MEAL MAGIC® cloud
Administration Guide

Version 15.7.0

Thank You

Dad (1926-1999)
and
Mom (1925-2002)

Radio Shack, for my first computer
Frank D. Sr, for emphasizing user perspectives
Lee R, for developing Formula IV
Sylvia K, for the inspiration

Contents

Reports

Getting Started

Navigating

Log In

To use Meal Magic Cloud, you need a computer that has an up-to-date web browser. Currently supported browsers include the latest versions of Microsoft Edge, Mozilla Firefox, Google Chrome, and Apple Safari. You also need the *District ID* assigned to your district by Meal Magic Corporation.

First-time User

As a first-time user, you will need to valid your account, set a passphrase, and, if required, setup two-factor authentication before you can use the software.

1. In your browser's address bar, enter the URL of *https://**districtID**.mealmagic.cloud*, replacing **districtID** with your actual *District ID*.
2. At the *Log In* page, click the *Forgot Passphrase* link.
3. Enter you email address in the *Username* box.
4. Click the *Send Reset Email In* button. An email with a reset link will be sent to you, and you have 20 minutes to complete setup; otherwise, you will have to restart the process.
5. Locate the email and click the link shown in it.
6. You will be prompted to enter a *New Passphrase* and then *Confirm New Passphrase*. A *passphrase* is like a password but is more flexible, for example, you could use a sentence, such as "I like eating popcorn for breakfast." You must enter the same passphrase twice. See *Passphrase Requirements* below for more information.
7. Click the *Reset* button.
8. If your access level requires two-factor authentication, a QR code will be displayed. Scan the code with an authenticator app, enter the six-digit code displayed by the app, and click *OK*.

Established User

1. In your browser's address bar, enter the URL of *https://**districtID**.mealmagic.cloud*, replacing **districtID** with your actual *District ID*.
2. At the *Log In* page, enter your *Username* (email address) and *Passphrase*.
3. Click the *Log In* button.
4. If your access level requires two-factor authentication, enter the six-digit code displayed by your authenticator app, and click *OK*.

Passphrase Requirements

Meal Magic Cloud closely follows the latest guidelines (Special Publication 800-63B, revision 3) from the National Institute of Standards and Technology (NIST) for managing digital identities and safeguarding sensitive information, so your passphrase must meet certain requirements to be accepted. Current requirements include: (1) a minimum length of 12 characters; (2) no sequences of letters or numbers, such as 1234, 9876, abc, or PONML; (3) cannot include part of your name; and (4) cannot have appeared in any known online data breaches.

Login Errors

Sometimes a user might receive a rather generic error at the *Log In* page. These errors intentionally are vague to prevent giving a would-be attacker information that might help them gain access. Look at the number shown in parenthesis within the message to determine the problem.

Number	Reason
101	The user's account is locked, so they need to reset their passphrase.
102	The user has been inactive too long and needs to reset their passphrase.
103	The user is logged into the system somewhere else.
104	The concurrent user capacity has been reached. Try later.
105	The user was forced out because their username was changed.
106	The user was forced out because their username was deleted.
107	A force resetting of the user's passphrase has been requested.
199	We're not quite sure. Give us a call.
201	The user has been denied login privileges.
202	The user does not have weekend access rights, and it's the weekend.
203	The user is trying to log in outside their allowed hours.
204	The district's fiscal year close process is running.

Forgotten Passphrase

We all experience those moments when things just seem to slip our minds. If you have forgotten your passphrase, you can ask the system to send you instructions for resetting it.

1. Click the *Forgot Passphrase* link on the *Log In* page.
2. Type your email address in the *Username* box that appears.
3. Click the *Send Reset Email* button.
4. Locate the email and click the link shown in it.
5. You will be prompted to enter a *New Passphrase* and then *Confirm New Passphrase*. You must enter the same passphrase twice.
6. Click the *Reset* button.
7. If your access level requires two-factor authentication, enter the six-digit code displayed by your authenticator app, and click *OK*.

Dashboard

Once you have successfully logged in, you will be at the *Dashboard*, which contains valuable information about your Meal Magic Cloud operations. News from Meal Magic Corporation appears on the left, and an *Important Notices* list appears on the right if there are issues that need attention.

Across the top of the screen are menu headings. When you hover over the headings, a list of corresponding functions appears. Simply click on any desired function to go to the appropriate screen.

You can return to this screen at any time by selecting clicking the banner at the top of the page.

Quick-Nav Links

You will notice *Quick-Nav* links in the various sections of the software to make moving between related pages quicker and easier. The links are underlined or labeled as *Go to related*. Clicking on them will take you to other sections of the software that relate to the current page.

Help

The Help menu provides access to various useful items, such as manuals, online training, and more.

Manuals

The *Help* menu also contains a list of available manuals. These manuals are presented in Portable Document File (PDF) format and can be opened with any PDF viewer, such as the free Adobe® Acrobat® Reader.

Training

You can access Meal Magic Corporation's online tutorials for the sales registers and nutritional analysis through this menu if you have licenses for these features.

Privacy Policy

This option allows you to read the newest version of Meal Magic Corporation's Privacy Policy.

Status

Select this option to open a new tab that reports the current operating status of various Meal Magic Corporation websites. The information is a best-effort attempt to accurately reflect the current operating conditions of our products and services.

Get Help / About

Here you will find information about the current version of the software, such as legal notifications and and ways to contact Meal Magic Corporation's Customer Experience Team (CET). If you want to give temporary access to Meal Magic Cloud to a CET member, click the *Allow CET Access* button. Only do this when instructed, and our team will be able to log into your Administration to provide one-time assistance.

CET members will be able to view information, but they cannot make changes.

Log Out

Whenever you are done using Meal Magic Cloud, click the *Log Out* button located in the gray bar at the top of the page and to the right of the menu options. This prevents other people from using your login and access rights.

Management

District

Management → District

Introduction

This section is used to enter information that is universal to the school district. Without this information, much of Meal Magic Cloud will be unusable.

Rates Settings

The *Rates* tab contains information necessary for processing applications. Be very careful when entering values so that benefits are determined properly.

Eligibility Rates

The USDA publishes these amounts each spring for the following school year. Amounts must be taken from the annual income chart. Values flow to Family Portal, so be sure to enter amounts for the upcoming school year before June 30 to ensure that correct information is shown to parents submitting new-year applications or Household Information Reports.

⚠ Be careful you are entering rates for the proper school year. Changes to the current school year affect all active applications.

In the section marked *Eligibility for Free Benefits*, enter the eligibility amounts for each household size (1-8) from the free column of the USDA chart. *Step* is the eligibility amount for each additional household member above eight.

In the section marked *Eligibility for Reduced Benefits*, enter the eligibility amounts for each household size (1-8) from the reduced column of the USDA chart.

Miscellaneous Considerations

Various processing information is entered in the *Miscellaneous* section of the screen. Each item is covered below.

Claim Meals Where Roaming Students are Served

By default, Meal Magic Cloud claims meals based on where students purchased their meals, the "serving school". If the box is unchecked, meals are claimed at sites where students are enrolled, the "home school".

Expiration Reminder Period (days)

This setting determines when expiring applications are noted on the Dashboard. The greater the value, the sooner you will be notified about pending expirations.

Benefit Grace Period (days)

When a change to an application results in a lesser benefit for the household, you can extend a grace period before the change takes effect. The grace period applies only to current-year applications, not applications “bumped” forward from a prior year. Consult the current USDA regulations to ensure the correct grace period.

CEP Transfer Grace Period (days)

When a student who attends a CEP site transfers to a non-CEP site within the school year, you can extend a grace period that allows the student to continue receiving free reimbursable meal benefits until the household is notified of the change. Consult your regulatory agency to ensure the correct grace period is used.

Average Daily Attendance Factor

This value usually comes from the USDA around the end of October. Upon receipt of this information, enter it in this box. Calculated attendance figures are based on this percentage of enrollment.

Special Considerations Settings

Many districts charge for various programs in which students participate, such as Pay-for-Play Athletics, Driver’s Education, and Performing Arts. Some districts charge for textbooks. In some cases, special considerations are made for students who receive meal benefits. To track possible eligibilities within Meal Magic Cloud, enter descriptions of the Special Consideration programs here. Click the *Special* tab to begin.

Adding a Special Consideration

1. Click *Add New Special Consideration*.
2. Enter the name of the *Special Consideration* program in the text box.
3. Indicate if the benefit is to be an opt-in or an opt-out choice.
4. Optionally, enter a description, note, or other explanatory text in the *Family Portal Description* text box. This text will be displayed on Family Portal to provide additional information about the Special Consideration.
5. Click *Save*.

Editing a Special Consideration

1. Select the name from the *Special Consideration* list.
2. Make any necessary changes in the text boxes.
3. Click *Save*.

Deactivating a Special Consideration

1. Select the name from the *Special Consideration* list.
2. Make sure the *Active* box is unchecked.
3. Click *Save*.

Deleting a Special Consideration

1. Select the name from the *Special Consideration* list.
2. Click *Delete*.

> You cannot deactivate or delete a Special Consideration that is in use.

Contact Settings

Contact information is used on various reports and letters as needed and should be kept current. Select the *Contact* tab to make changes. The *General Contact* is the person that handles routine operations of the food service department, such as a food service director. The *Appeals Contact* handles mediation of disputes regarding applications for meal benefits and is usually a business manager, superintendent, or other official that oversees the food service department.

District Name

1. Enter the *District Name*.
2. Click *Save*.

General Contact

1. Enter the name of the person in charge of the food service department in the *Contact* box.
2. For the individual named in Step 1, enter the *Address, City, State, Zip, Telephone, Email,* and, if available, a secondary telephone (*Telephone 2*) in the corresponding boxes.
3. Click *Save*.

Appeals Contact

1. Enter the *Title* for the individual that handles appeals.
2. Enter the person's name in the *Contact* box.
3. For the individual named in Step 2, enter the *Address, City, State, Zip, Telephone, Email,* and, if available, a secondary telephone (*Telephone 2*) in the corresponding boxes.
4. Click *Save*.

With the Child text box and Reauthorization Act of 2004, schools must provide toll-free assistance to all families selected for verification. *Telephone 2* can be used to identify the toll-free number if this requirement applies to your district.

Reply-To Email Address

The *Sender* listed on email sent from Meal Magic Cloud is a generic, no-reply account assigned to your district by Meal Magic Corporation when your account was established. The assigned email address does not exist. Neither you nor your email recipients have access to it.

If you want email recipients to be able to reply to your messages, enter the email address to whom they should respond as the district's *Reply-To Email Address*. Then, when a recipient tries to reply to an email sent through Meal Magic Cloud, their message will be sent to the address you entered here.

Benefits Settings

1. Use the calendar to select the *default benefit expiration date,* which is when manually assigned benefit statuses ("forced benefits") for customers not on applications become inactive.
2. If allowed by your regulatory authority, enter the number of days you are allowed to backdate application benefits; otherwise, use zero.
3. Click *Save*.

Reimbursement Settings

At or before the start of the school year, the USDA and states issue the reimbursement rates for meals served. Meal Magic Cloud uses these rates to calculate reimbursements on the *Reimbursement Claim* report. To update the rates, click the *Reimbursement* tab.

State and Federal Reimbursement Rates

1. Select the meal period from the drop-down box.
2. Enter the rates in the corresponding boxes.
3. Click *Save*.
4. Repeat Steps 1 through 3 for each meal period.

Community Eligibility Provision (CEP)

If your district participates in Community Eligibility Provision, enter the *CEP Reimbursement Multiplier* before saving.

Reimbursement Claim Free and Reduced Counts

The *Reimbursement Claim* report provides the total number of free and reduced students enrolled on a month-to-month basis. These numbers are calculated either at the highest number for the month or for the exact total on file for the last day of the month, depending on USDA regulations.

Clicking the *Reimbursement Claim Free/Reduced Counts* bar expands the page to show which value is used for each of the twelve months, and you can modify them as necessary. Be sure to click *Save* after making any changes.

Applications / EBFs Settings

If your state has alternate titles for SNAP, FDPIR, or TANF, you can change the names using the *Alternate Title* text boxes on this tab.

If desired, you can define the required format of case numbers used for SNAP, FDPIR, and TANF using the *Case Filter* text boxes. Use “A” for letters (A-Z), “#” for digits (0-9), or “.”, “/” “:”, “\” or “-” for separators. For example, AA-#### accepts case numbers such as AZ-0123, BS-9999, and TW-3333. If multiple formats are needed, separate them with a comma, such as “AA-####, ##-AA-#####”.

Preferred Reports shows the report that is run when the *Print Notification Letter* button is used for an application. By using the dropdown list, you call switch from our pre-defined report to a custom report that you have entered into the system.

You also can collect additional student demographics through Family Portal by checking each optional item you want. Select *No* if you do not want to collect the information, *Yes* if you want to allow but not require the information, or *Required* to mandate entry of the information. Check with your state authority before making changes.

If you want to exclude certain income frequencies from appearing on Family Portal, check the appropriate boxes.

There are four options that determine how Family Portal handles applications and Household Information Reports. Be sure to check these options near the end of each school year to ensure they are correct for the upcoming year.

Accept These Documents

These settings determine what income documents parents can submit through Family Portal. Uncheck both if you do not want to use online documents; otherwise, check *Applications* if you need meal benefit applications, and check *EBFs* if you need income surveys for programs other than food service.

For selected documents, you can check *with Special Considerations* to include choices for those. Special considerations are opt-in, opt-out programs for which parents can give permission for sharing their income status, for example, Medicare or textbook assistance.

Accept for These Years

These settings control for which school year parents can submit the selected documents. Check which years you want active on Family Portal.

Current allows submissions for the current school year, which is the one you see when your first open Meal Magic Cloud. Family Portal will not accept applications after June 30 of the open school year when you select this setting.

Upcoming allows submissions for the upcoming school year, which is the school year after the one you see when you first open Meal Magic Cloud. This is the year you will be working with after you close the current year. If you select this option, Family Portal will not accept applications until after June 30 of the open school year.

To allow submissions for the current school year and the upcoming one, check both boxes. In this case, Family Portal will accept current-year submissions through June 30 and then switch to accept new-year submissions beginning July 1.

EBF Income Format

Check this box if you want to use range-style incomes and your state allows parents to indicate their income by choosing an income range; otherwise, uncheck the box.

Be sure to click the *Save* button after making any changes.

Family Portal Settings

This tab is used to manage important Meal Magic Family Portal information, such as payment processor, credentials, customer linking requirements, and the availability of student accounts and features.

Payment Processor

On June 29, 2023, Meal Magic Corporation and Vanco Payment Solutions, Inc. entered into a joint marketing agreement to better serve food service customers. If your district was referred to us by Vanco, or if your district transferred to our solution from Food Service Solutions, also known as FSS or Vanco Food, your payment processor option is limited to Vanco RevTrak.

Districts that select Vanco RevTrak will enjoy additional benefits not available with other providers, including the option to use the Vanco RevTrak Web Store, which will include Family Portal conveniences, such as live balances and real-time deposit posting.

If your district wants to allow parents to make food service deposits, you must establish a relationship with a payment processors that works with Family Portal. A list of selectable processors is shown when you click the Processor dropdown list.

Once you have an account in place, you need to select the processor from the dropdown list and click *Save*.

Once you have saved a payment processor choice, this section will be locked. If you need to change your chosen processor, or if you wish to disable depositing, you must click the lock icon next to *Payment Processor* to enable editing. This is a safety feature to prevent accidental changes.

The *On* checkbox must be checked for depositing to work. If you uncheck this setting, no deposits can be made on Family Portal.

For some processors, when both *Sharing* and *On* are checked, customer balances, and possibly names, are transmitted to the processor if the information changes. If your district only uses Family Portal for online deposits, do ***not*** check *Sharing*. You should ***not*** check *Sharing* box unless your district allows deposits to be made through the processor's proprietary website. By checking this box, you are consenting to sharing information.

⚠ Do not select *None* as your payment processor unless you have discontinued your contract with them; otherwise, your various *Account Number* and *Account PIN* will be cleared. Instead, use the *On* toggle to temporarily disable a payment processor.

Customer Linking

By default, Family Portal users can add customers to their account without needing approval by supplying the correct ID number and name of the customer if the user's email address is on the customer's account. This provides convenience for Family Portal users, who do not need to wait for approval, and for the district, because the linkage can be approved automatically.

