to the **Point of Service** screen.

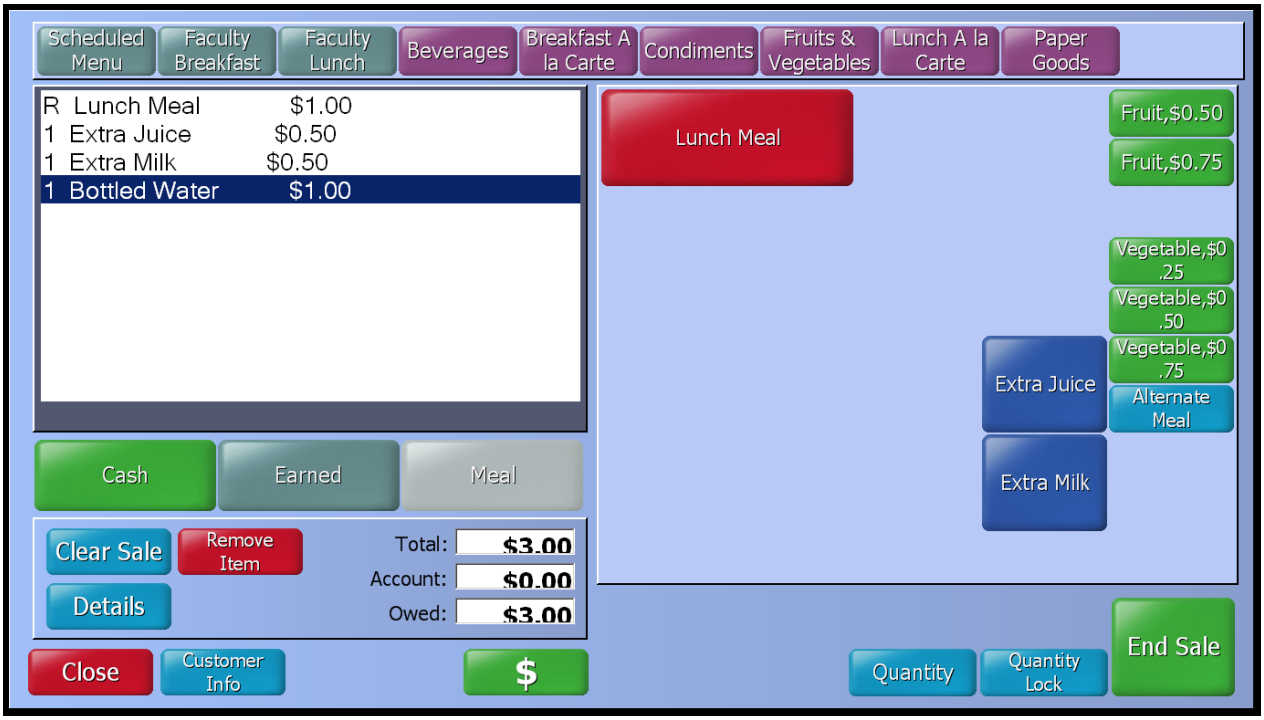
4.2) A LA CARTE SALES

The basic steps required to sell **A La Carte** items are outlined in the steps below. For additional detail, refer to the **Process Sales** screen example on the following page.

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, just touch 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. Touch 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 has enough money on account to pay for the sale, the system will complete the sale and return to the **Point of Service** screen.

