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PrimeroEdge Food Service Solutions
PrimeroEdge Point of Service Cashier Guide

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In this module you will learn how to:

- Open PrimeroEdge POS.
- Log into PrimeroEdge POS.
Open & Log In to PrimeroEdge POS

To open PrimeroEdge POS:

1. Double-touch the **PrimeroEdge POS** shortcut on your desktop.
   The PrimeroEdge splash screen displays as PrimeroEdge POS opens.
2. In **User Name**, enter or select your user name.
3. In **Password**, enter your Password.
   - Press the up arrow key to select uppercase letters and special characters.
   - Press the down arrow key to select lowercase letters and default special characters.
4. Touch **Login**.
Section 1: Accessing PrimeroEdge POS

1. PrimeroEdge POS
2. POS Powered By...
3. Login
4. User Name:
5. Password:

POS Menu
Welcome, Cashier
School: High School
Terminal: CS
Session Status: Closed
Serving: Breakfast
Closed On: 4/30/2014 2:00 PM

Open POS
Enter POS
Close POS
Payments
Classroom Sale
Exit
Section 1: Accessing PrimeroEdge POS

<< End of Section >>
In this module you will learn how to:

✓ Open a POS session and enter coin and bill denominations.
✓ Enter a POS session and load or look up a patron account.
✓ Record transactions for one or more patrons.
✓ Exit a serving session.
✓ Record Payments.
✓ Conduct a Classroom Sale for one or more patrons.
✓ Exit POS.
You are able to operate various functions on the POS terminal depending on the permissions set by your System Administrator.
Primary Functions

Primary POS functions include:

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open POS</td>
<td>Displays the <strong>Open POS</strong> screen. Count and enter the quantities of coins and bills by denomination to establish the opening balance.</td>
</tr>
<tr>
<td>Enter POS</td>
<td>Displays the POS serving screen with the default menu settings relevant to the time of day. Use this button to enter transactions.</td>
</tr>
<tr>
<td>Close POS</td>
<td>Displays the <strong>Close POS</strong> screen. Enter the quantities of coins and bills by denomination.</td>
</tr>
<tr>
<td>Payments</td>
<td>Displays the <strong>Payments</strong> screen to accept payments on accounts without having to enter POS.</td>
</tr>
<tr>
<td>Classroom Sale</td>
<td>Displays the <strong>Classroom Sale</strong> screen to serve multiple students at one time based on homeroom.</td>
</tr>
<tr>
<td>Exit</td>
<td>Closes the POS system window and logs you out. <strong>Exit does not end or close the session.</strong></td>
</tr>
</tbody>
</table>

Title Bar Functions

You may see up to four buttons on the **POS Menu** screen title bar if your User ID has been granted the appropriate permissions. These buttons include:

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Device Configuration</td>
<td>Starts a wizard to guide you through set up of an input device, such as a barcode scanner, PIN pad, etc.</td>
</tr>
<tr>
<td>Help</td>
<td>Displays the <strong>Help</strong> dialog which provides frequently requested information by Cybersoft support.</td>
</tr>
<tr>
<td></td>
<td>The <strong>Help</strong> dialog offers the <strong>Remote Assistance</strong> button which allows Cybersoft Support to establish a screen sharing session with your POS terminal. Support will walk you through the connection process over the phone.</td>
</tr>
<tr>
<td>Change Password</td>
<td>Changes your login password.</td>
</tr>
<tr>
<td>Minimize</td>
<td>Minimizes the POS serving screen while keeping the session open.</td>
</tr>
</tbody>
</table>

See **Appendix: Title Bar Functions** for more information about these buttons.
**Open POS**

**To open a POS session**

1. Touch **Open POS**.
2. Count the coin and bill denominations in your starting change bank and enter the quantities of each in **Denominations**.

   The **Total Opening Balance** automatically calculates with each entry.

   Touch **Clear** to reset all quantities to zero, if needed.

3. When you have entered all **Denominations**, touch **OK**.

   **Note** – If you do not have a starting change bank, you can touch **OK** without entering counts in **Denominations**.
Enter POS

To enter a POS session

1. Touch Enter POS to load the serving screen and perform transactions. Transactions start with the number 1 and increase each time a patron is loaded on the screen.

Note – Since it is possible to exit PrimeroEdge without closing the session, the first transaction you ring after touching Enter POS may not always be the first transaction recorded during the session.

