

PowerLunch User Guide

**PowerSchool
Student Information System**



PowerSchool

Document Properties

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Owner	Technical Communication and Documentation
Last Updated	8/10/2004
Version	4.0

Please send comments, suggestions, or requests for this document to manuals@powerschool.com. Your feedback is appreciated.

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Introduction

Use PowerSchool Help to learn the PowerSchool Student Information System (SIS) and to serve as a reference for your daily work. However, before you can begin using PowerSchool, the PowerSchool administrator at your school must set up the system and import the data from your previous system. Once those steps are complete, you can start using PowerSchool. Use PowerSchool Help to assist you in navigating in PowerSchool.

PowerSchool Help is updated as PowerSchool is updated. Not all versions of PowerSchool Help are available in a printable guide. For the most up-to-date information, click Help on any page in PowerSchool.

There are user guides available that include the same information as PowerSchool Help for each major release of PowerSchool. These user guides include instructions for certain user roles, though these roles will vary depending on your school or district's circumstances. For the most recent version of the printable guides, visit the PowerSchool Customer Support web site at <https://www.powerschool.com/support/documentation/userguides/>. This URL is case-sensitive.

Note: You need a username and password to view anything on the PowerSchool Customer Support web site. Contact your PowerSchool administrator for access.

You are encouraged to read each section of the help that pertains to you. While the introductory sections build a foundation of knowledge that you will use every time you log on to PowerSchool, the remaining sections are independent of each other and can be read in any order. However, if you have never used PowerSchool before, it will be most helpful if you start with the section "[Introduction to PowerSchool](#)." Whenever you read this guide, keep the following points in mind:

- The actions you can perform in PowerSchool depend on your job responsibilities and subsequently on your level of access to PowerSchool. Some users only have viewing rights to some pages. Others can view or edit any page. Still other users can view or edit any page, and create new ones as well. Finally, some pages are view-only for everyone. This guide outlines viewing, editing, and creating options for most pages. Depending on your needs and your level of access, only certain options will be applicable and available to you. If you find that your work requires a greater level of access, contact the system administrator at your school.
- Almost all of the activities described in this guide begin by selecting the appropriate student or group; thus, it is imperative that you understand how to search for and select a student. For detailed instructions on how to do this, refer to the section "[Search and Select](#)."
- The school and student records used in this guide differ from those displayed on your page as you work. You will work with real data based on student records at your school. The graphics in this guide are only examples.
- In PowerSchool, different pages provide some of the same information because you view the same data from a different place each time. If you add, change, or delete data on one page, it will be added, changed, or deleted on other pages that contain the same field(s) of data.

- The reporting features described in this guide are some of the most important you will use in the system. A PowerSchool report is a statement of student or staff records that is produced for viewing or printing and can include information text in addition to the report listings. PowerSchool reports include report cards, lists of class schedules, lunch balance sheets, mailing labels, lists of current staff members, and attendance records.
- Use PowerSchool to create numerous types of reports that pull selected data quickly and easily. Select from a list of pre-configured reports that have preset parameters or create a custom report to include parameters needed for a specific task. You should read the sections "**Custom Reports**" and "**Pre-Configured Reports**" before creating a report.

Legend

- This guide uses the > symbol to move down a menu path. Thus, if instructed to "Click File > New > Window", begin by clicking the File menu. Then, click New and Window. The option noted after the > symbol will always be on the menu that results from your previous selection.
- It is easy to identify notes because they are indented and prefaced by the text **Notes:**.

Audience

This document is intended for cafeteria personnel.

PowerLunch

PowerLunch is the lunch management portion of PowerSchool. The system helps you monitor meals sold including free and reduced lunches as well as student account balances and transactions. For more information on types of meals, see the section "[Meal Classifications](#)."

PowerLunch is compatible with a wide selection of bar code and magnetic-strip readers; if your school is properly equipped, students can use their lunch ID to have their account automatically debited as they pass through the lunch line. A full array of reports is available, including meal count reports and transaction reports.

You are encouraged to read the section "[Introduction to PowerSchool](#)" if you have not already done so. In addition, the section "[Custom Reports](#)" will be helpful to you in creating and running reports in PowerLunch.

PowerLunch Security

Before you can access PowerLunch, you need to enter your username and password. Everyone who uses PowerLunch must have a confidential password. Do not share your password. Doing so compromises the security of the PowerSchool system.

In addition, it is best to memorize your password. If you think you will not remember it and must write it down, keep it in a secure place. Imagine the problems if a student enters the system with your username and password!

There are three pieces of information you must have before you can log in to PowerLunch.

PowerSchool URL

Since PowerSchool is web-based, the system at your school must have an Internet address. Access PowerLunch from the PowerSchool start page.

Username

Your PowerSchool administrator assigns your username, which can be a variation of your first or last name. If you are not sure of your username, contact your PowerSchool administrator.

Password

Your PowerSchool administrator assigns your password. When you log in to PowerSchool Teacher, you must enter your password exactly as it is assigned. Spelling is important! If you do not know your password, contact your PowerSchool administrator. You cannot access PowerSchool Teacher without it.

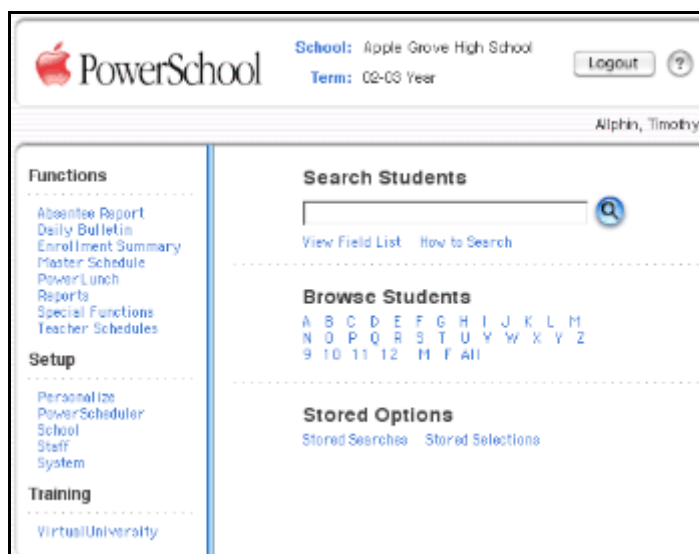
Note: Do not use your colleague's password or give your password to anyone. Security is very important in PowerSchool. For more information, see the section "[Security](#)."

How to Log In to PowerLunch

1. Open your web browser to your school's PowerSchool URL. The Log On page appears.



2. Enter your username, followed by a semicolon, then your password. The characters display as asterisks (*) to ensure greater security when you log in. For example, when Chris Smith enters chriss;password, it appears in the password field as *****.
3. Click Enter. The start page appears, and you are logged in to PowerSchool.



How to Log Out of PowerLunch

When you finish your work in PowerLunch, it is important to log out. Do so from any page in the system.

1. Click Logout in the navigation bar.



2. The password page appears, and you must enter your password again to redisplay the start page.



Meal Classifications

PowerLunch meal classifications include two main groups of patrons: students and adults.

Student Meal Classifications

PowerLunch classifies cafeteria patrons into several categories. This helps schools maintain records on how many meals are sold. Additionally, use the classifications to prepare reports for government funding. It is important to understand each category before you can set up PowerLunch for your school.

Students

Most people that eat lunch at school are students. They are divided into six groups based on the amount each pays for meals.

Free

These students have qualified for the free lunch program and are not charged for meals. This is based on the financial situation of the students' families.

Reduced

These students have qualified for a reduced price for meals. This is based on the financial situation of the students' families.

Full Pay

These students pay the full, standard price for meals.

Exempt

These students do not pay for their lunch because of special programs set up by the school. Some schools exempt students because they periodically work in the cafeteria in exchange for lunch. Others allow it because the student has participated in another program that benefits the school in some way. If a school does have such a program, students are exempt for specific days only. Generally, students are not exempt from paying for lunch everyday. If a student is exempt, the government does not subsidize that lunch.

It is important to understand that exempt students are not the same as those who receive free lunches. Whether a student receives free lunches or not depends on the family's financial situation. Students who are exempt from paying for lunch are designated as such because they participate in a school program that allows for it. If a student is exempt, the government does not subsidize that lunch, whereas a free lunch is subsidized.

Free-Direct Certification

These students do not eat each lunch and are not counted in the eligibility counts for PowerLunch reports.

Guest

These students visit the school and receive lunch there.

Adult Meal Classifications

While most meals are served to students, some are served to adults. There are three classifications for adult patrons.

Staff

Staff work at the school or in the school district. Staff members include teachers, administrators, counselors, custodial staff, and maintenance workers.

Guest

These adult patrons do not work at the school. Parents and PowerSchool trainers are guests.

Earned

These adults have earned a free meal by working at the school. Some schools offer this type of program to those who work in the cafeteria or other part of the school. This classification is the equivalent of the exempt status for students.

PowerLunch Initialization

At most schools, the PowerSchool administrator sets up PowerLunch with the input of cafeteria staff. If you are responsible for setup, follow the instructions in this section and in the section "[Free and Reduced Lunches](#)."

How to Set Prices

Set up a price list for the different categories of patrons at your school. Each category pays a different price for meals depending on their role at your school and their financial situation.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

- Click "Set Prices and Options." The "Set Prices and Options" page appears.

