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| Owner | Technical Communication and Documentation |
| Last Updated | 6/19/2003 |
| Version | 3.6.0 |

Please send comments, suggestions, or requests for this user guide 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 Web site: http://www.powerschool.com/support/documentation/psusersguide.html. This URL is case-sensitive.

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.

Open 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 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.
2. Click "Set Prices and Options." The "Set Prices and Options" page appears.

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast Prices</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>You cannot edit the Student Free Price field because students with a Free status do not have to pay for their first meal.</td>
</tr>
<tr>
<td>Second Breakfast Prices</td>
<td>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.</td>
</tr>
</tbody>
</table>
### PowerLunch User Guide

**Meal Classifications © 2003 Apple Computer, Inc. All rights reserved.**

#### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lunch Prices</td>
<td>Enter the price of lunch for all categories of patrons. It is not necessary to enter a dollar sign when entering the price. You cannot edit the Student Free Price field because students with a Free status do not have to pay for their first meal.</td>
</tr>
<tr>
<td>Second Lunch Prices</td>
<td>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.</td>
</tr>
<tr>
<td>Auto-calculate cash if the account is deficit</td>
<td>Select this checkbox to automatically calculate cash if the patron’s account does not have enough of a balance to cover the meal (optional).</td>
</tr>
<tr>
<td>Use single-screen lunch process (Quicksale)</td>
<td>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 &quot;Daily Activities.&quot;</td>
</tr>
<tr>
<td>Show student photo on screen</td>
<td>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.</td>
</tr>
<tr>
<td>Don’t use false balance for free lunch students</td>
<td>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.</td>
</tr>
<tr>
<td>Allow students from any school through the lunch line</td>
<td>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.</td>
</tr>
</tbody>
</table>

4. 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.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.
2. Click Set Messages. The Set Messages page appears.

**Set Messages**

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

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

- When account balance drops below this level...
  
  ![Account Balance](image)
  
  Display this message:
  
  ![Message](image)

- When there is not enough money in the account, display this message...
  
  ![Insufficient Funds](image)

- When patron is purchasing a 2nd meal, display this message...
  
  ![2nd Meal Warning](image)
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>When account balance drops below this level</td>
<td>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.</td>
</tr>
<tr>
<td>…display this message</td>
<td>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.</td>
</tr>
<tr>
<td>When there is not enough money in the account</td>
<td>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.</td>
</tr>
<tr>
<td>When patron is purchasing a second meal</td>
<td>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.</td>
</tr>
</tbody>
</table>

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.

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>For</td>
<td>Select the option to indicate for whom you want to assign ID numbers.</td>
</tr>
<tr>
<td>Don’t overwrite any existing IDs or passwords</td>
<td>Select this checkbox if you do not want to overwrite any IDs or passwords already in PowerSchool.</td>
</tr>
<tr>
<td>In case of conflicts append</td>
<td>If there is a conflict with an existing ID, choose a suffix from the pop-up menu.</td>
</tr>
<tr>
<td>Assign Lunch IDs</td>
<td>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.</td>
</tr>
<tr>
<td>Each Lunch ID is</td>
<td>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.</td>
</tr>
</tbody>
</table>

6. Click Submit. The Alert page appears.
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.
3. Click New. The Transaction Record page appears.

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

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

5. Click Submit. The Changes Recorded page appears.

6. Click Lunch Transactions to display the transaction. The balance updates to reflect the 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.
2. Click Meal Program Eligibility. The Meal Program Eligibility page appears.

3. Click Set Eligibility Levels. The Eligibility Levels page appears.
4. Click New. The Edit Eligibility Level page appears.

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Household Size</td>
<td>Enter the number of household members identified for this meal program.</td>
</tr>
<tr>
<td>Max monthly income that qualifies for Free meals for this household size</td>
<td>Enter the maximum monthly income that qualifies a student for free meals for the specified household size.</td>
</tr>
<tr>
<td>Max monthly income that qualifies for Reduced meals for this household size</td>
<td>Enter the maximum monthly income that qualifies a student for reduced meals for the specified household size.</td>
</tr>
</tbody>
</table>

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.

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

3. Enter the last name of the student(s) to be evaluated. Separate multiple names with semicolons.

4. Enter the application number, if applicable.

5. Click Submit. The "Evaluate a student pages menu" appears.

6. Use the following table to enter information in the fields:
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select each student to whom this evaluation will apply</td>
<td>Select the checkbox(es) to choose each student to whom this evaluation will apply, even if only one student is listed.</td>
</tr>
<tr>
<td>Household size</td>
<td>Enter the size of the student's or students' household.</td>
</tr>
<tr>
<td>Monthly income</td>
<td>Enter the monthly income of the student's or students' household.</td>
</tr>
<tr>
<td>Guardian name and address</td>
<td>Enter the name and address of the student's or students' guardian, as displayed on the eligibility letter.</td>
</tr>
<tr>
<td>Options</td>
<td>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.</td>
</tr>
</tbody>
</table>

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.

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

![Record Sale](image)

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](image)

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.

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.
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."

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.
2. 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

3. Click Student Guest. The Record Sale: Student Guest page appears.
4. 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.

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

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

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

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

![Record Sale](image)

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

![Search Staff](image)

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

6. Note the teacher’s lunch ID.

7. 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.