If you check the box for *Require Birth Date Match*, Family Portal users also will need to supply the correct birth date for customers they want linked to their account. If you decide not to require email matching, then enabling this option is recommended to help prevent unwanted access to customers that a user should not have.

It is highly recommended that you leave *Require Parent/Guardian Email Match* checked to help prevent users from accessing customers that are not part of their household.

Student Accounts

These settings are not available for editing yet.

Allow Student Accounts

☑ Family Portal users can grant permission for their linked students to log into Family Portal to check their balances and show their ID number.

☐ Students cannot have Family Portal accounts.

Allow Students to Place Orders

☑ Students with Family Portal access can place meal orders if the district uses ordering.

☐ Students cannot place their own orders.

New Account Permissions

When a person creates a new Family Portal user account, the settings in this section will be applied to their account. Check the features that you want new users to have, and uncheck those that you do not want them to have.

When you change one of these permissions, the *Apply* button becomes active. Clicking the button will apply the current settings to all existing Family Portal user accounts, overriding any previously applied permissions.

Credentials

1. Make any necessary changes to *Account Number* and *Account PIN*.
2. Click the *Update* button.

You must have a payment processor selected to be able to update credentials.

Account Number and *Account PIN* are supplied by your payment processor and must be entered. When you attempt to update, the system will validate these two items with the chosen processor. If they are not confirmed, they will not be saved.

Ordering

If your district uses our optional *Ordering for Parents* service, you can use these settings to configure how that system works. Please read this section carefully before making changes, as reserves, while useful, are not a definitive solution for avoiding overspending.

Requiring reserves is an assistive tool to try to prevent customers from overspending. When selected, orders can be placed for a member only when that member has a positive balance and that balance, less any existing orders, is at least the *Per Meal* amount. For example, if a customer has a balance of $10.00 and two existing orders at a *Per Meal* price of $3.00, that customer has $4.00 available for new orders ($10.00 - 2 X $3.00). In this case, the customer can place one additional order.

If a customer's balance is below zero, the ordering page can be accessed for editing, but no new orders can be placed until the customer's balance, less any reserves for remaining orders, meets the *Per Meal* reserve requirement.

A *Minimum* reserve can be set as a second means of trying to prevent overspending. This is a fixed amount that is added to the *Per Meal* reserve and can be useful for setting aside funds for a-la-carte purchases.

⚠ Reserves are calculated using a customer's current benefit without regard to any *Free Entrees* site settings. If a benefit is lessened or eliminated while a customer has pending orders, it is possible for the customer's balance to go negative when those orders are sold.

Maximum Days

Enter a number from 10 to 30 to indicate the maximum number of days to show when orders are being entered on *Family Portal*. If you have schedules set for more days than the value set here, the extra days will not be shown.

Require Reserves

☑ Ordering will be restricted based on the selected member's meal benefit, current account balance, and the number of future orders already entered for them.

☐ Orders can be placed, even if the member has a zero or negative balance.

Per Meal

Enter the amount a member needs to be able to place a single order. For students, enter an amount for full-paying students and for students that pay a reduced price. There is no restriction for students who receive their meals at no charge. Also enter an amount for adults. Amounts can be between $1.00 and $20.00.

Minimum

For the same categories as above, you can specify a minimum balance that the member must maintain to be able to place orders. For example, you could indicate that a person must keep $5.00 in their account when placing orders. This is a good way to set aside funds for a-la-carte purchases at sales registers or vending machines. Amounts can be $0.00 to $100.00.

Color Settings

You can use color-coded item buttons on Prestige sales registers by selecting Use Component-based Button Colors under Cafeteria settings. Colors will be applied to buttons based on the components the item meets and the colors you select here.

Change or Clear Colors

1. Click the square for the desired component group.
2. To assign a color, click the color from the pop-up list. To remove a color, click the *Clear Color* button.
3. Repeat steps 1-2 as needed.
4. Click the *Save* button.

Miscellaneous Settings

The *Miscellaneous* tab allows you to set other preferences as follows.

Use Dynamic Balance

Meal Magic Cloud's sales registers automatically reflect changes to a customer's balance with each item selected. This is called *Dynamic Balance*. This feature can be turned off by removing the check mark in this box.

Use Alphanumeric Customer IDs

When this box is checked, ID numbers can contain letters and numbers, for example, 12E34F56G. Only enable this if your Student Information System uses alphanumeric ID numbers.

Disable Quick IDs

If you check this box, Quick ID numbers are ignored throughout Meal Magic Cloud Administration.

Sites

Management → Sites

Introduction

Sites refer to distinct locations within the district, such as school buildings. For example, Franklin Elementary could be a site as could Administrative Services Center.

When you select this option, a list of existing sites is displayed on the left. If you want to view the settings for a listed site, click its name.

Add a Site

1. Click *Add New Site*.
2. Enter information on the appropriate tabs as described below.
3. Click *Save*.

Edit a Site

1. Within the list, click the name of the site you need to change.
2. Enter information on the appropriate tabs as described below.
3. Click *Save*.

Delete a Site

1. Within the list, click the name of the site you need to change.
2. Click *Delete*.

> You cannot delete a site that is in use.

Contact Settings

Each site should have a unique *Site Name*. Also include a *Contact* and mailing address including *Address, City, State*, and *Zip Code*. Be sure to list a *Phone* number too.

You also need to assign a unique *Site Number*. This number should match any numbering used in the district's Student Information System so that information can be shared between that system and Meal Magic Cloud.

For the *Contact*, typically you should list the person in charge of food service at the site. This information can be displayed as the return address on letters you create in the *Custom Reports* section.

Click *Save* after all the information has been entered.

Prices Settings

On the *Prices* tab you enter the standard meal price, broken down by benefit type, for each serving period. Prices entered here also appear on *Eligibility Letters* that you send home.

If *Build-A-Meal* is used, the tiered prices are used when individual components combine to create a reimbursable meal.

For prices marked *tiered* you optionally can enter multiple prices for the benefit classification. Tiered pricing is indicated by entering multiple prices, separated by commas. When a reimbursable meal is created by *Build-A-Meal*, the unit price for the meal will be the tiered pricing amount closest to but not over the price of the individual components that comprise the meal. If there is no price that fits, the closest lower-tiered prices will be used.

Example For Tiered Pricing With Build-A-Meal

As a-la-carte purchases, pizza is $1.50, milk is $0.30, and an apple is $0.50. Without Build-A-Meal, the total meal price is $2.30.

Assume that tiered pricing is set as $2.00, $2.75, $3.25. The closest amount without going over $2.30 is $2.00, so $2.00 is used as the unit price.

When individual items are combined into a meal and sold as a unit, the meal can be classified as a reimbursable serving if no other meal is served to the customer. In this case, the $2.00 unit-priced meal is reimbursable, but the $2.30 meal would not have been.

To update prices, select the meal period from the drop-down box. Then enter the prices for each benefit classification listed. Click *Save* after entering all the amounts.

Tiered Adult Prices

If tiered pricing is not used, enter the price for a standard adult meal. For tiered pricing, enter the list of prices with a comma between each amount.

Tiered Full Pay Student Prices

If tiered pricing is not used, enter the price for a standard full-pay student meal. For tiered pricing, enter the list of prices with a comma between each amount.

Reduced Student Price

List the maximum price chargeable to reduced-priced students as determined by the USDA. Typically, this is $0.30 for breakfast and $0.40 for lunch.

Published Full Pay Price

This price is used on *Eligibility Letters* and must be the normal price for a standard full-pay student meal. Unless tiered pricing is used, this should match *Tiered Full Pay Student Prices*.

Published Adult Price

This should be the standard price for an adult meal. Unless tiered pricing is used, this should match the *Tiered Adult Prices* entry.

Free Entrees

With this feature, you can extend free entrees to reduced-price students and/or full-paying students. If you do this, you also may limit this special handling to a span of grades. Adjust these settings as appropriate for your district.

When active, there is no charge for the first reimbursable meal sold to a student during the meal period; however, the meal will be claimed under the student's normal benefit. This is handy for programs such as Universal Breakfast and State initiatives.

Include For Prorated Credit

If this box is checked, prices for the selected meal period will be included in prorated credit calculations.

Required Settings

Information found here affects various reporting features of the software.

Low Balance Level

The *low balance level* is the amount at or below which a customer's account is considered to be low on funds. The balance of customers at or below this amount appear in yellow at sales registers.

Cafeteria

By default, the site is assigned to the cafeteria with the same name as the site; however, you can select a different cafeteria from the list if necessary. For example, an elementary site might be served in a middle school cafeteria.

Last Grade for Free Milk

Students at or below the grade specified here will be counted in the milk enrollment. All other students will be counted in the meals enrollment.

Reimbursement

If the site is eligible for severely-needy rates for a particular program, such as breakfast, place a check mark in the *Needy* column for that program.

Community Eligibility Provision (CEP)

If the site participates under Community Eligibility Provision, make sure this box is checked. When enabled, this setting ensures that students attending the site receive reimbursable breakfasts and lunches at no charge.

Be sure to click *Save* to update the site if you make any changes on the *Required* tab.

Behaviors Settings

Various behaviors can be set for each site. Keep in mind that these are site-specific behaviors, i.e., behaviors for Site A do not affect Site B. Each behavior is described below. To activate a behavior, place a check mark in the box next to it.

Student Build-A-Meal

When *Build-A-Meal* is active, sales registers can intelligently combine a-la-carte items into a qualifying reimbursable meal with a set unit price per USDA regulations.

For example, a student selects pizza priced at $1.50, milk priced at $0.30, and an apple priced at $0.50. Priced individually as an a-la-carte purchase, this totals $2.30. By using *Build-A-Meal*, the sales register recognizes this combination as a qualifying reimbursable meal and applies unit pricing to the meal.

Adult Build-A-Meal

This behavior works just like the student version except it applies to meals served to adults.

Require Unique Components

Build-A-Meal checks to see what meal components each item contributes toward a reimbursable meal. With this setting selected, when two or more items contribute a like component, only one of the items will be used in the unit meal. The actual selection is based on the price of the items and the number of components each contributes.

Extra Components Are A-la-carte

A reimbursable meal can potentially contain all five components: fruit, grain, milk, meat or meat alternative, and vegetable. With this behavior selected, individual items will not be included in the reimbursable meal if the minimum number of components has been met.

Block Allergens

The *Allergy Alert* feature compares a food item's marked allergens with the marked allergens of the customer and normally displays items that could potentially trigger an allergic reaction in red. With *block allergens* selected, the items appear in gray and cannot be sold.

Enable Intelli-Credit

If a purchase will bring a customer's balance below zero dollars, *Intelli-Credit* limits chargeable purchases to the first reimbursable meal served to the customer during the meal period. This ensures that customers are not using credit to fund non-reimbursable a-la-carte selections. In these credit situations, the customer must pay cash for a-la-carte items.

Don't Show on Family Portal

Check this box if you do not want this site to appear on Family Portal.

Pickup Location

Check this box if parents/guardians can pickup meals for at-home learning at this location.

Pickup Meals

Meal pickup can include breakfasts and/or lunches. A student's *Lunch Site* setting indicates the site that determine what meals are available for that student. Because pickup ordering usually spans multiple days, generic items should be used, such as *Lunch* and *Breakfast*. To set items, click the meal period, chose an item from the list, and click *Done*. If no item is selected, it will indicate that tno meals are available for that period.

Generating Quick IDs

This setting determines how *Quick ID*s are created for the site. By default, Meal Magic Cloud randomly assigns these ID numbers using the shortest possible number. You can select the method that best serves your needs.

Be sure to click *Save* after you have changed behaviors.

Enrollment Settings

Enrollment and attendance figures are calculated automatically by the software using the number of active student customers in the system. These numbers are used for the *Reimbursement Claim* report and in determining potential over-claim situations. You can override the computed values on this tab.

Change Enrollment and Attendance

1. Select a serving date by either typing it into the box or using the pop-up calendar.
2. Adjust the *Enrolled* and *Attended* figures as necessary. Be sure to properly allocate the numbers between meal programs and, if you participate, the Special Milk Program.
3. Click *Save*.

You can only adjust enrollment and attendance figures for days on which sales were recorded.

Credit Limit Settings

Without credit, customers normally cannot make purchases that would make their account go below zero dollars, so a customer would be required to pay cash at the sales register when he has insufficient money in his account to fully cover the purchase.

An exception occurs when a sales register operates in disconnect mode. Because a disconnected sales register cannot obtain up-to-the-minute account balances, credit limits are not enforced.

Extending credit can be tricky and requires close monitoring of account balances to ensure that temporary credit is repaid in a timely manner by the customers. Also, USDA regulations concerning credit limits and credit purchases must be followed.

If you wish to extend credit to customers, you must choose between using fixed or pro-rated amounts.

Because we are working with sites, credit limits set here apply to everyone at the site. You also can set individual credit limits (see **Customers → Edit**).

Fixed Amount

With this option, every customer at the site is assigned the same credit limit regardless of benefits.

1. Click the circle next to *fixed amount*.
2. Enter the credit limit each customer will have.
3. Click *Save*.

Pro-rated Amount

When pro-rated credit is used, for each benefit classification the system sums the corresponding prices of all meal periods marked *Include for Prorated Credit* on the *Prices* tab. It then multiplies the sums by the number of days you specify to derive credit limits based on benefit classifications.

1. Click the circle next to *pro-rated amount*.
2. Enter the number of days customers can make purchases on credit.
3. Click *Save*.

When using pro-rated credit, you must mark at least one meal period as Include for Pro-rated Credit or no credit will be extended.

Override Individual Limits

Customers can be assigned their own credit limits, which also can be locked from being changed. If you want to reset these individual credit limits to match the site's credit limits, you must check the *override individual limits* box before clicking *Apply to All Customers*.

Apply to All Customers

The steps for establishing credit limits given above do not change credit limits already assigned to customers but instead only apply to new customers when they are added to the system. To assign the newly established credit limits to existing customers, click the *Apply to All Customers* button.

Nutrition Settings

USDA nutrition standards vary based on grade ranges. For each site you need to indicate the grade range of the students in attendance there so that the nutritional analysis feature of Meal Magic Cloud can measure menus against the age-appropriate USDA guidelines. Separate settings are available for breakfast and lunch.

1. Select a grade range for breakfast.
2. Select a grade range for lunch.
3. Click *Save*.

Pickup Schedules

Management → Pickup Schedules

Introduction

Advance sales work on a district-wide scheduling basis, i.e, all sites have the same pickup day with meals available for the same days. Care needs to be taken to ensure that pickup days and the associated lists of serving days do not overlap.

Add or Edit a Pickup Schedule

1. Enter a *Pickup Date* or use the calendar to select one.
2. Click *Edit*.
3. Enter an *Ordering Cutoff* date or use the calendar to select one. The date is the last day parents/guardians can order pickup service online and must be at least one day prior to the intended pickup date.
4. Choose a *Type of Service*:
   A. Walk-in Only – to prevent advance ordering online
   B. Orders Only – to require online ordering
   C. Walk-in and Orders – to allow online ordering and walk-in ordering.
5. Make a choice for *Lock Serving Days*:
   - ☑ Parents will not have a choice of which days they want meals but instead will be ordering for all days available.
   - ☐ Parents will be able to indicate for which days they want meals.
6. Click up to ten days on the *Serving Dates* calendar to indicate for which days you are offering meals. Clicking a selected day will remove it.
7. Click *Save*.

Teachers

Management → Teachers

Introduction

Being able to assign students to teachers can improve accuracy in locating the correct customers. Having teachers in the system is essential if you use *Class Sales*; otherwise, it is optional.

Add a Teacher

1. Select a *Site* from the drop-down list near the top right-hand corner of the screen.
2. Click the *New Teacher* button.
3. Enter the *Teacher's Name* in the text box,
4. Enter the *Room Number* in the text box.
5. If the teacher will be entering orders for his/her classroom, check the *Can Place Class Orders* checkbox. When the *Email Address* text box appears, enter the teacher's email address.
6. Click *Save*.

Edit a Teacher

1. Select a *Site* from the drop-down list near the top right-hand corner of the screen.
2. Click the teacher's name in the list.
3. Correct the information as needed.
4. Click *Save*.

