



InTouch Terminal Operations: Customer History

ID: 185538 ACTIVITY C Yes
Grade: 11 Account Balance: (\$70.00)

Receipts Fines Fees Account Notes

3/5/2012 4:10:38 PM

Customer Ledger

InTouch Public Schools
123 Main St
Fife, WA 98424

Dates 7/1/2010 - 3/6/2012
Excludes Charges On Account
Includes Deposits On Account

To the Parent/Guardian of:
Miriam Acosta Parra
123 Main St
Fife WA 98424

Customer Id: 185538
Phone Number: 555-5555
Grade: 11

Receipt #: 567639 Origin Site: Lincoln High School
Date/Time: 2/14/2012 11:45:00 AM Destination Site: Lincoln High School

Item	Item Description	Memo	Qty	Price	Line Total
F5592	INTRO FASHION & INTERIOR DESIG		1.00	\$10.00	\$10.00
1301	ATHLETICS - SPORTS FEE		1.00	\$70.00	\$70.00
3459	PSAT	THE PSAT TEST IS ON OCTOBER 15TH AT 8 AM!	1.00	\$20.00	\$20.00
3470	ACTIVITY CARDS		1.00	\$16.00	\$16.00
				Total	\$118.00

Receipt #: 567410 Origin Site: Lincoln High School
Date/Time: 1/31/2012 12:31:00 PM Destination Site: Lincoln High School

Item	Item Description	Memo	Qty	Price	Line Total
3470	ACTIVITY CARDS		1.00	\$16.00	\$16.00
				Total	\$16.00

Tax: 0.00
Total: 0.00

Enter Fines Finish Sale
Enter Fees Quick Screen
Customer History Lookup Student
Customer Info Lookup Non-Student
InTouch Manager Lookup Inventory
Logout More...

Enlarge Print Done

Steps:

- Lookup a Student (or non-student)
- Select the "Customer History" Button
- Select a Tab to view (Receipts, Fines or Fees, Account, Notes)
- Print as needed

Tabs

Receipts: items paid for with any tender – the date range for this presentation is controlled in the manager section, setup/general settings/rollover date

- PRINT at the bottom of the screen will print on the receipt printer
- Selecting the printer at the top of screen will print to laser printer

Fines: Fine ledger for open fines only and payment history on open fines¹

¹ Open fines and fees are fines/fees with a balance due, not fines fully paid or cleared. For a complete fine/fee history, use the manager report for fines/fees and select, "include paid fine and fees"



InTouch Terminal Operations: Customer History

Fees: Fees charged from the terminal or mass fee interface, only open fees and their payment history

Account: an account ledger for all account-related activities – account related activities include use of account tender, account billings, account billing adjustments, mass billings

Notes: Ability to add notes to a student's records – viewed only by InTouch terminal users, notes are not viewable by the parent over the counter or online

Customer Ledger Date Range Control

The screenshot shows the 'InTouch Manager - [General Settings]' window. On the left is a navigation menu with buttons for 'Account Setup', 'Reports', 'Functions', 'Misc', and 'Setup'. The main area is titled 'Site: Lincoln High School'. It contains two sections: 'Over/Short Settings' and 'Other Settings'.
Under 'Over/Short Settings', there are two lists of codes. The 'Debit' list includes: 3465 - PARKING-PERMIT, 3465-A - PARKING-REPLACEMENT, 3465-B - COVERED PARKING FOR RICH KIDS, 3465C - CHEAP PARKING, and 3468 - AUXILIARY OVER/SHORT ACCOUNT (highlighted in blue). The 'Cash' list includes: BRCOMBO - BUILDING RENTAL COMB., BRCUST - CUSTODIAL CHARGES, BRSEC - SECURITY CHARGES, bsc - BEFORE SCHOOL CARE, and CASH - CASH (highlighted in blue). A 'Save' button is at the bottom right of this section.
Under 'Other Settings', there is a 'Rollover Date:' field with a calendar icon, set to '7/ 1/2010' (highlighted in yellow). Below it is a 'Multi-Shift:' dropdown menu set to 'False'. A 'Save' button is at the bottom right of this section.

Many times the point of sale user does NOT want to see a 10 year receipt student history – by setting the rollover date in **manager/misc/general settings** properly, the terminal report is truncated –

Best practices: in this setting, normally set the report date to be 07/31/YYYY where year is the current year.

InTouch User Observations

- This is a very quick and useful tool to receive payment or debt status information
- Use of notes will allow records for payment plans and NSF transactions