


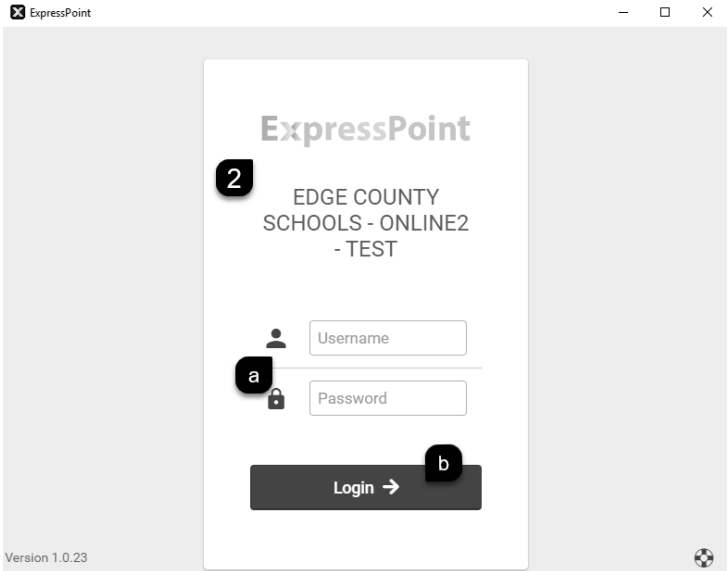
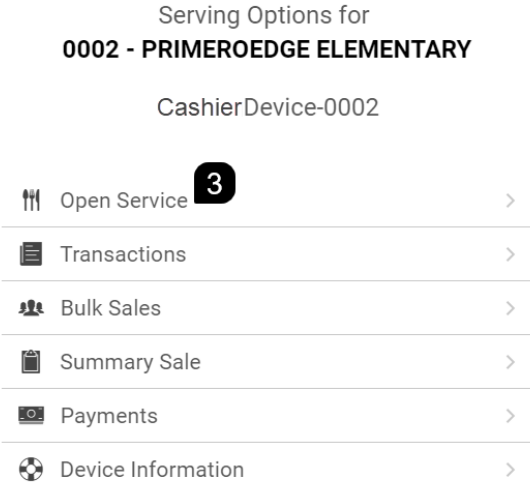
EXPRESS POINT FUNCTIONALITY