Delete a Teacher

1. Select a *Site* from the drop-down list near the top right-hand corner of the screen.
2. Click the teacher's name in the list.
3. Click *Delete*.
4. Confirm the deletion by clicking *Delete Teacher*.

Delete Unused

This feature allows you to remove teachers that have no students assigned to them en masse.

1. Select a *Site* from the drop-down list near the top right-hand corner of the screen.
2. Click *Delete Unused* at the bottom of the list.
3. Confirm the deletion by clicking *Delete Unused Teachers*.

Student Groups

Management → Student Groups

Introduction

This feature allows you to create groups of customers. These groups then can be used for *Class Sales* at the register. For example, you could create a group called *After-School Care Center* and then assign students who attend the program to it. You could then use *Class Sales* to conveniently and quickly sell after-school snacks to them.

Add a Student Group

1. Click *Add New*.
2. If you want to use the group for *Class Sales*, place a check mark in the *Show At Register* box; otherwise, make sure it is unchecked.
3. Enter the *Name* of the group.
4. Click *Save*.

Edit a Student Group

1. Select the group from the list.
2. Adjust the settings as needed.
3. Click *Save*.

Delete a Student Group

1. Select the group from the list.
2. Click *Delete*.

You cannot delete student groups that have students assigned to them.

Report Queue

Management → Report Queue

Introduction

You can perform various management tasks to keep your report queue orderly. For example, you can manage which types of reports are allowed to run, purge all or selected reports from the queue, or update the email address of report recipients.

Reporting Settings

On this tab, you can set which types of reports are allowed to run.

1. Select from the *Run* drop-down which reports should run as scheduled.
2. Click *Save Reporting Settings*.

Setting *Run* to *No Reports* is a good way to retain scheduled reports yet make sure they do not run during a period when school is not in session.

Purge Report Queue

A little housekeeping on your report queue will keep it tidy and make finding reports easier.

1. Use the *Purge Reports For* drop-down list to select either *All Users* or a single user.
2. Place a check mark next to each type of report you want to delete from the queue.
3. Click *Purge Selected Reports*.
4. On the confirmation page, enter into the text box the code that appears above it. Make sure it matches exactly.
5. Click *Continue*.

Archived reports are purged after 90 days in the queue and when the fiscal year is closed.

Manage Report Email

Instead of recreating reports when recipient email addresses change or are no longer valid, you can edit the existing reports en masse.

Remove Email From Reports

Example: Various reports are scheduled to be emailed to Mary in accounting. Mary, however, has taken a new position and no longer needs to receive these reports. You can remove Mary's email address from the reports, and the reports will still send to other recipients but not Mary.

1. Set *Action* to *Remove Email From Reports*.
2. Select *All Users* or a specific user from the *Modify Reports Created By User* drop-down. Normally you would select *All Users* when deleting email addresses.
3. Type the recipient's email address in the *Email To Remove* text box.
4. Click *Remove Email*.

Update Email In Reports

Example: John's email has changed from john@school.com to john.smith@school.com. You can quickly make this change to existing reports instead of having to recreate them.

1. Set *Action* to *Update Email In Reports*.
2. Select *All Users* or a specific user from the *Modify Reports Created By User* drop-down.
3. Enter the *Email To Replace* in the text box.
4. Enter the new email address in the text box to the right of the box listing *Replacement Emails*. (You cannot type in the list.)
5. Click *Add New Email*.
6. Repeat Steps 4 and 5 as needed.
7. Click *Replace Email*.

You can remove an email address from the list if necessary. Click the email address and then click *Remove Selected Email*.

After email addresses have been removed or updated, the number of affected reports will appear in a yellow box near the top of the screen.

Users

Management → Security → Users

Introduction

For accountability, all individuals that access Meal Magic Cloud must have their own user account. Certain activities are attributed to the user that performed them, so if you want to know who did what, it is imperative that everyone has their own login and passphrase.

Security is applied through the use of roles. Roles determine what users can do. As delivered, Meal Magic Cloud has these pre-defined roles: *Administrator* web role*, Administrator* register role, and *Time-Clock Only* register role. The food service administrator must create any additional roles needed for other users. Any given role can be assigned to one or more users, greatly reducing the effort needed to get everyone into the system with proper access rights.

Although the *User* tab appears first on screen, we will start with web roles and then register rolls before covering users. By having web roles and register roles created first, managing users will be much easier.

Add a Web Role

Web roles define what users are allowed to do in Meal Magic Cloud's Administration.

⚠ Be sure that *New Role* appears in the *Role Name* text box after you click *Add Role*; otherwise, the changes you make will overwrite the role that is named there.

1. Click the *Web Roles* tab.
2. Click *Add Role*.
3. Enter the *Role Name* in the text box.
4. Select access rights by placing check marks in the boxes next to the rights you want to grant. Unchecked boxes indicate that there is no access to those activities. Be sure to grant or deny rights on all three tabs: *Administration Permissions, Report Permissions,* and *Login Permissions*.
5. Click *Save*.

Edit a Web Role

1. Click the *Web Roles* tab.
2. Select the *Web Role* from the list.
3. If necessary, correct the *Role Name* shown in the text box.
4. Select access rights by placing check marks in the boxes next to the rights you want to grant. Unchecked boxes indicate that there is no access to those activities. Be sure to grant or deny rights on all three tabs: *Administration Permissions, Report Permissions*, and *Login Permissions*.

5. Click *Save*.

Zeus is the most power web role available. It should be assigned only to individuals that need unrestricted access to all areas of the software. As a security precaution, the *Zeus* web role does not appear in the list.

Administration Permissions

Admin permissions refer to various settings that affect which features are available to users.

View Permissions

Marked *View Permissions* grant access to viewing the information described in the individual settings. An unmarked *View Permission* prevents viewing.

Edit Permissions

Marked *Edit Permissions* indicate where users can add, change, or delete information. If an *Edit Permission* is unchecked, the users cannot alter information.

Execute Permissions

Marked *Execute Permissions* allow users to perform the associated functions. These special tasks should only be granted to users that absolutely need them.

Edit and *Execute* permissions depend on the ability to view the associated information. For example, if you grant access to edit benefit statuses, you also must grant access to view benefit statuses.

Report Permissions

Report Permissions indicate which reports users can run. If a report is marked, the user can access it.

Applications, POS, and Nutrition

Each of these tabs lists all the pre-defined reports for the named area of the software. When you add a web role, all the reports are active.

To remove access to a report, unmark the box next to its name. To quickly remove access to all reports in a particular area of the software, mark the *Restrict All Reports* box.

Custom

On this tab you grant rights to the *Custom Reports* feature of Meal Magic Cloud. Users can add, edit, and run custom reports; run existing reports only; or do nothing with custom reports.

Login Permissions

Login Permissions limit when users can use Meal Magic Cloud Administration.

Require Two-Factor Authentication (2FA)

When checked, users must enter a one-time, six-digit code each time they attempt to log into the system. This greatly improves the security of your information and might be a requirement in your state or by your district's cybersecurity insurance provider. Users without this setting will be extremely limited in what they can see and do.

Restrict To Weekday Logins

This restriction only allows users to login Monday through Friday during hours that you set when this option is selected.

Deny All Logins

This restriction prevents users from logging into the system under any circumstances. If an employee leaves, you should move them into a web role that has this restriction set.

Add a Register Role

Register roles determine what special tasks users can and cannot do at Meal Magic Cloud sales registers.

⚠ Be sure that *New Role* appears in the *Role Name* text box after you click *Add Role*; otherwise, the changes you make will overwrite the role that is named there.

1. Click the *Register Roles* tab.
2. Click *Add Role*.
3. Enter the *Role Name* in the text box.
4. Select *Execute Permissions* by placing check marks in the boxes next to the ones you want to allow. Unchecked boxes indicate that there is no access to those tasks.
5. Click *Save*.

As a safety precaution, the *Administrator* and *Time-Clock Only* register roles do not appear in the list.

Time-Clock Only is a very limited register role that only allows users to "punch in" and "punch out" with the time clock feature of the sales register.

Edit a Register Role

1. Click the *Register Roles* tab.
2. Select the *Register Role* from the list.

3. If necessary, correct the *Role Name* shown in the text box.
4. Select *Cashier Permissions* by placing check marks in the boxes next to the ones you want to allow. Unchecked boxes indicate that there is no access to those tasks.
5. Click *Save*.

Cashier Permissions

As you will notice by their descriptions, the execute permissions represent managerial functions that should not be granted haphazardly to everyone.

Make Cash Sales

If this permission is denied, the user is restricted to making sales against customer accounts only.

Reclassify Cash Sales

When enabled, cashiers can toggle anonymous sales from a-la-carte to reimbursable at will. For accountability, a manual list of who received anonymous reimbursable meals should be kept.

Void Sales

With this permission set, users can void sales. Without it, a user with greater authority would have to be tasked to void sales.

Rollback Clock

This permission is needed if the user has to adjust information at the sales register for activity that occurred on prior days.

Cash-out Access

Cash-out Access rights limit how users can edit and perform cash-outs on the sales registers. Users can be prevented from entering cash-outs, limited to making a single cash-out without the ability to edit their entries, or allowed to make unlimited changes to cash-out information.

Add a User

Be sure that *New User* appears in the *Real Name Of User* text box after you click *Add User*; otherwise, the changes you make will overwrite the user that is named there.

1. Click the *Users* tab.
2. Click *Add User*.
3. Enter the user's name in the *Real Name Of User* text box.
4. If the user needs access to Administration:

A. Make sure *Grant Web Access* is checked.
B. Enter the user's *Email Address*.
C. Select an appropriate *Web Role*.
D. If you want to limit the user to having access only to specific sites, click the *Site Access* bar to reveal a list of all your sites. Place a check mark next to the sites the user can access and make sure all other sites are unchecked.

5. If the user does not need access to Administration, make sure *Grant Web Access* is unchecked.
6. If the user needs access to sales registers:
   A. Make sure *Grant Register Access* is checked.
   B. Enter a *Register User Name*. This is the *Login* name the user will enter at the sales register.
   C. Select an appropriate *Register Role*.
   D. Click *Change Register Passphrase*.
   E. Enter a *Register Passphrase* for the user.
7. If the user does not need access to sales registers, make sure *Grant Register Access* is unchecked,
8. Click *Save*.

Edit a User

1. Select the user's name from the list.
2. Make the changes you need (see Steps 3 through 6 of *Add a User* above).
3. If you need to assign a new register passphrase for the user:
   A. Click *Change Register Passphrase*.
   B. Enter the new passphrase in the *Register PassPhrase* text box.
4. Click *Save*.

Email Subscriptions

For each user with web access, check the box for each email notice that you want the user to receive.

Reset Credentials

If an established web user needs to setup two-factor authentication on a new device, a *Zeus*-level user will need to reset the user's account so that a new shared secret can be established on the new device.

1. Select the user's name from the list.
2. In the *Grant Web Access* section, click the *Reset Credentials* button.

3. Click *Save*.

Reports

From the *Reports* tab you can generate a report that lists all active users and their assigned roles. This gives you an easy way to check everyone's web and register roles quickly. If desired, the report can be sent via email to one or more addresses.

Online

Management → Security → Online

Introduction

This page lists the email addresses of all users currently logged into Meal Magic Cloud Administration. If someone has forgotten to log out, you can force them off the system.

1. Click the email address for the user you need.
2. Click *Force Log Out*.

⚠ Do not arbitrarily force users out of Administration as they could be in the middle of doing something very important.

Licenses

Management → Security → Licenses

Introduction

In addition to listing all your Meal Magic Cloud licenses by type with quantities of each, this section allows you to create *API Keys* and displays your *District ID*, district URL, and subscription expiration date. It also includes access to the CloudWS software, the sales register installer, and API control settings.

API Service

This section controls access to the Meal Magic Cloud Administration API service through an on/off mechanism and security restrictions.

Allow Administration API Usage

Meal Magic Cloud includes various *Application Programming Interfaces* (*APIs*) that allow interaction with the system for specific tasks, such as uploading student information and photographs. To enable access to administrative functions, the *Allow Administration API Usage* box must be marked.

> During the close-year process, administrative API usage will be disabled until this box is checked after the year is closed.

Generating API Keys

You can create three API keys, one for each permissible type of user of API services: the district, the district's SIS provider, and the district's payment provider. You should only create an API if it is needed, and you should remove an API key that is no longer required.

Keys are generated randomly, so if you remove a key, the chances of regenerating the same key are extremely low. Only the displayed keys work with API services. If no key is assigned, *n/a* will be shown. When there is no key, clicking the *+ –* button generates one. When there is a key, clicking the *+ –* button removes it.

Requesting Authorization for an IP Address or Range

To prevent unauthorized use by third parties, use of certain API keys may be restricted by IP addresses. You can request access for up to five IP addresses or ranges.

1. Enter an IP address or range in the *IP Range* text box. For a single address, use the format *#.#.#.#*, and for a range use *#.#.#.#-#*. Using a range allows up to 256 sequential addresses, which is way more than a school is likely to have.

2. Select the type of *Service* from the dropdown list. Use *District ISP (Internet)* for external IP addresses providing Internet service to the district; *SIS Provider* for a student information

system located outside of the district; or *Payment Provider* for a credit card gateway service outside the district.

Payment Provider is not available for districts that transition from Food Service Solutions or were referred by Vanco Payments.

3. Click the *Request* button to submit the addresses. All submissions go through a review process. If the assignee of an IP address or range cannot be determined, you might be asked to provide documentation as to the current assignee's identity.

Deleting an IP Address or Range

1. Using the format described above, enter the IP address or range in the *IP Range* text box. If the address is found either alone or within a listed range, then a *Remove* button will appear.
2. Click *Remove*.

Files

For CloudWS, click the link appropriate for your operating system to download the installer. CloudWS provides easy access to API functions, eliminating the need to write helper code that works with the API.

Click *Sales Register Setup* if you need the latest installer for sales register.

The macOS version of CloudWS requires Microsoft's .Net Core Runtime, which can be downloaded from www.microsoft.com/net/download. You do not need the SDK, just the runtime. CloudWS is not compatible with Apple Silicon (M series) systems.

If you cannot download a program to a particular location, you will need to contact your district technology department for assistance.

CloudWS is not intended for use by third parties. To that end, it will not work for certain services, such as payment providers.

Change Fiscal Year

Management → Other → Change Fiscal Year

Introduction

In Meal Magic Cloud, the fiscal year is defined as July 1 through June 30. Information is editable in the current fiscal year only. Prior fiscal years are maintained in a read-only state.

Choosing a Fiscal Year

1. Follow the menu path shown at the top of the page.
2. Click *View* next to the fiscal year you want to access.

> Meal Magic Cloud currently maintains one open (current) year and five closed (prior) years.

Close Year

Management → Other → Close Year

Introduction

⚠ If you are uncertain about any settings or what you should do after reading this section, please contact the Meal Magic Customer Experience Team for assistance.

To finalize records for the current school year, you must perform the close year process in Meal Magic Cloud. It is a relatively easy step for transitioning to the new school year. The *Close Year* function will graduate senior students; move all applications to “bumped” statuses, giving all benefits a grace period of your choosing; begin documenting transactions for the new fiscal year; optionally, remove all inactive students that have no balances; and clear all teachers and homeroom settings.

> If there are any inactive customers that you want to delete from the system, you must zero their balances before closing the year. Running the *Customer Balances* report with the *Benefits* filter set to *Inactive* will assist you in determining which students might need to be adjusted. Be certain that all students you want to delete have zero balances and their status is Inactive prior to closing the year. During the *Close Year* process, all 12th grade students with zero balances will be removed from the new fiscal year as long as inactive students are set to be removed and you choose to graduate seniors.

> The fiscal year cannot be closed until July 1 or later; however, prior to then you can schedule the process to run automatically on or after July 1.

Closing the Year

1. The first page asks *Are all registers ready for close year?* It shows the date and time of the last transaction for each register. Highlighted rows indicate registers that are significantly different from the last known transaction. The last transaction received from each register will be listed. If you find a register that does not correspond with the last serving day for its cafeteria, double check the register for any offline transactions. Once you have verified that all registers are ready for the close year process, click *All registers are ready for close year*.
2. The next page lists all of your sites. During a normal close process, inactive students and student groups are cleared. You can alter this behavior by adjusting *Holds* to fit your needs. You can disable the normal process for a given site by clicking the corresponding boxes.

