FasTrak Admin User Guide

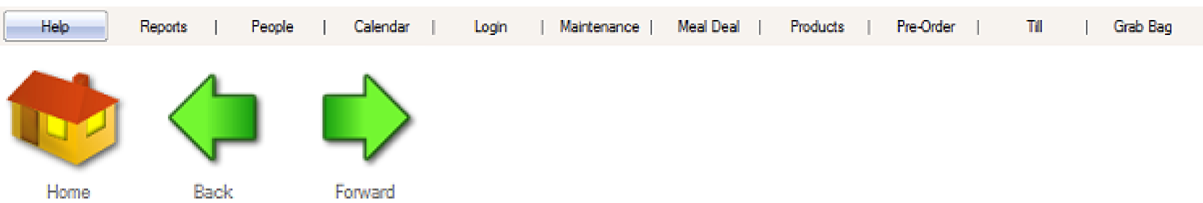
A simple to use yet powerful integrated cashless and attendance system, designed from the ground up to administer and process Universal Infant Free School Meals, standard Free School Meals, Supervisor Allowances, Online Payments and Cash/Cheque Payments.

Pre-order meals using interactive whiteboards in each classroom and take the class register all at the same time.

- Full reporting facilities provide the catering manager with the information they need, when they need it.
- Print out the meal requirements for the day.
- Quickly calculate the UIFSM and FSM claims.
- Leave FasTrak to do the rest!

Contents

You can also find this help documentation under FasTrak's 'Help' section.



Use the sidebar in the Help section to navigate through the help file. You can select 'Home' to return to the introduction screen, and use Back/Forward to return to previously viewed help pages.

1.0 – People

The people section of FasTrak Admin is used for:

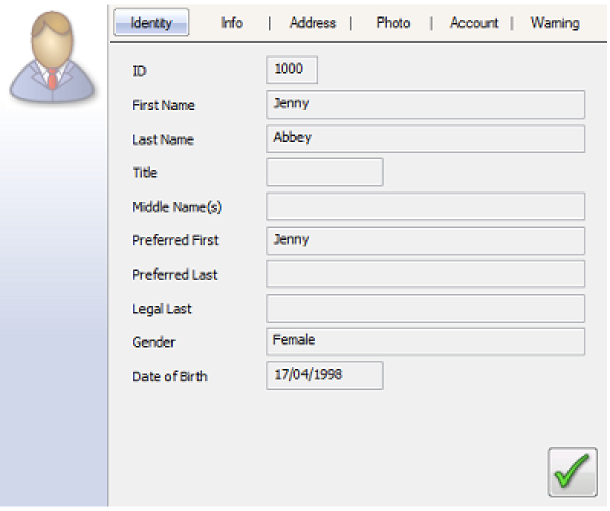
- Viewing a person's details
- Adjusting a person's funds
- Adjusting a person's account details
- Setting ingredient/allergy warnings
- Searching for people in FasTrak

1.0.1 – Viewing a person's details

People in FasTrak come from the school's database. Some information about each person is included to make it easier to identify different people, such as names, year groups, and photos.

Viewing a person's details

In the *People* section, click on the person that you want to view, and then select *View Person* from the toolbar. The *View Person* window will appear:



The person's information is split into different sections, which you can select from the menu bar. Note that the information displayed will vary depending on what the school allows.

Identity – Information that helps identify the person, including their name.

Info – Additional information including whether the person is student/staff, and FSM eligibility.

Address – Contact details including address, phone, and email.

Photo – The person's photo.

Account – Account details (*see [1.0.3 – Adjusting a person's account details]*).
Warning – Warnings enabled for the user (*see [1.0.4 – Set ingredient/allergy warnings]*).

Select *OK* to close the window and return to the people section.

Running reports on the selected person

Certain reports can be run on the selected person, including a summary of their transactions, pre-orders (if the school uses pre-orders), attendance (if the school uses FasTrak for registration) and customer diet.

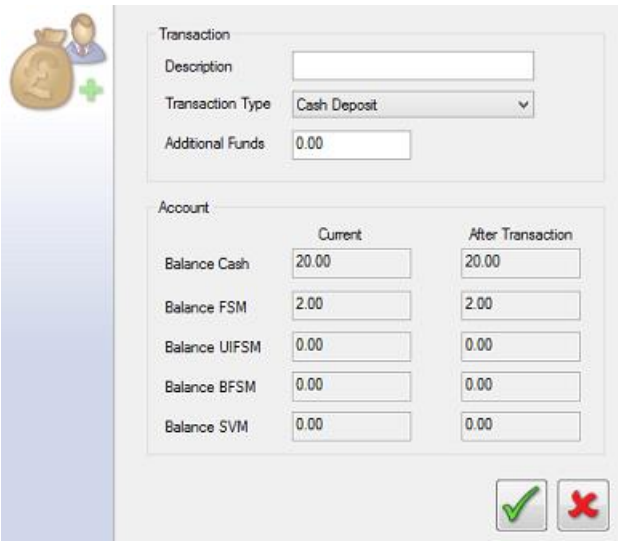
These reports can be found in FasTrak's *Reports* section. See *1.1 – Reports* in this help documentation for further information on reports.

1.0.2 – Adjusting a person's funds

You can adjust the funds that people have available to them directly from FasTrak Admin. Note that these adjustments are recorded for use in transaction reports.

Adjusting people's funds

In the *People* section, select the person that you want to adjust funds for, and then select *Adjust Funds* from the toolbar. The *Adjust Funds* window will appear:



This window displays information about the selected person's currently available funds, and allows you to manually deposit, reclaim, or refund money.

Description – Enter a suitable description for updates you make; descriptions are displayed in transaction reports as a means of identifying the transaction.

Transaction Type – Select the transaction type that matches what you want to do. The available options are as follows:

- Cash Deposit – For when a user hands in cash to be added to their account.
- Cheque Deposit – For when a user hands in a cheque to be added to their account.
- Refund – For refunding an amount of money to a user.
- Redeem – For redeeming an amount of money from a user.
- FSM/UIFSM Deposits and Reclaims – Intended for manually depositing or reclaiming FSM/UIFSM amounts, if an alternative is needed to the automatic End of Day process.
    - Note that FSM and UIFSM amounts are automatically deposited and reclaimed when the End of Day process (see *1.8.1 End of Day Process*) is run. These amounts are decided by the values entered in *Maintenance – Settings – Financial Setup* (see *1.8.6 FasTrak Settings* for further information on the maintenance section).
- SVM Deposit and Reclaim – For manually depositing or reclaiming Supervisor Meal allowances.

Additional Funds – Enter the amount of money that you want to deposit/refund/redeem. Transactions that reclaim allowances take the allowance amount from the values entered in *Maintenance – Settings – Financial Setup* (see *1.8.6 FasTrak Settings*)

Account – Current / After Transaction – This section of the *Adjust Funds* window displays the selected person's current balance for cash, FSM, UIFSM, and SVM amounts, and also the balance that they will have after any transaction you enter.

Adjusting multiple people's funds

You can make adjustments for multiple people at the same time. To select multiple people, hold CTRL on your keyboard and select each individual person. To select a group of people, hold SHIFT on your keyboard and select the first person, and then select the last person to select them and all people in between. To select all users, hold CTRL and tap A.

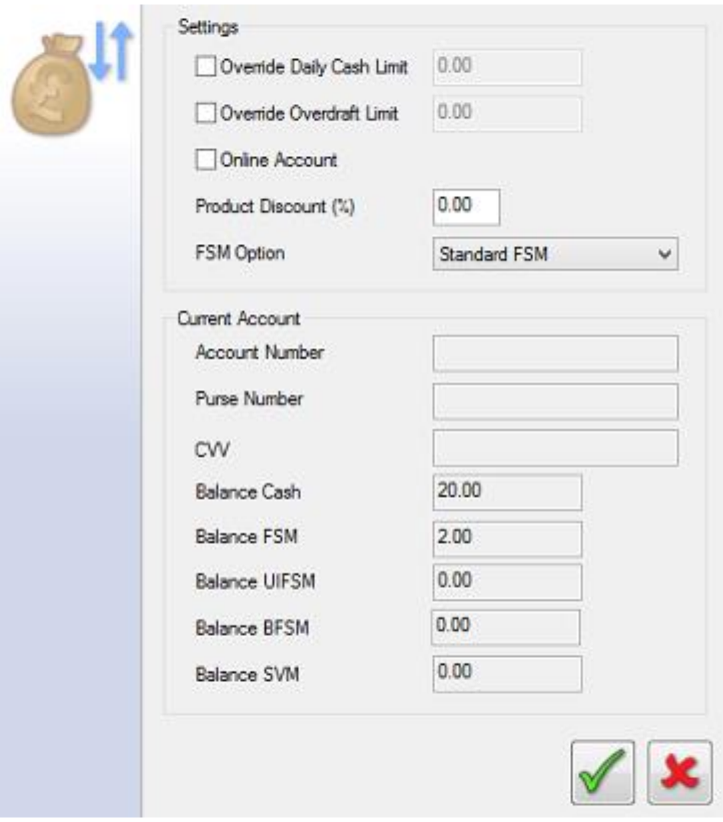
Select *OK* to apply any adjustments you make, or *Cancel* to discard your adjustments and return to the list of people.

