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Food Service (Portal)

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The Food Service screen allows parents and students access to the following food service information:

- **Current account balances**
- **Transactions** (food item purchases, account deposits of cash, check and credit card, when enabled)
- **Account history** (historical transaction records)
- **Account adjustments** (debits/credits)

The link to the **Food Service** screen displays in the Portal index, as shown:

Image 1: Food Service Screen

Account Types

Depending on school setup of food service accounts, the organization of the Food Service screen may vary. Some users may have family accounts, where one account is shared by all individuals in the household. Other users may have individual accounts, where an account exists for each member of a household.

Image 2: Family Account versus Individual Student Food Service Accounts within the same Household

Viewing Account Information

The Food Service screen includes the following features.

Image 3: Account Information

Account Information Area

The following information is available at the top of the screen:

Image 4: Individual Accounts

Column	Description
Account Name	This column lists the names of household members who have individual Food Service accounts.
Account Number	This column indicates the number associated to the accounts established for the household.
Balance as of (Current Date)	This column indicates the balance for each account, as of the current date.

Transaction Detail Area

The Transaction Detail area, located in the middle of the page, controls which transactions are displayed in the list at the bottom of the page. Information may be filtered based on the fields in this section:

Image 5: Transaction Detail

Field / Button	Description

Show Transactions for	This dropdown field allows the user to select the person/account to be reviewed or printed. If switching between accounts, click the **Go** button to refresh the information in the Transaction List table. If accounts are set up as family accounts, the user can choose to view/print specific student transactions or family account transactions.
Month	When the **Month** button is selected, the user may select a month from the dropdown list that appears. After clicking the **Go** button, all transactions posted for that month will display. The **Ending Balance** total at the bottom of the page will be the balance as of the last day of the selected month, *OR*, the current date, if the selected month is the current month.
Date Range	When the **Date Range** button is selected, the user should enter a start date and an end date in the two fields that appear. After clicking the **Go** button, all transactions posted on and between the specified start and end dates will be displayed in the Transaction List table.
Go	Clicking on the **Go** button refreshes the display of the Transaction List table, based on the criteria currently displayed in the Transaction Detail area.
Print	Clicking on the **Print** button will generate a PDF of transaction data, based on the criteria currently displayed in the Transaction Detail area.

Transaction List Table

The following types of information may appear in the table at the bottom of the screen, if the account has applicable transactions posted:

Image 6: Transaction List

Column	**Description**

Date	This column contains dates on which transactions occurred.
Patron	The patron to whom the transaction directly relates.
Item	The transaction type - generally a deposit or (food) purchase, but may also include adjustments, voided items and starting balances. • **Purchases** - each item and/or meal name will be indicated (*e.g.*, Brkfst Meal, Pizza, Milk, Ala Carte). • **Deposits** - to the account, it will be listed as "Deposit" with a description of the payment method listed in the **Comment** column. Entries in gray font are posted transactions that have been successfully voided. Entries in red font represent the action of voiding the original transaction (the preceding items in gray font).
Comment	Entries in this column provide additional details on the transaction listed in the **Item** column. These are a standard set of labels applied to the transaction. • **Comments on Purchases -** If the transaction was a meal or food item purchase, the school's internal method of processing may be indicated (*e.g.* , Cafeteria Serve, Class Serve). • **Comments on Deposits -** If the transaction was a deposit, the payment method is indicated as "Cash," "Check #," "Credit Card #," "Online Checking" or "Online Savings" (the last three options are only applicable if a school allows that type of payment method). • **Voided Transactions -** If the purchase or deposit transaction has been voided, it will be indicated. Comments on the voided transaction will display, if entered. Entries in gray font are posted transactions that have been successfully voided. Entries in red font represent the action of voiding the original transaction (the preceding items in gray font).
Debit	This column indicates a purchase or adjustment amount that *reduced* the current account balance.
Credit	This column indicates a deposit or adjustment amount that *increased* the current account balance.

Below the Transaction List table are two three totals: **Total Debits**, **Total Credits**, **Ending Balance as of [Date]**.

> These totals are for the **Month** or **Date Range** currently displayed in the Transaction Detail area.

Example of Printed Account Information

Clicking on the **Print** button will generate a PDF of transaction data, based on the criteria currently displayed in the Transaction Detail area.

Food Service Account Statement for Family Account

12-13 • PUBLIC SCHOOLS
4321 109TH AVENUE NE, BLAINE MN 55449

Generated on 02/22/2013 10:06:59 AM

Transaction Summary for Family Account

Balance as of 01/01/2013	Debit	Credit	Transfer	Deposit	Balance as of 01/31/2013
$8.85	$11.15	$62.80	$0.00	$14.75	$75.25

Transaction Detail for Family Account

	Transaction Time	Post Time	Patron Name	Category	Item	#	Debit	Credit
1.	01/03/2013 09:54	01/03/2013 09:55	Switch , Jimmy	Ala Carte	Hot Ent -brk	1	~~$1.00~~	
	01/03/2013 10:01				Voided Transaction			
2.	01/03/2013 09:55	01/03/2013 09:56	Switch , Joey	Breakfast	Brkfst,SH	1	$1.40	
3.	01/03/2013 09:55	01/03/2013 09:56	Switch , Jimmy	Deposit	Check # 1111			$20.00
4.	01/03/2013 00:00	01/03/2013 09:59	Switch , Joey	*Deposit	Cash (Amount: $14.75)			$14.75
5.	01/03/2013 10:01	01/03/2013 10:03	Switch , Joey	Breakfast	Brkfst,SH	1	$1.80	
				Ala Carte	Milk, 8 oz PLAS	1	$0.40	
				Cash Payment				$5.00
6.	01/03/2013 11:01	01/03/2013 11:02	Switch , Jimmy	Deposit				$7.80
7.	01/16/2013 10:02	01/16/2013 10:02	Switch , Joey	Transfer to Account#21068 (Switch, Jimmy)			$22.80	
8.	01/16/2013 10:02	01/16/2013 10:02	Switch , Jimmy	Transfer from Account#21068 (Switch, Jimmy)				$22.80
9.	01/16/2013 13:45	01/16/2013 13:46	Switch , Joey	Lunch	LUNCH/SH	1	$0.00	
				Ala Carte	Peanut Butter cup	1	$0.40	
				Ala Carte	SWITCH	1	$1.25	
10.	01/16/2013 13:45	01/16/2013 13:46	Switch , Jimmy	Ala Carte	Lg Chip	1	$0.80	
				Ala Carte	Pretzel, lg	1	$0.75	
				Ala Carte	Lg Cookie	1	$0.40	
				Ala Carte	Rc Krspy	1	$0.80	
				Ala Carte	SWITCH	1	$1.25	
11.	01/16/2013 13:48	01/16/2013 13:49	Switch , Joey	Deposit				$30.00
12.	01/17/2013 10:21	01/17/2013 10:22	Switch , Joey	Lunch	LUNCH/SH	1	$0.00	
				Ala Carte	Fruit, Fresh Whole	1	$0.50	
13.	01/17/2013 10:24	01/17/2013 10:24	Switch , Joey	Ala Carte	Lg Milk	1	~~$1.00~~	
	01/17/2013 10:32				Voided Transaction			
14.	01/17/2013 10:29	01/17/2013 10:29	Switch , Jimmy	Lunch	LUNCH/SH	1	$0.00	
				Ala Carte	Peanut Butter cup	1	$0.40	
				Ala Carte	Lg Milk	1	$1.00	
					Total Debits/Credits		$33.95	$100.35

Image 7: Example of Printed Account Information for a Household Account