Patron Type	Breakfast Prices	Second Breakfast Prices	Lunch Prices	Second Lunch Prices
Student Full Price	<input type="text" value="2.00"/>	<input type="text" value="2.50"/>	<input type="text" value="3.50"/>	<input type="text" value="4.00"/>
Student Free Price	Free	<input type="text" value="2.5"/>	Free	<input type="text" value="4"/>
Student Reduced Price	<input type="text" value="1.75"/>	<input type="text" value="2.25"/>	<input type="text" value="3.25"/>	<input type="text" value="3.75"/>
Student Guest Price	<input type="text" value="2.50"/>	<input type="text" value="3.00"/>	<input type="text" value="4.00"/>	<input type="text" value="4.50"/>
Staff Member	<input type="text" value="2.50"/>	<input type="text" value="3.00"/>	<input type="text" value="4.00"/>	<input type="text" value="4.50"/>
Adult Guest	<input type="text" value="3.00"/>	<input type="text" value="3.50"/>	<input type="text" value="4.50"/>	<input type="text" value="5.00"/>

Auto-calculate cash if account is deficit
 Use single-screen lunch process (QuickSale)
 Show student photo on screen
 Don't use false balance for free lunch students
 Allow students from any school through the lunch line (affects all schools)

[PowerLunch Main Menu](#)

- Use the following table to enter information in the fields:

Field	Description
Breakfast Prices	<p>Enter the price of breakfast for all categories of patrons. It is not necessary to enter a dollar sign, but you must use a decimal point.</p> <p>You cannot edit the Student Free Price field because students with a Free status do not have to pay for their first meal.</p>
Second Breakfast Prices	<p>Enter the price of breakfast for all categories of patrons. You can charge patrons receiving free or reduced meals the full meal price in Quicksale mode when they purchase a second meal. Additionally, this will put these second meals under the paid heading on the Meal Count Listing report. It is not necessary to enter a dollar sign when entering the price.</p>
Lunch Prices	<p>Enter the price of lunch for all categories of patrons. It is not necessary to enter a dollar sign when entering the price.</p> <p>You cannot edit the Student Free Price field because students with a Free status do not have to pay for their first meal.</p>
Second Lunch Prices	<p>Enter the price of lunch for all categories of patrons. You can charge patrons receiving free or reduced meals the full meal price in Quicksale mode when they purchase a second meal. Additionally, this will put these second meals under the paid heading on the Meal Count Listing report. It is not necessary to enter a dollar sign when entering the price.</p>
Auto-calculate cash if the account is deficit	<p>Select this checkbox to automatically calculate cash if the patron's account does not have enough of a balance to cover the meal (optional).</p>
Use single-screen lunch process (Quicksale)	<p>Select this checkbox to have the lunch process (Quicksale) display and to set a full-priced meal as the default. This step is optional, but you are encouraged to use it. For more information on Quicksale, see the section "Daily Activities."</p>
Show student photo on screen	<p>Select this checkbox to display the patron's photo on the page (optional). This option is only available if student photos have been imported into PowerSchool.</p>
Don't use false balance for free lunch students	<p>Select this checkbox if you do not use false balances for free lunch students. This allows the student's free or reduced lunch price to appear on the page. This also allows low-balance messages to appear. Selecting this checkbox can create confidentiality issues if others view the page.</p>
Allow students from any school through the lunch line	<p>Select this checkbox to allow students from any school through the lunch line (optional). Often, this refers to other students in your school district. This affects all schools on your PowerSchool system.</p>

- Click Submit. The Changes Recorded page appears.
Your prices are set, and you are ready to set messages that appear on the page during transactions.

How to Set Messages

These are warning messages that appear when a student's account balance gets low or becomes deficit. Set up another message to tell the cashier if a student is eating a second meal for the day. If you do not want a message for a specific event, leave that field blank.

- On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

- Click Set Messages. The Set Messages page appears.

Set Messages	
When account balance drops below this level...	<input type="text" value="3.00"/>
...display this message: (this school only)	<input type="text" value="Needs to deposit more money!"/>
When there is not enough money in the account, display this message... (all schools)	<input type="text" value="Insufficient funds to cover this meal"/>
When patron is purchasing a 2nd meal, display this message... (all schools)	<input type="text" value="2nd MEAL WARNING No IOU's after a -\$5.00 balance!!"/>
PowerLunch Main Menu	
<input type="button" value="Submit"/>	

- Use the following table to enter information in the fields:

Field	Description
When account balance drops below this level	Enter the dollar amount of the cut-off if you want to display a message when the patron's account balance drops below this level. This selection applies to your school only.
Display this message	If you entered a dollar amount in the previous field, enter the message to appear on the page when the student's balance is low.
When there is not enough money in the account	If you want to be warned when there is not enough money in the patron's account to pay for the meal, enter the message to appear on the page. This selection applies to all schools on your PowerSchool system.
When patron is purchasing a second meal	If you want to be warned when a patron is purchasing a second meal for the day, enter the message to appear on the page. This is especially important when the student purchasing the extra meal receives free or reduced lunches. This selection applies to all schools on your PowerSchool system.

4. Click Submit. The PowerLunch page appears.

Your warning messages are set, and you are ready to assign lunch ID numbers.

How to Create Lunch ID Numbers for Students

Assign numbers to a group of students or to an individual. Lunch ID numbers may or may not be the same numbers as the student ID numbers. They are linked to the price that students pay for their meals and are used to keep track of students' meal account balances. PowerSchool administrators can assign lunch IDs at some schools.

1. On the start page, select the student or group of students.

Note: If you select a group of students, either choose ID/Password Assignment from the pop-up menu on the Student Selection page and skip to step 5, or continue to the next step.
2. Click the PowerSchool logo to return to the start page.
3. Choose Special Functions from the main menu.
4. On the Special Functions page, click Assign IDs & Passwords. The Assign IDs & Passwords page appears.

Assign IDs & Passwords

For ALL CURRENTLY ENROLLED STUDENTS (changes all IDs/passwords for all students)
 For the selected ID students only
 For Inval'd student ID's only

Don't overwrite any existing IDs or passwords

In case of conflicts append:

Assign Web IDs and passwords Assign Guardian Web IDs and passwords

Each Web ID is characters long and is

Each Web Password is characters long and is

Enable web access accounts for processed students Enable web access accounts for processed Guardians

Assign PowerLink PIN numbers (phone system)

Each PIN is digits long and is

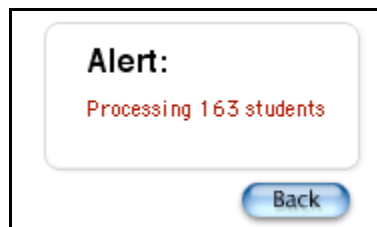
Assign Lunch IDs

Each Lunch ID is digits long and is

5. Use the following table to enter information in the fields:

Field	Description
For	Select the option to indicate for whom you want to assign ID numbers.
Don't overwrite any existing IDs or passwords	Select this checkbox if you do not want to overwrite any IDs or passwords already in PowerSchool.
In case of conflicts append	If there is a conflict with an existing ID, choose a suffix from the pop-up menu.
Assign Lunch IDs	Select this checkbox to create only lunch IDs. Ensure that any other checkbox is not selected unintentionally, such as the "Assign Web IDs and passwords" checkbox.
Each Lunch ID is	Choose the number of digits in the lunch IDs from the pop-up menu. Choose how the number will be generated from the pop-up menu.

6. Click Submit. The Alert page appears.



7. Click Back when the process finishes.

How to Create Lunch ID Numbers for Staff

To assign lunch IDs to staff, you must assign them one at a time by going through the Staff page: select the teacher, click Edit Information, enter the lunch ID, and click Submit. This works well for an individual teacher, but sometimes you want to export a list of several teachers, such as during the PowerSchool setup. When you export the staff list to your spreadsheet application, it will be easier to assign lunch ID numbers to each teacher and import that list back into PowerSchool. For more information, see the section "[Work With Groups](#)."

How to Publish Lunch ID Numbers

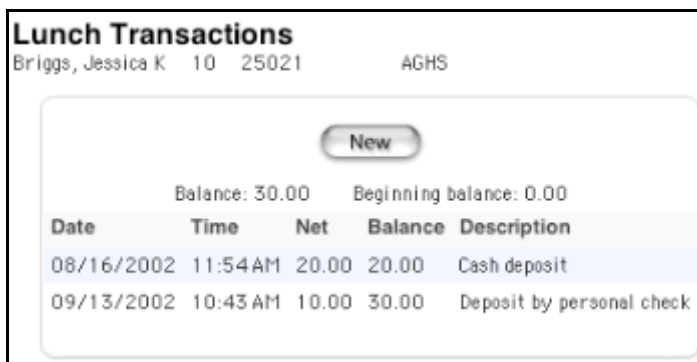
Now that you have assigned lunch ID numbers, you must tell everyone what each person's number is. A popular method of doing this is to create mailing labels with the lunch ID and barcode printed on them. Some schools put the label on a card and laminate it. To download a mailing label layout, visit the PowerSchool help site, <http://help.powerschool.com/viewtopic.html?t=barcode-labels>. For more information on creating mailing labels, see the section "[Mailing Labels](#)."