Updated:
10/24/2019

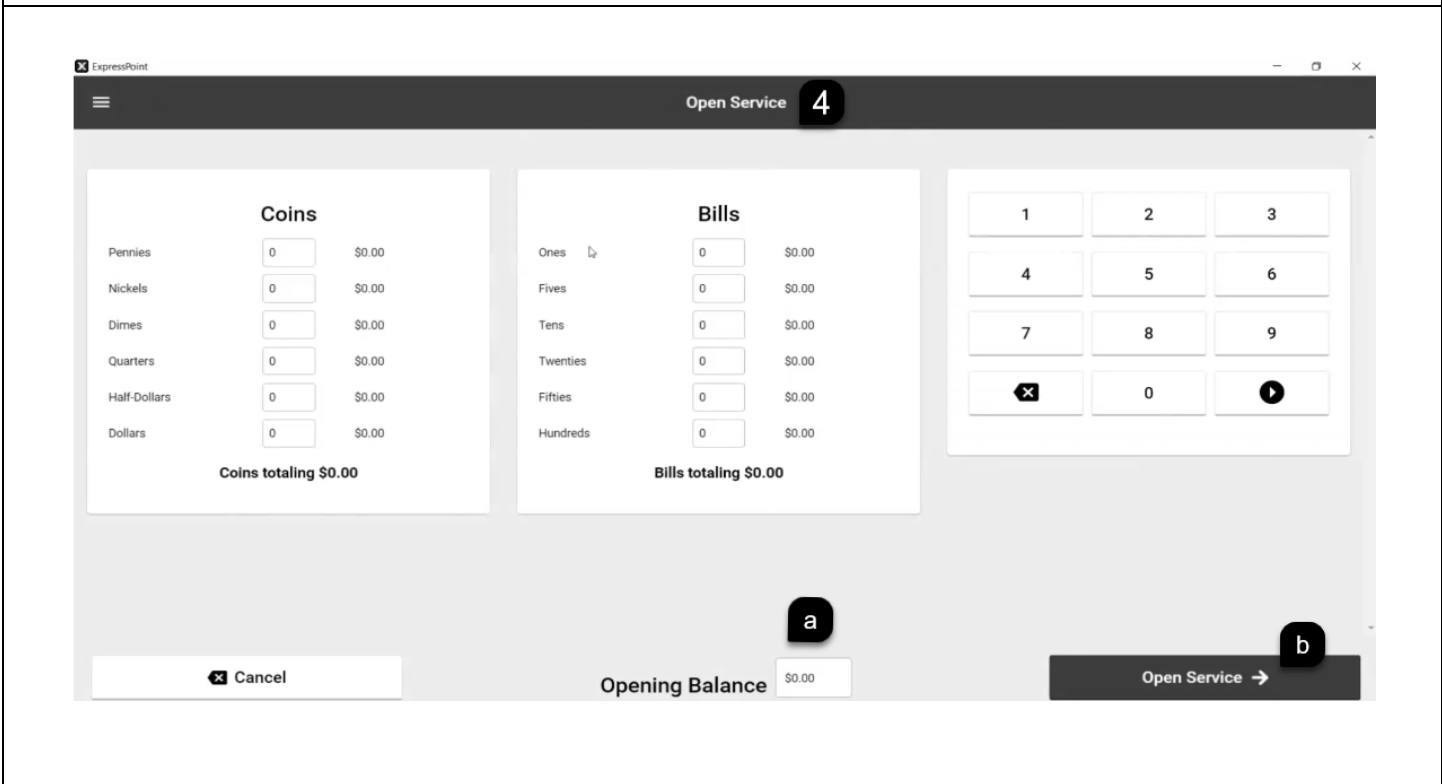
Document Type:
Test Guide

Use this guide to test terminal with both Cashier and Manager logins. All test sessions are then reconciled on the server.

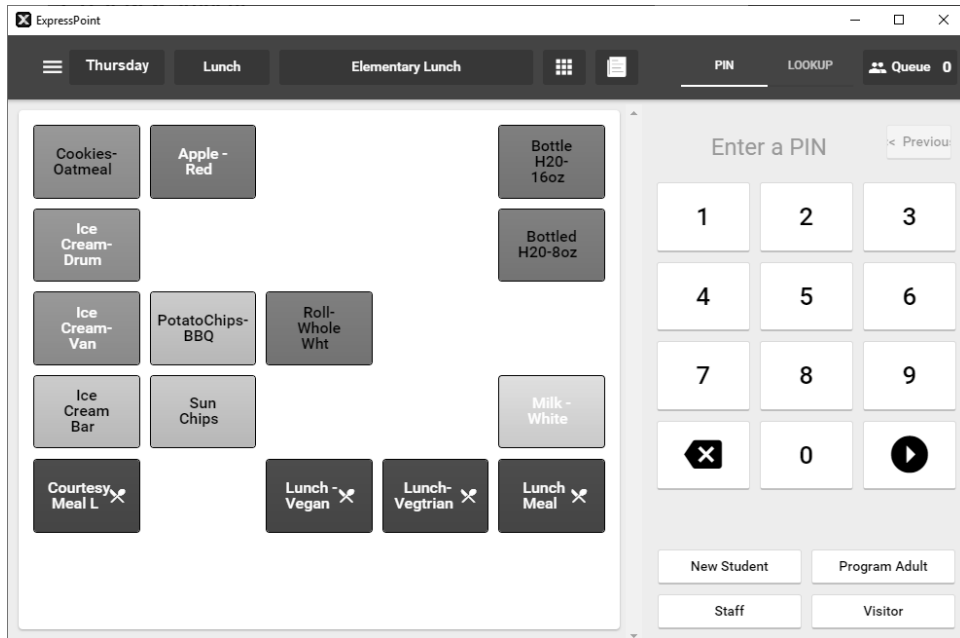
OPEN EXPRESSPOINT POS

<p>1. Click the ExpressPoint icon on your computer desktop to open the software's Login browser</p>	
<p>2. Enter in login information a. Enter the Username with the Operate POS role permission and Password b. Click Login <i>You should automatically be directed to your district and school</i></p>	
<p>3. Click Open Service</p>	

