# Food Service (Portal)

Account Types | Viewing Account Information | Example of Printed Account Information

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:

Family		Food Serv	vice				
Messages	>						
Household Information	>	Account Nan	ne	Account #	Balance as of 02/22/2013		
Family Members	>	Family Account		4451			<b>\$</b> 113.15 <sup>^</sup>
Calendar	>						
Food Service							
User Account							-
Account Management	>						
Contact Preferences	>	Transaction [	Detail				
Access Log	>	Show transaction	ons for Family Account -	Month C Date Range	Go	Print	
		Date	Patron	Item	Comment	Debit	Credit
		02/01/2013		Starting Balance			\$96.40 🔺
		02/04/2013	Andrew S	Lunch Meal (Sec)		\$0.00	
				Cookie	\$0.35		
				Medium Item \$.60	\$0.60	E	
		02/04/2013	Emma S	Brkfst Meal (Elem)	\$0.00		
		02/04/2013	Emma S	Brkfst Meal (Elem)		\$0.00	
		02/05/2013 Emma S 02/05/2013 Andrew S		Lunch Meal (Sec) Cookie		\$1.95	
						\$0.35	
				Lunch Meal (Sec)		\$0.00	-
					Total Debits/Credits	\$3.25	\$116.40
				Endir	ng Balance as of 02/22/2013		\$113.15

©2015 Infinite Campus, Inc. All Rights Reserved.

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.

> Food Service	Food Service		One account is shared by all individuals in the household.		
Information > Account Name	Account #	Balance as of	02/22/2013		
nbers > Family Account	4451		\$113.15		
			-		
OR OR Food Service	Account #	Balance as e	4 04/27/2044		
Ce Unt Anagement Account Name	Account #	Balance as o	of 01/27/2011		
Ce Unt anagement Account Name Kommer, Emily N	<b>Account</b> # 15726	Balance as o	of 01/27/2011 \$-0.70		
Ce Unt Anagement OR Food Service Account Name Kommer, Emily N Kommer, Jarred L	Account # 15726 3356	Balance as o Current individual balances for students in the bousehold who	\$-0.70 \$-0.70 \$5.85		
Ce Unit anagement OR Food Service Account Name Kommer, Jarred L Kommer, Jessica	Account # 15726 3356 15725	Balance as o Current individual balances for students in the household who have Food Service	of 01/27/2011 \$-0.70 \$5.85 \$16.90		

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.





### **Account Information Area**

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

Food Service		
Account Name	Account #	Balance as of 01/27/2011
Kommer, Emily N	15726	\$-0.70
Kommer, Jarred L	3356	\$5.85
Kommer, Jessica	15725	\$16.90
Kommer, Mallory S	2706	\$20.00

#### 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:

Transaction Detail Show transactions for Kommer, Emily  Month Obate Range January (2011) Go Print							
Date	Patron	ltem	Comment	Debit	Credit		
01/01/2011		Starting Balance			\$4.00		
01/18/2011	Emily K	Fruit, Fresh Whole		\$0.50			
		2 X Rc Krspy		\$1.60			

#### Image 5: Transaction Detail

Field / Button	Description
-------------------	-------------

R

Show Transactions for	This dropdown field allows the user to select the person/account to be reviewed or <u>printed</u> . If switching between accounts, click the <b>Go</b> 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 <b>Month</b> button is selected, the user may select a month from the dropdown list that appears. After clicking the <b>Go</b> button, all transactions posted for that month will display. The <b>Ending Balance</b> total at the bottom of the page will be the balance as of the last day of the selected month, <i>OR</i> , the current date, if the selected month is the current month.
Date Range	When the <b>Date Range</b> button is selected, the user should enter a start date and an end date in the two fields that appear. After clicking the <b>Go</b> 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 <b>Go</b> button refreshes the display of the Transaction List table, based on the criteria currently displayed in the Transaction Detail area.
Print	Clicking on the <b>Print</b> 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:

Transaction Detail							
Show transactions for Kommer, Emily 🔍 Nonth Obate Range January (2011) 💌 Go							
Date	Patron	ltem	Comment	Debit	Credit		
01/01/2011		Starting Balance			\$4.00		
01/18/2011	Emily K	Fruit, Fresh Whole		\$0.50			
		2 X Rc Krspy		\$1.60			
		3 X Peanut Butter cup		\$1.20			
		2 X Lg Cookie		\$0.80			
		Yogrt		\$0.60			
					~		
			Total Debits/Credits	\$4.70	\$4.00		
		E	nding Balance as of 01/27/2011		\$-0.70		

Image 6: Transaction List

Column	Description
	©2015 Infinite Campus Inc. All Rights Reserved

Date	This column contains dates on which transactions occurred.						
Patron	The patron to whom the transaction directly relates.						
ltem	The transaction type - generally a deposit or (food) purchase, but may also include adjustments, voided items and starting balances.						
	<ul> <li>Purchases - each item and/or meal name will be indicated (<i>e.g.</i>, Brkfst Meal, Pizza, Milk, Ala Carte).</li> <li>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).</li> </ul>						
Comment	Entries in this column provide additional details on the transaction listed in the <b>Item</b> column. These are a standard set of labels applied to the transaction.						
	<ul> <li>Comments on Purchases - If the transaction was a meal or food item purchase, the school's internal method of processing may be indicated (<i>e.g.</i>, Cafeteria Serve, Class Serve).</li> <li>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).</li> <li>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).</li> </ul>						
Debit	This column indicates a purchase or adjustment amount that <i>reduced</i> the current account balance.						
Credit	This column indicates a deposit or adjustment amount that <i>increased</i> 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.

KNOWLEDGE BASE - FOOD SERVICE (PORTAL)

infinitecampus.com

# 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

Fransaction	Summary	for Family	Account /

Balance as of 01/01/2013 Debi			Credit	Transfer	ransfer Deposit Balance as of 0		as of 01/3	31/2013		
\$8.85 \$11.1		\$11.15	5	\$62.80	\$0.00	\$14.75		\$75.25		
Transaction Detail for Family Account										
	Transaction Time	Pos	t Time	Patron	Name	Category	Item	#	Debit	Credit
1.	01/03/2013 09:54	01/0	3/2013 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	01/0	3/2013 09:56	Switch,	Joey	Breakfast	Brkfst,SH	1	\$1.40	
3.	01/03/2013 09:55	01/0	3/2013 09:56	Switch ,	Jimmy	Deposit	Check # 1111			\$20.00
4.	01/03/2013 00:00	01/0	3/2013 09:59	Switch ,	Joey	*Deposit	Cash (Amount: \$14.75	5)		\$14.75
5.	01/03/2013 10:01	01/0	3/2013 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	01/0	3/2013 11:02	Switch ,	Jimmy	Deposit				\$7.80
7.	01/16/2013 10:02	01/1	6/2013 10:02	Switch ,	Joey	Transfer to Account#21	068 (Switch, Jimmy)		\$22.80	
8.	01/16/2013 10:02	01/1	6/2013 10:02	Switch,	Jimmy	Transfer from Account#	21068 (Switch, Jimmy)			\$22.80
9.	01/16/2013 13:45	01/1	6/2013 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	01/1	6/2013 13:46	Switch,	Jimmy	Ala Carte	Lg Chip	1	\$0.80	
						Ala Carte	Pretzel, Ig	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	01/1	6/2013 13:49	Switch ,	Joey	Deposit				\$30.00
12	. 01/17/2013 10:21	01/1	7/2013 10:22	Switch ,	Joey	Lunch	LUNCH/SH	1	\$0.00	
						Ala Carte	Fruit, Fresh Whole	1	\$0.50	
13	. 01/17/2013 10:24	01/1	7/2013 10:24	Switch,	Joey	Ala Carte	Lg Milk	1	<del>\$1.00</del>	
	01/17/2013 10:32			Voided	Transaction					
14	. 01/17/2013 10:29	01/1	7/2013 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