1.0.3 – Adjusting a person's account details

By selecting Adjust Account from the toolbar, you can override daily cash limits and overdraft limits on a per-user basis.

Adjusting people's account details

In the *People* section, select the person that you want to adjust funds for, and then select *Adjust Account* from the toolbar. The *Adjust Account* window will appear:



This window displays information about the selected person's account, and allows you to manually override daily cash and overdraft limits. You can also toggle the account's availability for online ordering (You can also toggle this option using the *Set Online On/Off* buttons on the toolbar).

Override Daily Cash Limit / Overdraft Limit - The default daily cash and overdraft limits are a global value which you can change by navigating to *Maintenance - Settings - Account Defaults* (see *1.8.6 FasTrak Settings*).

Online Account – Toggle the selected person’s availability for online pre-ordering. This can be done on a per-user basis from the *Adjust Account* window, or you can toggle this availability for multiple users by holding CTRL on your keyboard and selecting each individual person, and then selecting *Set Online On* or *Set Online Off* from the toolbar:

To select a group of people, hold SHIFT on your keyboard and select the first person, and then select the last person to select them and all people in between. To select all users, hold CTRL and tap A.

Product Discount – You can use this option to set a discount percentage for the selected person on products that they buy through FasTrak.

FSM Option – FasTrak supports two Free School Meal options: Standard FSM and Bursary Fund FSM. You can change this option as needed.

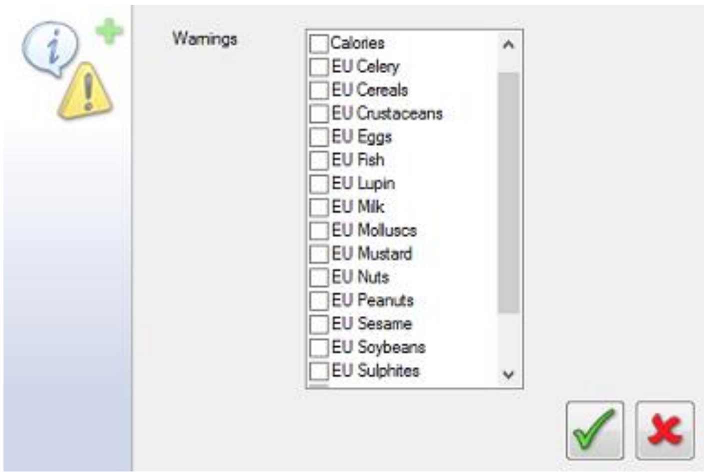
Select *OK* to apply any adjustments you make, or *Cancel* to discard your adjustments and return to the list of people.

1.0.4 – Set ingredient/allergy warnings

Warnings can be created for use with products with, for example, high sugar content or ingredients that some people may be allergic to. These warnings can then be applied to everyone or a subsection of people, as needed.

Adjusting warnings for people

In the *People* section, select the person that you want to apply warnings to, and then select *Warnings* from the toolbar. The *Student Warnings* window will appear:



This window displays a list of available warnings. This list is populated from the warnings added via *Products – Add Warning* (see [1.4.3 Add product warnings to FasTrak](#)).

Tick each warning that you want to apply to the selected person. To remove a warning from the selected person, un-tick it.

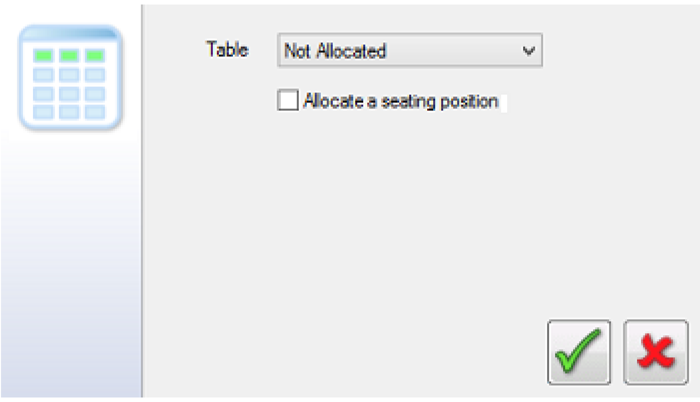
Select *OK* to apply any adjustments you make, or *Cancel* to discard your adjustments and return to the list of people.

1.0.5 – Table and seating arrangements

You can set table/seating arrangements for people if you want finer control of your dining area.

Allocating tables and seats

In the *People* section, select *Table/Seat* from the toolbar. The *Table/Seat* window will appear:



You can allocate tables and seats separately. The *Table* dropdown list displays available tables (including sitting times, e.g. morning/afternoon), and is populated from the tables added via *Maintenance – Tables* (see [1.8.3 – Setting Tables and Seats](#)).

From the dropdown list, you can select the table and sitting that you want to allocate to the selected person. To remove an allocation, simply select the 'Not Allocated' option.

If you want to allocate a seat as well as a table, tick the 'Allocate a seating position' box. This will display a seat option where you can enter a seating number for the selected person. To remove a seating option, enter '0' *(zero)* as the seating number.

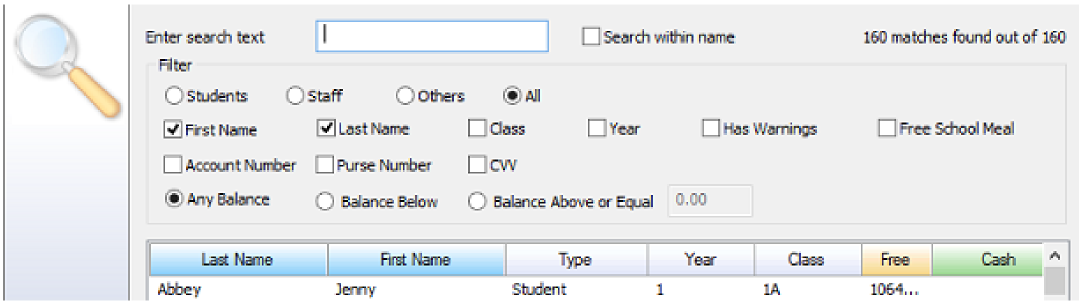
Select *OK* to apply any table/seat choices you make, or *Cancel* to discard any changes and return to the list of people.

1.0.6 – Search for people in FasTrak

You can search for people in FasTrak, filtering results by user type, name, balance, and more.

Search for people in FasTrak

In the *People* section, select *Search People* from the toolbar. The *Search People* window will appear:



Enter search text - Enter what you want to search for.

Search within name - If ticked, search for part of a name. To search for whole names only, leave this option un-ticked.

Filter options - Select the user type you want to search for, and any other relevant options.

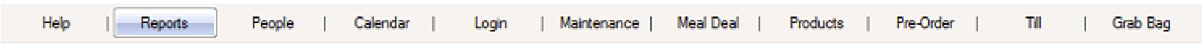
The list of users matching your search query will automatically update depending on what you search for. You can sort the search results by clicking on the column header you want to sort by. Click the header again to toggle between ascending or descending order.

Select a person from the search results and then select *OK* to return to the list of people, where the selected person will be highlighted.

1.1 – Reports

The reports section of FasTrak Admin is used for:

- Selecting from a wide range of reports to run
- Setting custom report date ranges (e.g. term times or holidays)
- Printing or saving reports in a variety of formats



1.1.1 – Introduction to FasTrak Reports

FasTrak provides a detailed set of built-in reports. Select the *Reports* section to view these. You can filter the displayed reports by selecting one of the categories from the toolbar – Financial, Customer, Product, and Diagnostic. The *Favourites* category includes some of the most frequently used reports.

Reports can be produced by selecting one of the built-in reports, and then clicking *Open Report* from the toolbar. Alternatively, you can configure a variety of options including custom date ranges, sort options, and filtering after selecting a report.

Setting custom dates

Common date ranges, such as *previous 7 days, next 7 days, current month, previous month, current year,* and *previous year* can be chosen by selecting the *Set Dates* button. You can also set your own report dates if you want to run reports for a specific date range which isn't included as a default option, such as term times or school holidays.

Per-user reports

Certain reports, such as Transactions, Historical Pre-orders, Attendance, and Customer Diet are run on a per-user basis. To run these reports, select the person you want to run the report for from the *People* view, and then select the *Reports* view to choose the report that you want to run.