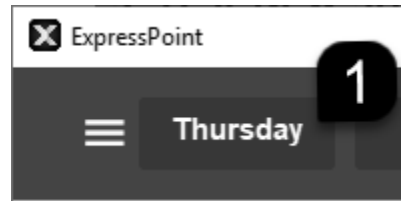
- 4. View the **Open Service** home screen
 - a. Leave the **Opening Balance** as "\$0.00"
 - b. Click **Open Service**




TEST NEW STUDENT

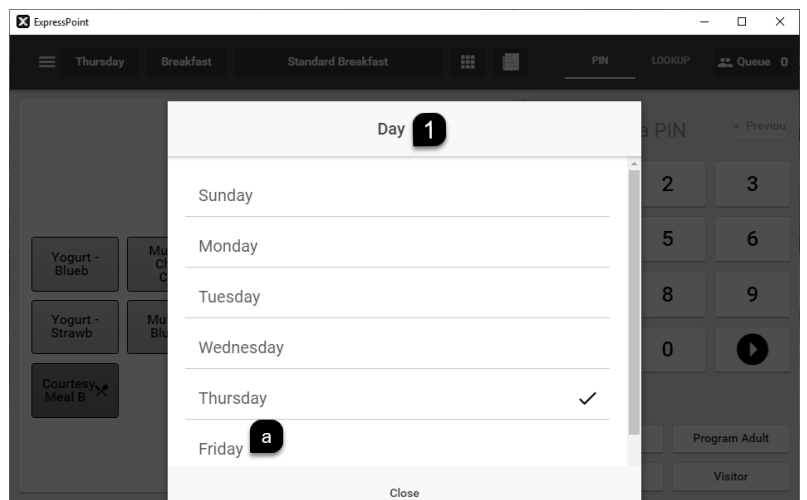


1. Click the **Day** button

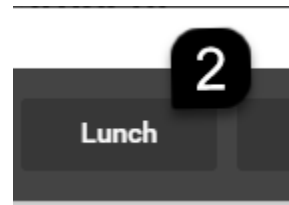


a. Select a different day to test (ex. *Friday*)

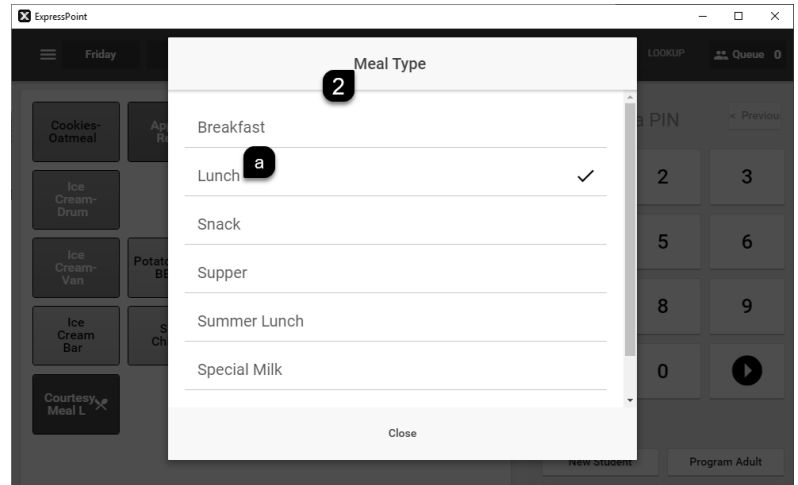
 The checkmark  indicates the current setting



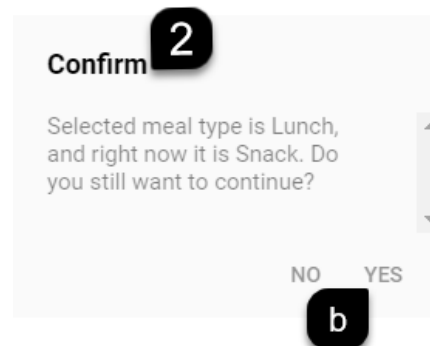
2. Click the **Meal Type** button
A message will appear to Confirm the selected Meal Type