Graduate Seniors

☑ All students in grade 12 will be moved to grad “other” and be marked inactive.

☐ Senior students will not be changed.

Do NOT Clear Inactives

☑ All inactive students at the site remain in the system.

☐ Inactive students with zero balances at the site are deleted.

Do NOT Clear Student Groups

☑ Students remain in any groups to which they were assigned.

☐ Student groups are cleared of all participants.

3. To apply a hold to all sites, you can check the corresponding boxes at the top of the page.
4. For *Bumped Applications* and *Direct Certification Students*, found on the same page, you have the option to *Clear special considerations*. Different states have different requirements for things such as this, so you should check your local guidelines to see if this pertains to you. Make sure the box is unchecked if you want to retain current special considerations.
5. If you allow reimbursable cash sales for any cafeteria, you will be shown an option to *Retain Reimbursable Cash Sale Settings*. If left unchecked, cash sales in the new year will default to a-la-carte. Check this box if you want cash sales to default to reimbursable.
6. Click *Next* when you have finished adjusting settings.
7. Next, you must indicate when rollover benefits expire. Select the date from the *Expire Applications on* calendar. Consult State or Federal guidelines to ensure that you use the proper date.

The *Expire applications on* setting is the date that all benefits that were in effect during the current school year will expire in the fall.

---

8. The second calendar schedules when *Close Year* will take place. Select a date and time in the future (on or after July 1) that you would like the year to close. If it is after June 30 you can check the box to begin when submitted..
9. Enter the confirmation code exactly as it appears. It is case sensitive, so “E” and “e” are not the same.
10. Click the *Close Year* button.
11. Next, you will see a message indicating when the *Close Year* will occur. If for any reason you need to reschedule the process, re-select *Close Year* from the menus and re-enter all responses.

You do not have to stay logged in for closing to occur. After the closing process has finished you will need to enter new eligibility rates. Until you do so, you will have limited access. After saving the new rates, all your menu options will be available again.

POS Management

Cafeterias

Management → POS → Cafeterias

Introduction

Cafeterias are serving locations within the district. Each cafeteria sells meals to one or more sites depending on their physical location relative to the sites.

When you create sites in Meal Magic Cloud, a corresponding cafeteria is created too. This simplifies the setup of cafeterias that serve a single site. Sometimes, however, two or more sites might share a cafeteria, such as an elementary site and a middle school site located on the same campus. You can easily group multiple sites into a single cafeteria as described in the **Management • Sites** section of this document and then delete any unneeded cafeterias.

Sales information can be reported by cafeteria and by individual sites.

Add a Cafeteria

1. Click *New*.
2. Enter a name for the cafeteria in the text box.
3. Click *Save*.

Delete a Cafeteria

To delete a cafeteria, select it in the list and then click the *Delete* button to remove.

> You cannot delete cafeterias that have activity associated with them.

Edit a Cafeteria's Settings

1. Click the name of the cafeteria in the list.
2. Click the *Edit* button.
3. Make changes to the settings as needed.
4. Click *Save*.

Serving Day

Use the calendar to select a serving date. If preordering is available on the date selected, the available choices will be displayed. To edit choices for a day, select one or more cafeterias from the list and then click the *Choices* button.

Choices

To take orders for a given day, you must create one or more schedules (lists) of available choices for that day. Each cafeteria can have three separate *Schedules* for a serving day. The *Schedule* setting for a given customer determines which items are available for ordering based on the lists created here. At present, only combo meals and milk items can be scheduled, there is a limit of eight items per schedule, and only a single item per customer can be ordered.

To add an item, select it in the *Items* list and then click *Add* under the *Schedule* to which you want to add it. To remove an item from a schedule, select the item on that schedule and then click the *Delete* button below it.

To help with preparing enough meals for a serving date, you might want to enter an *Ordering Cutoff* day prior to the actual serving day.

Ordering for Parents via Family Portal will not allow orders to be placed on the serving day.

Use items with descriptive names, such as *Pizza Combo*, *Hot Dog on a Bun*, etc. so people placing orders know what they are ordering. *Lunch A* and *Lunch B* are not very useful names.

Basic Settings

Cafeteria Name

If you need to rename a cafeteria, or perhaps correct a typographical error in the existing name, enter the name here.

Default Site

If roaming customers are served at this cafeteria, their sales will be attributed to this site.

Sales Tax Rate

If you sell taxable items, enter the appropriate sales tax rate here. Enter 6.000 if sales tax for your area is 6%. You can enter fraction percentages too, such as 5.375 for a 5⅜% sales tax.

Lunch Start Time

If the sales registers are started prior to the time specified here, they start with breakfast selected; otherwise, they start with lunch selected. A sales register will automatically switch from breakfast to lunch at the time you specify here unless the breakfast sales screen is open, in which case the cashier will be asked if the sales register should switch to lunch. The default time is 11:00 AM, but you can change that to fit your schedule.

Operational Settings

Cash-Out Per Period

When selected, a cash-out is required after each meal period instead of once for the entire day.

Allow Tender Cash

This setting enables the *Cash Only* button on the sales registers. Then cashiers can accept cash from customers that have available funds in their accounts.

Show Tender Up

Pressing the *Tender Up* button causes the sales register to calculate the change the cashier needs to give for the next higher full dollar amount. This button is only available, however, if this setting is selected.

Tender up works as follows: If the purchase total is $2.50 and the cashier selects *Tender Up*, the register assumes that the customer gave $3.00, enters this, and shows $0.50 change due. Tender up does not work for whole dollar amounts, i.e., if the sale ends in .00 then it acts like an exact change button.

Show Earned Sale

If you have customers that earn meals by working, enable this setting to track earned reimbursable meals. Earned meals are given without cost to the customer but still qualify for reimbursement.

Show Repeat Sale Screen

When enabled, if a customer has had a prior purchase during the meal period, a message appears on the register during subsequent purchases. The cashier must tap the reminder to continue with the sale. This is a good way to catch duplicate sales or customers trying to use the accounts of others.

Acknowledge Second-Meal Sales

When checked, a message appears at the start of the sale when the customer has already had a reimbursable meal for that period.

Confirm Billing Group Selection

Check this item to require cashiers to confirm that they have selected the proper billing group.

Acknowledge Over Limit

When this option is selected, cashiers must respond to pop-up messages that appear when customers exceed either their daily spending limit or their overall credit limit.

Allow Reimbursable Cash Sales

This setting determines how sales of reimbursable meals to anonymous cash customers are classified. When selected, meals can qualify as reimbursable; otherwise, meals are counted strictly as a la carte servings, even if they meet the requirements of reimbursable meals.

If the cashier is granted the *Can Change Cash Sale Classifications* right and this setting is enabled, the cashier can change the classification on a per-sale basis.

Default to Reimbursable Cash Sales

This setting only appears if *Allow Reimbursable Cash Sales* is enabled. When marked, this setting counts reimbursable cash sales as such when the meal qualifies. When not marked, cash sales are treated strictly as a la carte sales.

Voided Transactions Require Reason

This setting enables a feature that requires cashiers to choose a reason for voiding a sale.

Must Acknowledge Roaming Customers

When enabled, a pop-up message appears when customers from sites not normally served by the cafeteria come through line. The cashier must tap this box to continue with the sale. This setting can help with making sure that a customer is not using someone else's account.

No Check Cashing

When this setting is selected, when a check exceeds the amount of the transaction, the change is deposited automatically into the customer's account because giving change is disallowed.

Adult Build-A-Meal Meals Are Taxable

Use of this setting causes the sales registers to charge sales tax to the appropriate meals created for adult customers. It ignores the tax settings for the individual items and uses the unit meal price instead.

Student Build-A-Meal Meals Are Taxable

This setting works the same as its adult counterpart except it applies to student meals.

Show Over/Short

When this option is used, the sales registers show a message (short, over, or balanced) when a Cash Out is completed.

Super Class Sales

Super Class Sales alters the behavior of Class Sales. In Class Sales, you click a customer's picture and then select up to four items on the same screen, giving you a quick means of making sales. In Super Class Sales, you click a customer's picture and then are taken to the full sales screens with all the additional items and functionality that those screens provide.

Use Component-Based Button Colors

When you select this option, item buttons at the sales register are color-coded based on the components they meet. Colors are assignable under District settings.

Disallow Repeat Sales via Express Sales

When this setting is checked, the cashier cannot make multiple sales to a customer using Express Sales. Due to the unavailability of history during disconnected operations, this feature only works when connected to the network.

Express Sales

Express Sales on the sales registers allows cashiers to sell one item to many customers very quickly. This setting determines which items are listed when Express Sales is used. Choices are all items, only items that appear on the menu, or only items on the menu for the selected meal period.

Roaming Mode

Because Meal Magic Cloud utilizes a central database, it is possible for customer accounts to be accessed at any cafeteria, allowing customers free movement throughout the district. Whether or not customers can make purchases at a cafeteria other than the one associated with their home site is determined by the roaming mode. Select a roaming mode that best handles your needs with the least possibility for unwanted roaming.

Students And Adults

Select this mode to allow every customer in the district to make purchases at this cafeteria.

Adults Only

As the description states, only adult customers from other sites can make purchases at this cafeteria.

No One

This mode disables all customers from sites not assigned to this cafeteria from making purchases.

Specify Per-Site

When you select this roaming mode, you can select one of the above described modes for each site that normally is not served by this cafeteria. For example, you could allow customers from the middle school to be served but not those from an elementary site. Unlike other roaming mode selections, this option allows roaming customers to be accessed by name.

ID Lookup Mode

This setting allows you to choose how customer accounts can be accessed at the sales register. You can specify *Quick ID*, which disallows using standard ID numbers; *ID Number*, which disallows the use of Quick ID numbers; or both ID numbers with Quick ID having priority.

User-Defined Buttons

These buttons appear on the cash calculator at the register and can be set to any frequently entered amount you wish. By setting these buttons, cashiers can quickly tender a cash sale or make a deposit. Some commonly used amounts would be full pay meal price, reduced meal price and commonly deposited amounts.

Order Cutoff Times

Same-day ordering is possible up to the times indicated here for up to eight lunch periods. If a time is not specified, the order cutoff time will default to one hour before the Lunch Start Time for the cafeteria.

Remember to click *Save* after changing cafeteria settings.

Billing Groups

Management → POS → Billing Groups

Introduction

Billing groups allow cashiers to bill meal purchases to third-party organizations. How these collectible sales are journalized for accounting purposes is determined by a categorical selection you assign to each group.

Examples of billing groups include charges to be paid by the superintendent or a principal; charges to another fund, such as athletics or a club; charges to a parent organization; or charges to another school district.

Add a Billing Group

1. Click *Add New Group*.
2. Type the name of the group in the text box.
3. Select the type of group from the drop-down list. The type determines how sales are categorized on financial reports.
4. Click *Save*.

> If you use a compatible vending machine that accepts credit card payments, create a Billing Group called *Vending CC* with type set to *Accounts Receivable* so the system can properly record vends paid by credit card.

Edit a Billing Group

1. Click *Edit* next to the group you need to change.
2. If the group's name needs to be corrected, adjust it accordingly.
3. If the group's type needs to be corrected, select the correct type from the drop-down.
4. Click *Update*.

> Do not re-use an existing billing group for a new group. Doing so will combine both groups under the new name and cause confusion when reconciling activity.

Toggle a Billing Group's Active Status

1. Click *Edit* next to the group you need to change.
2. Click the *Inactivate* (or *Reactivate*) button to change the status.

> An inactive group is indicated by light gray text. Inactive groups cannot be selected at the sales register.

Group Type determines where activity appears on financial statements. Use *Accounts Receivable* for outside groups that maintain their own financial accounts, such as a PTA; use *Due From Other Funds* when the group has financial accounts separate from food service within your district; and use *Due From Other Governmental Units* for places such as townships or intermediate schools.

Cash-Out Groups

Management → POS → Cash-out Groups

Cash-out groups allow you to track money that is received by means other than a purchase at a sales register. Catering is an example.

Add a Cash-out Group

1. Click *Add New Group*.
2. Type the name of the group in the text box.
3. Select the type of group from the drop-down list. The type determines how receipts are categorized on financial reports.
4. Click *Save*.

Edit a Cash-out Group

1. Click *Edit* next to the group you need to change.
2. If the group's name needs to be corrected, adjust it accordingly.
3. If the group's type needs to be corrected, select the correct type from the drop-down.
4. Click *Update*.

Do not re-use an existing cash-out group for a new group. Doing so will combine both groups under the new name and cause confusion when reconciling activity.

Toggle a Cash-out Group's Active Status

1. Click *Edit* next to the group you need to change.
2. Click the *Inactivate* (or *Reactivate*) button to change the status.

An inactive group is indicated by light gray text. Inactive groups cannot be selected at the sales register.

Group Type determines where activity appears on financial statements. Use *Accounts Receivable* for outside groups that maintain their own financial accounts, such as a PTA; use *Due From Other Funds* when the group has financial accounts separate from food service within your district; use *Due From Other Governmental Units* for places such as townships or intermediate schools; and use *Miscellaneous Revenue* for extra sources of money within food service, such as vending machines.

Allergens

Management → POS → Allergens

Introduction

Meal Magic Cloud's allergy alert system provides a proactive approach to keeping customers away from items that could cause them to suffer an allergic reaction. When customer allergies are noted on their accounts and food items are marked for allergens, the sales register can provide visual warnings or even block purchases.

User Advisory

The allergy alert system is intended to be a helpful tool for preventing potential allergic reactions, but it is not intended to be, nor should it be used as, a substitute for proper preventative measures.

Add an Allergen

1. Click *Add New*.
2. Enter the name of the allergen.
3. Click *Save*.

Edit an Allergen

1. Click the name of the allergen in the list.
2. Correct the description as needed in the text box.
3. Click *Save*.

Delete an Allergen

1. Click the name of the allergen in the list.
2. Click *Delete*.

Allergens currently assigned to customers or items cannot be deleted.

Void Reasons

Management → POS → Void Reasons

Introduction

By enabling the cafeteria setting *Voided Transactions Require Reason*, you can track why cashiers void or cancel transactions at the sales register by making them provide a reason. There are a number of pre-defined reasons, and you can add more to best suit your needs.

Reasons are used when cancelling a transaction that is in progress and when voiding a transaction that has been completed. When you edit void reasons, you can make individual reasons applicable to one or both of these circumstances.

Add a Void Reason

1. Click *New.*
2. Type the *Reason* in the text box. Make sure everything is spelled correctly prior to saving.
3. Select when the reason should appear.
4. Click *Save*.

Edit a Void Reason

1. Select a reason from the list by clicking it.
2. Adjust when the reason should appear.
3. Click *Save*.

Once a void reason has been added, you cannot change its wording.

Delete a Void Reason

1. Select a reason from the list by clicking it.
2. Click *Delete*.

You cannot delete a void reason that is associated with a voided transaction.

Items

Management → POS → Items

Introduction

Items are the heart of the sales register. Without them, you would have nothing to sell. Meal Magic Cloud allows you to create a variety of different types of items. Each type serves a particular need.

To add an item, begin by clicking the *Create Item* button. Then proceed according to the type of item you are adding.

Add a Reimbursable Meal

This is a generic item that encompasses a meal that meets the component requirements of a reimbursable meal. Similar names for this item include *Type "A"* Meal and *Combo Meal*.

1. Click *Reimbursable Meal* as the type of item you want to create.
2. Click *Next*.
3. Enter the item information on the *Basics* page.
4. Click *Next*.
5. Enter prices and tax information on the *Prices* page.
6. Click *Next*.
7. Place a check mark next to any allergens the item contains.
8. Click *Save*.

Add a Food Item

A food item is an individual item that meets one or more component requirements of a reimbursable meal but not enough to actually qualify as a meal. Taken alone it is an a-la-carte food.

1. Click *Food Item* as the type of item you want to create.
2. Click *Next*.
3. Enter the item information on the *Basics* page.
4. Click *Next*.
5. Enter prices and tax information on the *Prices* page.
6. Click *Next*.
7. Place a check mark next to any components that the item meets.
8. Click *Next*.
9. Place a check mark next to any allergens the item contains.
10. Click *Save*.