Information on each available report, including report contents and potential uses, can be found in FasTrak Admin's help section. The report help files are split into their relevant categories.

1.1.3 – Report options

The following options are available in reports that you run:

Save to...

Use this option to save the report to a location of your choice. PDF, Rich Text Format (.rtf) and Comma Separated Values (.csv) files are supported.

- In cases where a report is going to be a few pages long, it will automatically be converted to a Comma Separated Values file (.csv). By default, this is done when the report reaches 500 lines. You can increase or decrease this by navigating to *Maintenance – Reports – Switch to CSV Count* (see *1.8.6 FasTrak Settings* for further information on the maintenance section).

Print

Print a report to a printer connected to your computer. You can print all pages of a report or only the currently displayed page. Reports are divided into pages which will fit comfortably on an A4 sheet of paper.

Navigation

Use the arrow keys or the scroll bar to navigate through the report.

Zoom

You can change the display size of the report by selecting the zoom in (+) and zoom out (-) buttons. Note that this doesn't change the size of the printed report.

1.1.4 – End of day report

What this report does

A daily overview of all funds in and out of your FasTrak system, including current balance held in the system, deposits, refunds, sales made, allowances used, and more. This report also includes a breakdown of the day’s sales, including items paid for by allowances or cash.

Recommended use

This report is part of the end of day process, and **must** be run at the end of every day. You can run this process by going to *Maintenance -> End of Day* in FasTrak Admin.

Running the end of day process will also carry out the following steps:

- Reclaim all unused Free School Meal (FSM) allowances.
- Credit people’s accounts with FSM allowances for the next day.
- If you are using FasTrak Pre-ordering, select a menu for the next day.

After running this process, the end of day report will open.

Report breakdown

Details

The date and time that the end of day report was generated.

Cash Flow

An overview of the cash flow in and out FasTrak. Depending on whether a transaction adds money to the overall cash held or reduces it, the amount for each item will be seen in the ‘money in’ or ‘money out’ columns accordingly.

For example, when people deposit money this increases the overall amount held so the total value will appear in the ‘money in’ column. When customers spend money from their accounts, the overall balance decreases, so the sales values appear in the ‘money out’ column.

The following items are included:

- **Initial Cash Balance**
  - The balance at the start of the day. This is calculated from the total of all customer account balances held in FasTrak.
- **Allowance Deposits**
  - Allowances deposited into FasTrak for the day, including Free School Meals, Bursary Free School Meals, Universal Infant Free School Meals, and Supervisor Meals.
- **Cash Deposits**
  - Cash deposited info FasTrak for the day, including online deposits, cash and cheques that have been entered manually, and cash added through cash loader machines.
- **Sales**
  - Sales made for the day, including both pre-orders and till sales (if you only use one of these two options, the value of the option you do not use will always be 0.00). Includes refunds given and till cash drawer transactions.
- **Unused Allowance Recovery**
  - Recovery of FSM, BFSM, UIFSM, and SVM allowances. These appear as ‘money out’ because the unused allowances are being reclaimed from customer accounts.
- **Cash Withdrawals**
  - Cash that has been withdrawn from a customer’s account, either through an online payment system or by cash being manually handed over to a customer.

The items detailed above are totalled up to display the day’s final balance, including the total money in and out for the day.

Allowances

Sales that have been made using allowances:

- **Used Allowances**
  - This section includes a list of how many allowances have been allocated, and how many have been used. The allowances included are Free School Meals, Bursary Free School Meals, Universal Infant Free School Meals, and Supervisor Meals.

At the end of this section, a calculated total of the number of allocated allowances and the number of used allowances, including a total value of allowances used, is displayed.

Cash Sales

An overview of sales that have been wholly or partially paid for with cash rather than the customer's FasTrak account balance.

- **Cash Sales**
  - Includes a count of sales made to students, staff, and visitors, as well as the value of the sales and any VAT.

A total count of cash sales made, VAT charged, and value of all cash sales made is included at the end of this section.

Total Sales

A breakdown of sales that were wholly paid for with allowances, sales that were wholly paid for with cash, and sales that were paid for with a mix of allowances and cash.

- **Total Sales**
  - Includes a count of allowance-only sales, cash-only sales, and sales made with a combination of allowance and cash, as well as the value of the sales and any VAT.

A total count of cash/allowance sales made, VAT charged, and value of all cash/allowance sales made is included at the end of this section.

Consistency Check

To ensure that all funds are being accounted for, the value of all customer balances are compared to the value of all transactions made. These two values should always be the same.

- **Total Purse Balance**
  - The total balance held in FasTrak at the end of the day.
- **Total Expected Balance from Transactions**
  - The expected total balance that is calculated from the day's transactions. This should be identical to the Total Purse Balance.
- **Difference**
  - The difference between the two above values. This should always be 0.00 (zero).

Finding previous end of day reports

You can view previous end of day reports by selecting the *Reports* view in FasTrak Admin. Select the End of Day report, and a list of all previously run reports will be displayed, along with the dates and times that they were run. To open one of these past reports, select the date you want to view and then select *Open Report* from the menu bar.

1.2 – Calendar

The calendar section of FasTrak is used for:

- Creating and maintaining a calendar for setting pre-order menus in advance
- Inputting holiday dates for when pre-order menus aren't required
- Configuring custom day types, e.g. longer lunch breaks on Fridays

1.2.1 – Introduction to the calendar

Main features of the calendar:

- Set a different pre-order menu for each week of the school year from a 5-day or 7-day menu, depending on what pre-orders you have set up.
- Use the calendar for both offline and online pre-ordering.
- Add your own holiday times into the calendar.
- Set different day types for tills to use - e.g. having a longer lunch break on Friday.

1.2.2 – Create/Edit the calendar

When you load FasTrak Admin for the first time, a calendar won't be available. To create one, select *Edit Calendar* from the *Calendar* view.

Year Start/Year End - Select dates for the calendar to start/end. You can either type into the date fields or select the date button to view a mini-calendar, from which you can select the desired date.

Treat weekends as holidays - If this option is ticked, the calendar will be created with weekends marked as holidays.

Select *OK* to save changes to the calendar, or *Cancel* to discard any changes you've made.

Holiday options

To add holidays to a calendar, select *Edit Calendar*.

Type - Select whether the holiday will be a single day (e.g. teacher training day), or a date range.

Start Date/End Date - Select a start/end date for the holiday. You can either type into the date fields or select the date button to view a mini-calendar, from which you can select the desired date.

Comment - Enter a comment briefly describing the holiday, to make it easier to identify if future changes are needed.

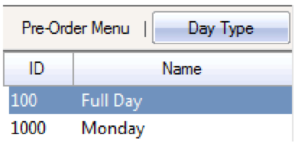
Synchronizing with the online pre-ordering calendar

If you're using online pre-ordering, changes you make in the *Calendar* section will be reflected online within 50 minutes (by default). You can change this time by navigating to *Maintenance – PreOrder Settings – Menu Upload Interval*.

1.2.3 – Day types

Day types can be used to customize how long your canteen remains open for purchases on any given day. You can apply a single day type to all days if this customization is not required, or you can apply a different day type to each day of the week.

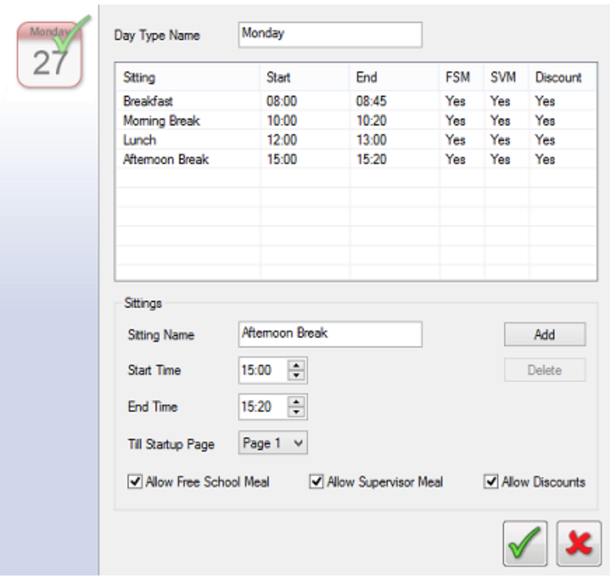
Select the *Calendar* view. From the sidebar, ensure *Day Type* is selected, listing any currently available day types.



Once *Day Type* is selected from the sidebar, you can create, edit, or delete day types by selecting the relevant option from the toolbar.

Creating a day type

To create a new day type, select *Create Day Type* from the toolbar. The following window will appear:



Day Type Name – Enter a name for the day type, such as the day it is intended to be used for.