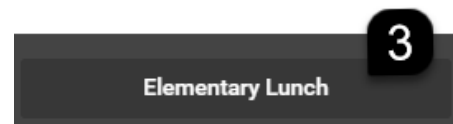
a. Select a different **Meal Type** to test (ex. Lunch)



b. Click **YES** to confirm the **Meal Type** to test

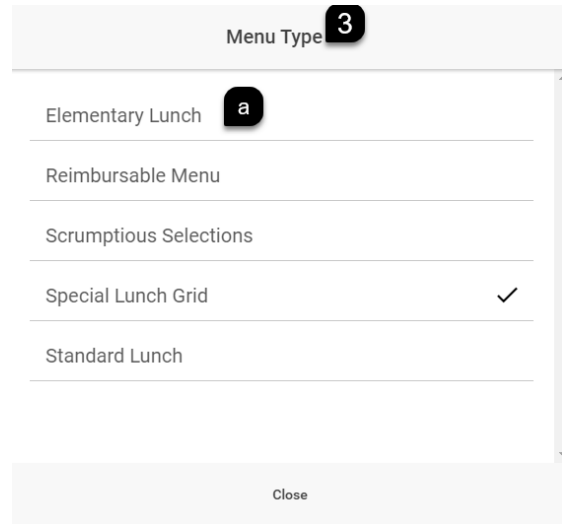


3. Click the **Menu Type** button



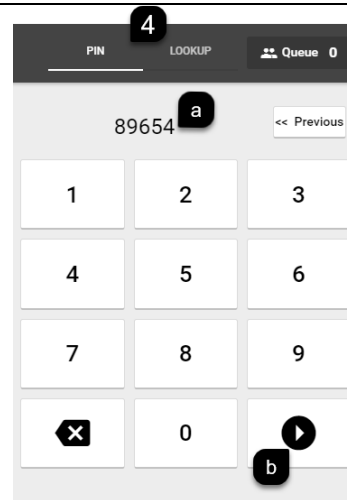
- a. Click a **Menu Type** to test (ex. *Elementary Lunch*)

The list of Menu Types will depend on the Day and Meal Type that the user chose. The Menu Types selected will show the Menu Grid configured for that Menu Type.



- 4. Locate a student using the **PIN** function to begin testing a transaction
 - a. Enter the Student's **PIN** number
 - b. Click the **Play** button

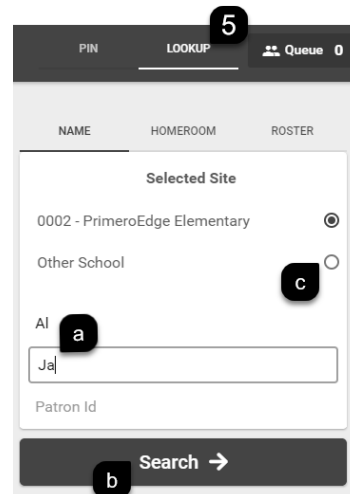
The students window will pop up




- 5. Locate a student using the **Lookup** button to begin testing a transaction
 - a. Enter the Student's name in the appropriate sections of the **NAME** tab
 - b. Click the **Search** button

The Search button will be inactive/grayed out until credentials are entered

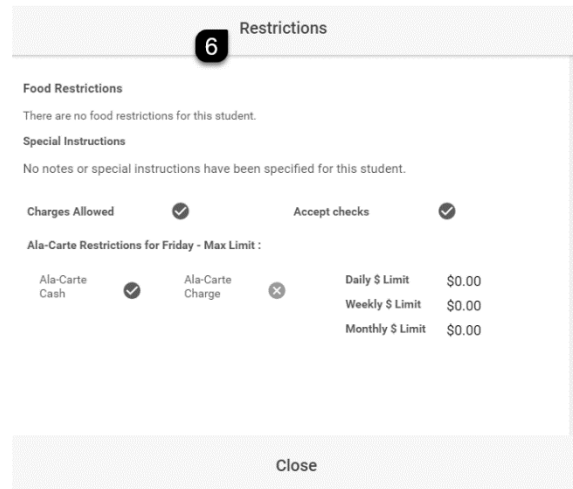
 - c. Repeat steps 5a-5b to search for a student at a different school/site by clicking the **Other School** button