Add a Milk

As the name suggests, this item is milk, be it whole, skim, chocolate, or any other variety of milk.

1. Click *Milk* as the type of item you want to create.
2. Click *Next*.
3. Enter the item information on the *Basics* page.
4. Click *Next*.
5. Enter prices and tax information on the *Prices* page.
6. Click *Next*.
7. Place a check mark next to any allergens the item contains.
8. Click *Save*.

Add a Snack

A snack item is a food item that does not contribute any component towards a reimbursable meal. It has little or no nutritional value. A junk food item such as candy fits into this category. You can disallow some customers from buying snack items.

1. Click *Snack* as the type of item you want to create.
2. Click *Next*.
3. Enter the item information on the *Basics* page.
4. Click *Next*.
5. Enter prices and tax information on the *Prices* page.
6. Click *Next*.
7. Place a check mark next to any allergens the item contains.
8. Click *Save*.

Add a General Item (Non-food)

Like a snack item, the general item has no nutritional value, especially when used for items such as shirts or pencils. You also can use it for bottled water. General items are not affected by snack blocks on customer accounts.

1. Click *General Item (Non-food)* as the type of item you want to create.
2. Click *Next*.
3. Enter *Item Information* on the *Basics* page.
4. Click *Next*.
5. Enter prices and tax information on the *Prices* page.
6. Click *Save*.

Add a Pop-up

A pop-up item gives you access to a list of multiple items that are closely related. On the sales register, pop-up items are shown with a blue down arrow. When a cashier selects a pop-up item, the list of items it contains is revealed. She then can select from the list. One use of pop-ups would be to offer different sizes of an item. Another would be to list different types of pizza.

1. Click *Pop-up* as the type of item you want to create.
2. Click *Next*.
3. Enter a *Description*.
4. Click *Next*.
5. From the list on the left of the *Pop-up* section, select an item that will be included on the pop-up list.
6. Click the button that points to the right.
7. Repeat Steps 5 and 6 for each item you want listed under this pop-up item.
8. If necessary, you can remove an item from the pop-up list by selecting it from the right-hand list and then clicking the button that points to the left. The *Clear* button removes all the items from the list.
9. If desired, rearrange the order in which selected items appear in the pop-up by clicking an item and then using the up and down arrow buttons to reposition that item. Repeat as necessary.
10. Click *Save*.

Add a Weighed Item

Weighed items are those that are priced by weight, such as fresh salad prepared at a salad bar.

1. Click *Weighed* as the type of item you want to create.
2. Click *Next*.
3. Enter a *Description*.
4. Optionally enter a *UPC*.
5. Enter a *Required Weight* in pounds. This is the minimum weight needed for the item to qualify as a component. For example, if you are creating an item called “diced ham”, enter how much diced ham is required to qualify as a helping of meat/meat alternative.
6. Enter a *Maximum Weight* in pounds. When the item exceeds this weight, the excess is charged as a-la-carte.
7. Click *Next*.
8. Enter prices and tax information on the *Prices* page.
9. Click *Next*.
10. Place a check mark next to any components that the item meets.
11. Click *Next*.
12. Place a check mark next to any allergens the item contains.

13. Click *Save*.

Item Information Settings

Many of the item types require the same basic item information to describe them. This section describes what is needed.

Description

This is the name of the item as it will appear on the sales registers and various reports.

UPC

A Universal Product Code can be included for items if a UPC scanner is used at the sales register. Then the item can be selected by being scanned.

Taxable for Adults

When marked, sales tax is added when an adult purchases this item.

Taxable for Students

When marked, sales tax is added when a student buys this item.

Ignore "Cash for A La Carte"

This setting, when selected, overrides the "Cash for A La Carte" option that can be set for customers, allowing the item to be charged to their accounts. It frequently is used for bottled water and extra milk.

Student Base Price

This is the price that is charged when a full-pay student purchases the item. When the item is served as a-la-carte, it is the price all students pay, regardless of benefit.

Student Discount Price

If you charge a different price for a second helping of an item purchased by a student, enter that price. Each additional quantity of the item above one sold during one sale is charged at this price. If you do not offer discount prices, check the box for No Discount Prices.

⚠ Do not enter zero for the discount price. If you do, the sales register will not charge for the additional quantities.

Adult Base Price

This price is charged when an adult purchases the item.

Adult Discount Price

If you charge a different price for a second helping of an item purchased by an adult, enter that price. Each additional quantity of the item above one sold during one sale is charged at this price. If you do not offer discount prices, check the box for No Discount Prices.

⚠ Do not enter zero for the discount price. If you do, the sales register will not charge for the additional quantities.

Adding an Allergen

While creating items, you can add additional allergens if necessary. On the *Allergens* page, click *Add Allergen*. Type the name of the allergen in the text box and then click *Add*.

After items have been created, you easily can alter, deactivate, or delete them.

Edit an Item

1. Select the item from the list.
2. Click the tab that describes what you need to change.
3. Make any changes necessary.
4. Repeat Steps 2 and 3 as needed.
5. Click *Save*.

Discontinue an Item

Items that have been used during the year cannot be deleted, but they can be discontinued. Discontinuing an item makes it no longer available but retains any history associated with it.

1. Select the item from the list.
2. Click *Discontinue Item*.

Activate an Item

If you discontinue an item but later need to use it again, you can reactivate the item.

1. Select the item from the list.
2. Click *Activate Item*.

Delete an Item

1. Select the item from the list.
2. Click *Delete*.

> If an item is listed on a menu, you must remove it from the menu before you can delete it. You cannot delete an item that has sales associated with it.

View Item Selection Report

The *Item Selection* report lists details about who has purchased the item and quantities purchased by date. Selections can be narrowed down to a specific cafeteria and meal period if desired.

1. Select the item from the list.
2. Click the *Reports* tab.
3. Adjust *Start Date, End Date, Cafeteria*, and *Meal Period* as desired.
4. Click *View Item Selection Report*.
5. When the report appears, you can view it, print it, save it, or even e-mail it using the various icons that appear just above the report. When you are finished, click *Close Window* to return to *Edit Items*.

Menus

Management → POS → Menus

Introduction

Meal Magic Cloud sales registers can display up to 270 items per meal period, broken down into ten pages of 27 items each. When you consider pop-up items, even more items can be added.

Each sales register in a cafeteria can have its own unique menu or can share a common menu. You even can have a mix of shared and unique menus within the same cafeteria. For example, your main serving lines might use shared menus while an a-la-carte line has its own menu.

An alternate method of handling varying menus between registers is to use different pages of the menu if space permits. This way all registers have access to the same items. To make this method easier to use, a “home” or starting page can be set at the individual sales registers.

To program shared menus, you only have to add items to the first sales register at the cafeteria. For any register that will use the same menu layout, just select the option to use the menu from register one.

Menus are specific to cafeterias. You need to enter menus for each cafeteria; however, to make this easier, you can copy menus from other locations.

Select a Menu

1. From the *Cafeteria* drop-down near the top of the screen, select the cafeteria whose menu you want to change.
2. Use the *Current Menu* drop-down to select the meal period you are programming.
3. Use the *Current Register* drop-down to specify which sales register’s menu will be changed.

Add an Item

1. Select a menu.
2. If you want to place items on a page other than the one displayed, click the appropriate page number located beneath the item buttons.
3. Select the item from the list.
4. Click one of the blank buttons.
5. Repeat Steps 2 through 4 for each item you want to add.
6. Click *Save*.

If you will be using *Class Sales*, keep in mind that the four item buttons nearest the upper left-hand corner of Page 1, with yellow highlighting, are the ones that appear on the *Class Sales* screen.

Replace an Item

1. Select a menu.
2. Locate the button that you want to change. Use the page numbers if necessary to find the right page.
3. Select the new item from the list.
4. Click the button that shows the item you want to replace.
5. Repeat Steps 2 through 4 for each item you want to replace.
6. Click *Save*.

Remove an Item

1. Select a menu.
2. Locate the button that shows the item you want to remove. Use the page numbers if necessary to find the right page.
3. Click the button.
4. Repeat Steps 2 through 4 for each item you want to remove.
5. Click *Save*.

If a different item is selected in the list, clicking the button in Step 3 will replace the current item with the new item. Simply click the button a second time to clear it.

You call remove all items from all pages of a menu at once by clicking the *Clear Menu* button.

Moving Items By Dragging

If you click and hold down the mouse button over an assigned item button, you then can drag the item to a different button on the page and drop it there by releasing the mouse button. The first item button will clear and the destination item button will list the dragged item. Be sure to click Save after moving items.

Dragging an item to a button that already contains an item will cause the contents of the destination item button to be replaced by the dragged item.

Use Menu From Register 1

When this option is available, you can place a check mark in the box to share the menu programmed for register 1. If you leave the box unchecked, the register will have its own independent menu. Click *Save* after changing this setting.

Copying Menus Between Cafeterias

If multiple cafeterias use the same menu layout, common with elementary schools, you can create a menu for one cafeteria and then copy it to others.

1. Create the menu for the first cafeteria as described above.
2. Select a menu for the second cafeteria by changing the cafeteria, menu, and register as needed.
3. Click *Overwrite Current Menu With Another Menu*, and select the menu that you want to duplicate at the new cafeteria.
4. Click *Overwrite Menu*.
5. Click *Save*.

Meal Periods

Management → POS → Meal Periods

Introduction

Meal Magic Cloud comes with pre-defined meal periods for breakfast, lunch, milk, and snack. These periods include Build-A-Meal settings that are compliant with USDA regulations regarding reimbursable meals. You can add more periods to fit your particular needs. Typically these meal periods will not affect your Reimbursement Claim. In the rare chance, however, that a new reimbursable meal program is approved, you can apply rules to describe when offered components can be counted as a reimbursable meal.

Add a Non-Reimbursable Meal Period

1. Click *Add New Period*.
2. Enter the *Meal Period Name*.
3. Make sure the *Reimbursable Period* box is unchecked.
4. Click *Save*.

Add a Reimbursable Meal Period

1. Click *Add New Period*.
2. Enter the *Meal Period Name*.
3. Select the appropriate *Build-A-Meal* settings.
4. Click *Save*.

Edit a Meal Period

1. Select the meal period from the list.
2. Adjust the settings as necessary.
3. Click *Save*.

Disable a Meal Period

You cannot delete a meal period that has activity associated with it, but you can disable it from further use. Breakfast and Lunch cannot be disabled.

1. Select the meal period from the list.
2. Click *Disable*.

Activate a Meal Period

Disabled meal periods can be reactivated at any time.

1. Select the meal period from the list.
2. Click *Reactivate*.

Delete a Meal Period

1. Select the meal period from the list.
2. Click *Delete*.

You cannot delete a meal period that has sales history. You can, however, disable it.

Build-A-Meal Settings for Reimbursable Periods

When a meal period is marked as being a reimbursable period, additional *Build-A-Meal* settings are displayed. These settings determine how individual food items can be combined into qualifying reimbursable meals.

WARNING! Defining the rules for *Build-A-Meal* can be extremely confusing if you do not completely understand all the settings. Wrong settings are likely to result in under claiming or over claiming. It is your responsibility to ensure the accuracy of your claims.

Build-A-Meal uses meal components to discover reimbursable meals. How these components are evaluated depends on the selections you make. Be sure to configure all five components.

Optional

When a component is marked as optional, that component does not have to be present for a meal to qualify as reimbursable.

Required

As the description suggests, required components must be met to have a qualifying reimbursable meal.

Group

When components are marked as being part of a group, their contribution to reimbursable meals is determined by the *Group Action* setting, either *Exclusive* or *Swap*.

Exclusive

When exclusive is marked, only one of the grouped components will be counted towards making a reimbursable meal.

Swap

"A rose is a rose, is a rose, is an onion." Any component within the group can be substituted for one of the other components.

Example of a Swap

For breakfast, you need a fruit, but you can substitute a vegetable instead. You would mark fruit and vegetable as a group and then select *Swap* as the *Group Action*.

Now suppose a meal selection includes two vegetables but no fruit. Build-A-Meal will swap one of the vegetables for a fruit to fulfill the fruit requirement.

Requirement Mode

Set to "All" if every marked component is required for a reimbursable meal, or set to "One" if only a single component from the group is needed.

Components Needed

This value indicates how many components of those available are required for the meal to be classified reimbursable.

Allow Only Checked Components

When this setting is marked, items containing unchecked components are not used in the creation of a reimbursable meal.

Limit Benefits to Specified Grades

When this box is marked, you must specify a *Minimum Grade* and a *Maximum Grade*. Reimbursable meals then only apply to students who are in any grade in the specified range.

Remember to click *Save* after making changes.

Vending

Management → POS → Vending

Introduction

Customers can use supported vending machines to purchase reimbursable meals and a-la-carte items using their accounts and, if the machine is properly equipped, to make deposits to their accounts. The vending machines communicate with Meal Magic Cloud's Administration, providing capabilities such as allergen blocking, meal restrictions, spending limits, and other parental controls.

If you use a compatible vending machine that accepts credit card payments, create a Billing Group called *Vending CC* with type set to *Accounts Receivable* so the system can properly record vends paid by credit card.

Set-up a Vending Machine

1. Click the *Add Vending Machine* button.
2. Select the vending machine.
3. Select the cafeteria to which the vending machine is to be assigned.
4. Select a register number for the vending machine.
5. Click the *Finish Setup* button.

Enable a Vending Machine

1. Select the *Cafeteria* from the drop-down list.
2. Click the desired vending machine from the list on the left.
3. Click the *Status* tab and then check the box next to each desired action:
   A. Enabled — turn on the vending machine
   B. Enable Deposit Mode — allows customers to make deposits
   C. Enable Combo Sales — allows customers to purchase multiple items that might be combined into a reimbursable meal
   D. Temperature Sensitive (health safety error) — indicates if the machine is above 45-degrees Fahrenheit for five minutes.
   E. Require PIN — when selected, customers must enter their vending PIN's to make transactions more secure
4. Click the *Save* button.

To prevent false errors during machine refills, a health safety error will not occur within the first 30 minutes of the vending machine door being opened.

Add Selection Options

Use these steps to assign products to the slots of a vending machine.

1. Select the *Cafeteria* from the drop-down list.
2. Click the desired vending machine from the list on the left.
3. Click the *Selection Options* tab.
4. Click the button or slot to which you want to assign an item.
5. Select the item that is loaded in the select slot.
6. Repeat 4-5 for each slot.
7. Click the *Save* button.

Vending machines will not allow customers to exceed the amount of money in their account even if they have credit limits.

Add Meal-Period Schedules

Schedules allow you to specify when vending machines are operational and to which meal period sales should be recorded.

1. Select the *Cafeteria* from the drop-down list.
2. Click the desired vending machine from the list on the left.
3. Click the *Schedule* tab.
4. Click the *Add New Time Range* button.
5. Enter the time the meal period starts.
6. From the dropdown list, select the desired meal period.
7. Repeat steps 4-6 for each timeframe needed.
8. Click the *Save* button.

Remove Meal-Period Schedules

1. Select the *Cafeteria* from the drop-down list.
2. Click the desired vending machine from the list on the left.
3. Click the *Schedule* tab.
4. Click the *Remove* button next to each schedule you want to delete.
5. Click the *Save* button.

Revert to Default Start Times

Use this button to change your vending machine schedule to the default breakfast start time of 12:00 AM and the lunch start time set for the cafeteria.

Register Assignment

Management → POS → Register Assignment

Introduction

Normally, sales register numbers are added automatically when the sales register software is configured on the POS computers. The only reason to manually add numbers is if you want to program menus prior to having the POS software installed and configured. By default, each cafeteria has one sales register pre-assigned.

Add a Sales Register Number

1. Select a cafeteria from the drop-down list near the top right corner of the screen.
2. Click *Add New Register*.
3. Select a *Register Type* (Prestige, a PC register; Presto!, an iPad register; or Vending, a vending machine) from the dropdown list.

Assigning a Sales Register to a Number

Adding sales register numbers as outlined above simply adds a placeholder to the cafeteria. Mapping of sales registers to numbers occurs during set-up of the POS software on the physical sales registers. The *Currently Assigned* column indicates if a number has been assigned to a sales register computer.

Although you can create more sales register numbers than you have, you can only assign as many as you have licenses.