Sitting Name – A single day type can have several sittings, e.g. breakfast, break, and lunch. Enter a sitting name that you want to use.

Start/End Time – Enter the start and end times of the sitting.

Till Startup Page – This option sets the category that will be shown by default in the till view, during the sitting. Other available categories can still be selected as normal on the till, but the one selected here is the one that will be displayed to the till operator first.

Allow Free School Meal – Tick this option to enable FSM purchases during the sitting.

Allow Supervisor Meal – Tick this option to enable SVM purchases during the sitting.

Select **Add** to add the sitting to the day type. You can remove sittings by selecting it from the list in the day type window and selecting **Delete**.

Select  *OK* to save changes to the day type, or  *Cancel* to discard any changes you've made.

Editing a day type

To edit a day type, select it from the sidebar list and select *Edit Day Type* from the toolbar. You can edit all settings and add/delete sittings in the day type as required.

Deleting a day type

To delete a day type, select it from the sidebar list and select *Delete Day Type* from the toolbar. You will be prompted to confirm that you want to delete the selected day type. If you do not want to delete a day type but just remove it from a day, select the relevant day and then select *Clear Day Type* from the toolbar.

Remember to save any changes you make to the calendar by selecting *Save Changes* from the toolbar. You will be prompted to save changes if you leave the calendar before saving. If you do not wish to save your changes, simply select *No* from the confirmation box that appears.

1.2.4 – Set menu items

You can select the menu option that you want to apply to a day from the *Pre-Order Menu* list on the sidebar. This menu list is populated from the choices you add in the *Pre-Order* section of FasTrak (see *1.6 FasTrak's Pre-order System* for details on how to make products available for pre-order).

Select a day that you want to apply a pre-order menu to, select the desired day from the side-bar, and then select *Set Menu* from the toolbar.

Note that holidays can't be selected - edit the calendar if you want to remove holiday status from a day or date range)

Pre-Order Menu - This sidebar button displays the list of pre-order days.

5 Day Menu/7 Day Menu - These buttons, located below the list of pre-order days, can be used to switch between a 5-day or 7-day pre-order menu, depending on what you have set up in the Pre-order section of FasTrak Admin.

Removing a menu from a day

To remove a menu, select the relevant day and then select *Clear Menu* from the toolbar.

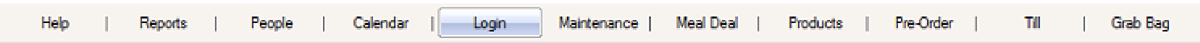
Saving changes to the calendar

Remember to save any changes you make to the calendar by selecting *Save Changes* from the toolbar. You will be prompted to save changes if you leave the calendar before saving. If you do not wish to save your changes, simply select *No* from the confirmation box that appears.

1.3 – Logins

The logins section of FasTrak Admin is used for:

- Adding, editing, and deleting logins for FasTrak software
- Changing login permissions for different people
- Configuring biometric/card login for staff members using FasTrak Client



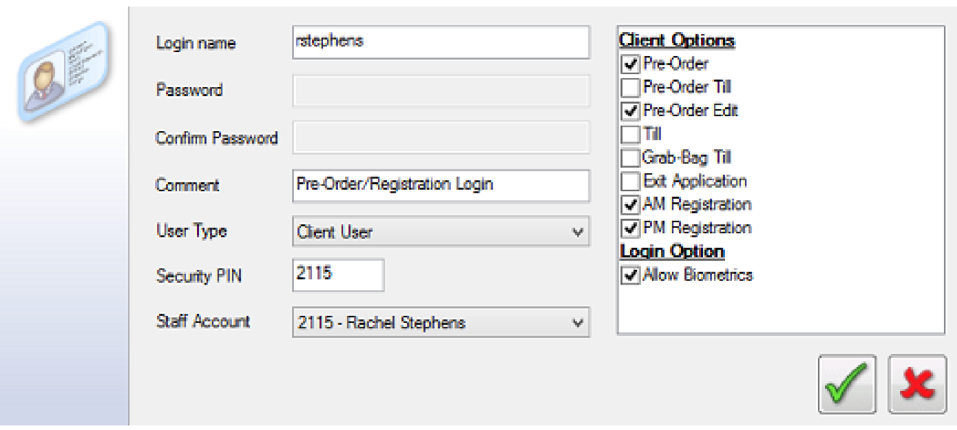
1.3.1 – Add/Edit a login for FasTrak

The *Login* section of FasTrak Admin is used to create, edit and delete login accounts for staff as well as for other programs that need to connect to FasTrak.

Only an *Administration* user can create logins. Other user types may not create any logins, and cannot see the Login section.

Creating a login

To create a new login, go to the Login section and select *Add User* from the toolbar. The following window will appear:



Login options

Login Name - Enter a username to be used for the login. This is an alphanumeric field of up to 20 characters.

Password - Enter a password to be used for the login. This is an alphanumeric field of between 6 and 20 characters. Type the same password in the *Confirm Password* box.
Comment - Enter an optional comment. This field is usually used for a description of the login's intended purpose. This field may contain up to 256 characters.
User Type - The available user roles include *Administration, Report User, Client User, Machine,* and *Gateway*. See the following section of this document, login types, for more information.
Security PIN - This option is only enabled for *Client User* logins, and is used instead of a password for this user type. This field may contain between 4 and 6 numerical characters.
Staff Account - You can associate a login with a staff account. The staff member must be in before you can select them. This is required if you want staff members to log in to FasTrak Client using biometric/card authentication.

Report login options

When you create a report user, a list of viewable reports appears. You can configure which reports the user can see from here. There are also options for report logins which include permissions for viewing & editing or just viewing the 'People' section.

Client login options

When you create a client user, a list of client options appears. You can configure which options are available to this user, such as pre-order and till access, user registration, and the ability to exit the client. By enabling the biometric login option, the user can log in to the client software using a finger scanner (staff account association required).

If you create a client user with only 'Exit Application' enabled from the list of options, FasTrak Client will immediately exit when that user's security PIN is entered.

Editing a login

To edit a login, select *Edit User* from the toolbar. You can edit all options as needed.

If you edit login names/passwords for logins in use at another location, remember to enter the new details in the relevant program.

Deleting a login

To delete a login, select it from the login list and then select *Delete User* from the toolbar. You will be prompted to confirm that you want to delete the login.

If you only have one Administration login, you will not be able to delete it. This is to avoid locking yourself out of FasTrak Admin.

Only delete logins that are not in use, or that you have replacement logins for. If in doubt, do not delete the login; multiple logins can be created for each role.

1.3.2 – Available login types

User types define how each login can be used. The available user types include *Administration, Report User, Client User, Machine,* and *Gateway*.

Administration

An Administration user can create logins for other users and has access to all features of FasTrak Admin.

Report User

Only has access to the Reports section. This user can run reports but can't make any changes to FasTrak.

Report User (Show People)

Has access to the Reports section and read-only access to the People section.

Report User (Show/Edit People)

Has access to the Reports section and the People section.

Client User

This is a login for FasTrak Client, and has no access to FasTrak Admin.

Machine

This login type is used to enable the Client and Admin software to talk to FasTrak Server.

Gateway

Used by FasTrak Server to synchronize your FasTrak database with IDManager.

You can create multiple logins for each user type.

1.3.3 – Biometric/card login for staff members

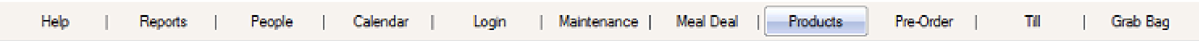
Staff members, when associated with client logins, can log in to FasTrak Client using the finger or card that they have enrolled in IDManager.

To enable biometric/card login for staff members, create or edit a Client User login via the Login view in FasTrak Admin, and enable the *'Allow biometrics'* option.