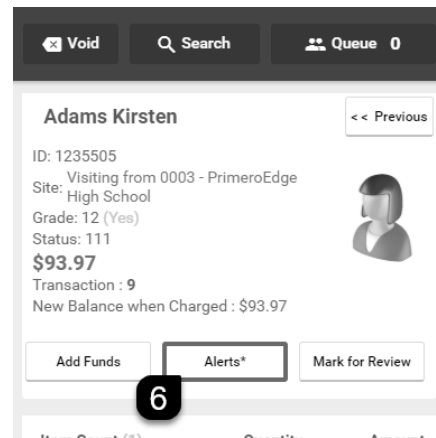
 The user can also use the HOMEROOM or ROSTER features to locate a student

6. Review the student's **Restrictions** (Food Restrictions/Allergies, Special Instructions, Charge Restrictions, and Order Limit Restrictions)

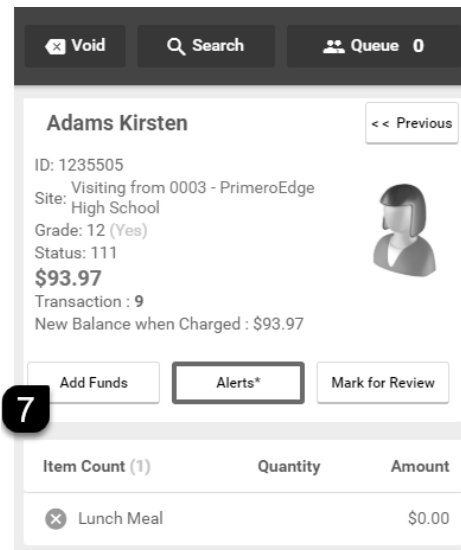
*A pop-up **Restrictions** message will automatically appear when the student is located*



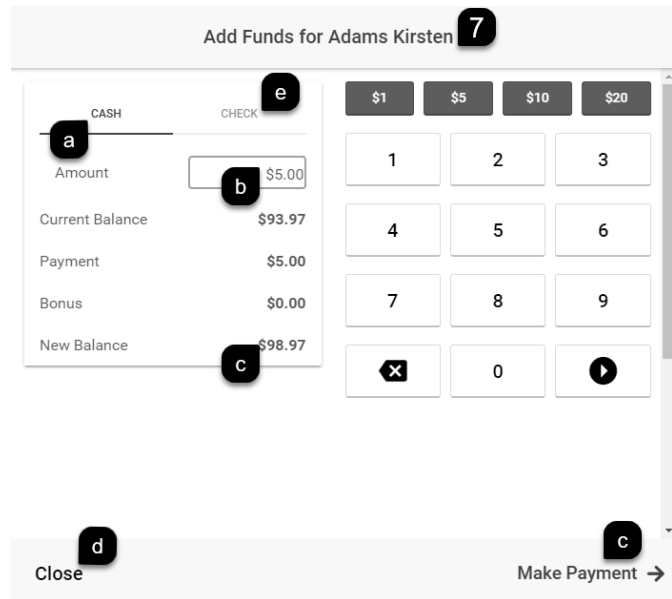
💡 Click the **Alerts*** button to review the student's **Restrictions** again



