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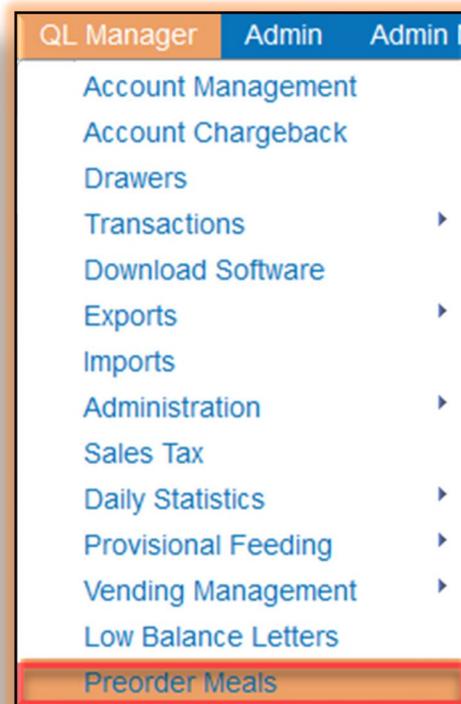
# PREORDER BULK SALES SCREEN

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PaySchools is excited to introduce a new, modern school meal preordering system built-in to the PaySchools software suite. Now with the most recent update, you can sell meals in PaySchools Admin by date. Or you can filter the data you are looking for and then sell all items with a single button click.

## Preorder Instructions

1. In PaySchools Admin, click on QL Manager and select *Preorder Meals*.



2. Use the *QuikLunch Manager – Preorder Meals* screen to find individual sales or a list of sales you want to complete. Filter options include the following:
- **Sales date** that you want to process meals or a la carte sales
  - **Sale Meal Period**, or all meal periods for that day
  - **District**, if there is only one district, it will be selected by default
  - **School**, by default this will be All Schools, but can be filtered to a particular school
  - **Terminal** is pre-selected to associated sales to current QuikLunch sales and reports
  - Additional filters can be used to further filter the sales by **Homeroom**, **Grade**, specific **Patron ID**, or **Patron Name**

The screenshot shows the 'QuikLunch Manager - Preorder Meals' search interface. At the top, there is a navigation bar with 'Search' and 'Bulk Sale' tabs. Below this, the 'Bulk Sale' section contains several filter fields: '\*Sale date:' with a date picker set to '25-Aug-2021', '\*Sale Meal Period:' with a dropdown menu set to 'All Meal Periods', '\*District:' with a dropdown menu, '\*School:' with a dropdown menu set to 'All Schools', and '\*Terminal:' with a dropdown menu. Below these fields, a message states: 'To limit the amount of information returned you must filter by one of the following items.' This is followed by four more filter fields: 'Homeroom:', 'Grade:' with a dropdown menu set to '(All Grades)', 'Patron Id:', and 'Patron Name:'. A blue 'Search' button is located at the bottom of the form.

3. Once filters have been applied, click **Search** at the bottom of the screen. Review the resulting transaction list to identify the transaction and process the sale using the patron meal account balance.
  - You can click the **Sell** button next to each patron to sell a single meal.
  - You can click the **Void** button to void a single meal based on your school's policy for meals that are not picked up.
  - Green or red pricing indicates the price has changed, up or down, since the item was preordered.

The screenshot shows the 'QuikLunch Manager - Preorder Meals' interface. At the top, there are tabs for 'Search' and 'Bulk Sale'. Below is a table with the following columns: Patron, Patronid, Preorder Items, Subtotal, Available Preorder Balance, Available Meal Balance, and Single Sale. The 'Single Sale' column contains 'Sell' and 'Void' buttons for each row. A red box highlights these buttons in the first row.

Patron	Patronid	Preorder Items	Subtotal	Available Preorder Balance	Available Meal Balance	Single Sale
<input checked="" type="checkbox"/>		Dasani Sparkling Bottled Water Fruit Water/Polar <input checked="" type="checkbox"/> Cheese Sandwich Lunch ▲0.15 Milk <input checked="" type="checkbox"/> Deli Lunch ▲0.15 Fruit or Veg Elem	11.45	0	0.15	<input type="button" value="Sell"/> <input type="button" value="Void"/>
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> Cheese Sandwich Lunch ▲0.15	2.95	0	0.00	<input type="button" value="Sell"/> <input type="button" value="Void"/>
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> Bagel Lunch	2.95	0	14.75	<input type="button" value="Sell"/> <input type="button" value="Void"/>
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> Bagel Lunch	2.95	0	0.00	<input type="button" value="Sell"/> <input type="button" value="Void"/>
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> Bagel Lunch <input checked="" type="checkbox"/> Beef Nachos ▼2.95	0.00	0	9.85	<input type="button" value="Sell"/> <input type="button" value="Void"/>