1.4 – Products

The products section of FasTrak Admin is used for:

- Adding products to FasTrak
- Adding product categories to FasTrak
- Adding product warnings to FasTrak
- Searching for products in FasTrak



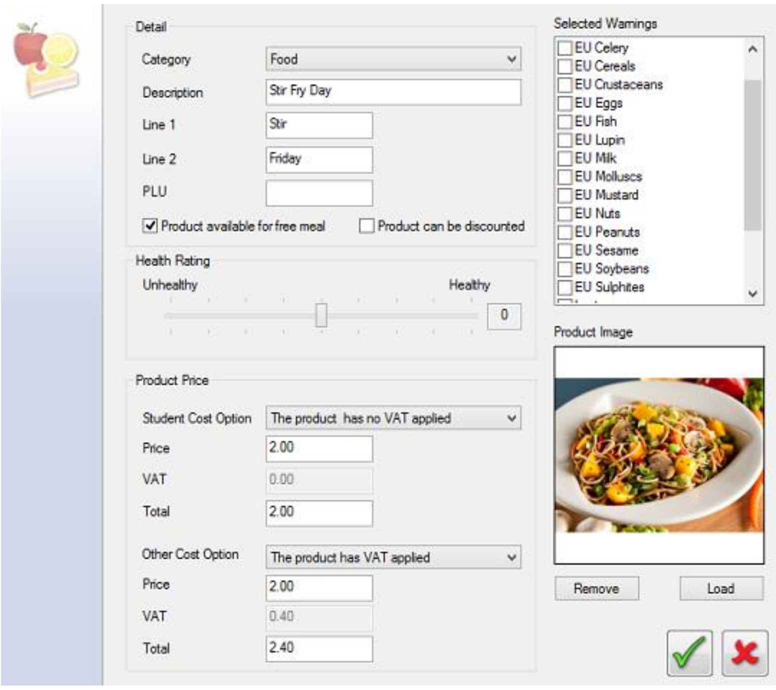
1.4.1 – Add products to FasTrak

The Products section of FasTrak Admin is used to create, edit and delete products and product categories for use with your FasTrak catering system.

Only **Administration** logins can create products. Other logins may not create any products, and cannot see the products section in FasTrak Admin.

Creating a product

To create a new product, go to the Products section and select *Add Product* from the toolbar. The following window will appear:



Product Options

Description - Add a description for the product you're adding.

Category - Select which category the product should be in. See the following section of this document for more details.

Line 1 / Line 2 - When you add products to the till, these two fields are displayed as shown in the following image:

Enter a short description of the product in each line. Only Line 1 is mandatory, however using both lines can allow for a better description of the product on the till.

PLU - Enter the price look-up code, if required.

Product available for free meal - If you want the product to be available to people qualifying for free school meals, tick this option (enabled by default).

Product can be discounted – When this option is enabled, a discount can be applied to the product by the till operator.

Health Rating – If you want to set a health rating for the product, you can use the health rating slider to indicate how healthy/unhealthy the product is.

Student Cost Option - Choose whether the product is free or paid, and if it has VAT applied. This option only applies to students.

> **Priced at till** – If you set the product as being priced at till, the till operator is required to enter the price of the product when it is purchased.

Price - Enter the price that you want to charge for the product (disabled if no cost or priced at till).

VAT - The VAT is automatically calculated. You can edit this from FasTrak Admin's *Maintenance* section or remove it as required. The value entered here will be added to the price you set for the product.

Other Cost Option - Set the price of the product for non-students, e.g. staff members. You can use the same price as set for students, or set a different price as needed.

Selected Warnings - Tick any warnings that you want to apply to the product. This list is populated from the warnings added in the *Products* section and includes the current EU standard allergens. See *1.4.3 Add product warnings to FasTrak* for further details.

Product Image – You can attach images to a product. To do this, select the *Load* button in the Product Image section, and browse to the image you want to use. Note that there is a size limit set by default for product images; you can change this limit by navigating to *Maintenance – Admin Setup – Max Image Size* (see *1.8.6 FasTrak Settings* for further information).

Select *OK* to save the product, or *Cancel* to discard your changes and return to the administration window.

Editing a product

To edit a product, you can either double-click it in the product list, or select *Edit Product* from the toolbar. You can edit all options apart from the internal product code.

Deleting a product

To delete a product, select it from the product list and then select *Delete Product* from the toolbar. You will be prompted to confirm that you want to delete the product.

Only delete products that are not in use. The product code used by a deleted product will not be made available again. If you want to re-use a product code, edit the product using it instead.

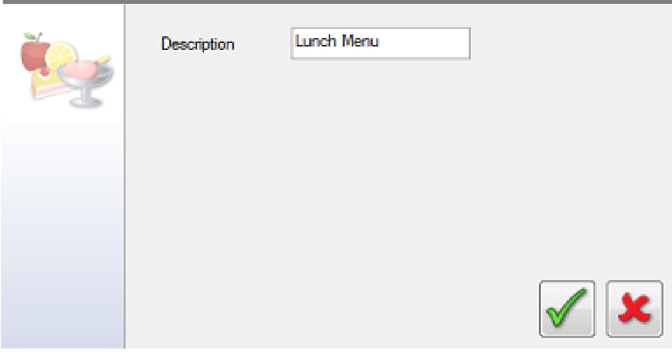
1.4.2 – Add product categories to FasTrak

The Products section of FasTrak Admin is used to create, edit and delete products and product categories for use with FasTrak.

Only **Administration** users can create categories. Other logins may not create any categories, and cannot see the category options in FasTrak Admin.

Creating a category

To create a new category, go to the Products section and select *Add Category* from the toolbar. The following window will appear:



Category Options

Description - Add a description for the category you're adding.

Select *OK* to save the category, or *Cancel* to discard your changes and return to the administration window.

Editing a category

To edit a category, you can either double-click it in the category list, or select *Edit Category* from the toolbar. You can edit all options as needed.

Deleting a category

To delete a category, select it from the category list and then select *Delete Category* from the toolbar. You will be prompted to confirm that you want to delete the category.

Only delete categories that are not in use. Ensure no products are using the category before deleting it.

1.4.3 – Add product warnings to FasTrak

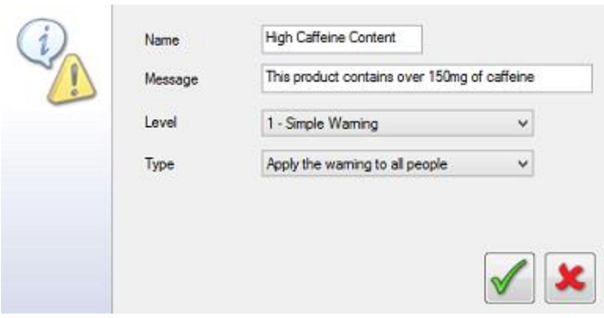
The product Warnings section of FasTrak is used to create different warnings that you can apply to products, such as products containing nuts or high amounts of sugar or caffeine.

FasTrak comes with the current EU standard allergens as available warnings. Note that you cannot edit or remove these required warnings, but you can create your own.

Only **Administration** users can create warnings. Other logins may not create any warnings, and cannot see the warnings options in FasTrak Admin.

Creating a warning

To create a new warning, go to the Products section and select *Add Warning* from the toolbar. The following window will appear:



Warning options

Name - Add a descriptive name for the warning you're adding.

Message - The warning message is what will be displayed to users and/or till operators.

Level - There are a number of warning levels available:

1. Simple Warning: Displays the warning message when a product with this warning is selected.
2. Yes/No confirmation: Displays the warning message and Yes/No buttons to confirm that the user wants to continue or cancel this selection.
3. Show but don't allow: Displays the warning message and stops the product from being selected.
4. Remove Option: Removes the product from display when a person with the warning applied is making a selection.

Type - Choose who sees the warning (on a per-user basis), or apply the warning to everyone.

- To apply warnings to users, go to the *People* section and edit a person. See *1.0.4 Set ingredient/allergy warnings* for further information.

Select  *OK* to save the warning, or  *Cancel* to discard your changes and return to the administration window.

Editing a warning

To edit a warning, you can either double-click it in the warning list, or select *Edit Warning* from the toolbar. You can edit all options as needed.

Deleting a warning

To delete a warning, select it from the warning list and then select *Delete Warning* from the toolbar. You will be prompted to confirm that you want to delete the warning.

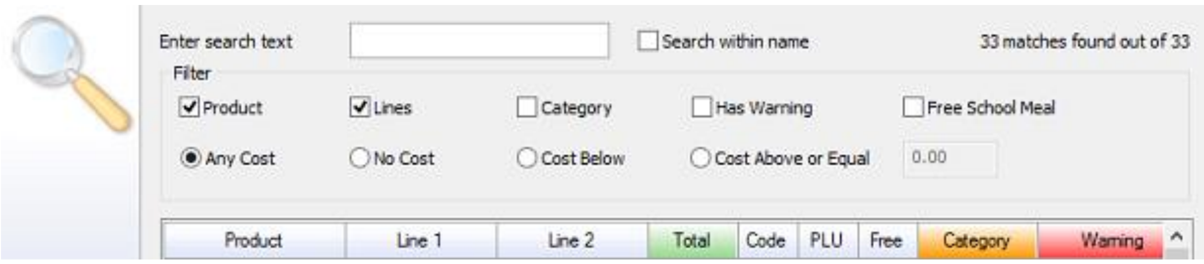
Only delete warnings that are not in use. Ensure no products are using the warning before deleting it.

1.4.4 – Search for products in FasTrak

You can search for products in FasTrak, filtering results by category, warning, and more.

