POS USER GUIDE
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1. Double-click from the desktop. This pulls up the Log on screen.

2. Do not enter any information into the Login Name and Password fields. Just hit .

3. This opens the POS so that you may access the properties screen. Click . This is where you need to enter either the IP address of your server or the server name. Both will connect the software to the server database, but only one needs to be entered.

4. Click . This returns you to the POS front page.

5. Click . Use the Login Name “A” and the Password “A” to log in for the first time. (of course, do not type in the quotations)
To begin using the FSS POS application, you must first log into the POS system. Click "Log in," located on the FSS POS front page. This pulls up the Log on screen.

Click beside the Login Name and Password fields to bring up an alphanumeric keypad (shown below). Enter the appropriate information.

Click to apply what is entered using the keypad to the Log on screen.

After both the Login Name and Password are entered, whether by keypad or keyboard, click to proceed.

If there is a keyboard attached to the POS machine, the Login Name and Password can just be typed in rather than having to pull up the keypad.

Click once again. This displays the POS Wizard – General screen.
LOGGING INTO THE POS (cont.)

6. Place the cursor in the POS Name field and name your POS. (before assigning this POS to a school, make sure there is not a check mark in the Always Offline checkbox)

7. Click on the white field window beside school so that the cursor is active in that window. Click ... which is adjacent to the right of the field.

8. Highlight the appropriate school as shown in the screenshot to the right. This screenshot shows that we will be setting up the POS for the FSS Middle School.

9. Click OK.

For anything to appear in the Schools Quick Search list, they must first be set up in the FSS Admin Program. You cannot enter school information via the POS. It can only be accessed.

10. Click OK to accept these settings.
The Sync function pulls information from the server database to the local database or transfers information from a client machine's local database to the server database. This function must be run in order to pull information that has been added or modified through the FSS Admin program. **NOTE: Once the Sync function is run for the first time, it is highly recommended that you log out of the system under Login Name “A” and re-login using the appropriate Login Name and Password!**

1. Click **this pulls up the synchronization screen.**

2. Click **to begin synchronization.**

3. The Picture sync function is defaulted to OFF. When the pictures need to be updated, push **which will turn it on** and update the pictures.

4. Click **to begin synchronization.**

- If you are always running online, the Sync function should be run every time the POS is opened (before cashing in) to keep the local database updated. We strongly urge that you sync before exiting the POS to make sure all sales have been sent to the server.
1. Click ![Properties](image) on the POS front page. Again, doing this pulls up the POS Wizard – General screen.

   You will notice that when the screen is brought up this time, you can no longer modify POS Name or School, nor can you click on either buttons beside those fields.

2. **Force Cashier Cashout**  This option will ensure that the Cashier will get an error if trying to log out or exit the program without Cashing out.

3. **Show Order Total** if checked, allows the order total to be displayed on the POS sales screen. If this item is not checked, the order total will not show up on the sales screen.

4. **Show Balance** if checked, allows the student’s account balances to be displayed on the POS sales screen. This must be checked if the balances are to appear.

5. **Show PinPad Balance** if checked, this option allows the use of a pin pad for student balance checks.
6. **Show Item Price**  Selecting this option will enable the price of the item to appear in the sales window to the right of the item.

7. **Enable Misc Screen**  Selecting this option will enable the Misc Screen to appear during a sale. This allows the cashier the ability to enter an amount of the item sold and lists it as a Misc Item in the account.

8. **Tax Misc. Items**  To impose tax on the Misc Items, select this option.

9. **Enable UPC Screen**  When using a bar code scanner to scan UPC codes from items to charge them to an account, select this option.

10. **Enable Meal Equivalency**  Select this option when using Meal Equivalencies.

11. **Enable QuickSale**  This option is used to turn on the quick sale function. This allows you the ability to select 3 items. As the students are recognized by the system, they will appear in a list and you will select the item they purchased to charge to the account.

12. **Payment Options** include:  When checked, gives the cashier the ability to add a payment to a customer’s account.