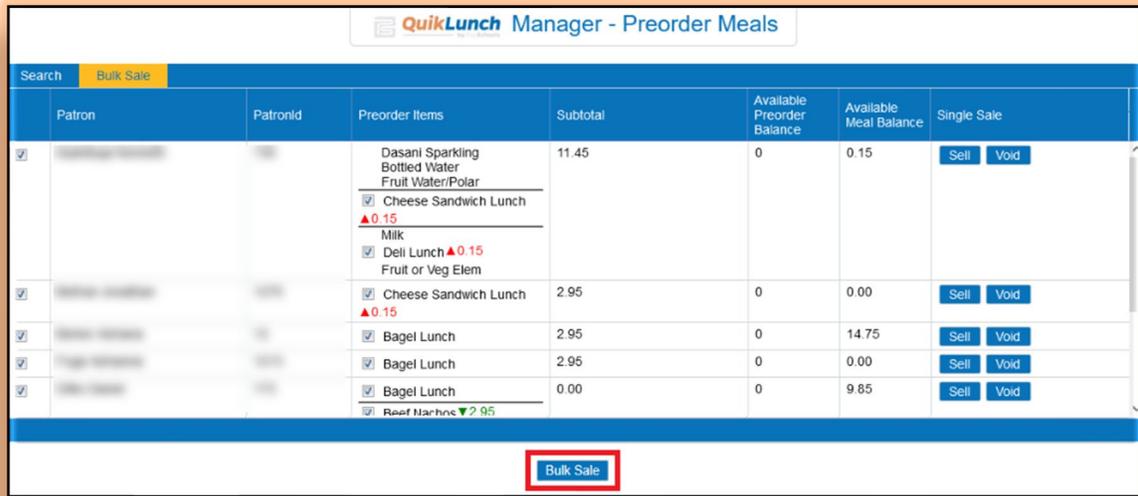
4. Transactions are displayed based on the filters chosen. By default, all transactions will be displayed with the checkbox selected in the first column.
  - Leave all items selected if all meals were picked up.
  - Uncheck the box next to patrons that did not pick up their items or that need to be sold later.

QuikLunch Manager - Preorder Meals							
Search		Bulk Sale					
<input checked="" type="checkbox"/>	Patron	Patronid	Preorder Items	Subtotal	Available Preorder Balance	Available Meal Balance	Single Sale
<input checked="" type="checkbox"/>			Dasani Sparkling Bottled Water Fruit Water/Polar <input checked="" type="checkbox"/> Cheese Sandwich Lunch ▲0.15 Milk <input checked="" type="checkbox"/> Deli Lunch ▲0.15 Fruit or Veg Elem	11.45	0	0.15	Sell Void
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/> Cheese Sandwich Lunch ▲0.15	2.95	0	0.00	Sell Void
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/> Bagel Lunch	2.95	0	14.75	Sell Void
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/> Bagel Lunch	2.95	0	0.00	Sell Void
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/> Bagel Lunch <input checked="" type="checkbox"/> Beef Nachos ▼2.95	0.00	0	9.85	Sell Void

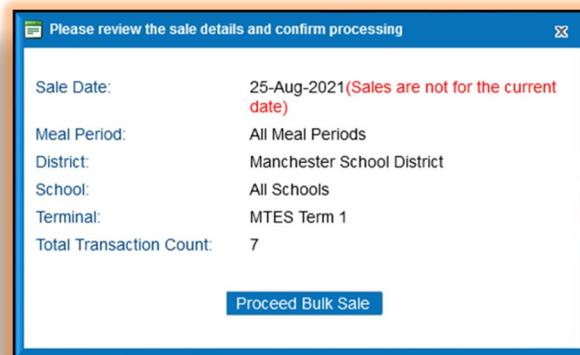


Note: The school's Charge Limit is considered. If the student or staff does not have enough funds in the account, the Charge Limit will be used. If there is no charge limit, or that limit is already reached, the sale will not be allowed and is displayed as uncheckable with an inactive Sell button.

- Once you have selected all items to be sold, click the *Bulk Sale* button at the bottom of the screen.



- Confirm the summary of all sales that will be processed by ensuring the correct date, terminal, and total amount of sales are correct.





**Note:** Sales for future or past dates will display the following notice in red font: "Sales are not for the current date."

- All sales are completed using the patron's preorder balance, meal status at the time of the sale, and current item pricing in PaySchools Admin.