Search for products in FasTrak

In the Products section, select *Search Products* from the toolbar. The *Search Products* window will appear:



Enter search text - Enter what you want to search for.

Search within name - If ticked, search for part of a name. To search for whole names only, leave this option unticked.

Filter options - Select whether you want to filter by products, product lines, categories, warnings, or FSM availability. You can also filter by cost using the available options.

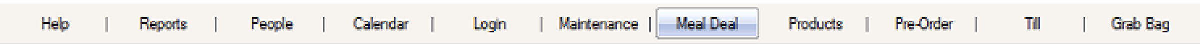
The table of products will automatically update depending on what you search for. You can sort the search results by clicking on the table header you want to sort by. Click the header again to toggle between ascending or descending order.

Select a product from the search results and then select *OK* to return to the products view, where the selected product will be highlighted.

1.5 – Meal deals

The meal deals section of FasTrak Admin is used for:

- Creating meal deals
- Selecting which products are available in each meal deal
- Setting meal deal costs, including FSM availability

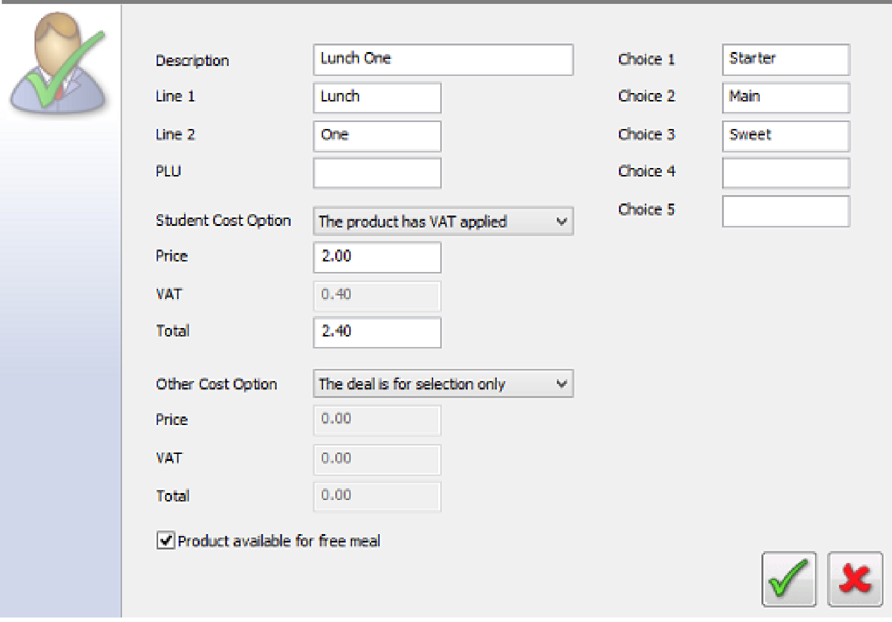


1.5.1 – Creating meal deals

Meal deals are groups of products that you can create, allowing people to purchase a group of items at a discounted price. You can add up to 5 choices per meal deal (e.g. main meals, desserts, drinks), each comprising of either a single product or multiple products.

Adding a meal deal

To add a new meal deal, go to the Meal Deals section and select *Add Meal Deal* from the toolbar. The following window will appear:



Meal deal options

Description - Enter a name to identify the meal deal.

Line 1/ Line 2 - When you add meal deals to the till display, these two lines are displayed on the associated till button. Only Line 1 is required.

PLU - Enter the price look-up code, if required.

Student Cost Option - Choose whether the meal deal is for selection only, and if it has VAT applied. This option only applies to students.

Price - Enter the price that you want to charge for the meal deal.

VAT - The VAT is automatically calculated. You can edit this in FasTrak Admin's *Maintenance* section or remove it as required. The value entered here will be added to the price you set for the product.

Total - The total price of the meal deal including VAT if applied.

Other Cost Option - Set the price of the meal deal for non-students, e.g. staff members. You can use the same price as set for students, or set a different price as needed.

Choices - Choice 'titles' for products added to the meal deal to be grouped under, e.g. Main meals, desserts, drinks.

Product available for free meal - If you want the product to be available to people qualifying for free school meals, tick this option (enabled by default).

Editing a meal deal

To edit a meal deal, select it from the meal deal list and then select *Edit Meal Deal* from the toolbar. You can edit all options as needed.

Deleting a meal deal

To delete a meal deal, select it from the meal deal list and then select *Delete Meal Deal* from the toolbar. You will be prompted to confirm that you want to delete the meal deal.

Adding products to meal deals

To add a product to a meal deal, follow these steps:

1. Select the meal deal choice that you want the product to appear under.
2. Select the product you want to add from the product list at the side of the window, and select *Add Product* from the toolbar.
3. The product will appear under the selected choice in the meal deal.

If you want to remove a product from a meal deal, select it from the choice column and then select *Remove Product* from the toolbar.

You can change the order that products appear in by selecting *Move Up / Move Down*. Products higher up the choice list will appear first.

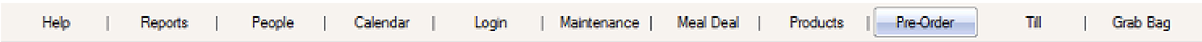
Saving meal deal changes

Select *Save Changes* to save the meal deal, otherwise you will be prompted to save when you leave the meal deal view.

1.6 – FasTrak's Pre-order system

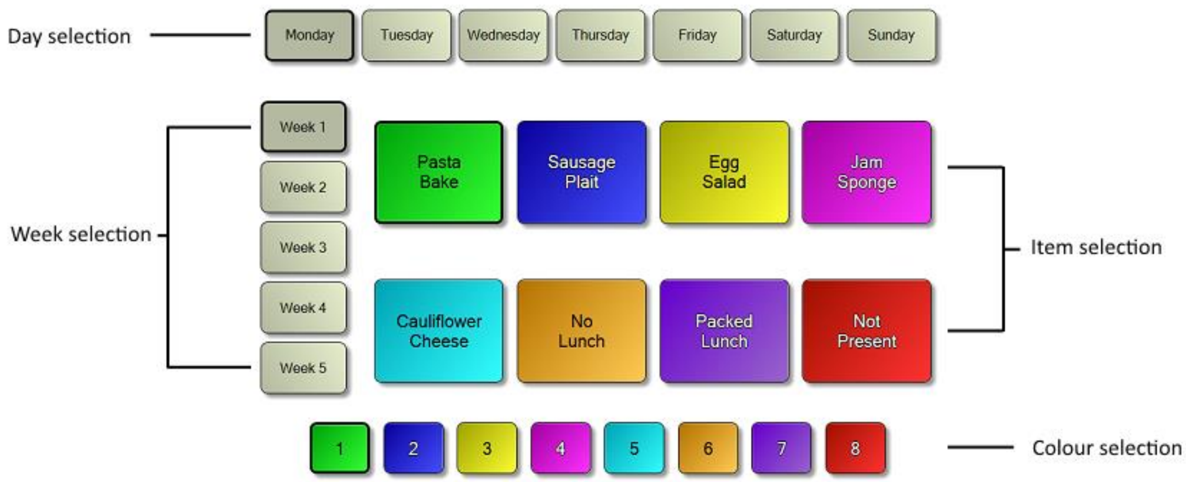
The pre-order section of FasTrak Admin is used for:

- Changing the pre-order displayed
- Adding products to the pre-order menu
- Setting future pre-order menus



1.6.1 – Creating pre-order menus

The Pre-order section of FasTrak Admin is used to set pre-order menus, which can be set for up to 5 weeks in advance.



Setting a pre-order menu

1. Select the desired Day and Week from the *day selection* and *week selection* buttons.
2. From the table at the side of the pre-order window, select *Choose Product* or *Choose Meal Deal* and then select the product or meal deal that you want to include in the pre-order menu.
3. Choose an *item selection* button to apply the chosen product or meal deal to, and then select *Product Set* from the toolbar.
4. To change the colour of an *item selection* button, select one of the numbered *colour selection* buttons, and then select *Product Set* from the toolbar.

Enabling/disabling a pre-order button

If you want to hide an *item selection* button in FasTrak Client (e.g. if one of the buttons is unused), select the *item selection* button and then select *Product On/Off*. A cross (X) will appear on buttons that you mark as hidden.

Saving your changes

Select *Save Changes* to save the pre-order menu, otherwise you will be prompted to save changes when you leave the Pre-order view.

Changing today's menu

If you want to set the current display on the pre-order view as today's menu, select Set *Today's Menu* from the toolbar.

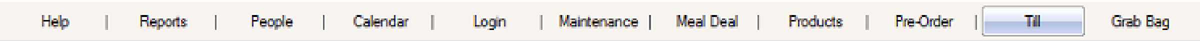
To load the menu set for today, select *Get Today's Menu* from the toolbar.