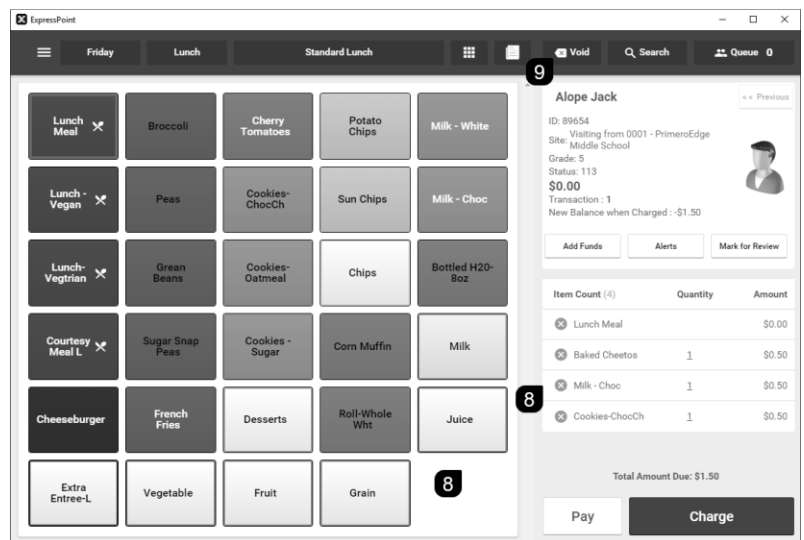
7. Click the **Add Funds** button to test adding funds to the account



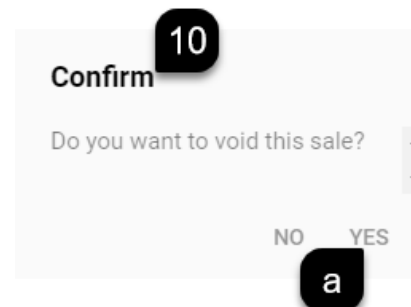
- Click the **Cash** button
- Enter an **Amount** of funds (ex. \$5) to test adding an amount is being added and the **Make Payment** button becomes active
- Verify the **New Balance** is correct and the **Make Payment** button is active
- Click **Close**
- Repeat steps a-d to verify the **Check** option



- Click several items on the **Menu Grid** to "Serve" the student
The Total Price should reflect the course of the items
- Click **Void** to cancel the transaction and close the service

