

How to Set Up a Register in Web UFS for School Services

QUESTION

How do I set up a register for a School Services Unit?

ANSWER

1. Go to **Revenues > Cash Setup > Register**
2. Click on **Add**.
3. Enter the number you are assigning to the register.
 - a. The user determines the register number.
 - b. This number can be between 1 and 999.
4. Enter the name you are assigning to the register in the *Description* field.
 - a. The user determines the register description.
 - b. The description can be up to 30 characters.
5. Enter the school number you are assigning to the register, or click on the **School No.** dropdown and select from the list.
 - a. UFS will automatically display the contents of the *Unit Number* field.
6. Enter the **Asset Number** of the register.
 - a. Contact the Fixed Asset Dept. at the Buffalo Service Center(BSC) to obtain asset numbers.
7. Enter the register model worksheet number for which you are setting up this register, or click on *Worksheet No.* dropdown and select for the list.
8. Enter the current register reading.
9. Enter the state and zip code of the location of the register.
10. Input the POS number, if applicable.
11. Enter the default change fund amount. This amount will display on the *Cash Entry* tab.
12. Select the Register Type: **Cumulative, Daily, or Cash Box**
13. Click on **Tax Rates**
14. Click on the magnifying glass to bring up the Tax Rate Lookup list.
15. Click on the appropriate tax rate.
 - a. If multiple rates are needed, click on **Insert** and repeat *Steps 14-15*.
16. Click on **OK** when all tax applicable tax rates have been added.
 - a. You must assign a tax rate to the register, as this information is required by the Buffalo Service Center Tax Department.
 - b. Contact the Tax Department at the BCS if there are any questions about sales tax rates.
17. Click on **Save**
18. Click on **OK** to the confirmation message.
19. Click on **Cancel** when finished adding all needed registers.