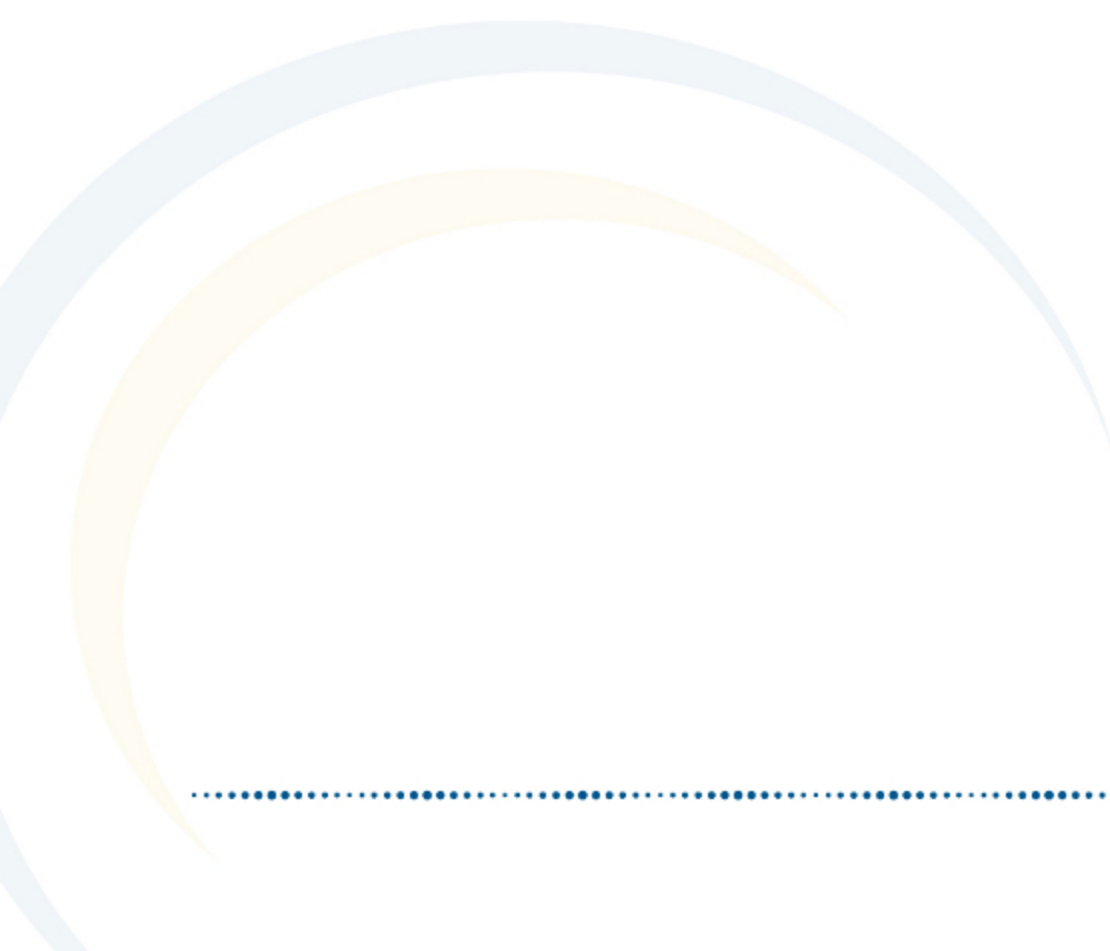


## Food Service (Portal)

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August 2012



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## Food Service (Portal)

[Overview](#) | [Account Types](#) | [Analyzing Account Information](#)

✓ This document is written for use by parents. Districts can choose to provide this information to their parents or use it as a guide for creating district-owned documentation.

### Overview

Some Portal users will see the **Food Service** link in the Portal index, as shown:

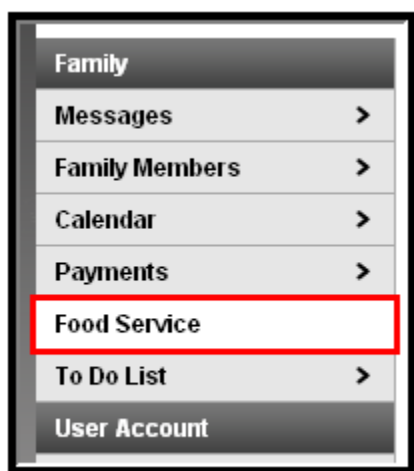


Image 1: Food Service Tab

⚠ The **Food Service** link will not appear to all users, as it depends on specific school operations and settings. Similarly, the [Payments](#) link, which allows Portal users to electronically deposit funds into food service accounts, will only be available if that feature is used by the school.