## Patron Screen

The Patron Screen displays balances and activity for each patron.

Patron Data	Meal Status	Fees	Lunch Account	Accounts	Family	History
<b>Balances</b>						
Account		Balance	Adjust Balance	Transfer Funds		
Patron Account		\$58.30				
Preorder Account		\$2.80				
<b>Auto Replenishment Details</b>						
Balance Level		Amount to Add	End Date			
No records to display.						
<b>Activity</b>						
Transaction Id	Sales Date	Cashier	Sales School	Meal Period	Total Sale	
Clear filters	8/19/2021 to 8/26/2021		All			
2300922	8/26/2021 10:23:00 AM				\$2.80	
2300921	8/26/2021 10:16:00 AM				\$23.20	
2300920	8/26/2021 9:54:00 AM				\$11.60	
2300919	8/26/2021 9:30:00 AM				\$5.60	

## Patron Activity Report

The Patron Activity Report displays the Preorder and Meal Account balance, providing details for each money movement into the accounts from payments or out of the accounts for sales and voids. Voided transactions from the Preorder Bulk Screen will be refunded to the Meal Account.

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Districts: [Redacted] Grade: KF  
Homeroom: 117

Patron Name: [Redacted]

Patron Id: [Redacted]

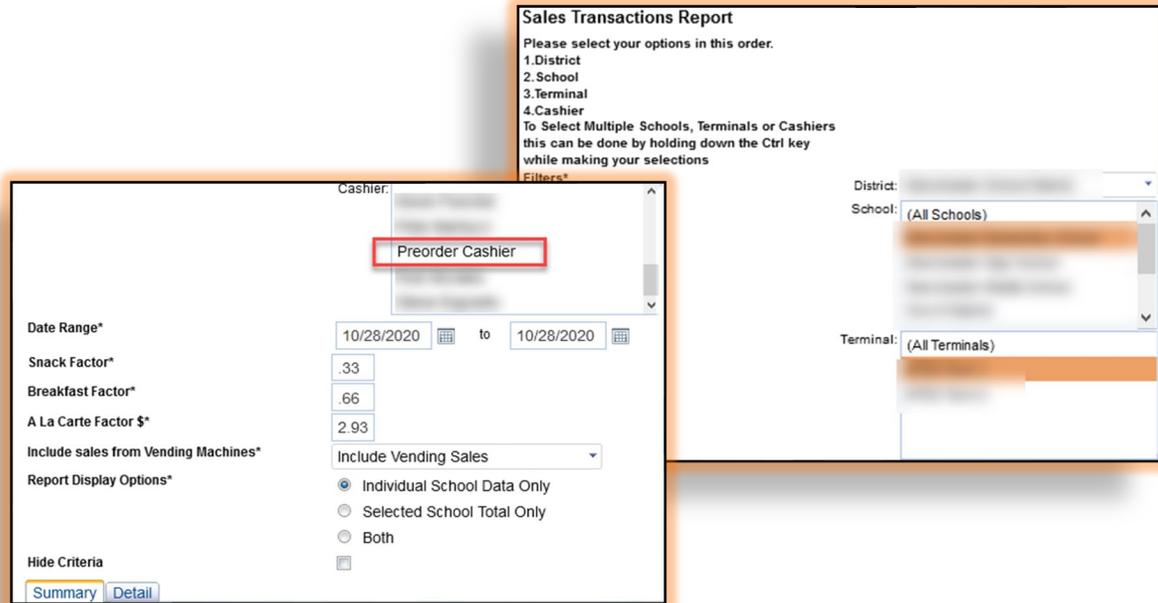
School: [Redacted]

**Patron Activity for 7/1/2021 - 8/16/2021**

Date & Time	School	Meal Period	Items Sold	Price Each	Total & Payments	+/-	PreOrder Balance	+/-	Account Balance
Beginning Balance as of 07/01/2021:									
							\$0.00		\$0.00
07/28/2021 08:44 AM 2300920					Online Credit Card ROA Note: Preorder Meals	\$14.20	\$14.20	\$14.20	\$0.00
07/28/2021 08:46 AM 2300922		Breakfast	1xCheese Sandwich Lunch Elem 1xElementary Lunch 1xDeli Lunch 1xPanini Lunch 1xHot Lunch	2.80 2.80 3.00 2.80	Voided Note: Preorder Void	-14.20			
					Preorder Account Note: Preorder - Void	\$14.20	-\$14.20	\$0.00	
					Meal Account ROA Note: Preorder - Void		\$14.20	\$14.20	\$14.20
07/28/2021 12:26 PM 2300941					Online Credit Card ROA Note: Preorder Meals	\$2.80	\$2.80	\$2.80	\$14.20
07/28/2021 12:27 PM 2300943					Online ACH Payment#71635 ROA Note: Preorder Meals	\$2.80	\$2.80	\$5.60	\$14.20
07/28/2021 12:30 PM 2300945					Meal Account Note: ProcessTransaction		\$2.80	-\$2.80	\$11.40
					Preorder Account ROA Note: Preorder Meals	\$2.80	\$2.80	\$8.40	