13. **Enable Refund Button**  Gives the cashier the ability to refund money from a students account.
14. **Force Pmt on Low Balance** Selecting this option forces the cashier to enter a payment to an account with a low balance.

15. **Bypass Payment Warning** When selecting this option, the low account balance warning will not pop up.

16. **Display Low Balance Warning** Select this option to display a low balance warning when the customer account goes below the allowable limit.

17. **Display Low Meal Warning** Select this option when using meal plans to display the low meal warning when the customer goes below the allowable limit.

18. You have the option of running an individual POS unit offline all the time. We recommend that this option not be used unless bandwidth is an issue or there is no network connectivity whatsoever. Always offline means that instead of running real-time data off the server database, the POS runs by using the information that has been synchronized to the local database on the POS terminal. Once lunch is over and the cashier has cashed out, the transaction stored in the local database must be synchronized to the server database before any reports can be run. To set the POS unit to run offline, make sure a check is showing on **POS Always Offline**.

19. Select **Get Balance from Server** if using more than one POS in a location so you can pull the current balance from the server.

20. **Forward** Cycles forward through shortcut pages
    **Back** Cycles through previous shortcut pages
Configure your identification devices using this screen.

1. Select the type of Identification device you are using.

   a. If using a **Bar Code Scanner**, select Bar Code as displayed here. Select the device, cable type and the com port it is attached to. Select **Bar Code Scanner Always on** so the light will stay on and you will not have to push the trigger to scan a card.

   ![POS Wizard Devices Screen](image)

   **Select Your Device**
   - Not Used
   - Bar Code
   - Prox Reader
   - Pin Pad

   **Device Options**
   - HHP 3800 LR
   - HHP 3800 G
   - Bar Code Scanner Always On

   ![Select Cable Type](image)

   **Select Cable Type**
   - Serial (RS-232)
   - USB

   ![Select COM Port Number](image)

   **Select COM Port Number**
   - OFF

   ![Select Device Options](image)

   **Device Options**
   - 20 bit Cards
   - 32 bit Cards

   ![Select Your Device](image)

   **Select Your Device**
   - Not Used
   - Bar Code
   - Prox Reader
   - Pin Pad

   ![Select Device Options](image)

   **Device Options**
   - 20 bit Cards
   - 32 bit Cards

   ![Select Cable Type](image)

   **Select Cable Type**
   - Serial (RS-232)
   - USB

   ![Select COM Port Number](image)

   **Select COM Port Number**
   - OFF

b. When using a Prox Reader, select this option. Select the appropriate option, cable type and the com port if necessary.
c. To configure a pin pad, select **Pin Pad**. Select the appropriate pin pad, cable type and the com port if necessary.

**Lookup Pad**

This device is used so the customer can enter their pin number to see their account balance. Select the appropriate Device, cable type and com port if necessary.
Biometrics
Select the appropriate biometric device.
Select _______ to move to the next device.

POS Wizard - Devices

1. If using a Receipt Printer which is connected to the POS machine, click the drop down arrow and select the appropriate option. Then select _______.

2. If using a Kitchen Printer, click the drop down arrow and select the appropriate device then select the options to the right that you would like to appear on the receipt.

3. If using an electronic Cash drawer, Click the drop arrow to the right of Using USB Cash Drawer and select yes.

4. Select Electronic Scale if connecting a scale to the POS for weighing scaled items.
5. Select **Pole Display** if you have this device connected to the POS.

6. **Menu Shortcuts** indicates the number of shortcut screens you need on the POS. 

![POS Menu Shortcuts](image)

- Adds an additional shortcut page
- Removes a shortcut page

7. These shortcuts can be imported from another POS by selecting ![Import Shortcuts](image). This will bring up a list of other POS machines for you to choose from.

![POS Quick Search](image)

8. Select the name of the POS that you would like to copy then select ![OK](image) 

Select ![Forward](image) to move to the next screen.
**POS Wizard-Shortcuts**

This screen allows you to setup the menu items in the order you prefer.

1. Select one of the N/A boxes. You will receive options to select. Click the drop down arrow to select the category you would like to choose from.