How to Set Up Beginning Balances

Once everything else is set up and everyone has a lunch ID, you can start collecting lunch money. Most schools that use PowerSchool allow students to deposit money into their accounts so that they do not have to pay cash everyday. This is advantageous for the schools because there are minimal cash transactions. The following instructions explain how to enter the first deposit into an individual student's account and subsequent deposits outside of those occurring as students pass through the lunch line. For instructions on how to handle deposits at the lunch line, see the sections "[Daily Activities](#)" and "[Maintenance Activities](#)."

Note: If you are just setting up PowerLunch or if you are entering the beginning balance for several students, you can enter the data in a spreadsheet application and import it to PowerSchool. Contact your PowerSchool administrator for information on this topic.

1. On the start page, search for and select the student.
2. Choose Lunch Transactions from the student pages menu. The Lunch Transactions page appears.



Lunch Transactions				
Briggs, Jessica K		10 25021	AGHS	
<input type="button" value="New"/>				
		Balance: 30.00	Beginning balance: 0.00	
Date	Time	Net	Balance	Description
08/16/2002	11:54 AM	20.00	20.00	Cash deposit
09/13/2002	10:43 AM	10.00	30.00	Deposit by personal check

3. Click New. The Transaction Record page appears.

Transaction Record

Briggs, Jessica K 10 25021 AGHS

Transaction Date	<input type="text" value="1/24/2003"/>
Description	<input type="text" value="Deposit"/>
Amount of Fee	<input type="text"/>
Amount of Credit	<input type="text" value="30"/>
Tender Type	<input checked="" type="radio"/> Cash <input type="radio"/> Check

4. Use the following table to enter information in the fields:

Field	Description
Transaction Date	Enter the date of the transaction.
Description	Enter a description for the transaction, such as Beginning Balance.
Amount of Fee	It is not necessary to enter an amount in this field since a deposit is being made.
Amount of Credit	Enter the amount of the deposit.
Cash Transaction	Select this checkbox if the transaction is a cash transaction.

5. Click Submit. The Changes Recorded page appears.
6. Click Lunch Transactions to display the transaction. The balance updates to reflect the deposit.

Lunch Transactions

Briggs, Jessica K 10 25021 AGHS

Balance: 60.00 Beginning balance: 0.00

Date	Time	Net	Balance	Description
08/16/2002	11:54 AM	20.00	20.00	Cash deposit
09/13/2002	10:43 AM	10.00	30.00	Deposit by personal check
01/24/2003	12:31 PM	30.00	60.00	Deposit

Repeat these steps for all students when they make their initial deposit into their meal accounts and subsequent deposits that do not occur while passing through the lunch line.



The steps for entering staff members' first transactions are the same as those above except you must open the Staff page, select the staff member, click Transactions, and click New. Continue this procedure at step 4.

PowerLunch is almost set up. See the section "**Free and Reduced Lunches**" to finish the preparatory activities.

PowerLunch Setup

At most schools, the PowerSchool administrator sets up PowerLunch with the input of cafeteria staff. If you are responsible for setup, follow the instructions in the sections "[PowerLunch Initialization](#)" and "[Free and Reduced Lunches](#)." If it is not your responsibility, you must wait until the PowerSchool administrator finishes setting up PowerLunch before you can use it. When set up is complete, proceed to the section "[Publish Lunch ID Numbers](#)."

No matter who is responsible for setting up PowerLunch, everyone is encouraged to set a bookmark at the PowerLunch page on your computer's web browser. This will save time when you log in to PowerLunch. If you need help setting a bookmark, see the section "[Favorites/Bookmarks](#)."

Once the setup is complete and you have created your bookmark or favorite, begin working with PowerLunch.

Free and Reduced Lunches

This section explains how to set up PowerLunch to serve free and reduced lunches. The first two sections, "[How to Set Eligibility Levels](#)" and "[How to Create Eligibility Letter Templates](#)," must be done before you can start using PowerLunch. This may or may not be the responsibility of your PowerSchool administrator. School administrators follow the last section on evaluating applications every time they receive an application for free or reduced lunches.

How to Set Eligibility Levels

For students to receive free or reduced-price lunches, you must tell PowerSchool what the cut-off amounts are for each type of lunch. Additionally, you must tell PowerSchool how much money a family can earn to be eligible for each type of lunch. The number of people in a household is also a part of the calculation. The state issues the values for these cut-offs that you enter into PowerLunch.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

- Click Meal Program Eligibility. The Meal Program Eligibility page appears.

Meal Program Eligibility

Evaluate Student(s)

Enter the last name(s) of students you wish to evaluate (Multiple names must be separated by semicolons.)

Application number to edit:

Meal Program Administration

[Set Eligibility Levels](#)

Edit Evaluation Letters: [Free](#), [Reduced](#), [Not eligible](#)

[PowerLunch Main Menu](#)

- Click Set Eligibility Levels. The Eligibility Levels page appears.

Eligibility Levels

Household Size	Max Monthly Income to qualify for Free Lunch	Max Monthly Income to qualify for Reduced Lunch
-----------------------	---	--

[PowerLunch Main Menu](#)

- Click New. The Edit Eligibility Level page appears.

Edit Eligibility Level

Option	Value
Household size	<input style="width: 80px;" type="text" value="3"/>
Max monthly income that qualifies for Free meals for this household size	\$ <input style="width: 80px;" type="text" value="2000"/>
Max monthly income that qualifies for Reduced meals for this household size	\$ <input style="width: 80px;" type="text" value="2500"/>

[PowerLunch Main Menu](#)

5. Use the following table to enter information in the fields:

Field	Description
Household Size	Enter the number of household members identified for this meal program.
Max monthly income that qualifies for Free meals for this household size	Enter the maximum monthly income that qualifies a student for free meals for the specified household size.
Max monthly income that qualifies for Reduced meals for this household size	Enter the maximum monthly income that qualifies a student for reduced meals for the specified household size.

6. Click Submit. The Eligibility Levels page appears.

Repeat these steps for each household size indicated by your state's directives.

How to Create Eligibility Letter Templates

When a student applies for a free or reduced lunch, you must inform the parents or guardians of the results of the evaluation. To do this, PowerLunch generates letters. Generating such a letter is discussed in the section "[How to Evaluate an Application](#)," but the following instructions explain how to set up the template for the letter.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

- Click Meal Program Eligibility. The Meal Program Eligibility page appears.

Meal Program Eligibility

Evaluate Student(s)

Enter the last name(s) of students you wish to evaluate
(Multiple names must be separated by semicolons.)

Application number to edit:

Meal Program Administration

[Set Eligibility Levels](#)

Edit Evaluation Letters: [Free](#), [Reduced](#), [Not eligible](#)

[PowerLunch Main Menu](#)

- Click Free. The Free Letter page appears.

Free Letter

Letter to show a student has been approved for FREE Meals

```

<b>~(schoolname)</b>
~(date)

~(name_and_address)

We would like to inform you that based on the information provided in
~(first_name)'s application for free or reduced lunch, ~(he/she) is
eligible for free lunches effective on ~(date).

If you have any questions, please call the school at (555) 555-1212.
                    
```

Use ^ (student_names) to insert student names in the letter.

Use ^ (LunchApplicNo) to insert the application number in the letter.

Use ^ (name_and_address) to insert the name and address of the guardian in the letter.

Use ^ [date] to insert the current date in the letter.

[PowerLunch Main Menu](#)

4. Enter text for the letter to appear when a student is approved as free. Use standard text as well as HTML tags and PowerSchool data codes. For more information, see the sections "[HTML Tags](#)" and "[PowerSchool Data Codes](#)," respectively.

Note: A few of the most common PowerSchool data codes are noted at the bottom of the page to help you complete the letter.

5. Click Submit. The Changes Recorded page appears.
6. Repeat these steps for the other two types of letters: Reduced Lunches and Not Eligible.

Note: To make your work quicker, copy the text and codes from the Free Lunch letter, and paste them into body of the remaining letters. Then simply edit the text or codes to make them fit in the new letters.

PowerLunch is set up. If you want to evaluate an application for free or reduced lunches, see the section "[How to Evaluate an Application](#)." If you want to learn how to serve meals, see the section "[Daily Activities](#)."

How to Evaluate an Application

This section explains how to evaluate a student's application for free or reduced lunches.

Note: The default status for all students is Full Pay. An evaluation resulting in free or reduced lunches changes the status accordingly, and PowerLunch records the free or reduced lunch price in the appropriate student record. When the student passes through the lunch line, either the amount for a reduced lunch is charged to the student's account or there is no charge if the student receives free lunches. All lunches (full pay, reduced, free, and earned) are recorded for reporting purposes.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

- Click Meal Program Eligibility. The Meal Program Eligibility page appears.

Meal Program Eligibility

Evaluate Student(s)

Enter the last name(s) of students you wish to evaluate
(Multiple names must be separated by semicolons.)

Application number to edit:

Meal Program Administration

[Set Eligibility Levels](#)

Edit Evaluation Letters: [Free](#), [Reduced](#), [Not eligible](#)

[PowerLunch Main Menu](#)

- Enter the last name of the student(s) to be evaluated. Separate multiple names with semicolons.
- Enter the application number, if applicable.
- Click Submit. The "Evaluate a student pages menu" appears.