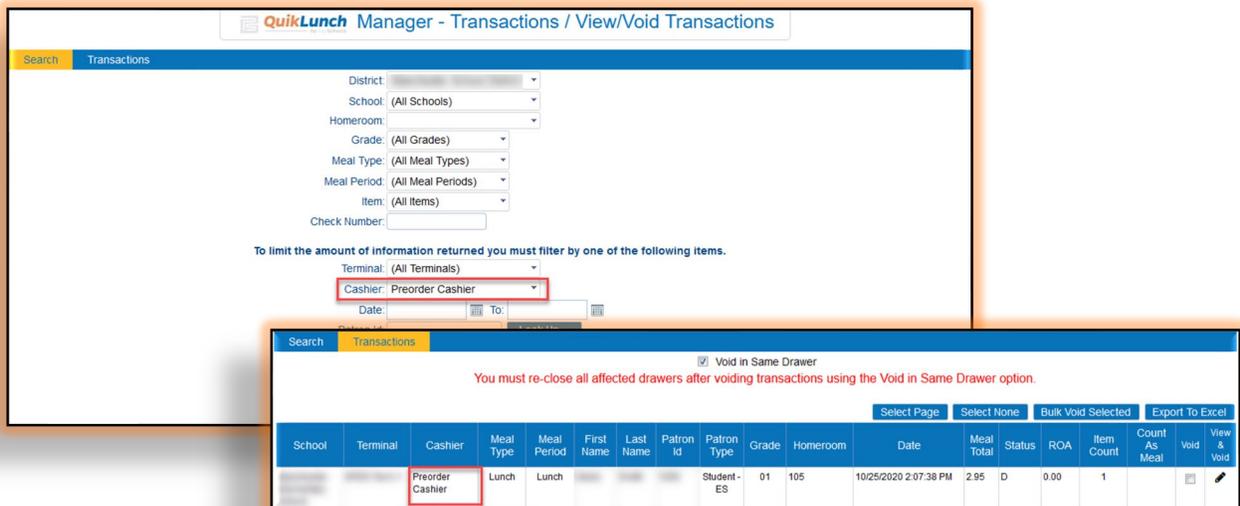
## Sales Transaction Report

This report has been updated with a selectable *Preorder Cashier* option and makes it easy to find or combine preorder sales executed through the *Bulk Sales* screen.



## View and Void Transactions

Transactions completed using the *Bulk Sales* screen, are found in the same manner as QuikLunch sales on the *View/Void Transactions* screen. In addition to the current filters, you can also search for preorder sales using the *Preorder Cashier* as a filter or you can view the *Preorder Cashier* on the individual transactions.



## Preorder Report

This new report will provide a full list of sales that were made on a specific school, homeroom, grade, patron for a specific date or time frame. This report will show those that were ultimately sold through the bulk sales screen or not, displayed in the *Sold* column. The report will also show any sales, if any, that were later voided through the *View\Void Transactions* screen.

### Preordered Meals Report

Filter\* District:

School: (All Schools)

Homeroom: (All Homerooms)

Grade\* (All Grades) ▾

Patron Id

Patron Last Name

Show barcode

Transaction (All Transactions) ▾

Date Range\* (All Transactions) 2021

Sold

Voided

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QuikLunch System Ve

- Meal Reports ▶
- Patron ▶
- Sales Reports ▶
- State Reports ▶
- Preorder Report

#### Preorder Meal reports

School	Grade	Homeroom	Patron	Patron Id	Meal Date	Preorder Items	Voided	Sold
					10/9/2020 12:00:00 AM	Deli Lunch	N	Y
					10/16/2020 12:00:00 AM	Deli Lunch	N	Y
					10/16/2020 12:00:00 AM	Hot Lunch	N	Y
					10/16/2020 12:00:00 AM	Deli Lunch	N	Y
					10/16/2020 12:00:00 AM	Hot Lunch	N	Y
					10/16/2020 12:00:00 AM	Deli Lunch	N	Y
					10/2/2020 12:00:00 AM	Deli Lunch	N	Y