The current day's menu can also be set via the end of day process.

1.7 – Till

The till section of FasTrak Admin is used for:

- Changing the till display
- Adding categories to the till
- Adding products to the till
- Setting up a grab bag till



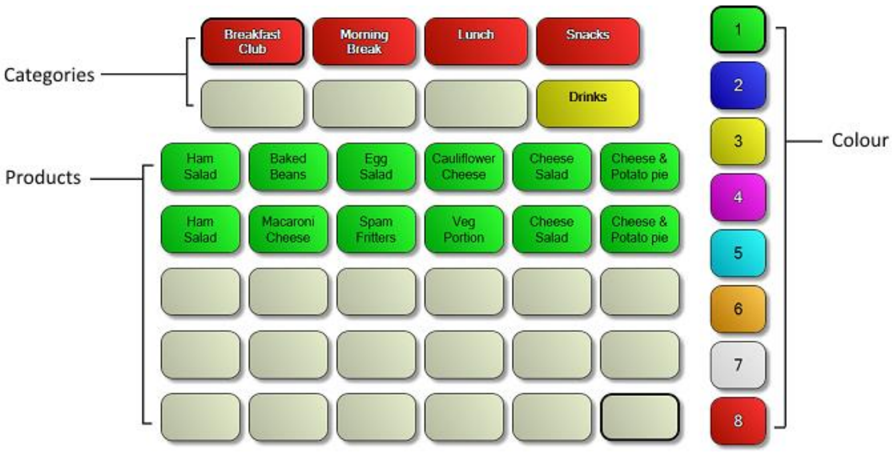
1.7.1 – Changing your till display

The Till section of FasTrak Admin is used to set and clear products and categories on till displays.

Only an *Administration* user type can make changes to the till display.

Till display

From the till view, you can see the categories and products currently on the till. You can have up to 30 products per category, and a maximum of 8 categories.



The top two rows are category buttons. Products are specific to each category; each category has its own set of products.

The column at the side of the till display allows you to change the display colour of the selected product or category. You can change the display colour of each button at any time.

1.7.2 – Adding categories to the till

The Till section of FasTrak Admin is used to set and clear products and categories on till displays.

Only an *Administration* user type can make changes to the till display.

Before being able to set categories on your till, you first need to add the categories that you want to use to FasTrak Admin. You can set up to 30 products per category on the till. A total of 8 categories are available.

Set a category

To add a category to the till, follow these steps:

1. Select the category button that you want to set.
2. From the list of colours, select which colour you want the selected category button to be.
3. Select *Set Category* from the toolbar.
4. In the window that appears, enter a suitable name for the category. You can enter a second line if needed.
5. If you want to apply a meal deal discount to the category, tick the relevant option. The list of discounts is generated from the meal deals you add.
6. Select *OK* to set the category, or *Cancel* to return to the till view without setting the category.

If you want to make any changes to buttons that you have already set, simply repeat the above steps. Select *Save Changes* from the toolbar to save the till display.

Clear a category

If you want to clear a product from one of the till buttons, select the button and then select *Clear Product* from the toolbar. Select *Save Changes* to save the till display. Note that if you just want to make changes to a product button, you do not need to clear it first.

1.7.3 – Adding products to the till

The Till section of FasTrak Admin is used to set and clear products and categories on till displays.

Only an *Administration* user type can make changes to the till display.

Before being able to set products on your till, you first need to add the products that you want to use to FasTrak Admin. You can set up to 30 products per category on the till display. A total of 8 categories are available.

Set a product

Note that you'll need to set up categories before setting products. Categories are used to group certain products together.

To add a product to the till, follow these steps:

1. Select the category button that you want the product to appear under.
2. Select one of the product buttons on the till where you want the product to appear.
3. From the list of products, select which one you want to set on the selected button.
4. (Optional) From the list of colours, select which colour you want the selected product button to be. You can change the colour at any time.
5. Select *Set Product* from the toolbar.

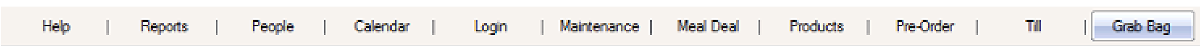
If you want to make any changes to buttons that you have already set, simply repeat the above steps. Select *Save Changes* from the toolbar to save the till display.

Clear a product

If you want to clear a product from one of the till buttons, select the button and then select *Clear Product* from the toolbar. Select *Save Changes* to save the till display. If you just want to make changes to a product button that has already been set, you do not need to clear it first.

1.7.4 – Setting up a Grab Bag till

The Grab Bag section of FasTrak Admin is used to set and clear products and categories on grab bag till displays.



Only an *Administration* user type can make changes to the grab bag till display.

Before being able to set products on your grab bag till, you first need to add the products that you want to use to FasTrak Admin.

Create a grab bag

Description - Add a description for the grab bag you're adding.
Line 1 / Line 2 - When you add grab bags to the grab bag till, these two lines are displayed as shown in the following image:

PLU - Enter the price look-up code, if needed.

Student Cost Option - Choose whether the grab bag is free or paid, and if it has VAT applied. This option only applies to students.
Price - Enter the price you want to charge for the grab bag.
VAT - The VAT is automatically calculated depending on the value set in *Maintenance - Financial Setup - VAT*.
Other Cost Option - Set the price of the grab bag for non-students, e.g. staff members. You can use the same price as set for students, or set a different price as needed.

Select *OK* to save the product, or *Cancel* to discard your changes and return to the administration window.

Add a product to a grab bag

To add a product to the grab bag till, follow these steps:

1. Select the grab bag category button that you want the product to appear under.
2. Select one of the product buttons on the grab bag till where you want the product to appear.
3. From the list of products, select which one you want to set on the selected button.

4. (Optional) From the list of colours, select which colour you want the selected product button to be. You can change the colour at any time.
5. Select *Product Set* from the toolbar.

If you want to make any changes to buttons that you have already set, simply repeat the above steps. Select *Save Changes* from the toolbar to save the till display.

Clear a product

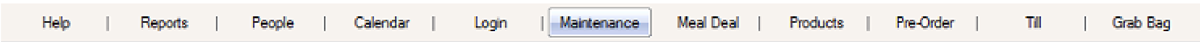
If you want to clear a product from one of the grab bag till buttons, select the button and then select *Product Clear* from the toolbar. Select *Save Changes* to save the till display. If you just want to make changes to a product button that has already been set, you do not need to clear it first.

You can change the number of product rows on the grab bag till here: *Maintenance - Admin Setup - Grab Bag*.

1.8 – FasTrak Maintenance

The maintenance section of FasTrak Admin is used for:

- Running the end of day process
- Confirming any outstanding pre-orders
- Changing FasTrak settings



1.8.1 – End of day process

The end of day process is **required** at the end of each day because it is used to calculate daily reports and to set the following day's menu. Any outstanding pre-orders (if pre-orders are being used) must be confirmed before you can run the end of day process.

This process is non-reversible. Only authorised staff members should run this process.

The end of day process has the following steps:

- Reclaim all unused Free School Meals and Universal Free School Meal allowances
- Create an End of Day report. All of the day's transactions will be in this report which will automatically be opened when you finish the end of day process, allowing you to print or save the report as needed. You can also find this report in *Reports - End of Day*.
- Credit people's accounts with Free School Meal allowances for the next day.
- Select a menu for the next day.

You must be logged in as an **Administration** user to run the end of day process.

1.8.2 – Reval Control

Note: This section only applies if your FasTrak system is using Revaluation machines (also known as cash loaders).

The Reval Control section is used to view the live status of connected cash loaders, put the machines in cashing up mode or maintenance mode, and for taking a backup of transactions.

Navigate to *Maintenance – Reval Control*. The Reval control window will open, where you can view all connected cash loaders. From this window you can turn cash loaders off for cashing up and/or maintenance (both options stop any new cash deposits through the units), and turn them back on again when they are ready to accept new deposits.

1.8.3 – Setting Tables and Seats

Table and seating arrangements can be used when you want finer control of your dining area. In FasTrak, you can create a list of tables and define the number of seats available at each one. Optionally, you can also create different sittings for each table, such as for breakfast and lunch.

To create your tables, navigate to *Maintenance – Tables*. The following options are available:

Name – Enter a suitable name for your table, something which will make it easy to identify if you need to make future changes.

Sitting – If you want to differentiate between tables at certain times through the day, you can add a sitting, e.g. Table 1 – Breakfast, or Table 1 – Lunch.

Seats – Enter the number of seats that are available at the table.

To add your table to the list, select **Add**.

To edit an existing table, select it in the list, make the changes you want to the Name, Sitting, or Seats, and then select **Update**.