POS Serving Screen

A: Patron Info displays information about the patron being served.
B: Menu Items offers food items available for serving.
C: Command Area includes functions used to conduct transactions.
D: Alerts button appears when a student is loaded who has allergies, restrictions, or special instructions recorded. Press this button to display the Patron Alerts window if it does not open automatically.
E: Special Instructions displays any food or purchase restrictions that the Central Office has identified for the patron.
F: Trans. # displays a Transaction number that is automatically generated by the system.
G: Review highlights transactions that require further attention by the Manager. Touch this button when you list a transaction on the Problem Log.
H: Transaction Details lists the elements of each transaction.
I: Numeric Keypad is used to enter payments and/or the patron’s ID
Function buttons include:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch Menus</td>
<td>Allows you to switch between menus. You can select any Breakfast, Lunch or Snack menu based on the day of the week.</td>
</tr>
<tr>
<td>Switch Hands</td>
<td>Allows you to switch the screen layout for left-handed or right-handed Cashiers.</td>
</tr>
<tr>
<td>Payment</td>
<td>Accepts payments in the service line. You can use this function in combination with a purchase or as a stand-alone transaction.</td>
</tr>
<tr>
<td>Exit</td>
<td>Allows you to exit the POS Serving Screen if no transactions are in progress.</td>
</tr>
<tr>
<td>Clear Item</td>
<td>Removes the highlighted item in the (incomplete) transaction.</td>
</tr>
<tr>
<td>Void</td>
<td>Deletes the current (incomplete) transaction.</td>
</tr>
<tr>
<td>Transactions</td>
<td>Allows you to view previous transactions and Mark for Review.</td>
</tr>
<tr>
<td>New Student</td>
<td>Used to enter Milk sales. This is a cash only transaction.</td>
</tr>
<tr>
<td>Visitor</td>
<td>Used to serve Visitors. This is a cash only transaction.</td>
</tr>
<tr>
<td>Program Adult</td>
<td>Used to serve Program Adults. You can serve individual Program Adults or many adults on one transaction. This is a cash only transaction.</td>
</tr>
<tr>
<td>Staff</td>
<td>Used to serve Staff members who are not in the system. This is a cash only transaction.</td>
</tr>
<tr>
<td>Look Up</td>
<td>Allows you to find and load patrons onto the serving screen. You could use this function for patrons who have forgotten their ID number. Explained in detail on page 16.</td>
</tr>
<tr>
<td>Queue</td>
<td>Allows you to see students that have already entered their PIN (they are in queue) and select one out of order to serve.</td>
</tr>
<tr>
<td>Charge</td>
<td>Charges the student’s account for the transaction. Always use this button when no money is involved in the transaction.</td>
</tr>
<tr>
<td>Principal Account</td>
<td>Charges a special Principal Account for the meal instead of the student. This is button is only used for an approved occasion such as Standardized Testing Week.</td>
</tr>
</tbody>
</table>
Patron Alert

The *Patron Alert* window can display automatically when a student is loaded who has allergies, restrictions, or special instructions. Press the **Alerts** button if the window is not configured to automatically display.

- A red “X” displays by restricted items.
- A green “√” displays by unrestricted items.
Look Up

You can search by Grade or by Special Roster. The Special Roster option displays lists that have been created for specific groups (ex.: Life Skills students only).

To select the current school or other schools, use the dropdown list.

⚠️ Note – If you choose to search other schools, you must specify search criteria.

**To look up a patron**

1. Touch .
2. Enter search criteria:
   - To display all students in a grade for the selected school, select a grade in the Grade dropdown list. Touch the desired patron’s name.
   - To look up by last name, begin entering the patron’s last name. When the desired patron’s name appears, touch the name.
   - To look up by first name, begin entering the patron’s first name and touch Search. When the desired patron’s name appears, touch the name.
   - To look up by patron ID number or PIN, begin by entering any portion of the patron’s ID number. Touch the desired patron’s name.
3. Touch OK.
Serving Steps

1. From the serving screen, load a patron’s account onto the screen by scanning their ID card, using a biometric device, using the PIN pad, using the touch screen number pad, or utilizing Look Up.

2. The meal item is automatically added to the transaction details area for all students if they have not been served a meal during this service. Add items to the transaction by touching the appropriate menu item buttons.

3. Touch Charge or press the space bar on your keyboard to charge the patron’s account. Based on District policy, you may also be allowed to accept cash or checks as forms of payment.

Informative Icons

Below are icons that can appear next to the patron’s information:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Network Connectivity Icon" /></td>
<td>Indicates that there has been a loss of network connectivity and you are utilizing a local database.</td>
</tr>
<tr>
<td><img src="image" alt="Birthday Icon" /></td>
<td>Indicates that today is the patron’s birthday.</td>
</tr>
<tr>
<td><img src="image" alt="A La Carte Icon" /></td>
<td>Indicates that the student has been served A La Carte only during this meal service (they are eligible for a reimbursable meal). Touch the icon to see the transaction details of the student’s earlier purchase.</td>
</tr>
<tr>
<td><img src="image" alt="Second Meal Icon" /></td>
<td>Indicates that the student has been served a reimbursable meal during this service (they are NOT eligible for a reimbursable meal). Touch the icon to see the transactions details of the student’s earlier purchase. This icon is accompanied by a popup message asking if you want to serve the student a SECOND MEAL.</td>
</tr>
<tr>
<td><img src="image" alt="502 Icon" /></td>
<td>Indicates that the student is enrolled in another school within your district. The number corresponds with the other school’s code.</td>
</tr>
</tbody>
</table>
Payments

To make/record a payment

1. Touch **Payments**.
2. Touch **Look Up** to select a patron.
3. Select Payment Method (and Check Number if appropriate).
4. Enter Payment Amount.
5. Touch **Apply Payment**.
6. Repeat Steps 2-5 to make additional payments or touch **Cancel** to close the Payments screen.
Change Due

The *Change Due* window allows negative balances (balances owed) to be applied to the current transaction. When a patron provides funds, the patron’s balance displays on the *Change Due* window. Select the *Include Balance* checkbox to subtract the negative balance from the cash paid before providing change.

