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Cash Tray Setup



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Configuring Cash Trays

Purpose

Cash Tray options must be configured for correct initialization and operation. Cash Tray Options are located in Locations, Jobs and Packages. The necessary steps to configure Cash Trays are listed below.

Restrictions

The user must have the Locations, jobs and Packages Job Rights to modify the Cash Tray information in Locations, Jobs and Packages respectively. A drawer must also be configured on the station to be able to use the Cash Tray functionality.

Steps to Configure Cash Trays

1. Configure Cash Tray Options for the Location.

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2. Configure Cash Tray Options for the Job.

3. Configure a Cash Tray Command in Packages.

Step 1: Configure Cash Tray Options for the Location

- Access Setup > Locations > Cash Trays.
- Select the Location that contains the Station with the cash drawer. Note: A drawer should already be configured in Locations > Station > Devices.
- Select the Require Open Before Use option.
- Select the Prompt for Starting Bank option if the user is expected to enter the beginning bank for the drawer.
- Enter the default beginning Bank Amount. Note: The beginning Bank Amount may be modified during the How to Open a Cash Tray with the Cash Tray Command procedure if the Prompt for Starting Bank option is selected.
- Select the One User Per Tray option if only one employee is allowed access to the cash drawer.
- Enter the number of Drawer Reports to print when the Cash Tray is closed.
- Select the Drawer Report that will print when the Cash Tray is closed.
- Select the Shift Inventory Worksheet that contains the Inventory Items displayed on the Inventory Counts Section of the Drawer Report for the Cash Tray. The Inventory Counts Section shows the variance between stock and usage levels for the Inventory Items contained in the Shift Inventory Worksheet.

Step 2: Configure Cash Tray Options for the Job

- Access Setup > Employees > Jobs > Rights.
- Select the Job that will access the Cash Tray.
- Select the Cashier - (Tray) Required Job Right.
- Select the Cashier - (Tray) Select at Clock In Job Right to allow employees to open/assign themselves to a Cash Tray at Clock In. Note: The employee will be automatically prompted to enter the Starting Bank if the Locations > Cash Trays > Prompt for Starting Bank option has been selected.
- Select the Cashier - (Tray) Open/Close Job Right if the employee is allowed to assign other employees to a Cash Tray after clocking in. This Job Right also allows the employee to Close the Cash Tray for the shift.
- Select the Cashier - (Tray) Declare Cash Job Right if the employee is allowed to enter the ending amount of cash in the drawer.
- Select the Drawer Report View Job Right if the employee is allowed to view the Drawer Report before the Cash Tray has been closed.
- Select the Drawer Report Print Job Right if the employee is allowed to print the Drawer Report before the Cash Tray has been closed.

- Select the Drawer Report - Access Other's Reports Job Right if the employee is allowed to view/print the Drawer Report for Cash Trays they are not assigned.

Step 3: Create a Package with a Cash Tray Command

- Access Setup > Packages
- Select the Package that will contain the Cash TrayCommand
- Select Command for the Type and Cash Tray for the Item.
- Click Save
- Click Close



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