Evaluate a Student

Select each student to whom this evaluation will apply

11 Anderson, Brittany

12 Anderson, Casey

09 Anderson, Richie

Household size:

Monthly income:

Guardian name and address:

Options:

Standard evaluation

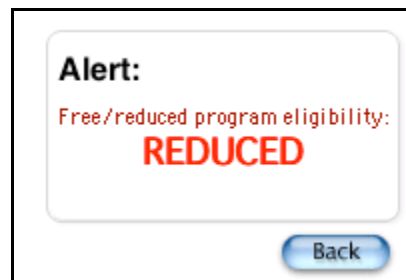
Direct certification - FREE

[PowerLunch Main Menu](#)

6. Use the following table to enter information in the fields:

Field	Description
Select each student to whom this evaluation will apply	Select the checkbox(es) to choose each student to whom this evaluation will apply, even if only one student is listed.
Household size	Enter the size of the student's or students' household.
Monthly income	Enter the monthly income of the student's or students' household.
Guardian name and address	Enter the name and address of the student's or students' guardian, as displayed on the eligibility letter.
Options	Select the option to indicate if this is a standard evaluation or a direct certification. Select the standard evaluation if you just want to verify a student's eligibility. Select the direct certification to qualify the student by overriding the minimum monthly income requirements.

7. Click Submit. The results of the evaluation appear.



Daily Activities

The items discussed in this section are those that you will perform on a daily basis, such as serving lunch or breakfast and entering earned meals. For more information, see the sections "[Serve Breakfast or Lunch](#)" and "[Maintenance Activities](#)."

Serve Breakfast or Lunch

These options are the most frequently used in PowerLunch. They help you to serve meals and track how much each patron spends. The instructions for serving breakfast and lunch are the same. Use the Record Sale page to enter deposits toward lunch balances. For more information, see the section "[How to Take Deposits](#)."

How to Perform a Quicksale

A Quicksale is the fastest way to record the sale of a meal because it uses minimal keystrokes. The best part about the Quicksale option is that it automatically records the proper amount to be charged to the patron's account, because all patrons have meal prices assigned to their lunch ID numbers. The following instructions assume that you selected the Quicksale option when you set up prices; see the section "[How to Set Prices](#)." These instructions apply to both students and staff.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

PowerLunch	
Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

2. Click [Serve Breakfast](#) or [Serve Lunch](#). The Record Sale page appears.

Record Sale

Lunch ID Quicksale

[Student Guest](#) [Adult Guest](#)
[Look up teacher ID](#)
[Review Last 10 Sales](#)
[PowerLunch Main Menu](#)
[Stop Serving/Log Off](#)

3. Enter the patron's lunch ID number. This can be a student or a staff member. You must enter the ID number for either.
4. Press Return (Mac) or Enter (Windows) to enter the sale. The transaction is recorded without any more work on your part. The amount of the sale is automatically deducted from the patron's account.

Note: If there is a deficit or low balance and you set up warning messages, those messages appear on the page. See the section "[How to Set Messages](#)."

PowerLunch is ready for the next patron's ID number.

How to Perform a Non-Quicksale

The Quicksale option is very handy when a student purchases a standard meal, but what if someone buys an item à la carte? These instructions apply to both students and staff.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

PowerLunch

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

2. Click Serve Breakfast or Serve Lunch. The Record Sale page appears.

Record Sale

Lunch ID Quicksale

[Student Guest](#) [Adult Guest](#)
[Look up teacher ID](#)
[Review Last 10 Sales](#)
[PowerLunch Main Menu](#)
[Stop Serving/Log Off](#)

3. Enter the patron's lunch ID number. This can be a student or a staff member. You must enter the ID number for either.
4. Deselect the Quicksale checkbox.
5. Press Return (Mac) or Enter (Windows).

Record Sale: Killian, Joshua

Lunch ID	7820
Current Account Balance	\$14.30
Charge One Meal <input type="checkbox"/>	<input type="text" value="0.00"/>
A La Carte Items	<input type="text" value="4.25"/>
Cash Received	<input type="text"/>

[Don't Record Sale](#)
[Show complete student transaction history](#)
[Show complete staff transaction history](#)
[PowerLunch Main Menu](#)

Record Sale

6. Deselect the checkbox and skip to step 9 if you do not want to charge one meal. If you do want to charge one meal, select the checkbox and enter the dollar amount charged, if different than the default amount.

Note: If the default meal price does not appear in the Charge One Meal field, your system is configured to suppress the price of the meal on this page.

7. Enter the dollar amount of any à la carte items.
8. Enter the dollar amount of any cash received.

Note: Click Don't Record Sale if you make an error in your entries. You return to the previous page.

9. Click Record Sale.

Record Sale

Lunch ID: Quicksale
 Sale recorded for **Killian, Joshua** Balance: 10.05
[Student Guest](#) [Adult Guest](#)
[Look up teacher ID](#)
[Review Last 10 Sales](#)
[PowerLunch Main Menu](#)
[Stop Serving/Log Off](#)

The sale is recorded, and the amount of the purchase is subtracted from the patron's account.

Note: If there is a deficit or low balance and you set up warning messages, those messages appear on the page. See the section "[How to Set Messages.](#)"

Personalize - Interface

Hide left navigation menu
 Enable task navigator

PowerLunch is ready for the next patron's ID number.

How to Perform a Student Guest Sale

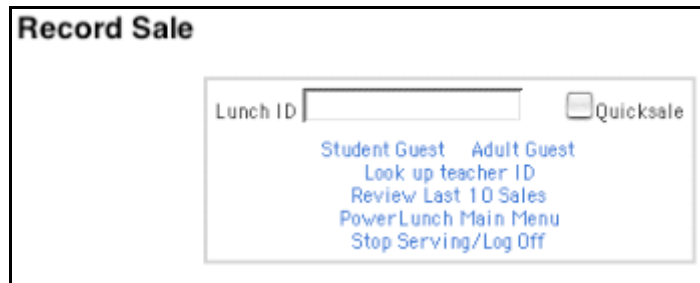
Students from other schools can visit your school and have lunch during the day. In that case, you must record the sale, but it must appear as a different type in the records.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

PowerLunch

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

- Click either Serve Breakfast or Serve Lunch. The Record Sale page appears.

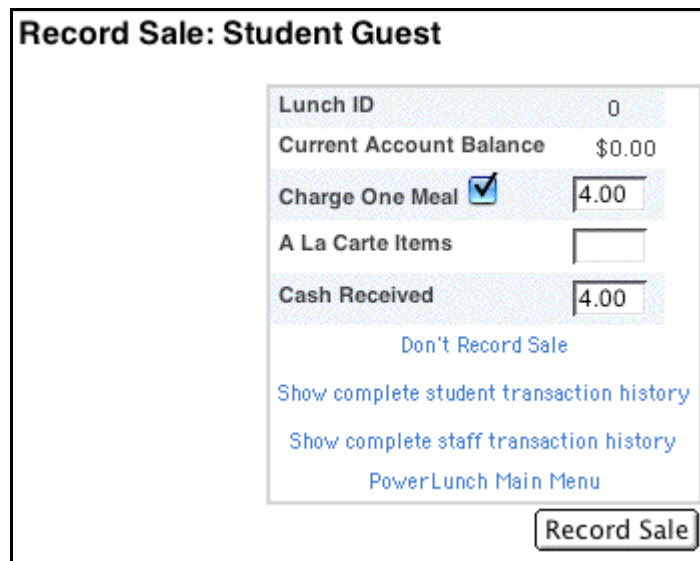


Record Sale

Lunch ID Quicksale

[Student Guest](#) [Adult Guest](#)
[Look up teacher ID](#)
[Review Last 10 Sales](#)
[PowerLunch Main Menu](#)
[Stop Serving/Log Off](#)

- Click Student Guest. The Record Sale: Student Guest page appears.



Record Sale: Student Guest

Lunch ID	0
Current Account Balance	\$0.00
Charge One Meal <input checked="" type="checkbox"/>	<input type="text" value="4.00"/>
A La Carte Items	<input type="text"/>
Cash Received	<input type="text" value="4.00"/>

[Don't Record Sale](#)
[Show complete student transaction history](#)
[Show complete staff transaction history](#)
[PowerLunch Main Menu](#)

- Select the checkbox if you want to charge one meal, enter the dollar amount charged if different than the default, and skip to step 7. If you do not want to charge one meal, deselect the checkbox and continue.

Note: If the default meal price does not appear in the Charge One Meal field, your system is configured to suppress the price of the meal on this page.

- Enter the dollar amount of any à la carte items.
- Enter the dollar amount of any cash received.

Note: Click Don't Record Sale if you make an error in your entries. You return to the previous page.

- Click Record Sale. The sale is recorded.

PowerLunch is ready for the next patron's ID number.

How to Perform an Adult Guest Sale

There are times when adults visit your school and want to eat lunch there. You must record these sales as well.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

2. Click either Serve Breakfast or Serve Lunch. The Record Sale page appears.

Record Sale	
Lunch ID	<input type="text"/> <input type="button" value="Quicksale"/>
Student Guest Adult Guest Look up teacher ID Review Last 10 Sales PowerLunch Main Menu Stop Serving/Log Off	

3. Click Adult Guest. The Record Sale: Adult Guest page appears.

Record Sale: Adult Guest	
Lunch ID	0
Current Account Balance	\$0.00
Charge One Meal <input checked="" type="checkbox"/>	<input type="text" value="4.50"/>
A La Carte Items	<input type="text"/>
Cash Received	<input type="text" value="4.50"/>
Don't Record Sale Show complete student transaction history Show complete staff transaction history PowerLunch Main Menu	
<input type="button" value="Record Sale"/>	

4. Select the checkbox if you want to charge one meal, enter the dollar amount charged if different than the default amount, and skip to step 7. If you do not want to charge one meal, deselect the checkbox and continue.