Note – *Include Balance* is only available when the patron has a negative balance.
To serve a meal to multiple students in the same homeroom at once:

1. Touch Classroom Sale on the POS Menu.

2. Select Grade, Homeroom, Meal Type, and Menu Item to populate the student selection area of the screen.

3. Touch student pictures one-by-one to select the students you wish to serve (they are highlighted in green when selected), or
   Touch Select All to highlight all students. Touching a highlighted student’s picture will deselect that student.

   Note – If a student’s picture is grayed out, or disabled, that student has already been served a meal during the specified meal service.

4. When all of the desired students are selected, touch Save.
   Repeat Steps 2-6 for as many Classrooms as needed.
   Touch Close to leave the Classroom Sale screen.
Marked for Review

Depending on settings, the **Review** button can be used to simply mark a transaction for review or can be used to mark a transaction for review while assigning a review reason.

*To mark a transaction for review*

1. Touch the **Review** button.

   The **Review** button displays with a green border.

   - or -

   1. Touch the **Review** button.

   2. Select a review reason.

   The selected reason changes to white font, gray background, and white border. The **Review** button displays with a green border after a reason is selected.
Close POS

To close POS

1. Touch Exit in the lower portion of the Command Area to return to the POS Menu screen.
2. Touch Close POS.
3. Count and enter the quantity of each denomination.
4. If needed, touch Checks and enter all checks collected during the meal service.
5. Confirm that your Net Receipts amount seems reasonable. You will not know if your drawer is over or under at this point.
6. When you are satisfied with the amounts entered, touch OK.
Exit POS

To close POS

1. Touch 

You can exit POS after closing a session or in between users that are sharing a session. Exiting does not close the POS session, it simply closes the application.

If you accidently touch , you can restart PrimeroEdge by double-touching the PrimeroEdge POS icon on your desktop and resuming where you left off.

⚠️ Note – If you exit PrimeroEdge during a session, touch to see previous transactions (made before your exit).
<< End of Section >>
Appendix: Title Bar Functions
**Configuring a Device**

**Device Configuration** configures a device to work with your POS terminal. The following steps configure a keypad on a POS terminal with no other configured devices.

**To configure a device**

1. Click **Device Configuration**.
2. Click **Next**.
3. Click **Yes**.

![Image showing the configuration process]

**Device Configuration Wizard**

Current Device Summary

1. If this is your current device configuration, click **Next**.
2. If this is not your current device configuration, click **Modify Configuration**.
3. This will delete current device configuration(s) for this terminal. Are you sure?

**Modify Configuration**

Current Device Configuration

- **Confirm delete**
- **Yes**
- **No**
4. Click Next.
5. Click the serving line option that represents your POS terminal and serving line(s).
6. With the **Installing Devices** dialog on display:
   - Plug in the device.
   - Click **Add Device**.

7. In the **Installing Devices** dialog, verify that the correct information is displayed in:
   - Device Type
   - Brand Name
   - Model Number

8. Click **Register Device**.
   A green success message appears.

9. Click **Next**.
10. In the **Installing Devices** dialog:
   - Select the serving line.
   - Test the keypad by pressing a number on the keypad. Verify that the number appears in the box and a green check mark appears.
   - Click **Set Configuration**.

A green success message appears.

11. Click **Next**.
12. In the **Installing Devices** dialog, click one of the following:

- If you have another device to configure, click ![Add New Device](image1.png), or
- If you have no more devices to configure, click ![Next](image2.png).

13. Click ![Finish](image3.png).
Changing a Password

To change a password

1. Click Change Password.
2. On the Change Password screen, enter the following:
   - In Current Password, enter the password that you logged in with.
   - In New Password, enter a new password, using a combination of letters and numbers. Your new password may need to meet certain requirements. These requirements display in red. As the password meets each requirement, the requirement turns green.
   - In Confirm Password, enter the new password again.
3. Click Save.

The next time you log in, you must use the new password that you set up.
Getting Help

If you find yourself “stuck” while working with PrimeroEdge (don’t know what to do next or the machine is not responding), please call Cybersoft Support at 1-866-442-6030. You will be asked for your computer name.

*To display your computer name on either the Login or POS Menu screen*

1. Click Help.

   Your computer name is the first piece of information listed in the PrimeroEdge Help dialog.

   You may be asked some of the other information listed on this screen.

   **STOP!** Do not click any buttons on this screen unless Cybersoft Support tells you to do so.
Remote Assistance Session

Cybersoft Support may need to log in to your POS to help determine how best to help you. In this case, you will be asked to participate in a screen sharing session—this is called Remote Assistance.

To open a Remote Assistance Session

1. Click .
   Cybersoft Support will provide instructions from this point.
<< End of Document >>