Deactivating a Sales Register

This feature allows you to move a sales register license from one computer to another. Because a sales register license can be assigned to only one computer at a time, you deactivate it from the old computer and then assign it to the new computer.

1. Select a cafeteria from the drop-down list near the top right corner of the screen.
2. Click *Deactivate* next to the register number.

Deactivation is intended solely for long-term reassignments of licenses. You cannot deactivate a license on days in which sales or deposits have been made on a sales register.

Deleting a Sales Register Number

1. Select a cafeteria from the drop-down list near the top right corner of the screen.
2. Click *Delete* next to the register number.

You cannot delete a sales register number if there is activity associated with it.

Activating Web Sales

When a site has no physical register computers, and you still have the need to make sales to students in that site, you can enable a feature called web sales. Web Sales will allow you to make sales entries for customers through Administration for sites without a register. This feature uses one register license for each location it is enabled.

1. Select a cafeteria from the drop-down list near the top right corner of the screen.
2. Click *Activate* to enable web sales.

Register Versions

Management → POS → Register Versions

Introduction

Use this page to see if your sales registers are current with updates. Ideally, all physical sales registers will show the same version number and an indicator that they are able to download updates.

Family Portal Management

Uncollectables

Management → Family Portal → Uncollectables

Introduction

Sometimes a deposit made through Meal Magic Family Portal will be deemed uncollectable, such as a disputed credit card charge or an eCheck that "bounced" due to insufficient funds or a closed account. In these cases, your merchant provider or underlying merchant bank likely will send notification that you will not receive the funds. In these cases, you should void the deposit using this function as opposed to making an account adjustment through other means.

All deposits made through Meal Magic Family Portal include a transaction ID number that is shared with your merchant provider when payment approval is requested. Your notification should include this number. If not, ask your provider to update their notifications to include it.

Recording an Uncollectable Item

1. Type the *Transaction ID* in the box.
2. Click the *Find* button. Assuming the transaction is found, the details of it will be shown, and you will be prompted to confirm you want to void the transaction.
3. Click *Yes* to void the transaction or *No* to keep it.

You cannot mark a pending transaction as uncollectable.

User Management

Management → Family Portal → User Management

Introduction

Family Portal User Management allows you to see details about all the user accounts associated with your district, including account types, account status, login information, linked customers, account transactions, and control changes. It also allows you to grant and revoke permissions either universally across an account or individually by linked customer.

The initial screen allows you to load a specific user account by email address. If there are any user accounts with linked customers that require manual approval, it also will show an *Approvals* button. Clicking the button will take you to the first user account with unapproved customer links.

If you use the *Family Portable* tab when editing a customer to select a user account to view , you will be taken directly to that account.

Manually Select a User Account

1. Type the *Username* (email address) in the box.
2. Click the *Load* button.

Account Details

This section shows the "real" name the user entered in Family Portal. Ideally, the user will have specified their real first and last name.

Account Type will be either *Adult* or *Student*. If the username matches a *Customer Email* address in your system and the associated customer is not marked as an adult, then the user is treated as a student. Students have fewer features than adults.

Account Status reflects the life stage of the user account. Possible values are:

Not Activated
The user requested an account but has not finalized the process.

Disabled
Either the district or the user has marked the account for deletion at the end of the current school year.

Reset Required
Either the district or a security feature has triggered the need for the user to change their passphrase.

S*uspended*
Too many unsuccessful attempts have been made to log into the account, so the user will need

to reset the account with a new passphrase.

Idle
The user has not logged into Family Portal for 90 or more days and will need to reset the account to regain access.

Active
The account has been accessed within the last 90 days and does not require resetting.

Last Login indicates the most recent date and time the user logged into Family Portal.

Email Opt-Out shows *No* if the user has not opted out of receiving automated emails; otherwise, it shows *Yes*.

Force Passphrase Reset

A *Reset* button is shown when an account is active and not in a state requiring the user to reset their access. Clicking the button will require the user to reset their passphrase the next time they try to log into Family Portal.

⚠ You should force a passphrase reset whenever you become aware that a user has compromised security by sharing their passphrase with someone, even if that someone is you. **You should never ask a user for their passphrase.** Everything you need to know about a user's account is available on this User Management page.

Linked Customers

This area shows a list of customers that have been linked to the Family Portal user account being viewed. Here you can approve or block access to individual customers and control what a user can and cannot do for a given customer.

If a linked customer's name is shown in gray italics, the customer was linked to the user at one time, but the user later removed the customer from their list of family members. Presently, the customer no longer has any access to these customers.

Manually Approving or Denying Links

When a user requests access to a customer but was not automatically approved due to unmatched information, you will need to approve or deny the link manually.

1. Click the customer's name.
2. For first-time requests, click *Approve* to let the user have access to the customer, or click *Block* to deny access.
3. If you previously denied access, only the *Approve* button will be shown. Click this button if you now want to allow the user to access the customer.
4. If you previously allowed access, only the *Block* button will be shown. Click this button if

you now want to deny the user access to the customer.

Controlling Access to an Individual Customer

When a user has been granted access to a customer, you can control what the user can do with that customer.

1. Click the customer’s name.
2. You will see a list of permissions that can be allowed or denied for the user. Place a checkmark in the box next to each permission you want the user to have, and remove the checkmark for each permission you want to withhold.
3. Click the *Save* button in the *Linked Customers* section when done.

Universal Settings

There are six universal settings that can be applied to all customers linked to the user account. These settings override individual-level settings. For example, if you uncheck the Deposits universal setting, the user will not be able to make deposits for any linked customers, even if those customers have deposits enabled.

In addition to universal overrides to individual settings, there are two other settings that can be set: *Disable* and *Block*.. When marked, these apply to the user, effectively denying them access to Family Portal.

Controlling Access to All Customers

1. Click the box next to each universal setting you want to add or remove to change the checkmark.
2. Click the *Save* button in the *Universal Settings* section when done.

What Individual and Universal Settings Mean

Deposits (and other payments)

☑ The user can make deposits.

☐ The user cannot make deposits.

E-Checks

☑ The user can make deposits or payments by e-check or credit card.

☐ The user can make payments using a credit card.

Transfers

Users with transfer rights can move part or all of a linked customer’s positive balance to other linked accounts regardless of who deposited the funds originally.

☑ The user can transfer food service balances to other linked customers.

☐ The user cannot transfer funds.

Orders

☑ The user can place orders for customers.

☐ The user cannot place orders.

Access

☑ The user can grant limited access for students attached to their account.

☐ The user cannot grant access for students attached to their account.

Settings

☑ The user can add or remove restrictions on meal participation, snack foods, a-la-carte spending, and daily spending limits.

☐ The user cannot change any restrictions through Family Portal.

Disable (user account only)

☑ The user cannot log into their account, and the account will be deleted when the school year is closed.

☐ The user can access Family Portal unless restricted by some other means.

If a user chooses to close their account but it has activity for the current school year, the account will be marked as disabled, preventing use of the account but keeping the activity accessible for district reporting.

Re-enabling an account disabled by the user could be a violation of state or Federal laws regarding online privacy, such as, but not limited to, the California Consumer Protection Act.

Block (user account only)

☑ The user cannot log into their account. The account will continue to exist after the school year is closed.

☐ The user can access Family Portal unless restricted by some other means.

History

This section allows you to view deposits and setting changes made by the user. Use the drop-down to select which history you want to see.

Deposits

Food Service deposits and transfers are shown by month, which you can change by clicking the arrow buttons around the name of the month. Only current year deposits are listed. Activity is grouped by color to show transactions that occurred together. The *Transaction* column identifies the amount.

Deposit

The amount shown was added to the listed customer's account.

Fee

This is the fee that your merchant provider charged the user for the deposit or payment. It is not added or subtracted from the associated transaction.

Transfer In

The amount shown was added to the listed customer's account from another customer's account. If you add all *Transfer In* transactions, they will total the same as the sum of all *Transfer Out* transactions.

Transfer Out

The amount shown was subtracted from the listed customer's account and added to another customer's account. If you add all *Transfer Out* transactions, they will total the same as the sum of all *Transfer In* transactions.

Unconfirmed Deposits

Unconfirmed deposits occur when Family Portal attempts to process a deposit but fails to receive a response from the merchant provider. Typically, these transactions will be resolved automatically. If you click on a row for an unconfirmed deposit that has not been resolved, an *Approve* and a *Reject* button will appear to allow you to manually indicate if the transaction was successfully processed (click *Accept*) or if it failed to be processed or was denied (click *Reject*).

If you hover the mouse pointer over a deposit or unconfirmed deposit, its transaction number will be displayed. Your merchant provider can use this number to determine if the transaction was received and, if so, if it was approved or denied.

Settings

The settings history shows account restrictions the user added or removed from linked customers. It shows when the setting was changed, to whom it was applied, and to what the setting was changed. For changes in daily spending limit, the amount is the new limited, and the description will indicate if limit was increased or decreased from its previous value.

Approvals Mode

If there are unapproved requests for customers to be linked to user accounts, an *Approvals* button appears on the account lookup screen. Clicking that button will take you to the first pending link.

When you are in approvals mode, the list under *Linked Customers* will show only unapproved customer links, and you will only be able to approve or block (reject) the request. After the last unapproved customer is processed for a user, the system will advance to the next user that has pending customer links.

Once there are no more links pending approval, you will be returned to the user lookup screen. If you want to exit approvals mode before you have processed all requests, you can click the *Done* button.

Deleting a Family Portal User

If the user has no current-year history, a *Delete* button will be available at the bottom of the screen. Clicking it will prompt for confirmation. If confirmed, the account will be removed.

If the user has current-year history, you can check the *Disabled* box under universal settings at the top of the screen to prevent use of the account, which will not be carried into the next fiscal year.

⚠ **Re-enabling an account disabled by the user could be a violation of state or Federal laws regarding online privacy, such as, but not limited to, the California Consumer Protection Act.**

Document Editor

Management → Family Portal → Document Editor

Introduction

When a parent elects to submit an application or Education Benefits form (EBF) using Family Portal, the process includes showing explanatory information to them prior to their entering information. Typically, districts do not need to change the preloaded documents unless they need to make changes based on state requirements. Three documents are used, as noted below.

Choice Instructions

If you are collecting both applications and EBFs, this document is shown to parents to help them select the correct income document to submit for their household. It instructs them to submit an application if they have at least one child enrolled in any of the listed non-CEP schools; otherwise, it advises them to submit an EBF.

Application Instructions

The default version of this document mimics the USDA prototype letter that explains the application process.

EBF Instructions

This predefined version of this document explains that children attending CEP sites will receive meals at no charge but asks parents to submit an EBF to help the school district qualify for other assistance programs.

Editing a Document

1. Chose a *Document* from the dropdown list.
2. Click *Load*.
3. Make any changes you need.
4. Click *Save*.

Resetting a Document

Use these instructions if you want to revert to the predefined documents.

1. Chose a *Document* from the dropdown list.
2. Click *Load*.
3. Click *Reset*.
4. Click *Save*.

Placeholder Text

Items contained in square brackets, such as **[District Name]**, **[Pricing Chart]**, **[Income Chart]**, and **[SNAP]** are special placeholders. In most cases, you should not change these items. The information named within the brackets will be inserted from your district settings when the document is displayed on Family Portal.

Items such as **[Appeals Contract]** will expand to show name, address, phone number, and email address; and **[CEP Schools]** and **[Non-CEP Schools]** will insert alphabetized lists of schools according to the named type.

The *Insert Data Field* dropdown lets you add other bracketed items to simplify editing.

Customers

Edit

Customers → Edit

Introduction

All the students and adults in your district are customers when they visit your sales registers. You can add, change, and delete customers as needed to maintain your records.

Add a Customer

1. Select the customer's *Site* from the drop-down near the top right-hand corner of the page.
2. Click *New Customer*.
3. Enter customer details.
4. Click *Save*.

Edit a Customer

1. Select the customer's *Site* from the drop-down near the top right-hand corner of the page.
2. Select the customer's name from the list on the left-hand side of the page.
3. Change customer details as needed.
4. Click *Save*.

Inactivate a Customer

When customers leave the district, you can inactivate their accounts to prevent inappropriate use.

1. Select the customer's *Site* from the drop-down near the top right-hand corner of the page.
2. Select the customer's name from the list on the left-hand side of the page.
3. Click *Inactivate*.

Reactivate a Customer

Reactivating customers restores all use of their accounts.

1. Select the customer's *Site* from the drop-down near the top right-hand corner of the page.
2. Select the customer's name from the list on the left-hand side of the page.
3. Click *Reactivate*.

Delete a Customer

1. Select the customer's *Site* from the drop-down near the top right-hand corner of the page.
2. Select the customer's name from the list on the left-hand side of the page.

3. Click *Delete*.
4. Confirm the removal of the customer by clicking *Delete Customer*.

> You cannot delete customers that have activity against their accounts. Instead, you can make their accounts inactive.

Name or ID Lookup

Instead of scrolling the list of customer names, you can start typing the customer's name (beginning with last name), ID number, or Quick ID number in the text box above the list. As you type, the list will change to show the first match for what you have entered. Pressing the *Enter* key on the keyboard displays the information for the selected customer.

Customer Information

Information about customers is organized into multiple categories as indicated by the tabs at the top of the form. Click a tab to move to it. Depending on your permissions, you might not have access to all the tabs.

Basic Settings

Basics represent general information about customers, such as name (first, middle, and last); ID numbers; grade and teacher; birthday; comments; and photograph.

First Name, Middle Name, Last Name

These are the single-most remembered forms of identification a person has. Without a name, a person would be pretty lost for recognition.

Quick ID

This is a short PIN-type ID that Meal Magic Cloud creates for each customer. Since ID numbers sometimes can be quite long, this is a shorter way to access customer accounts. Quick IDs can be used in Administration or at sales registers.

ID Number

This identification number uniquely identifies the customer. No two customers can have the same ID number. The ID numbers you use should match those of the district's Student Information System, especially if you want to share information between that system and Meal Magic Cloud.

PIN

Meal Magic Cloud automatically assigns a 4-digit PIN to each customer, but 4, 5, and 6-digit PIN's can be hand-assigned or imported into customer accounts. The PIN is needed for kiosk ordering and, in some cases, at vending machines. Requiring PIN's at vending machines for account-based transactions is optional.

State ID

Some States have their own ID numbers for students. Having State ID numbers in the system can be helpful with Direct Certification matching.

Grade

Every customer must be assigned a grade. Choices include *Pre-school, Developmental Kindergarten, Kindergarten*, *1st* through *12th, Adult*, and *Other*.

Use *Adult* for non-students, such as staff members and teachers. Use *Other* for students to which normal grade designations do not apply, such as certain special needs students.

Teacher

Typically you need to include teachers on student accounts to use Class Sales at the sales registers or when you want to filter reports by classrooms.

Customer Email

If you enter an email address here, Meal Magic Family Portal will use it to determine if the customer is a student and, if so, determine whether or not the customer can have a student account. If student accounts are enabled for Family Portal, students granted access by their parents or guardians can show their IDs using their smart devices, see their balances, and order meals in advance. ***Do not enter an email address for a parent or guardian.***

Birthday

When you include a birthday for a customer, sales registers will display a birthday indicator on the customer's special day.

Comments

Comments are notes that appear when a customer's account is accessed at the sales registers.

Severity

This setting controls how comments appear at the sales register. When set to *Normal* a caption icon appears next to the customer's photo, except in *Class Sales*, and the cashier must tap the icon to see the comments. When set to *Must Acknowledge* the comments are displayed each time the customer is accessed, including in *Class Sales*.

Photograph

If the customer's photograph has been uploaded to *Meal Magic Cloud*, it will be displayed to the right of other basic information. You can remove the photograph by clicking the *X* in the upper right-hand corner of the image.

Lunch Site

This setting is used for pre-ordered meals and does not apply to regular service. This is where the customer will receive their meals. It only needs to be set if not the same as the site to which the customer is assigned.

If you are using Advance Sales, in accordance with USDA requirements for 2020-2021 stating that pickup meals must are to be claimed where students normally would be served, this setting determines where customer meals will be recorded. Some districts are moving students to a generic “home learning” site, so it is very important that this setting reflect where the students would have been served if they attended classes.