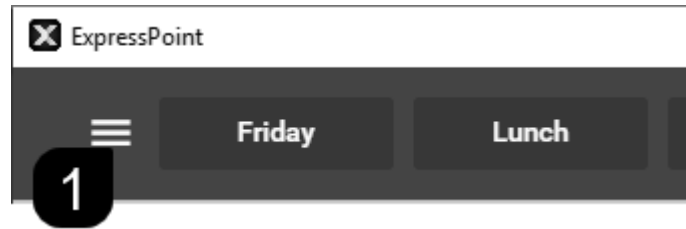


- Click **YES** to **Confirm** the voided transaction

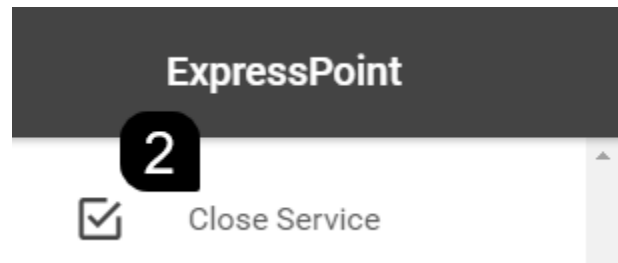


CLOSE SERVICE

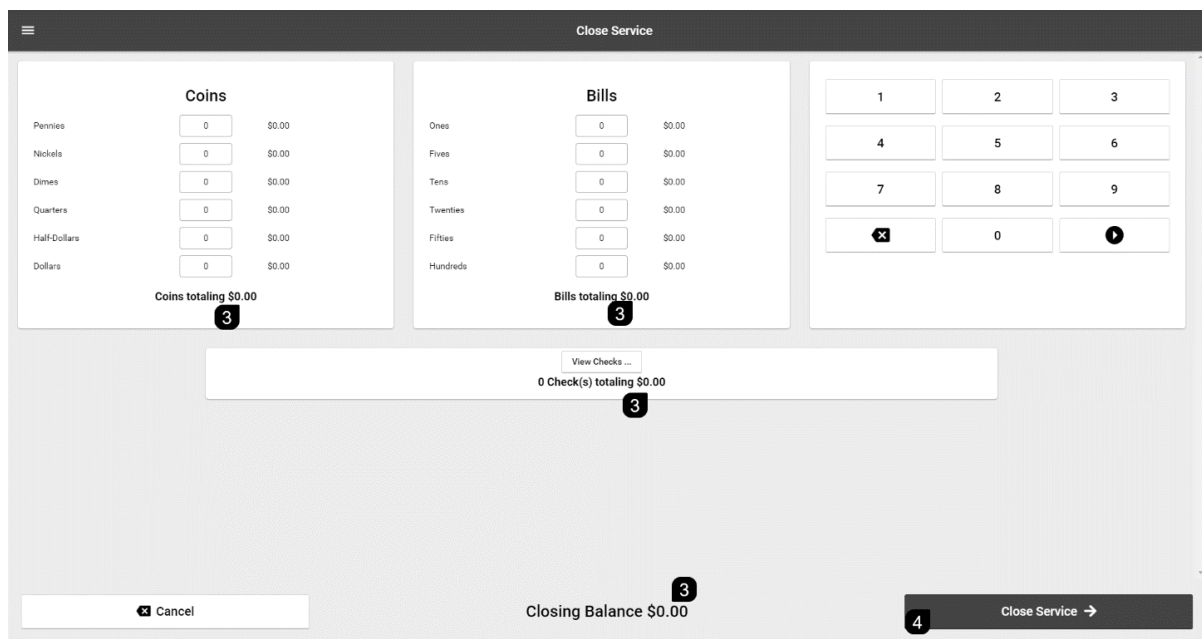
1. Click the **hamburger menu**  on the left-hand side



2. Click **Close Service**

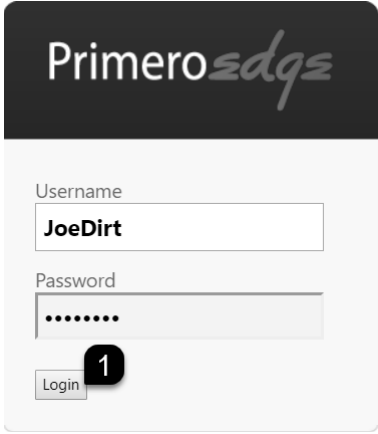
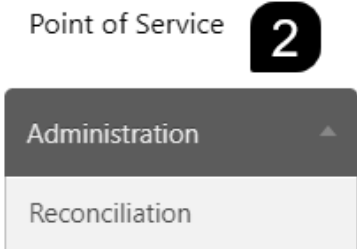

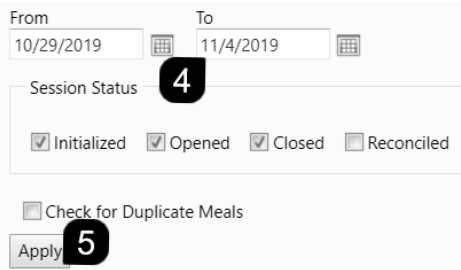


3. On the Close Service screen, verify the **Coins totals**, **Bills totals**, **Checks totals**, and the **Closing Balance** is zero.
4. Click the **Close Service** button





RECONCILE TEST SESSION

Reconciliation is a required task for every session generated in PrimeroEdge. The process is used to determine whether the actual amount received in ExpressPoint App or from Record Sales matches the calculated amount in PrimeroEdge online based on the transactions.

<p>1. Login into PrimeroEdge with the appropriate Username and Password</p>	
<p>2. Follow the steps to the Reconciliation page</p> <p>Point of Service > Administration > Reconciliation</p>	
<p>3. Select the Site Code or Site used for testing</p>	
<p>4. Enter today's date</p> <p>5. Click Apply</p> <p><i>A list of all POS test sessions for that site will display</i></p>	

- 6. Check only your test sessions in the **A/R** (Auto Reconciliation) column
Remove any check-boxes that aren't your test sessions
- 7. Click the **Auto Reconcile** button

Sessions								Deposit Slip ...	Auto Reconcile
Terminal	Opening Balance	Opening Date	Closing Balance	Closing Date	Status	Over/Under	A/R		
Edge County-001	\$0.00	6/13/2019 9:47:49 AM	\$0.00	6/13/2019 9:47:49 AM	Reconciled	\$0.00	<input type="checkbox"/>	 	

- 8. Click the **Logout** button