2. Select the item from that category that you would like to see in that position.

3. Repeat this process for all menu items.

4. Select **Forward** to move to the next shortcut screen.

5. Click **OK** when finished.
1. Double click on \[\text{Point of Sale}\] to open the Point of Sale program.

2. Enter your user name and password.

3. Click \[\text{OK}\].

4. The POS program will open with these options:
   - At the top of the screen you will see the name of your POS machine. In this case the name is POS-BRENDA.
   - Once logged into the POS, follow these steps:

5. Click the \[\text{Sync}\] button. This window will appear:
   - Press \[\text{OK}\] to begin synchronization. This will copy all the updated student information to the local POS machine. Once the Sync is completed, this window will disappear.
6. Click on **Cash In**

a. Enter the total amount of money that you are starting with.

b. You can enter your startup amounts by selecting **Amounts**. When you select this option, press the number keys, on the right, to display the amount of pennies, which is highlighted to the left, then hit **Set**. This moves the amount to the 0.01 cent section. Click on the 0.05 cent box and enter the amounts to the right, then hit **Set**. Repeat this process for each denomination.

c. You can enter your startup money by selecting **Counts**. When you select this option, you only need to enter the total number of coins or bills you have counted, for each denomination. Once the total, at the bottom, matches the amount of money in the drawer, click **OK**. This takes you to the main screen of the POS.
7. The main screen of the POS machine is the Search Engine. It looks like this:

![Screenshot of the Search Engine](image)

8. Enter the student sales and payments. When the session is completed and all meals are entered, you are ready to cash out.
9. Select \(\text{Cash Out}\). The cash out window will appear.

10. Enter the closing denominations.

11. Once the total at the bottom matches the total amount of money in the drawer, press \(\text{OK}\). This will display the amount that you are being held accountable for and overages or shortages.

12. If you have a large overage or shortage, recount your money and look at a payment report to double check the payments entered.

13. If you have a large overage or shortage, recount your money and look at a payment report to double check the payments entered.

14. If everything looks good, select \(\text{OK}\). This will end the session.

15. Click on \(\text{Sync}\) then \(\text{OK}\) to make sure the server has been updated.

16. Click \(\text{Log Out}\) then \(\text{Exit}\). 

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PLACING AN ORDER

1. Once you have cashed in and clicked , the customer Search Engine pops up. This is the main screen. You can either search for a specific student, have a student identify, use Guest Cash Sale for adult guests, or Student Cash Sale for students that do not have accounts.

2. When a student identifies, the account will open up.

3. Once the Order window appears, you can select Menu to pull up a menu list by category (shown to the left), or shortcuts can be used, which is more common for a graphical representation of menu items.

### MENU

- SC1
- SC2
- SC3
- SC4
- SC5
- Misc

**Category:** BREAKFAST

**Menu Item:**
- ST BREAKFAST
- St El pbj brk

### SHORTCUTS
4. One method of adding an item to an order (when using a menu listing rather than with shortcuts) is to double-click the item. When using a touch-screen, hit the item twice quickly. *Single click shortcut buttons.*

5. Select the item or items the student is purchasing. These items will appear to the right.

6. Select ∑ if the student is charging these items to the account and you are not receiving money for this transaction.

7. Select ✈️ only if you are receiving money for the transaction. Refer to Making a Payment document.

**ORDER FUNCTION KEYS**

**INCREASES THE QUANTITY OF AN ITEM IN THE ORDER SECTION**
Example: to charge a student for two sodas … add a soda, highlight the new soda entry, and hit this key. You should now see the quantity of sodas being increased to 2.

**DECREASES THE QUANTITY OF AN ITEM IN THE ORDER SECTION**
Example: say you accidentally added 2 sodas instead of 1 … again, highlight the soda entry, and hit this key. The quantity of sodas should now decrease to 2, making the order of 2 sodas correct.

**DELETES AN INDIVIDUAL ITEM FROM AN ORDER**
Example: a student is accidentally rung up for a white and chocolate milk … highlight the item that is incorrect and press this button.