The Food Service feature allows parents and students access to food service information, including:

- **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)

## Account Types

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

### Individual Accounts

When the **Food Service** icon is selected from the Portal index, the page will display account summary information. If the school has set up Food Service accounts for individual members of a household, the **Account Name** column will contain the name of each person with an account. The screen will resemble the following (two, individual student accounts within the same household):

The screenshot shows the 'Food Service' section of a web portal. On the left is a navigation menu with 'Food Service' highlighted. The main content area is divided into two parts: an account summary table and a transaction detail view.

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

Transaction Detail

Show transactions for: **Kommer, Emily** (selected) | Month | Date Range: January (2011) | Go | Print

Date	Part	Item	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
Ending Balance as of 01/27/2011					\$-0.70

Image 2: Student Food Service Accounts

Students within a household may have individual accounts. Transactions can be organized by student.

### Family Accounts

When the **Food Service** icon is selected from the Portal index, the page will display account summary information. If the school has set up one Food Service account per household, the **Account Name** column will contain one account named as "Family Account." All members of the household will share this account. The screen will resemble the following (one, shared account representing both students in the household):

**Family**

- Messages >
- Family Members >
- Calendar >
- Payments >
- Food Service**
- To Do List >
- User Account
- Account Management >
- Contact Preferences >
- Access Log >

[Care E1](#)  
[Care E2](#)  
[Care E3](#)

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**Food Service**

Account Name	Account #	Balance as of 01/27/2011
Family Account	4115	\$-0.70

Transaction Detail

Show transactions for **Family Account**  Month  Date Range **January (2011)**

Date	Pat	Item	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
Ending Balance as of 01/27/2011					\$-0.70

Image 3: Family Food Service Accounts

Students within a household may share one family account number. Transactions can be organized by student or account.

## Analyzing Account Information

The following features of the Food Service tool will be available to the user:

**Family**

- Messages >
- Family Members >
- Calendar >
- Payments >
- Food Service**
- To Do List >
- User Account
- Account Management >
- Contact Preferences >
- Access Log >

[Care E1](#)  
[Care E2](#)  
[Care E3](#)

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**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

Transaction Detail

Show transactions for **Kommer, Emily**  Month  Date Range **January (2011)**

Date	Patron	Item	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
Ending Balance as of 01/27/2011					\$-0.70

**Current, individual balances for students in the household who have Food Service Accounts.**

**Transactions are based on the student and date range selected. "Go" refreshes the displayed data.**

**Purchased meal items**

Image 4: Account Information

## 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 5: Individual Accounts

Column	Description
<b>Account Name</b>	This column lists the names of household members who have individual Food Service accounts.
<b>Account Number</b>	This column indicates the number associated to the accounts established for the household.
<b>Balance as of (Current Date)</b>	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: <input type="text" value="Kommer, Emily"/>		<input checked="" type="radio"/> Month	<input type="radio"/> Date Range	<input type="text" value="January (2011)"/>	<input type="button" value="Go"/>	<input type="button" value="Print"/>
Date	Patron	Item	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 6: Transaction Detail

Field / Button	Description

<b>Show Transactions for</b>	This dropdown field allows the user to select the person/account to be reviewed or printed. 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.
<b>Month</b>	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.
<b>Date Range</b>	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.
<b>Go</b>	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.
<b>Print</b>	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**  Month  Date Range **January (2011)**


Date	Patron	Item	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
<b>Ending Balance as of 01/27/2011</b>					<b>-\$0.70</b>

Image 7: Transaction List

Column	Description
<b>Date</b>	This column contains dates on which transactions occurred.
<b>Patron</b>	The patron to whom the transaction directly relates.

<p><b>Item</b></p>	<p>The transaction type - generally a deposit or (food) purchase, but may also include adjustments, voided items and starting balances.</p> <ul style="list-style-type: none"> <li>• <b>Purchases</b> - each item and/or meal name will be indicated (<i>e.g.</i>, Brkfst Meal, Pizza, Milk, Ala Carte).</li> <li>• <b>Deposits</b> - to the account, it will be listed as "Deposit" with a description of the payment method listed in the <b>Comment</b> column.</li> </ul> <p>Entries in <b>gray</b> font are posted transactions that have been successfully voided.                  Entries in <b>red</b> font represent the action of voiding the original transaction (the preceding items in gray font).</p>
<p><b>Comment</b></p>	<p>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.</p> <ul style="list-style-type: none"> <li>• <b>Comments on Purchases</b> - 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>• <b>Comments on Deposits</b> - 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>• <b>Voided Transactions</b> - If the purchase or deposit transaction has been voided, it will be indicated. Comments on the voided transaction will display, if entered. Entries in <b>gray</b> font are posted transactions that have been successfully voided.                  Entries in <b>red</b> font represent the action of voiding the original transaction (the preceding items in gray font).</li> </ul>
<p><b>Debit</b></p>	<p>This column indicates a purchase or adjustment amount that <i>reduced</i> the current account balance.</p>
<p><b>Credit</b></p>	<p>This column indicates a deposit or adjustment amount that <i>increased</i> the current account balance.</p>

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.