4.3) REMOVE ITEMS FROM A SALE

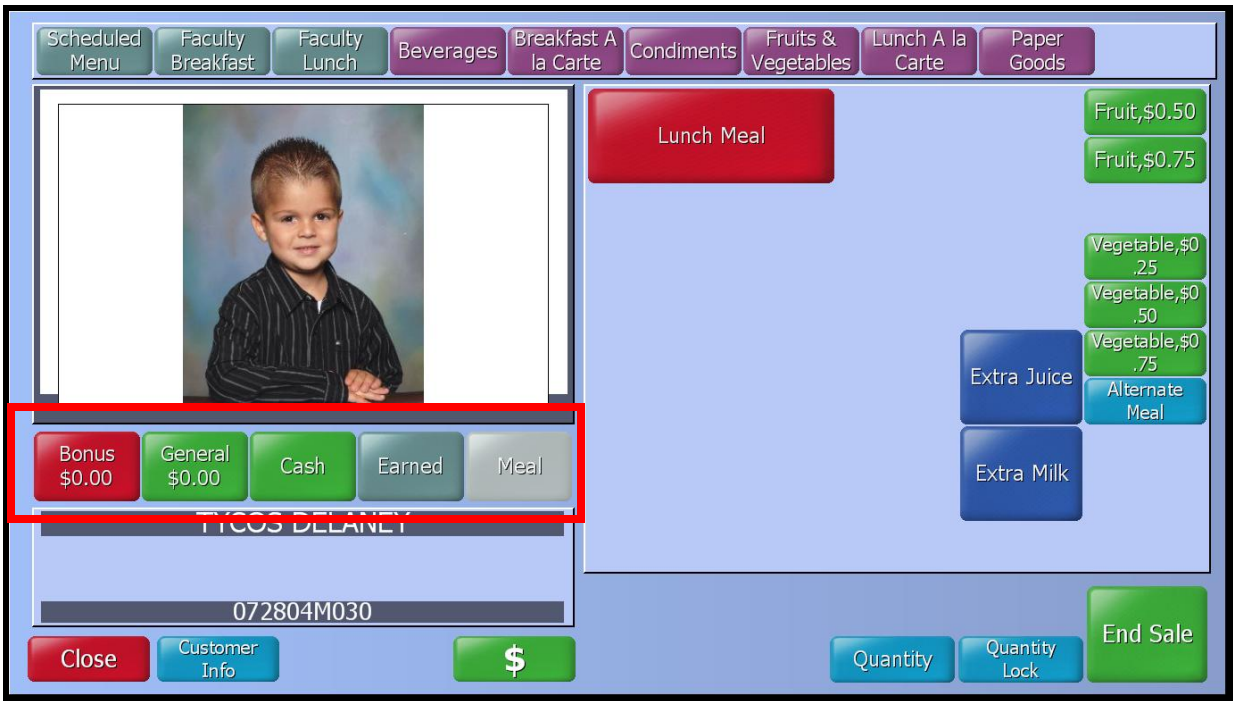
To remove an item from an order, follow the steps below. If multiple items were incorrectly added to the order, it is also possible to remove all items from the order and start over.

1. To remove a single item, touch the item name to highlight it.
2. Touch the **Remove Item** button to remove only that item.
3. To remove all items from the order, touch 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. This only appears when there is an account associated with purchase. No ID transactions (pictured here) do not have this information.***
   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.

****To view a sample of Account Buttons (# 4), go to the next page*



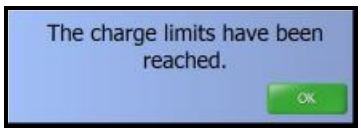
PROCESS SALES SCREEN OVERVIEW

4.5) TENDER CASH SCREEN

1. The cashier will collect cash from the customer and select the method to apply payment to the sale (i.e. Charge the meal, apply the change to account, or return the change to the customer). Remember – NO CHECKS.
   a. **Exact Change**: Select to complete the sale if exact change was received.
   b. **Charge**: Select to charge the amount owed to the **General** account. Use this when the student does not have any money.
   c. **Change to Customer**: Select the button that corresponds to the amount received. The amount due to the customer appears in the **Change** field.
   d. **Cancel**: Select to return to the **Process Sales** screen and add or remove items from the sale.
   e. **General**: Select to apply change to the **General** account.
   f. **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.
2. Touch **Enter** to complete the sale and return to the **Point of Service** screen.

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, and touch **OK** to continue.



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

   e. Touch the **Clear Sale** button to clear the sale.
   f. Touch the red **Alternate Meal** button
   g. Touch the **End Sale** button.

5) END OF MEAL SERVICE

5.1) CLOSE THE TERMINAL

1. Navigate 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 (for example, $1.00 in quarters is entered as '4').
3. Touch **Total Register**. The system totals the amounts entered and displays the till information.
4. Record the closing amount on the **Till Money Audit** form.
5. Touch **Close** to finish and return to the **Point of Service** menu.

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

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 the **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.