Lunch Period

Like Lunch Site, this setting only applies when using the ordering components of Meal Magic Cloud. You can have up to eight meal periods. Meal counts and non-classroom, order labels will be separated by this number. All customers are set to lunch period 1, so you only need to change it for other periods.

Schedule

Used with ordering, this setting determines which attendance schedule applies to the customer. All customers are assigned to schedule 1 unless you change them. This value is used for “hybrid” situations wherein customers attend classes on different days.

Pickup Service

Students whose meals will be distributed in advance, for example, home learning participants, should have this setting marked. It prevents ordering of individual meals via kiosk, classroom, or Family Portal. Instead, meals for these students, typically a week’s worth, will be distributed at a pickup location.

Only students marked for Pickup Service can receive pickup meals.

Be sure to click *Save* after making changes on the *Basics* tab.

Finance Settings

This customer information deals with balances, credit and spending limits, and benefits.

Balance

This is the customer’s current balance.

Credit Limit

Credit Limit determines how far below zero customers' balances are allowed to go when they have no funds in their accounts.

Lock Credit

☑ The customer's *Credit Limit* is not overwritten by any en masse changes to limits.

☐ Any en masse credit limits changes will affect the customer.

Daily Spending Limit

This shows how much of the balance the customer can use in a single day. If the amount is exceeded, the customer must pay cash for the excess. The amount can be changed by Family Portal users linked to the customer with the ability to change settings enabled. To change this amount, go to the *Settings* tab.

EBF Benefit

This reflects the best benefit as determined from all Education Benefits forms on which the student is listed.

Effective Benefit

This is the customer's current benefit. If there is an associated application in the system, its number will be shown as a link to the application.

Benefit

When no application is in the system for the customer, you can apply a "forced" benefit.

⚠ Make sure you have proper paperwork on file to support this setting.

Benefit Expiration

This date indicates when a "forced" benefit expires. If set to *Never*, the benefit will last through the remainder of the school year but will end when carry-forward benefits expire during the next school year.

Be sure to click *Save* after making changes on the *Finance* tab.

Address Settings

This tab contains communication-related information, such as address, telephone numbers, and email addresses for the customer.

Street, City, State, Zip

These items are used when written communications are mailed to the customer.

Parent/Guardian

For a student customer, enter the primary parent or guardian's name.

Home Phone, Work Phone

For a student customer, enter a home and work telephone number for the primary parent or guardian. For adults, enter their telephone numbers.

Language

The language specified here will be used when sending certain communications to the customer or the customer's parent or guardian. English and Spanish are the supported languages.

Parent/Guardian Email

To add an email address, click *Add New Email*, enter the address in the text box, and click *Add*. To delete an email address, select it in the list and click *Remove Email*.

To send an email to one of the listed addresses, click the email address and then the *Send Email* button. If your computer is properly configured with an email client, this will open a window for creating an email.

If an email address is listed in a red, italic font, the associated person has elected to opt out of email, so the *Send Email* button will not work when that address is selected.

Be sure to click *Save* after making changes on the *Address* tab.

Settings

Through Meal Magic Family Portal, or by contacting the district, parents can place various restrictions on their children's use of the money in their accounts. Those restrictions, and a few other special flags, are managed under this section.

Lost ID

☑ The customer's ID card has been reported as lost or stolen. Display a message that must be acknowledged when the ID number is used at a sales register. Require the cashier to check the identity of the person who uses the ID number associated with the account.

☐ There are no problems with the customer's ID card.

No Checks at Register

☑ Prevents cashiers from entering checks for this customer.

☐ This customer can submit checks for payments and deposits.

No Deposit Requests
This setting is used by Custom Reports when generating low-balance notifications.

☑ Skip this customer when requesting deposits.

☐ Include this customer when requesting deposits.

No Balance Emails

☑ Do not include this customer when sending low-balance notifications via email.

☐ This customer will receive low-balance emails.

No Breakfast Purchases

☑ Disallow this customer from purchasing items in the breakfast meal period.

☐ Allow purchases in the breakfast meal period.

No Lunch Purchases

☑ Disallow this customer from purchasing items in the lunch meal period.

☐ Allow purchases during the lunch meal period.

No Snack Foods

☑ The customer cannot buy snack items.

☐ The customer can buy snack items.

Cash For A La Carte

☑ The customer must pay cash for a la carte purchases.

☐ A la carte items can be paid from the customer's account.

Daily Spending Limit
This restricts how much of the balance the customer can use in a single day. If the amount is exceeded, the customer must pay cash for the excess.

Be sure to click *Save* after making changes on the *Settings* tab.

Allergies

Here you can specify what allergies the customer has. This enables the Allergy Alert system to notify cashiers of potential food conflicts.

Place a check mark next to each allergy the customer has. Leave the other allergies unchecked.

⚠ The allergy alert system is intended to be a helpful tool for preventing potential allergic reactions, but it is not intended to be, nor should it be used as, a substitute for proper preventative measures.

Add an Allergy

1. Click *Add New Allergen*.
2. Enter the *Allergen Description* in the text box.
3. Click *Add*.

Be sure to click *Save* after making changes on the *Allergies* tab.

Groups

Place a check mark next to any group to which the customer belongs. Leave the other groups unchecked. Be sure to click *Save* when done.

Reports

Customer-specific reports are accessible on the *Reports* tab.

Account History

This report provides a complete history of the customer's deposits, purchases, voids, and any other transactions that affect the customer's balance.

1. Click *Account History*. In a few moments the page will change.
2. Enter a *Start Date* and an *End Date* for the report. You can type the dates in the text boxes or select them using the pop-up calendars.
3. Place a check mark in the box next to *Include Transaction Item Details* if you want to see items purchased and other fine details. If you only want deposits, check the box next to *Include only deposits*.
4. Place a check mark in the box next to *Include Cashier, Cafeteria and Benefit* if you require that information.
5. If you want to email the report to one or more recipients, place a check mark in the box next to *Email when completed*. For each recipient, type the email in the *Email Address* box and click the *Add New Email* link. To remove an address from the list, click it and then click the *Remove Selected Email* link.
6. Click *View Account History*.
7. When the report is done being created, click the indicated link to view it.
8. When you are done with the report, click *Close Window*.

Eligibility Changes

This report shows all benefit and active/inactive changes that have occurred during the current fiscal year for the selected customer.

1. Click *Eligibility Changes*.
2. If you want to email the report to one or more recipients, place a check mark in the box next to *Email when completed*. For each recipient, type the email in the *Email Address* box and click the *Add New Email* link. To remove an address from the list, click it and then click the *Remove Selected Email* link.
3. Click *View Eligibility Changes*.
4. When the report is done being created, click the indicated link to view it.
5. When you are done with the report, click *Close Window*.

Custom Reports

1. Click *Custom Report*. The available reports will display on a new page momentarily.
2. Select the desired report from the list.
3. If you want to add comments for a report that will be sent via email:
   A. Check *Include Comments*.
   B. Type the comments in the box that appears.
4. To email the report:
   A. Check *Email when completed*.
   B. Enter an *Email Address* in the text box.
   C. Click *Add New Email* to add the email to the list.
   D. Repeat Steps 4A through 4C for any additional email addresses you want included.
   E. To remove an email address from the list, select it and then click *Remove Selected Email*.
5. Some reports have additional options. Be sure to adjust any additional settings as appropriate for your needs.
6. Click *Run Report*.

Emailed reports do not require further interaction. For other reports, a processing message will appear. Wait for the report to run and then click where indicated to view the report. From the report view you can print, save, or even email the report. When you are done, click the *Close Window* button at the bottom of the page.

Email a Report

When email reports, you can select email address from the customer's account instead of entering them manually.

1. Check the box next to each email address you would like to send the report.
2. Choose the desired report and continue with the corresponding instructions.

Family Portal

You can use this tab to see a list of all Meal Magic Family Portal user accounts that are or were linked to the customer you are viewing. User names (email addresses) listed in italics cannot make deposits, transfer funds, view histories, or do anything else with the customer's account.

If the customer has been granted student access on Family Portal, the user that granted the access will be listed to the right of the *Go* button. Once a student has been granted access, no other user can control that access.

For more details about a linked user, or to make changes to one, select that user name from the list and then click the *Go* button.

Find

Customers → Find

Introduction

You can locate customers without knowing which sites they attend by using this feature. Customers can be located by name, ID number, or Quick ID number. The *Edit Customers* page appears when you select a customer from the list of matches.

Find a Customer

1. Type all or part of the customer's last name, ID number, or Quick ID number in the text box.
2. Check the *Include Inactive Customers* box to search all customers, or uncheck the box to search only active customers.
3. Click *Search*.
4. Click *View* next to the customer for which you were searching.

> If the search results in only one match, you are taken directly to *Edit Customers* for the matching customer, bypassing Step 4.

Transfer

Customers → Transfer

Introduction

The *Transfer* page allows you to move a customer to a new site and assign a new teacher at that site. Ideally, you would transfer customers through imports from your Student Information System, but you can move them manually through this feature when necessary.

Transfer a Customer

1. Select the customer's *Site* from the drop-down list near the top right-hand corner of the page.
2. Select the customer's name from the list on the left-hand side of the page.
3. Choose the customer's new location from the *transfer to site* drop-down list.
4. Optionally, assign a new teacher from the *teacher at new site* drop-down list.
5. Click *Transfer*.

Name or ID Lookup

Instead of scrolling the list of customer names, you can start typing the customer's name (beginning with last name), ID number, or Quick ID number in the text box above the list. As you type, the list will change to show the first match for what you have entered. Pressing the *Enter* key on the keyboard displays the information for the selected customer.

Mass Delete

Customers → Mass Delete

Introduction

This function allows you to delete customers en masse. Only customers with no balance, no transactions in the current fiscal year, and not on an application can be removed.

⚠ This function cannot be undone. Be absolutely certain that you want to proceed before selecting this function.

Mass Delete Customers

1. If you want to delete inactive customers, click the checkbox to select this option.
2. Enter the confirmation code in the text box.
3. Click the *Delete Customers* button.

Families

Customers → Families

Introduction

Customers that appear on the same application for benefits are treated as members of the same family, but customers that are not on applications can only be grouped into families manually by using this feature. By having customers organized by their families, you can reduce the number of notifications you send and, even more important, you can easily split deposits among siblings.

Add Customers to a Family

1. Select the customer's *Site* from the drop-down list near the top right-hand corner of the page.
2. Select the customer's name from the list on the left-hand side of the page.
3. Click the *Search* tab.
4. Using the drop-down list, select the type of search you want to perform: *Name*, *ID Number*, or *Street Address*.
5. Enter what you want to find in the text box. For example, you could enter *Smith* as a name to match.
6. Click *Search*.
7. If there are no matches, repeat Steps 4 through 6, selecting a different type of search.
8. If matches are found, they are listed. For any match that you want to add to the customer's family, put a check mark in the *Add To Account* column.
9. Click *Add Selected*.
10. Repeat Steps 4 through 9 for any additional siblings that you want to add.

Remove Customers from a Family

1. Select the customer's *Site* from the drop-down list near the top right-hand corner of the page.
2. Select the customer's name from the list on the left-hand side of the page.
3. Any family members associated with the customer are shown on the *Current* tab. For the customers you want to remove from the family, click *Remove* next to their ID numbers.

> You cannot remove family members that appear on an application with the chosen customer.

Use Suggestions to Find Family Members

The *Suggested* tab shows any customers that share the same address as the customer you selected, even when their last names are not the same.

1. Select the customer’s *Site* from the drop-down list near the top right-hand corner of the page.
2. Select the customer’s name from the list on the left-hand side of the page.
3. Click the *Suggested* tab.
4. Potential family members are listed. For anyone that you want to add to the customer’s family, put a check mark in the *Add To Account* column.
5. Click *Add Selected*.

Name or ID Lookup

Instead of scrolling the list of customer names, you can start typing the customer’s name (beginning with last name), ID number, or Quick ID number in the text box above the list. As you type, the list will change to show the first match for what you have entered. Pressing the *Enter* key on the keyboard displays the information for the selected customer.

Import / Export

Customers → Import / Export

Introduction

Getting customer information to and from your Student Information System is handled through the Import / Export portion of Meal Magic Cloud's Administration. You can import and export information as needed, and you can automate the process through scheduling.

Imports (bringing information into Meal Magic Cloud) and *exports* (getting information out of Meal Magic Cloud) are processed according to descriptions and rules you define. With *templates*, you describe how the information appears in files and you add rules for converting and filtering the information.

Getting Things In Order

The key to success is knowing what information is being shared; how it is, or needs to be, organized; and any changes that need to be made so that the receiving system, either Meal Magic Cloud or your Student Information System, understands the information.

If information is coming into Meal Magic Cloud, you first need to know what pieces of information (*fields*) are being imported and in what order are the fields listed. Likewise, for information being exported to your Student Information System, you need to know which fields are needed and in what order the receiving system expects them to be.

Next, you need to know how fields are, or will be, separated in the file. Meal Magic Cloud supports CSV, tab delimitation, and fixed-width fields.

CSV

CSV is an abbreviation that means *comma-separated values*. It describes a layout wherein each field of information is listed on one continuous line with a comma between each field. Each line represents a single record, such as information for a customer.

Example:

123456,Mary,Jones,227 Main Street,4.30
123487,Tim,Johnson,1701 Star,1.25

Tab Delimited

Tab-delimited information is identical to the CSV layout, except tab characters are used instead of commas to separate fields.

Fixed-Width

In a fixed-width layout, every line of information is the same length, each field begins in the same position as on other lines, and each field has a known size. If the information in a field is shorter than the space allotted, the field is padded with spaces; if the information is longer than will fit, it is shortened to fit.

Example:

```
123456Mary  Jones     227 Main Street   4.30
123487Tim   Johnson   1701 Star         1.25
```

If your head is spinning, don't worry. The whole import/export process is much easier than it sounds. Knowing how information is stored in your import and export files is the most difficult part. A few freshly baked cookies usually can get your technology department to help you with the nitty-gritty of file layouts. If all else fails, Meal Magic Corporation's Support Team can help you get started.

Creating an Import Template

1. Click the *Define Import* button.
2. Click the *Template* tab if it is not selected.
3. Enter a *Name* for the template.
4. Mark or unmark the *API* check box to indicate if the this import can be triggered through administrative API uploads.
   - ☑ Customer information uploaded through the administrative API will be imported automatically.
   - ☐ This template cannot be used for customer uploads made using the administrative API.
5. Mark or unmark the *Treat errors in non-vital fields as warnings* check box to suit your needs.
   - ☑ Allows records to be imported when non-vital fields contain invalid information. The errors are reported as warnings.
   - ☐ Rejects entire records from being imported when one or more fields contain invalid information, even if the field is not essential.
6. Mark or unmark the *Generate truncation* warnings check box according to your preference.
   - ☑ Creates a list of truncated names.
   - ☐ Truncates names without creating a list of those affected.
7. If you select allow API access to this template, you can add an email address in the *Email for Error Logs* box. When you do this, if any errors occur while importing, an email will be sent to this address. Entering an email address also will send an email when pending name changes or drops need to be approved.
8. Complete the layout section using the instructions on the following page.
9. Click *Save*.

Creating an Export Template

1. Click the *Setup Export* button.
2. Click the *Template* tab if it is not selected.
3. Enter a *Name* for the template.
4. Mark or unmark the *API* check box to indicate if the this export can be triggered through administrative API uploads.

   ☑ Customer information can be downloaded using the administrative API and specifying this template.

   ☐ This template cannot be used for customer download through the administrative API.
5. Complete the layout section using the instructions below.
6. Set any desired *Filters*.
7. Click *Save*.

Copying a Template

1. On the list of templates, click the name of the existing template you want to copy.
2. Click the *Copy* button.
3. Make changes to the new template as necessary.
4. Click the *Save* button.

Defining the File Layout

1. Click the *Layout* tab.
2. Select the appropriate *File Format*.
3. If the file will contain headers, check the *Skip Header Row* box. This indicates that the first line of text in the file contains descriptions for the fields in the subsequent records.
4. In the *Fields* list, put a check mark in the box next to the items that make up the records in the file. If you selected *Fixed width* in step 3, you also need to enter the size of the field in the box to the right of its description. The *ID Number* field is required.
5. If you need to indicate a placeholder field, i.e., a field whose datum will be ignored, click the plus (+) button to add a *Skip* indicator. You can have as many *Skip* fields as needed.
6. Arrange the fields in the proper order using the up arrow and down arrow buttons within the *Fields* list.
7. Click *Save*.