**ALLOWS THE CASHIER TO ENTER A LARGER VALUE FOR A PARTICULAR ITEM**
Example: A student wants to purchase 10 drinks. Select the drink button then select the QTY button to enter that value.
ORDER FUNCTION KEYS (cont.)

CANCEL AN ENTIRE ORDER COMPLETELY

ALLOWS YOU TO MAKE PAYMENTS TO AN ACCOUNT
Also brings up the screenshot below.

ALLOWS THE CASHIER TO REFUND MONEY FROM A STUDENT’S ACCOUNT

FINALIZES TRANSACTION

ALLOWS THE CASHIER TO VIEW THE CUSTOMER’S LAST ORDER

RINGING A CASH SALE

1. Press either or depending on whether the sale is for a student or an adult. This will pull up the Cash Sale screen.
2. Ring up the items being purchased. Select \( \Sigma \) Total to finalize the transaction. Since this is a cash sale transaction, the system will automatically assume the money is being collected and put in the drawer. However, if you wish to use the POS like a cash register for cash sales, hit Payment. This will display the payment screen with the amount due already in place.

Notice that once \( \Sigma \) Total is pressed, the order total automatically defaults to the number pad window.

The same applies to a student that identifies but decides to pay with cash. This increases transaction speed of students.

You MUST hit cancel if the student decides to charge the order to his/her account after the payment screen has already been brought up!!

3. Enter the amount tendered, if different than the sale amount by using the number pad and select CASH. The change due will appear to the right.

4. When ready to finalize the transaction, press TOTAL.
RINGING A SALE WITH BIOMETRICS

1. To ring a sale using a biometric reader, you must first go to the Admin program and login. Click [Schools]. You should already have all your schools entered into the Admin program.

Highlight a school and click [Edit].

2. Once the School Details window is on the screen, click [Options] to pull up the Options page. Make sure [Do Fingerprint] is checked. Then click [OK] to close the screen.

   This field must be checked for each school entered if a Morpho Touch biometric reader will be used at that particular school. These steps are not necessary if using the MSO biometric reader.

3. When first implementing the biometric reader with the POS program, you must first go to the properties screen; this is the POS Wizard – General screen.

RINGING A SALE WITH BIOMETRICS (cont.)

5. If you are using a MorphoTouch, enter the MorphoTouch IP address in . If you are using a touch-screen, click . This will bring up a keypad so that a value can be entered without a keyboard. Make sure to click to save/apply what was entered and close the keypad.

Once all the preliminary information has been setup, you are now ready to ring your first sale using the biometric reader. Once cashed in, simply have the student place their finger on the biometric reader optic. After a moment, approval will pop up on the Morpho Touch’s LCD display and your terminal will pop up the order screen with the correct student information.

RINGING A SALE USING A BARCODE SCANNER

1. After cashing in, have the cursor in the Customer Search Engine box, and have the customer run his/her card through the scanner.

2. You will see that this will also pull up the customer’s account. Ring up the order as usual.

Barcode length and pin prefix must be defined in the Admin program before the barcode scanner can be used.

RINGING A SALE USING THE KEYPAD

1. Cash in as usual, bringing up the screenshot to the left (with or without QuickSale)
RINGING A SALE USING THE KEYPAD (cont.)

2. Enter the customer’s pin number on the keyboard and press [ENTER].

You will notice the account is brought up but this time bypassing Quicksale.

TRANSACTIONS VIA QUICKSALE

The first step to processing a QuickSale transaction is to have QuickSale turned on and the QuickSale buttons defined.

1. Log onto the system, sync, and cash in as you normally would. The first screen of the POS is quite different with the Quick Sale Option turned on; the Quick Sale buttons are on top of the queue box.

2. Have a customer place his/her finger on the Biometric unit, enter his/her pin number, or swipe his/her barcode through the FSS Pinpad. Customers may do this one after another as the names or placed into a queue (sequential listing).
3. To complete a transaction, the cashier has to highlight one of the names in the queue and hit the appropriate QuickSale button. The system is then ready for the next transaction.