Note: If the default meal price does not appear in the Charge One Meal field, your system is configured to suppress the price of the meal on this page.

5. Enter the dollar amount of any à la carte items.
6. Enter the dollar amount of any cash received.

Note: Click Don't Record Sale if you make an error in your entries. You return to the previous page.

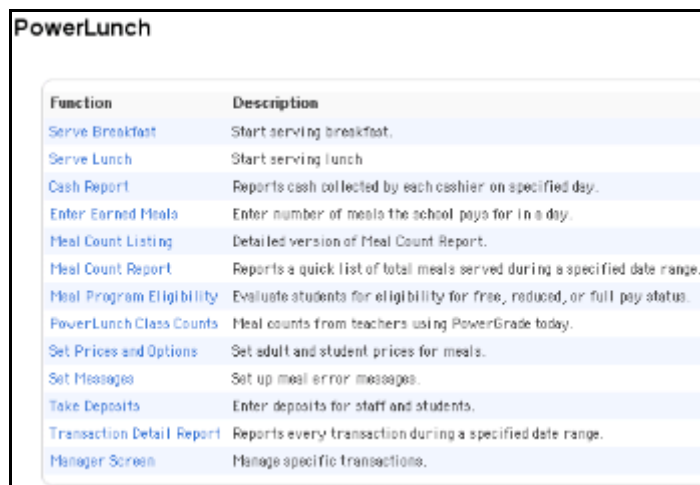
7. Click Record Sale. The sale is recorded.

PowerLunch is ready for the next patron's ID number.

How to Look Up a Teacher ID

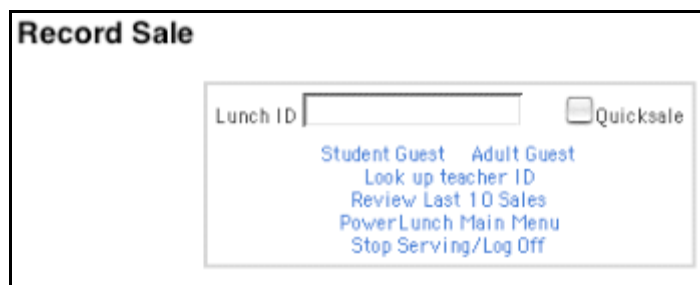
Sometimes a staff member forgets his or her assigned lunch ID number. In this case, you must look it up because you cannot perform a transaction for a teacher without the number.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.



Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

2. Click Serve Breakfast or Serve Lunch. The Record Sale page appears.



Record Sale

Lunch ID

[Student Guest](#) [Adult Guest](#)
[Look up teacher ID](#)
[Review Last 10 Sales](#)
[PowerLunch Main Menu](#)
[Stop Serving/Log Off](#)

3. Click "Look up Teacher ID." The Search Staff page appears.

Search Staff

▾

[View Field List](#) [How to Search](#)

Browse Staff

A B C D E F G H I J K L M
N O P Q R S T U V W X Y Z

Teachers Staff Lunch Staff Substitutes M F

Other Options

[New Faculty Entry](#)
[Faculty Directory](#)
[Stored Searches](#)

4. Search for and select the teacher. For more information, see the section "[Select Staff](#)."
5. Click Edit Information. The Edit Information page appears.

Edit Information - Allphin, Timothy 6

Name (Last, First MI)	<input style="width: 100%;" type="text" value="Allphin, Timothy"/>
Preferred Name	<input style="width: 100%;" type="text"/>
Email Address	<input style="width: 100%;" type="text" value="teacher@school.k12.ca.us"/>
Title	<input style="width: 100%;" type="text"/>
Gender	<input style="width: 100%;" type="text"/>
Ethnicity	<input style="width: 100%;" type="text"/>
ID	<input style="width: 100%;" type="text" value="6"/>
Homerroom	<input style="width: 100%;" type="text" value="Room 8"/>
School	<input style="width: 100%;" type="text" value="Apple Grove High School"/>
Lunch ID	<input style="width: 100%;" type="text" value="123"/>
Home Phone #	<input style="width: 100%;" type="text" value="436-555-9007"/>
School Phone #	<input style="width: 100%;" type="text" value="436-555-3164"/>
Street	<input style="width: 100%;" type="text"/>
City, State, Zip	<input style="width: 80%;" type="text" value="Folsom"/> <input style="width: 10%; text-align: center; font-size: 0.8em;" type="text" value="CA"/> <input style="width: 10%;" type="text"/>
SSN	<input style="width: 100%;" type="text"/>
DOB	<input style="width: 100%;" type="text"/>
Staff Status	<input style="width: 100%;" type="text" value="Teacher"/>
Status	<input style="width: 100%;" type="text" value="Current"/>

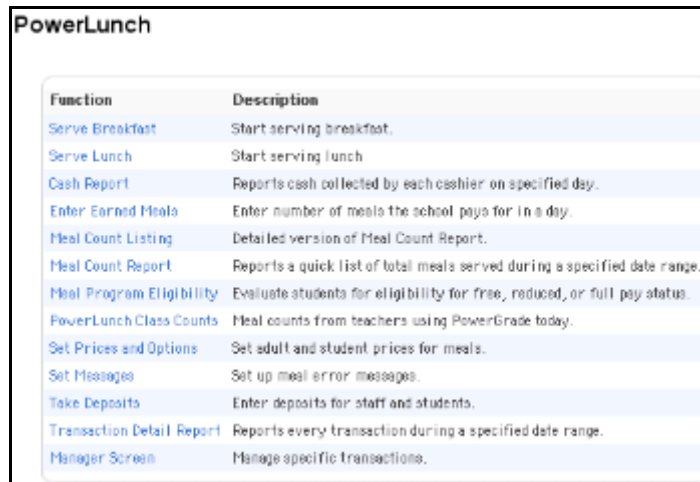
6. Note the teacher's lunch ID.

- Click your web browser's Back button until you return to the Record Sale page. Continue by entering the ID number to begin the sale.

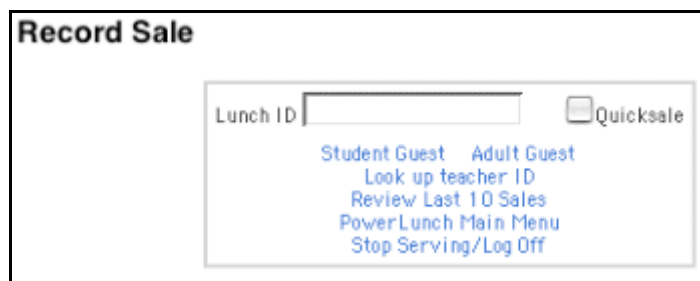
How to Review Recent Sales

If a patron approaches you saying that he or she was not given the correct change or that there was another problem concerning the sale, you can review the ten immediate previous sales.

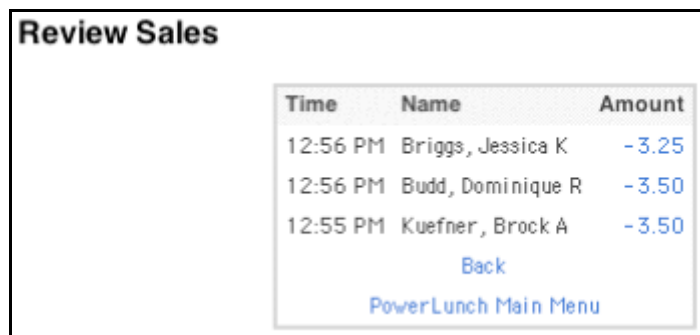
- On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.



- Click either Serve Breakfast or Serve Lunch. The Record Sale page appears.



- Click Review Last 10 Sales. The Review Sales page displays the names of the patrons, time of the sales, and amount of each sale.



- Click the amount of the sale to view more details about it. The View Transaction page appears.

View Transaction	
Field	Value
Name	Briggs, Jessica K
Date	2/19/2003
Time	12:56 PM
Description	Meal/Lunch
Meal Price	3.25
Net	-3.25
A la carte	0.00
PowerLunch Main Menu	
Delete Back	

- Click Delete to delete the transaction, if necessary. The Selection Deleted page appears.
- Click Back to return to the Record Sale page.

How to Enter Earned Meals

Some schools offer meals in exchange for work performed at school. Either students or adults can earn meals, but they must be recorded as such for reporting purposes. This should be done each day that someone earns a meal.

- On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

PowerLunch	
Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

- Click Enter Earned Meals. The Enter Earned Meals page appears.

Enter Earned Meals

Option	Value
School	Apple Grove High School
Which meal?	Lunch <input type="button" value="v"/>
# of student earned meals	<input type="text"/>
# of adult earned meals	<input type="text"/>
Date	8/16/2002

[PowerLunch Main Menu](#)

3. Use the following table to enter information in the fields:

Field	Description
Which meal	Choose the meal earned from the pop-up menu.
# of student earned meals	Enter the number of meals that students earned.
# of adult earned meals	Enter the number of meals that adults earned.
Date	Enter the date indicating when the meals were earned using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry.