To remove a table, select it in the list and then click **Remove**.

Select *OK* to save the current list of tables, or *Cancel* to discard your changes and return to FasTrak.

The tables that you add here will become available options in *People – Table/Seat* (See [*1.0.5 – Table and seating arrangements*] for information on how to allocate tables/seats to people).

1.8.4 – Setting Zones and Locations

One of the potential uses of the Zones and Locations feature is to allow larger sites to group multiple dining locations together.

To create zones and locations, navigate to *Maintenance – Zones*. The following options are available:

<u>Zones</u>
This is the list of zones currently available. When using this feature for the first time, this list will be empty.

- **Name** – Enter a suitable name for the zone, something which will make it easy to identify if you need to make future changes.
- **Add/Remove** – Add or remove a zone from the list.
- **Update** – Update the locations of the selected zone with any selected options from the Locations list.

<u>Locations</u>
This is the list of currently available locations. This list is pre-populated with the names allocated to each connected cash loader, and you can also add your own locations.

- **Name** – Enter a suitable name for the location.
- **Add/Remove** – Add or remove a location from the list.

To add a location to a zone, simply tick it in the location list and then select **Update**.

Select *OK* to save the current list of tables, or *Cancel* to discard your changes and return to FasTrak.

1.8.5 – Confirm outstanding pre-orders

This option is used to confirm that all pre-orders have been taken. When you use this option, all pre-orders for the current day will be marked as completed (collected).

You will not be able to run the end of day process until all pre-orders are confirmed either at the till or by using this option.

You will be asked to confirm that you want to continue when you select this option. If you continue, pre-orders will be confirmed as having been taken, and a summary window will appear informing you of the amount of pre-orders that have been confirmed.

If all pre-orders have been collected at the till, you won't need to use this option.

1.8.6 – FasTrak settings

By navigating to *Maintenance – Settings*, you can change a number of options for FasTrak. Note that caution should be taken when changing these settings. If you are unsure of what a setting does, please contact your support provider for assistance.

For each setting you change, remember to select the *Save* button to apply your changes.

<u>Admin Setup</u>

- Grab Bag
    - Number of product rows on the grab bag till
        - Default value: 3
- Max Image Size
    - Maximum size in Kb of an imported image
        - Default value: 64
- Till
    - Which tills to display (standard/grab bag/both)
        - Default value: None

<u>Client Setup</u>

- Allow Cash Transactions
    - Allow cash transaction on the till
        - Default value: No
- Demo Mode
    - Sets the client into demo mode
        - Default value: False
- Display Balance
    - Show balances on the till line display
        - Default value: Display Student balance
- Display Startup Message
    - The startup message on the till line display
        - Default value: Cashless Catering [Version]
- Grab Bag Barcode
    - Print a transaction barcode on the grab bag till receipts
        - Default value: Print Barcode
- Grab Bag Display
    - Displays message on till when in grab bag mode

        - Default value: Please choose a grab bag
- Idle Time Delay
    - The time in minutes before any idle time processing begins
        - Default value: 30
- Logo Name
    - The default logo file located in the html\image folder
        - Default value: FasTrak [logo name].png
- Name Display
    - The way customer names are displayed on-screen
        - Default value: First Name / Last Name
- Play Sound
    - The client uses sound
        - Default value: False
- Preorder Till
    - The return choice page for the preorder till
        - Default value: Remain on photo page
- Print Footer
    - The footer printed on till receipts
        - Default value: Printed by FasTrak
- Print Header
    - The header printed on till receipts
        - Default value: FasTrak Catering
- Print Startup
    - Test the printer when the till is connected
        - Default value: None
- Registration
    - Registration option for the whiteboard client
        - Default value: Preorder Registration
- Test Day End
    - Test for preorders from previous days indicating no day end has been run
        - Default value: Test for anomalous preorders
- Warning Popup Footer
    - The footer for the warning popup
        - Default value: Do you wish to continue?
- Warning Popup Header
    - The header for the warning popup
        - Default value: The chosen product contains
- Warning Popup Title
    - The title of the warning popup
        - Default value: Product Warning

Financial Setup

- Balance Minimum
    - The minimum balance warning level
        - Default value: 5.00
- Balance Warn
    - The warning level for a balance
        - Default value: 10.00
- FSM Amount
    - Amount credited to an account for free school meals
        - Default value: 2.00
- Global Daily Spend

  - The global daily spend limit
    - Default value: 10.00
- Global Overdraft Limit
  - The global allowable overdraft
    - Default value: 10.00
- SVM Amount
  - The supervisor meals allowance
    - Default value: 2.40
- UIFSM Amount
  - Universal free school meals allowance
    - Default value: 2.30
- UIFSM Classes
  - Classes qualifying for Universal Infant Free School Meals
    - Default value: Nursery, 1A, 2A
- UIFSM Years
  - Year-groups qualifying for Universal Infant Free School Meals
    - Default value: n/a
- VAT
  - The current VAT rate
    - Default value: 20.00

PreOrder Settings

- Copy Advanced Interval
  - Delay between attempts to copy online pre-orders to current pre-orders
    - Default value: 20 minutes
- Cut-off Days
  - A pre-order cannot be set or changed less than this far ahead
    - Default value: 1 day
- Menu Upload Interval
  - Time to wait between attempts to upload menus
    - Default value: 50 minutes
- Pre-Order Download Interval
  - Time to wait between attempts to download pre-orders
    - Default value: 30 minutes

Proxy Settings

- Enabled
  - The system uses a proxy server
    - Default value: False
- Password
  - The password associated with username for proxy server
- Proxy Address
  - Address and port of the proxy server
- UserName
  - A username that can be used to connect to proxy server

Reports

- Document Heading Logo
  - The logo used in reports
    - Default value: FasTrak.png
- Table Heading Colour
  - The colour used by the table headings
    - Default value: 255,140,0

sQuid Options

- End Point Address
    - End point address for sQuid connection
        - Default value: False
- IssuerId
    - Issuer ID provided by FasTrak / sQuid
- MerchantId
    - Merchant ID provided by FasTrak / sQuid
- Password
    - Password provided by FasTrak / sQuid
- Writeback Delay
    - Delay in seconds between updates
        - Default value: 5

ParentPay Options

- DinerSnapshotID
    - ID of last Diner Dataset processed - Internal Usage
- Enabled
    - Turn on ParentPay integration
        - Default value: False
- End Point Address
    - End Point Address for ParentPay Connection
- LastPaymentID
    - ID of last payment processed - Internal Usage
- LastTransactionID
    - ID of last transaction processed - Internal Usage
- MenuSnapshotID
    - ID of last menu dataset processed - Internal Usage
- MenuSourceID
    - MenuSource ID provided by FasTrak / ParentPay
- Password
    - Password provided by FasTrak / ParentPay
- SchoolID
    - School ID provided by FasTrak / ParentPay
- Username
    - Username provided by FasTrak / ParentPay
- Writeback Delay
    - Delay in seconds between updates
        - Default value: 5

Today

- Selected Menu
    - Sets which week index is used for the current pre-order menu
        - Default value: 0

Transaction

- Transaction Point
    - The point at which a transaction is complete
        - Default value: At collection

Appendix 1 – Troubleshooting

Errors when logging in to FasTrak Admin or FasTrak Client

- You receive a 'Network Error' when logging in
    - Ensure the FasTrak Server service is started by checking the *Control* tab in FasTrak Server Setup.
    - In FasTrak Server Setup's *Database* tab, set FasTrak Server's log file to Level 2 or above and restart the service. Select *View Log* to check the log for any errors. Note that you should set the log level to L2 for normal use, as prolonged use of higher levels will generate high amounts of data.

Users not being updated from IDManager

- In FasTrak Server Setup:
    - Ensure the Gateway service is started under the *Control* tab.
    - Check that the IP/port and login details are correct for both the FasTrak and IDManager connections under the *Gateway* tab.
- In IDManager:
    - Ensure users are enabled for the program by selecting users and navigating to *Edit Person - Programs* in IDManager's people view.

Using FasTrak

- There is no till view in FasTrak Admin
    - Enable the till view by navigating to *Maintenance - Admin Setup - Till*. You can enable the normal till, the grab bag till, or both.
- Need to enable or disable the 'Mark Present' button in Client
    - Navigate to *Maintenance - Client Setup - Registration*. From here you can select pre-order registration (displays the button) or no registration (hides the button).
- A login doesn't have access to a certain feature, or needs it's access removed
    - In FasTrak Admin, select the Login view. From here you can edit client logins to enable/disable access to certain client features.
- When I log in to FasTrak Client, it exits immediately
    - The login you're using probably only has the 'Exit Application' option enabled. Confirm this by navigating to the Login view and editing your login.