   *If a customer in the queue is purchasing more than one item, the cashier would make sure the customer’s name is highlighted and then hit the menu button. This pulls up the regular sales screen that contains individual menu items and the customer’s account information.*

removes any unwanted names from the queue. This would also include any customers that had their order processed under a student or guest cash sale (in this situation, the customer’s account is never affected).

**TRANSACTIONS VIA AUTOQUICKSALE**

Auto quicksale uses the same as above, but the cashier will touch the menu item once.

1. Log in, sync and cash-in as usual.

2. Select the menu item being sold. The item will turn White.

3. As the students identify, their name will appear in the list with the menu item next to their name. The item is automatically being sold to them as they identify.

4. You must preselect the item being sold before the customer identifies.
5. You cannot void a sale once it has gone through the quicksale process on the POS. You would have to void any incorrect sales in Admin.

6. When you search a customer, the quicksale screen is bypassed and you will have to choose items from the menu.

SEARCH OPTIONS

1. Hit **Search** to pull up the Customer Search window. You can locate a customer by his/her last name, first name, PIN number, or ID number. Enter whichever you choose and hit the appropriate button to perform the search.

2. Highlight the customer desired, and either double-click (“double-hit” w/ a touch-screen) or hit **Order** . The order window should appear. Once the sale is completed, you will return to the Customer Search Engine (Main Screen).

A partial search may also be done. For example, entering “S” and searching by last name will list all customers whose last name begins with the letter “S”.

3. To search for customers by a particular Homeroom, click on \[\ldots\] to the right of the Homeroom field. Select the homeroom from the list and Press ▶.

To conduct a search by group, such as Grade:

1. Select a Grade by pressing \[\ldots\] and select the grade from the list.
2. Press the ▴ key.

This will bring up a list of students. As you select them to adjust their accounts, their name will change color but the list will remain. Click on search to go back to the search engine (Main Screen).

To search for customers in all schools, place a check next to All Schools. You will now see the School field is blank.
LOW ACCOUNT WARNING SCREENS

The POS software is designed to alert a cashier that a customer has a low account balance or is not permitted to purchase Ala Carte items.

If a cashier attempts to sell a student an Ala Carte item that is not permitted to purchase these items, the warning screen pops up.

The cashier can select OVERRIDE ignore the message and sell the student the item or cancel the transaction altogether. The cashier could also select OVERRIDE then select to delete the item from the sale.

A similar Low Account Balance warning screen will appear if a customer attempts to purchase an item but has a low account balance.

MAKING A REFUND

1. Once the student is pulled up on the Order screen, hit

2. This refund screen will appear:
3. Use the number pad to enter the amount of the refund and hit TOTAL.

4. This window will appear: showing the amount of the refund. If the amount is correct, select OK to return to the Customer Search Engine window.

MAKING PAYMENTS

1. To enter a payment to a student’s account, you must open the account by searching the student’s name or having the student identify.

2. Press

3. The payment window will open.
Making a Cash Payment

4. To make a cash payment to a student account:

   a. Enter the amount by using the number keys

   b. Press CASH. The screen will look like this.

   c. Press TOTAL. When you press this key a window will pop up for you to select where you would like to apply the payment. It looks like this.

   d. Select how you would like to apply the payment. Ala Carte is the best option.

   e. When the choice is made, the payment will be applied and the POS will return to the main screen.
Making a Check Payment

5. To enter a check payment to a student’s account

   a. Enter the check amount by selecting the appropriate number keys.

   b. Press CHECK.

   c. Press TOTAL. This window will appear:

   d. Enter the check number by using the number keys, then select Set. This will enter the check number along with the payment into the student’s activity.

   e. Once Set is selected, the Apply to options will appear (below).

   f. Select where you would like to apply the payment. The system applies the payment then takes you back to the main page.

6. A credit card can not be used for payment to a student’s account. It may only be used to pay the exact amount of a sale.
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Not all images are to scale.