4. Click Submit. The meals are recorded and you return to the PowerLunch start page.

Maintenance Activities

The activities described in this section are those that you perform on a regular basis but perhaps not every day.

How to Take Deposits

This section concerns taking a substantial amount of money to be credited to a student's account after the initial deposit has been made. For more information on how credit the initial deposit, see the section "[How to Set Up Beginning Balances](#)." When a patron pays for a single meal with cash, use the non-Quicksale transaction. For more information on this type of transaction, see the section "[How to Perform a Non-Quicksale](#)."

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
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Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

2. Click Take Deposits. The Record Sale page appears.

Record Sale

Lunch ID
 Quicksale

[Student Guest](#) [Adult Guest](#)
[Look up teacher ID](#)
[Review Last 10 Sales](#)
[PowerLunch Main Menu](#)
[Stop Serving/Log Off](#)

3. Enter the patron's lunch ID number.
4. Deselect the Quicksale checkbox.
5. Press Return (Mac) or Enter (Windows). The PowerLunch Deposit page appears.

PowerLunch Deposit - Killian, Joshua

Option	Value
Lunch ID	7820
Current Acct Balance	-5.70
Amount Received	<input style="width: 50px;" type="text" value="20"/>
Tender Type	<input checked="" type="radio"/> Cash <input type="radio"/> Check
Don't Record Deposit Status: P	

6. Enter the amount of cash received.

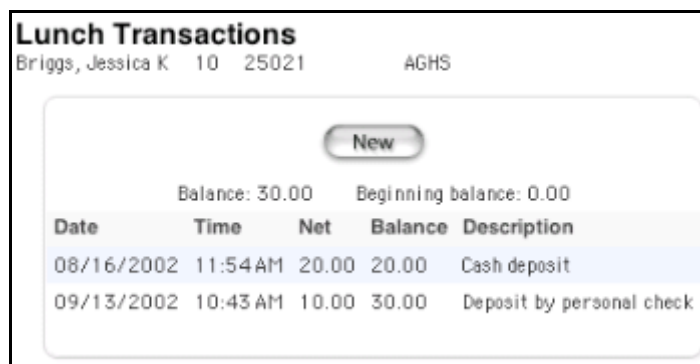
- Click Submit. The deposit is recorded, and PowerLunch is ready for the next patron's ID number. The transaction and new balance appear on the student's Lunch Transactions page.

How to Issue Refunds

There are times when you have to issue a refund; maybe a student is leaving school with a meal account credit, or perhaps someone made an error on the student's account. Whatever the reason, record the transaction when you determine that a refund should be issued.

Note: Be sure to use the Lunch Transactions page and not the Fee Transactions page.

- On the start page, search for and select the student.
- Click Lunch Transactions. The Lunch Transactions page appears.



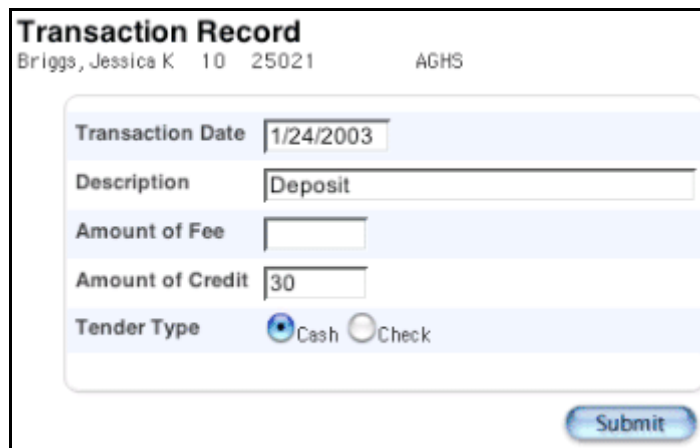
Lunch Transactions
Briggs, Jessica K 10 25021 AGHS

[New](#)

Balance: 30.00 Beginning balance: 0.00

Date	Time	Net	Balance	Description
08/16/2002	11:54 AM	20.00	20.00	Cash deposit
09/13/2002	10:43 AM	10.00	30.00	Deposit by personal check

- Click New Transaction. The Transaction Record page appears.



Transaction Record
Briggs, Jessica K 10 25021 AGHS

Transaction Date:

Description:

Amount of Fee:

Amount of Credit:

Tender Type: Cash Check

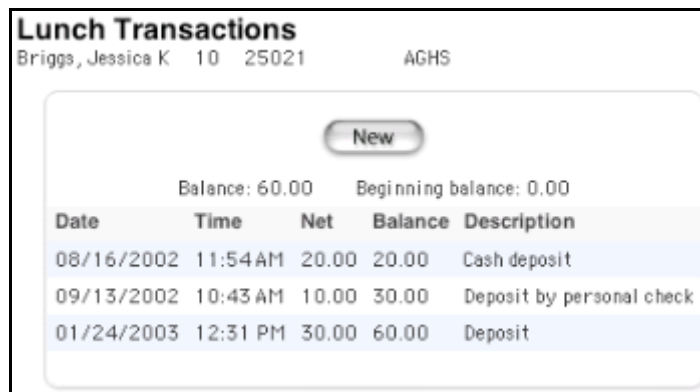
[Submit](#)

- Use the following table to enter information in the fields:

Field	Description
Transaction Date	Enter the date of the transaction.
Description	Enter a description for the transaction, such as Beginning Balance.

Field	Description
Amount of Fee	It is not necessary to enter an amount in this field, since a refund is being made.
Amount of Credit	Enter the amount of the refund.
Cash Transaction	Select this checkbox if the transaction is a cash transaction.

- Click Submit. The Changes Recorded page appears.
- Click Lunch Transactions to display the transaction. The balance updates to reflect the refund.



Lunch Transactions
Briggs, Jessica K 10 25021 AGHS

New

Balance: 60.00 Beginning balance: 0.00

Date	Time	Net	Balance	Description
08/16/2002	11:54 AM	20.00	20.00	Cash deposit
09/13/2002	10:43 AM	10.00	30.00	Deposit by personal check
01/24/2003	12:31 PM	30.00	60.00	Deposit

Follow the same instructions to refund a staff member, but go through the staff listings to find the record from the start page: click Staff, select the staff member, and then follow the instructions above.

How to Create a Deficit Account Letter

When a student's account balance is negative, you must notify the parents or guardians. This is a small project involving several tasks. You must first create a form letter template and then select the students whose accounts are deficit. Then run the report to generate the letters, preview them for errors, and print them. Finally, you must create a mailing label layout and print the labels.

Note: Export a sample form letter (Lunch Letter.pst) from the PowerSchool Help site: <http://help.powerschool.com/viewtopic.html?t=reportarchive>. For instructions on exporting the template and importing it to your PowerSchool system, see the section "**Report Templates**." In addition, the search string for selecting students with a deficit balance is `balance1<0`.

Manager Screen

Use the PowerLunch Manager Screen to perform PowerLunch activities that are outside of or more complex than the daily activities. All options on the Manager Screen concern changing data entered on days in the past.

How to Change Previous Meals

Change a patron's meal classification and edit previous transactions that might be impacted by the change in classification. This is useful when a student is approved for free or reduced lunches retroactively.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

PowerLunch	
Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

2. Click Manager Screen. The Manager Screen appears.

Manager Screen	
Function	Description
Change Previous Meals	Edit previous transactions to change a patron's meal classification.
Edit Transactions	Change a specific transaction.
Transaction For a Different Date	Edit a transaction on a specific day or range at a specific school. (In case of power outage, etc.)
PowerLunch Main Menu	

3. Click Change Previous Meals. The Change Previous Meals page appears.

Change Previous Meals

Option	Value
Which students?	<input checked="" type="radio"/> Miles, Destini only <input type="radio"/> The selected 14 students
On/between these dates	<input type="text" value="1/22/200:"/> through <input type="text" value="1/24/200:"/>
Change meals to this type	<input type="text" value="Free (F)"/>
<p style="font-size: small; margin: 0;">Read before proceeding: This function changes all transactions for the specified student(s) in the specified date range. Meal counts and student account balances will be changed due to the newly selected meal types and prices. Student lunch balances will be recalculated.</p> <p style="text-align: center; margin: 0;">PowerLunch Main Menu</p>	

4. Use the following table to enter information in the fields:

Field	Description
Which students?	Select the option to indicate which students' classifications will change.
On/between these dates	Enter the first and last days of the date range to be changed using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry.
Change meals to this type	Choose the meal type from the pop-up menu.

5. Read the note very carefully. It explains that the change you are about to make impacts all meal transactions for the student, the account balance, and meal counts. Be sure you want to change the classification.
6. Click Submit if you are sure you want to change the classification. The Changes Recorded page appears.

How to Edit Transactions

Change individual transactions for a specific day.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

PowerLunch

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

- Click Manager Screen. The Manager Screen appears.

Manager Screen

Function	Description
Change Previous Meals	Edit previous transactions to change a patron's meal classification.
Edit Transactions	Change a specific transaction.
Transaction For a Different Date	Edit a transaction on a specific day or range at a specific school. (In case of power outage, etc.)

[PowerLunch Main Menu](#)

- Click Edit Transactions. The Edit Transactions page appears.

Edit Transactions

Option	Value
Date Range	<input type="text" value="1/22/2003"/> through <input type="text" value="1/24/2003"/>
At this school	<input type="text" value="Apple Grove High School"/> ▾

[PowerLunch Main Menu](#)

- Use the following table to enter information in the fields:

Field	Description
Date Range	Enter the first and last days to be scanned using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry.
At this school	Choose the school from the pop-up menu.