1. On the start page, choose PowerLunch from the main menu. The PowerLunch page appears.
2. Click either Serve Breakfast or Serve Lunch. The Record Sale page appears.

![Record Sale](image)

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

![Review Sales](image)

4. Click the amount of the sale to view more details about it. The View Transaction page appears.
5. Click Delete to delete the transaction, if necessary. The Selection Deleted page appears.
6. 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.

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

2. Click Enter Earned Meals. The Enter Earned Meals page appears.
3. Use the following table to enter information in the fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which meal</td>
<td>Choose the meal earned from the pop-up menu.</td>
</tr>
<tr>
<td># of student earned meals</td>
<td>Enter the number of meals that students earned.</td>
</tr>
<tr>
<td># of adult earned meals</td>
<td>Enter the number of meals that adults earned.</td>
</tr>
<tr>
<td>Date</td>
<td>Enter the date indicating when the meals were earned.</td>
</tr>
</tbody>
</table>

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

![Record Sale interface](image)

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.
6. Enter the amount of cash received.
7. 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.

1. On the start page, search for and select the student.
2. Click Lunch Transactions. The Lunch Transactions page appears.
4. Use the following table to enter information in the fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Date</td>
<td>Enter the date of the transaction.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the transaction, such as Beginning Balance.</td>
</tr>
<tr>
<td>Amount of Fee</td>
<td>It is not necessary to enter an amount in this field, since a refund is being made.</td>
</tr>
<tr>
<td>Amount of Credit</td>
<td>Enter the amount of the refund.</td>
</tr>
<tr>
<td>Cash Transaction</td>
<td>Select this checkbox if the transaction is a cash transaction.</td>
</tr>
</tbody>
</table>

5. Click Submit. The Changes Recorded page appears.

6. Click Lunch Transactions to display the transaction. The balance updates to reflect the refund.

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](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.
2. Click Manager Screen. The Manager Screen appears.

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which students?</td>
<td>Select the option to indicate which students’ classifications will change.</td>
</tr>
<tr>
<td>On/between these dates</td>
<td>Enter the first and last days of the date range to be changed.</td>
</tr>
<tr>
<td>Change meals to this type</td>
<td>Choose the meal type from the pop-up menu.</td>
</tr>
</tbody>
</table>

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.

2. Click Manager Screen. The Manager Screen appears.

3. Click Edit Transactions. The Edit Transactions page appears.
4. Use the following table to enter information in the fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Range</td>
<td>Enter the first and last days to be scanned.</td>
</tr>
<tr>
<td>At this school</td>
<td>Choose the school from the pop-up menu.</td>
</tr>
</tbody>
</table>

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

6. Click the transaction to be edited. The Edit Transaction page appears.
7. Make any necessary changes in the Transaction Detail section.
8. Navigate to the Transaction Classifications section.
9. Use the following table to enter information in the fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meal or Deposit</td>
<td>Choose the transaction type from the pop-up menu.</td>
</tr>
<tr>
<td>Lunch or Breakfast</td>
<td>Choose the meal from the pop-up menu.</td>
</tr>
<tr>
<td>Who? (Student, Adult, Student guest, Adult guest)</td>
<td>Choose the type of patron from the pop-up menu.</td>
</tr>
<tr>
<td>Free, reduced, or full pay</td>
<td>Choose the meal classification type from the pop-up menu.</td>
</tr>
</tbody>
</table>

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.
2. Click Manager Screen. The Manager Screen appears.

3. Click "Transaction for a Different Date." The 'Transaction for a Different Date" page appears.
4. Use the following table to enter information in the fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date on which to enter</td>
<td>Enter the date that will be used to record the</td>
</tr>
<tr>
<td>transactions</td>
<td>transactions.</td>
</tr>
<tr>
<td>Which meal</td>
<td>Choose the meal from the pop-up menu.</td>
</tr>
</tbody>
</table>

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.

3. Enter the date for which you want to produce the report.

4. Click Submit. The resulting report displays which cashiers received deposits in cash and checks on the date you specified.
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.

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Range</td>
<td>Enter the date range to be scanned.</td>
</tr>
<tr>
<td>Meal</td>
<td>Choose the meal from the pop-up menu.</td>
</tr>
<tr>
<td>Use school calendar</td>
<td>Select this checkbox to use the school calendar when scanning. This function excludes any school holidays from the count.</td>
</tr>
</tbody>
</table>

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.

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


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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Range</td>
<td>Enter the date range to be scanned.</td>
</tr>
</tbody>
</table>
Field Level  Description
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.

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

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

<table>
<thead>
<tr>
<th>PowerLunch Class Counts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong>: 2/19/2003</td>
</tr>
<tr>
<td><strong>Apple Grove High School</strong></td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Columns to show</td>
<td>Select any combination of the checkboxes to indicate what to display.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Enter the start date of the report.</td>
</tr>
<tr>
<td>End Date</td>
<td>Enter the end date of the report.</td>
</tr>
<tr>
<td>Transaction Types</td>
<td>Select the checkbox next to the transaction type to display.</td>
</tr>
</tbody>
</table>
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."

5. Choose File > Save As....

6. In the Save dialog, specify a name, location, and file type.

7. Click Save. Open the file using a spreadsheet or other application.