5. Click Submit. The "Select a Transaction to Edit" page appears.

Select A Transaction To Edit

1/24	Unknown	\$-2.50	(Meal/Breakfast)
1/24	Unknown	\$-0.50	(Meal/Breakfast)
1/24	Stanley, Chelsea A	\$-2.00	(Meal/Breakfast)
1/24	Stark, Kourtney C	\$-2.00	(Meal/Breakfast)
1/24	Manning, Joel L	\$-2.00	(Meal/Breakfast)

[PowerLunch Main Menu](#)

6. Click the transaction to be edited. The Edit Transaction page appears.

Edit Transaction

Transaction Detail

Name of patron	Stark, Kourtney C
Date	<input type="text" value="1/24/2003"/>
Time	<input type="text" value="11:48 AM"/>
Description <i>(leave blank for automatic)</i>	<input type="text"/>
Debit	<input type="text" value="2.00"/>
Credit	<input type="text" value="0.00"/>
Meal price	<input type="text" value="2.00"/>
A La Carte	<input type="text" value="0.00"/>
Cash received	<input type="text" value="0.00"/>
Net <i>(calculated automatically)</i>	-2.00
Batch number	19776

Transaction Classifications

Meal or Deposit	<input type="text" value="Meal"/>
Lunch or Breakfast	<input type="text" value="Breakfast"/>
Who? (Student, Adult, Student guest, Adult guest)	<input type="text" value="Student"/>
Free, reduced, or full pay	<input type="text" value="Full pay"/>

[PowerLunch Main Menu](#)

7. Make any necessary changes in the Transaction Detail section.
8. Navigate to the Transaction Classifications section.

Transaction Classifications

Meal or Deposit	<input type="text" value="Meal"/>
Lunch or Breakfast	<input type="text" value="Breakfast"/>
Who? (Student, Adult, Student guest, Adult guest)	<input type="text" value="Student"/>
Free, reduced, or full pay	<input type="text" value="Full pay"/>

[PowerLunch Main Menu](#)

9. Use the following table to enter information in the fields:

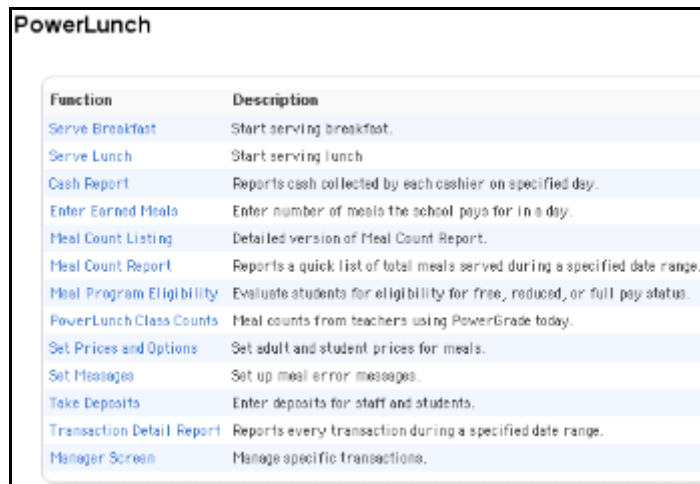
Field	Description
Meal or Deposit	Choose the transaction type from the pop-up menu.
Lunch or Breakfast	Choose the meal from the pop-up menu.
Who? (Student, Adult, Student guest, Adult guest)	Choose the type of patron from the pop-up menu.
Free, reduced, or full pay	Choose the meal classification type from the pop-up menu.

10. Click Submit. The Changes Recorded page appears.

How to Enter Meal Transactions for a Different Date

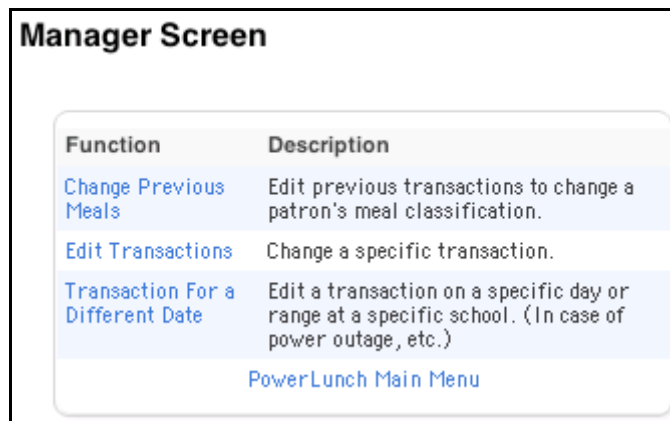
Use this option if your computer is not functioning and you must record the day's sales manually. When this happens, enter the sales into PowerLunch after the system is running again.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.



Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

2. Click Manager Screen. The Manager Screen appears.



3. Click "Transaction for a Different Date." The 'Transaction for a Different Date' page appears.



Transaction For a Different Date

Option	Value
Date on which to enter transactions	10/2/2002
Which meal	Lunch
School	Apple Grove High School

[Proceed to Serving Screen](#)

4. Use the following table to enter information in the fields:

Field	Description
Date on which to enter transactions	Enter the date that will be used to record the transactions using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry.
Which meal	Choose the meal from the pop-up menu.

5. Click "Proceed to Serving Screen." The Record Sale page appears, and you can now enter the transactions as if they were occurring live.

Note: When you finish entering the transactions on the different date, log out of PowerLunch to reset the date.

PowerLunch Reports

PowerLunch's reporting features are varied and useful. You will use them regularly to manage your own books and to provide statistics to the state. For the most part, they are simple to produce and

the application is user-friendly. However, you are encouraged to read the sections "**Custom Reports**" and "**Preconfigured Reports**" before trying to create reports.

Note: Click your web browser's Back button anytime you get a report that does not provide you with the proper information. Perhaps you needed another column, or maybe you selected the wrong date. This is not a problem; just back up and reset your specifications.

How to Run the Cash Report

This report tells you how much cash each cashier took in on a selected day.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

2. Click Cash Report. The Cash Report page appears.

Cash Report

Produce report for this date:

[PowerLunch Main Menu](#)

3. Enter the date for which you want to produce the report using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry.
4. Click Submit. The resulting report displays which cashiers received deposits in cash and checks on the date you specified.

Cashier Name		# Transactions		Amount Received		
		Cash	Check	Cash	Checks	Total
Allphin, Timothy		3	2	48.00	15.00	63.00
Total:		3	2	48.00	15.00	63.00

[PowerLunch Main Menu](#)

How to Run the Meal Count Listing Report

This report is similar to the Meal Count report but has far more detail. You have the option of clicking links in the reported statistics to learn more about them.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

2. Click Meal Count Listing. The Meal Count Listing page appears.

Option	Value
Date Range	8/16/2002 through 9/23/2002
Meal	Lunch
Use school calendar (This will exclude any school days listed as a school holiday) <input checked="" type="checkbox"/>	
Note: This report may take several minutes to generate.	
PowerLunch Main Menu	
<input type="button" value="Submit"/>	

3. Use the following table to enter information in the fields:

Field	Description
Date Range	Enter the date range to be scanned using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry.
Meal	Choose the meal from the pop-up menu.
Use school calendar	Select this checkbox to use the school calendar when scanning. This function excludes any school holidays from the count.

- Click Submit. The resulting report displays how many patrons there are in each category (the number in brackets) and how many meals were purchased by each category (the underlined number).

Meal Count Listing: Lunch 8/16/02 - 9/23/02
Apple Grove High School

Date	Students							Adults				Total	
	Free	Reduced	Paid	Guest	Exempt	Earned	Additional	Faculty	Guest	Earned	Additional		
8/16/02	0 [15]	0 [16]	0 [259]	0	0 [0]	0	0	0 [270]	0	0	0	2	2
8/19/02	0 [15]	0 [16]	0 [240]	0	0 [0]	0	0	0 [271]	0	0	0	0	0
8/20/02	0 [15]	0 [16]	0 [240]	0	0 [0]	0	0	0 [271]	0	0	0	0	0
8/28/02	0 [13]	0 [12]	0 [151]	0	0 [0]	0	0	0 [200]	0	0	0	0	0
8/29/02	0 [5]	0 [2]	0 [15]	0	0 [0]	0	0	0 [20]	0	0	0	0	0
8/30/02	0 [13]	0 [12]	0 [151]	0	0 [0]	0	0	0 [200]	0	0	0	0	0
9/3/02	0 [5]	0 [1]	2 [15]	0	0 [0]	0	2	2 [19]	0	0	0	0	2
9/4/02	0 [13]	0 [11]	0 [151]	0	0 [0]	0	0	0 [190]	0	0	0	0	0
9/5/02	0 [5]	0 [1]	0 [15]	0	0 [0]	0	0	0 [19]	0	0	0	0	0
9/6/02	0 [13]	0 [11]	0 [151]	0	0 [0]	0	0	0 [190]	0	0	0	0	0
9/9/02	0 [5]	0 [1]	0 [15]	0	0 [0]	0	0	0 [19]	0	0	0	0	0
9/10/02	0 [13]	0 [11]	0 [151]	0	0 [0]	0	0	0 [190]	0	0	0	0	0
9/11/02	0 [5]	0 [1]	0 [15]	0	0 [0]	0	0	0 [19]	0	0	0	0	0
9/12/02	0 [13]	0 [11]	0 [151]	0	0 [0]	0	0	0 [190]	0	0	0	0	0
9/13/02	0 [5]	0 [1]	0 [15]	0	0 [0]	0	0	0 [19]	0	0	0	0	0
9/16/02	0 [13]	0 [11]	0 [151]	0	0 [0]	0	0	0 [190]	0	0	0	0	0
9/17/02	0 [5]	0 [1]	0 [15]	0	0 [0]	0	0	0 [19]	0	0	0	0	0
9/18/02	0 [13]	0 [12]	0 [151]	0	0 [0]	0	0	0 [200]	0	0	0	0	0
9/19/02	0 [5]	0 [2]	0 [15]	0	0 [0]	0	0	0 [20]	0	0	0	0	0
9/20/02	0 [13]	0 [12]	0 [151]	0	0 [0]	0	0	0 [200]	0	0	0	0	0
9/23/02	0 [5]	0 [2]	0 [15]	1	0 [0]	0	1	1 [20]	0	0	0	1	2
Totals	0	0	2	1	0	0	3	0	0	0	0	3	6

The total number of eligible students in each of the four categories Free, Reduced, Paid and Exempt are displayed in [brackets] in the applicable columns.
Students classified as Free - Direct Certified or Temporary are counted in the Free column.
The Additional column shows the number of 2nd meals served. (Note that if any additional or earned meals were served, the total number of meals served may exceed the total number of eligible students.)
All other meals are not included in this report.

Click any of the underlined numbers to view the details of the transactions that make up that number. For students, there are seven categories: free, reduced, paid, guest, exempt, earned, and additional. The seven categories are added in the total column. For adults, there are four categories: faculty, guest, earned, and additional. The four categories are added in the total column. Both totals are added in the last total column on the right. Totals for multiple days appear at the bottom of each column.

How to Run the Meal Count Report

This report provides a quick list of total meals served on the selected days. It displays the breakdown by meal and lunch status.

- On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

PowerLunch	
Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

- Click Meal Count Report. The Meal Count Report page appears.

Meal Count Report	
Option	Value
Date Range	8/16/2002 through 9/23/2002
Restrict report to these grade levels: (leave blank to include all grades)	<input type="checkbox"/> through <input type="checkbox"/>
Note: This report may take several minutes to generate. PowerLunch Main Menu	
<input type="button" value="Submit"/>	

- Use the following table to enter information in the fields:

Field	Description
Date Range	Enter the date range to be scanned using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry.
Grade Levels	Enter the first and last grade levels to be scanned. If you want a report on one grade only, enter the same grade number in both fields. If all grades are to be scanned, leave both fields blank.

- Click Submit. The report displays the numbers of meals served on the specified days.

Daily Meal Count Report				
	Breakfast	Lunch	Total	Eligible 9/23/2002
Student Free	1	0	1	3
Student Reduced	0	0	0	0
Student Full	0	2	2	15
Student Guest	0	1	1	N/A
Earned Meals	0	0	0	N/A
Student Total	1	3	4	Eligible: 18
Faculty	1	3	4	
Adult Guest	0	0	0	
Earned Meals	0	0	0	
Adult Total	1	3	4	
Grand Totals	2	6	8	

[PowerLunch Main Menu](#)

How to Take PowerLunch Class Counts

This report helps you plan how many meals to prepare by importing counts from teachers' PowerGrade files.

Note: The count will only display meals for those teachers who submitted their lunch counts through PowerGrade.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

2. Click PowerLunch Class Counts. The PowerLunch Class Counts page appears.

	Student			Adult			Other	
	Breakfast	Hot Lunch	A La Carte	Breakfast	Hot Lunch	A La Carte	Milk	1 2
Totals	0	0	0	0	0	0	0	0


This information is taken from teachers who have used PowerGrade's "Submit Class Counts" function today.

The report displays today's date at the top of the page, as well as the number of hot meals and milk units students intend to purchase.

How to Run the Transaction Detail Report

This report provides detailed information about transactions in a selected date range. You will find it very helpful because you select the information to be scanned, and then PowerLunch produces a report in your spreadsheet application. You can select to have almost any information pulled from PowerLunch for any day.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.



The screenshot shows a window titled "PowerLunch" containing a table with two columns: "Function" and "Description". The table lists various menu items and their corresponding descriptions.

Function	Description
Serve Breakfast	Start serving breakfast.
Serve Lunch	Start serving lunch.
Cash Report	Reports cash collected by each cashier on specified day.
Enter Earned Meals	Enter number of meals the school pays for in a day.
Meal Count Listing	Detailed version of Meal Count Report.
Meal Count Report	Reports a quick list of total meals served during a specified date range.
Meal Program Eligibility	Evaluate students for eligibility for free, reduced, or full pay status.
PowerLunch Class Counts	Meal counts from teachers using PowerGrade today.
Set Prices and Options	Set adult and student prices for meals.
Set Messages	Set up meal error messages.
Take Deposits	Enter deposits for staff and students.
Transaction Detail Report	Reports every transaction during a specified date range.
Manager Screen	Manage specific transactions.

2. Click Transaction Detail Report. The Transaction Detail Report page appears.

Transaction Detail Report

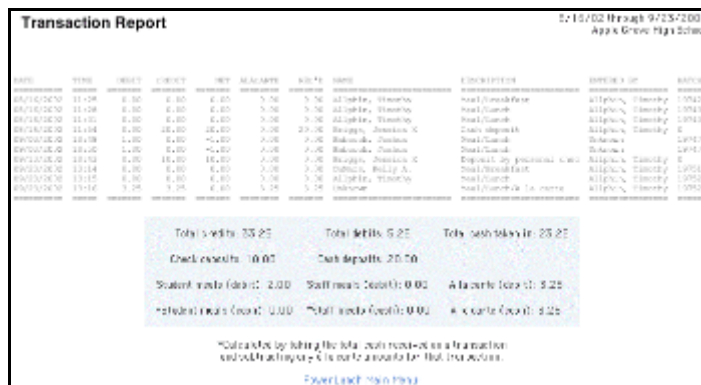
Option	Value
Columns to show	<input checked="" type="checkbox"/> Date
	<input checked="" type="checkbox"/> Time
	<input checked="" type="checkbox"/> Description
	<input checked="" type="checkbox"/> Student name
	<input checked="" type="checkbox"/> Debit amount
	<input checked="" type="checkbox"/> Credit amount
	<input checked="" type="checkbox"/> Net amount <i>(debit-credit)</i>
	<input checked="" type="checkbox"/> Cash received
	<input checked="" type="checkbox"/> A la carte amount
	<input checked="" type="checkbox"/> Entered by
	<input checked="" type="checkbox"/> Batch number
	Start Date
End Date	<input type="text" value="9/23/2002"/>
Transaction Types	<input checked="" type="checkbox"/> All
	<input type="checkbox"/> Student Lunch
	<input type="checkbox"/> Staff Lunch
Batch number	<input type="text"/>
Order	<input type="text" value="Order recorded (date)"/> ▾
Export	<input type="checkbox"/>
Note: To display several columns, enlarge the browser window. PowerLunch Main Menu	
<input type="button" value="Submit"/>	

3. Use the following table to enter information in the fields:

Field	Description
Columns to show	Select any combination of the checkboxes to indicate what to display.
Start Date	Enter the start date of the report using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry.
End Date	Enter the end date of the report using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry.

Field	Description
Transaction Types	Select the checkbox next to the transaction type to display.
Batch number	Enter a batch number to scan a specific batch. Separate multiple batches with commas. A batch refers to a cashier's session for the day. For example, if you have two cashiers for breakfast, the sessions are batch numbers 1 and 2. Perhaps you have four cashiers for lunch on the same day. They would be batch numbers 3-6. You can prepare a report on the activities of certain staff members.
Order	Choose the sort order from the pop-up menu. This refers to the order of the listings on the report.
Export	Select this checkbox to export the report to your spreadsheet application. If you do not select this checkbox, the report appears in your web browser and you will not be able to format it.

4. Click Submit. If you did not select the Export option, the report appears, including the columns you selected and cash totals. Print or save the report. If you save the report without exporting it, you could lose some of the report's format. For more information, see the section **"Run, Print, and Save Reports."**



The screenshot shows a 'Transaction Report' for the period 2-11-02 through 9:25:00 AM at Apple Grove High School. It features a table with columns for DATE, TIME, BATCH, CASHIER, AMOUNT, and DESCRIPTION. The report lists several transactions with their respective amounts and cashier names. At the bottom, there is a summary box with the following data:

Total sales: 35.25	Total bills: 5.25	Total cash sales: 30.00
Check credits: 0.00	Cash deposits: 20.00	
Student meals credit: 2.00	Staff meals credit: 0.00	Admin fee: 1.25
Refund meals credit: 0.00	Total meals credit: 0.00	W. credit credit: 1.25

Below the summary, a note states: '*Calculate by adding the total cash receipts as a transaction and subtracting the 6% service amount for that transaction.' At the bottom, it says 'PowerLunch User Menu'.

If you chose the Export option, save the file. Continue to the next step for those instructions.

- Choose File > Save As....
- In the Save dialog, specify a name, location, and file type.
- Click Save. Open the file using a spreadsheet or other application.