Defining Field Options

Some fields display *Options* when selected. *Options* allow you to enter translations for information contained in the selected field. For example, an import file might contain the value *Free* for the *Benefit Status*. Entering this value into the *Options* area lets the import engine know how to associate the value *Free* with the corresponding designation used internally by Meal Magic Cloud. Most options provide translations of information. Your Student Information System might export information differently than Meal Magic Cloud expects, so the options tell the system how to interpret incoming information or how to report outgoing information. The example above is a translation.

Some fields will show confirmation codes in the options. These codes must be entered exactly as shown to prevent accidental changing of vital information. For example, you must enter a confirmation code to be able to change ID numbers. When a field requires a confirmation code, the code changes each time the template is used and thus must be entered each time.

1. Select the field from the list.
2. Enter any options in the area on the right.
3. Repeat Steps 1 and 2 for each field you are using.
4. Click *Save*.

Defining Filters

Filters allow you to refine what information gets exported. For example, you can filter the information so that only fifth graders are included.

1. Click the *Filters* tab.
2. Select a field from the list by clicking it.
3. Choose filtering options on the right. Checking a box indicates that you want to include records that match that option. Some filters might have additional choices.
4. Repeat steps 2 and 3 for each field you want to restrict.
5. Click *Save*.

Performing a Manual Import

1. In the *Template* list, click the name of the template.
2. Click the *Layout* tab.
3. Click the *Browse* button.
4. In the pop-up box that appears, navigate to the location of the file to be imported.
5. Click the filename and then click the *Open* button.
6. You should preview the file to ensure you have properly setup the template, especially if this is the first time you are using the template. Importing without ensuring a proper layout can cause serious damage to existing information (See *Preview* below.)
7. If everything appears to be correct, click the *Run* button.
8. Wait for importing to complete.

When importing completes, a status message will be displayed. If errors or warnings are indicated, refer to *Errors and Warnings* below.

Performing a Manual Export

1. In the *Template* list, click the name of the template.
2. Click the *Run* button.

Previewing an Import File

1. Load the template as described above.
2. Click the *Preview* button.
3. Make sure the information in each column corresponds with the field titles shown at the top.
4. If everything appears OK, continue; otherwise, you need to adjust your template.

Errors and Warnings

If errors occur during a manual import, go to the *Errors* tab to see a list of problems that were encountered. If the tab is not accessible, there are no errors.

The error list will indicate on which line of the import file the error exists along with the offending field and a description of the problem. Use the list as a guide for correcting the information within the import file. Errors prevent the entire record from being imported.

When errors occur in non-vital fields and the template is configured to treat such errors as warnings, for each record all fields without errors will be imported but invalid non-vital fields will be ignored. The list will display appropriate warnings when fields are not imported.

If you want to save the list of errors for review at a later time, click the *Download Error List* button.

Automating Imports and Exports

To automate importing and exporting of information, make sure that the API checkbox is marked on the template that defines how information is or will be ordered in the corresponding file, ensure that administrative API usage is enabled, and use Meal Magic CloudWS to initiate file transfers. For more information, see *Using CloudWS*.

Error Logs

When a scheduled import encounters errors, an error log is created. If the *Logs* tab is visible, click it to see a list of error logs. To view a log, click the *View error log* link next to it.

Approving Name Changes

When a record contains a name that does not exactly match the name that exists in Meal Magic Cloud for the given ID number, as a precaution the import process will not change the name; instead, you must approve the change. When there are pending name changes, the *Name Changes* tab appears and is able to be selected.

On the *Names Changes* tab, customers with pending name changes will be listed. The information will include the ID number, Quick ID number, existing name, and the proposed new name for each customer.

1. Click the *Name Changes* tab.
2. For each name listed, choose either *Accept* to change the name or *Reject* to keep the existing name.
3. If you want to change every name en masse, click the *Accept All* button.
4. If you want to forego all name changes en masse, click the *Reject All* button.

Approving Drops

If your template imports the *Active* status for customers and you selected the *Require Confirmation for Drops* option, you must manually accept or reject any inactivation on the *Drops* tab, which appears when there are pending changes.

1. Click the *Drops* tab.
2. For each student, choose an action:
   A. *Retain* to reject the drop and leave the student active within Meal Magic Cloud; or
   B. *Inactivate* to accept the drop, making the student inactive in Meal Magic Cloud.
3. Optionally you can approve or reject all drops en masse by clicking either the *Retain All* or *Inactivate All* button accordingly.

Notes About Various Fields

ID Number

This field is required because Meal Magic Cloud uses it to identify customers. Each customer must have a unique ID number that directly corresponds with a unique number within your Student Information System.

Site Number

When importing new students this field is required.

Benefit Status

This field allows benefits to be imported when setting up Meal Magic Cloud. Once an application is entered into Administration, Meal Magic Cloud becomes the benefit authority and therefore benefits can no longer be imported.

Email List

To import multiple e-mail addresses, the e-mail addresses must be separated with semi-colons when using CSV files. They can be separated by commas for other file types or if enclosed in quotes within CSV files.

New ID

This field is used in rare cases where ID numbers need to be changed. For example, when the district changes to a different Student Information System.

Social Security Number

You can import student social security numbers (last four digits only) to assist with direct certification matching. As a safeguard for identity protection, this field is not shown on any screen or report. The field is exportable, so proper care should be exercised when doing so.

Third-Party Deposits

If your district uses a payment processor that does not interface with *Meal Magic Family Portal*, you can use the pre-defined *Third-Party Deposits* import template to apply deposits to customer accounts. Read this section carefully before attempting to use this feature.

The first line of the data file is assumed to be header information and will be skipped. The remaining detail lines will consist of three items (ID Number, Deposit Number, and Deposit Amount) and must be in the order listed here. Header and detail fields must be separated by commas.

Deposit Number

This field associates the deposit to the provider's transaction number and cannot be repeated for a given customer. Duplicates will be skipped. The value can contain up to 25 letters and numbers.

Deposit Amount

The amount must be a value from $0.01 to $10,000.00, inclusive, for deposits. If a negative value is specified, the amount will be recorded as a withdrawal.

Deposit Number is unique only within a fiscal year. Care must be taken to ensure that deposits are not imported twice.

For the best experience, we highly recommend the use of *Meal Magic Family Portal* with *Meal Magic Cloud*.

Third-Party Student Information Systems

If your district uses a Student Information System (SIS) that is hosted outside the district, you can use the pre-defined *MM Food Service* export template to provide customer balances and benefits to that service. If you give the third-party provider the ability to use the Administration API to upload information to Meal Magic Cloud, they also can download information using this particular template. In compliance with various state and Federal laws, no other data extractions can be performed by a third-party provider.

Balances

Customers → Balances

Introduction

Occasionally, you might need to update a customer's balance or make a deposit through Meal Magic Cloud Administration. This can be done using the *Balances* lookup and *Account Adjustments* pages.

Adjust an Account Balance

1. Type all or part of the customer's last name, ID number, or Quick ID number in the text box.
2. Check the *Include Inactive Customers* box to search all customers, or uncheck the box to search only active customers.
3. Click *Search*.
4. Click *View* next to the customer for which you were searching.

> If the search results in only one match, you are taken directly to *Account Adjustments* for the matching customer, bypassing Step 4.

5. Enter the amount of the adjustment in the *Amount* text box.
6. If a check is being recorded, enter check number in the *Check #* text box.
7. For accountability, you can enter a reason for making the adjustment in the *Reason* text box. When entering a debit or credit, an entry for *Reason* is required.
8. Click the button that indicates the type of adjustment that is being made. The transaction is added to a list below the buttons.
9. Click the *Done* button.

Undoing an Account Adjustment

1. Type all or part of the customer's last name, ID number, or Quick ID number in the text box.
2. Check the *Include Inactive Customers* box to search all customers, or uncheck the box to search only active customers.
3. Click *Search*.
4. Click *View* next to the customer for which you were searching.

> If the search results in only one match, you are taken directly to *Account Adjustments* for the matching customer, bypassing Step 4.

5. To reverse a deposit, family deposit, or withdrawal, click the *Void* link next to the transaction. For debits or credits, click the *Reverse* link next to the transaction.

Types of Adjustments

Deposit

A deposit to an account will increase the customer's balance. Enter a deposit when money is received for one customer.

Family Deposit

When you receive money from one person and need to distribute it to multiple accounts, enter a family deposit. You can split the money to any other family members linked to the customer's account.

Withdrawal

Withdrawals remove money from a customer's account and should only be used when money is physically changing hands.

Credit

Credits increase a customer's balance without the receipt of any additional money. Only use credits when there will be no change in the amount of cash you have.

Debit

Debits decrease a customer's balance without money being given to the customer. Only use debits when there will be no change in the amount of cash you have.

Applications

Edit

Applications → Edit Applications

Introduction

Meal Magic Cloud fully supports household applications as required by the USDA, including extending benefits in accordance with Policy 38-2009.

Finding a Student on an Application

Whether you are adding a new application or updating an existing one, the process begins with finding a student associated with the application.

1. From the *Search by* dropdown list, choose which information will be searched. Choices include student name, member name, home phone, street address, birth date, application number, and student ID number.
2. Enter what you want to find in the *Search for* text box. You may enter partial information, such as *Smi* to find every name that begins with those letters.
3. Click the *Search* button.

Matching students are listed after you click *Search*. If a student is already on an application, the corresponding application number is shown in the second column. Students that are not on current-year applications have a checkbox in the first column. Current-year benefits are in green.

Adding an Application

1. Follow the instructions for finding a student.
2. Place a check mark next to each student that you want to include on the application.
3. Click the *Add to New Application* button.
4. If you need to add additional students to the application, for example, if there are students with different last names than those already added, click the *Add More Students* button and repeat Steps 1 through 4.
5. For each student listed, click the student's name in the list and enter any information, such as *Basis*, and *Income for All Children combined*.
6. To add a non-student household member listed on the application, click the *Add Members* button.
7. Enter the household member's *Name* in the text box.
8. If the household member signed the application, mark the *Signed* checkbox. Then enter the last four digits of person's social security number in the *SSN* text box or mark the *None* checkbox.
9. Enter any income for the household member.
10. Repeat Steps 6 through 9 for each non-student household member.
11. If any household member has a case number, in the *Family Case Number* section, select

the proper *Basis* and enter the *Case Number* in the text box.

12. Click the *Address and Other* bar to display that section.
13. Enter any address and telephone number information in the appropriate text boxes and dropdown lists.
14. Optionally, indicate the *Ethnicity*, *Race*, and preferred *Language* for correspondences going to the household.
15. If you are backdating this application, be sure to set *Date Received* to the desired date .
16. If the application indicates interest in any special considerations programs, click the *Special Considerations* bar and then mark the appropriate programs.
17. If you need to add any notes to the application, click the *Notes* tab, enter the notes in the text box, and click the *Add Note* button. Be careful with your note entries because they become a permanent part of the application and cannot be edited or deleted.
18. Click the *Save* button to complete the application.

As a time-saver for adding non-student household members, you can enter the number of members to add in the text box that appears to the left of the *Add Members* button. When you click the button, that many people will be added to the application.

Recalling and Printing

When an application is saved, Meal Magic Cloud returns to the *Find* tab, which then includes the status of the last application processed. To go back to the application, click the *Recall* button; to notify the family of results, click the *Print Notification Letter* button; to view and print the application, click the *Print App* button.

Editing an Application

1. Follow the instructions for finding a student.
2. Click the application number shown in the second column.
3. If the application is a carryover from the previous year, which is also known as a *bumped* application, click the *New Application Received* button to activate the application for the current year so you can make changes. You will be prompted as to whether or not you want to clear all incomes from the old application. Click either the *Yes* or *No* button.
4. Update the application as necessary.
5. If necessary, you can remove a household member by clicking the name in the list and then clicking the *Remove Member* button.
6. Click the *Save* button to complete the application.

Making a Student Active or Inactive Through an Application

1. Follow the instructions for finding a student.
2. Select the student from the list of household members.
3. To the right of the list, locate the *Name* text box and then the link that follows.

4. Click the link to toggle the student's active status.

Changes to a student's active status take effect immediately without the need to save the application. Even if you click the *Cancel* button the active status remains as last set.

Inactive students are listed in a light gray color.

Selecting a Basis for a Student

Because of Meal Magic Cloud's flexible handling of household applications, each student listed on an application can have a different basis. When editing a student, select the proper basis from the *Basis* dropdown list.

For *Administrator Approval*, you must enter the administrator's name in the text box. If the selected basis requires the inclusion of a case number, enter it in the *Case Number* text box.

For the purpose of assigning benefits, multiple foster children can be listed on an application along with other children. The program automatically separates them when assigning benefits.

When a student does not fall into any of the special eligibility categories, be sure to set the basis to *Income*, which is the default.

Entering Incomes

1. Click the person's name in the list of household members.
2. Enter the amount of income in the first box in the *Income* section.
3. Select how often the income is received using the dropdown list.
4. If the person has another income, click the *Add New Income* button and repeat Steps 1 through 4.
5. If you need to remove an income, click the *Delete* button next to it.

Household members that have an income assigned specifically to them are listed in the household members list with a dollar sign symbol ($). Income for students on the application are combined in the *Income for All Children* section.

Waiving Benefits

Sometimes a parent or guardian might ask that their children not receive benefits. You can mark their application accordingly to override benefits, making the children Full Pay.

1. Follow the instructions for finding a student.
2. Click the application number shown in the second column.
3. Click the *Address and Other* bar to view that section.

4. Click the circle preceding *Deny Benefits*.
5. Click the *Save* button.

It is highly recommended that you add a note to the application to explain why benefits were waived.

Reviewing Prior Versions of an Application

Meal Magic Cloud retains a visual history of all applications for auditing purposes. Each time you save an application, the previous version is archived and a new copy is created. This makes it easy to see what changed on an application, when, and by whom.

1. Follow the instructions for finding a student.
2. Click the application number shown in the second column.
3. If previous versions of the application exists, use the *Previous* and *Next* buttons at the bottom of the application to scroll through the revisions.

The *History* tab is not shown for prior versions of an application. It is only available on the current revision.

Reviewing Determination Histories

Each time a benefit determination or reason for a determination changes, the change is logged. You can review the logs on the *History* tab of the application.

1. Follow the instructions for finding a student.
2. Click the application number shown in the second column.
3. Click the *History* tab.
4. If necessary, select the student whose history you want to see using the *History for* dropdown.

Histories permanently remain with students, even if an application is deleted or the students move to different applications.

Backdating Benefits

DO NOT USE THIS FEATURE WITHOUT AUTHORIZATION FROM THE PROPER STATE OR FEDERAL AGENCY.

This feature typically is used only at the beginning of the school year, when schools are processing lots of new applications and are falling behind due to the work load. It can only be used when a new application is entered initially. There is no redo option once an application is saved.

1. Click the *Address and Other* bar to open that section.
2. Enter the appropriate date in the *Date Received* text box or click the calendar icon and se-

lect a date.

You cannot backdate to a date prior to when an application was received.

When the application is saved, if students on the application are entitled to better benefits than they previously had, Meal Magic Cloud will make appropriate adjustments for any meals served back through the date the new application was received.

You must enable backdating benefits on the *Benefits* tab under **Management** → **District** prior to editing applications.

Retroactive Benefits

Retroactive benefits can be used when clerical errors are found to have been made entering an application for the current fiscal year.

NEVER APPLY RETROACTIVE BENEFITS WITHOUT PROPER AUTHORITY. IMPROPER USE OF THIS FEATURE COULD RESULT IN ADVERSE ACTION, INCLUDING FINANCIAL PENALTIES, FROM GOVERNING AGENCIES.

1. Correct any miskeyed information on the application.
2. Click the *Address and Other* bar to open that area.
3. Check the box in the *Retroactive Benefits* section.
4. Select the date back to which any benefit changes should start.
5. Click the *Save* button.
6. In the popup box that appears, enter the reason why you are retroactively applying benefits.
7. Enter the *Confirmation Code* exactly as shown using matching letter case.
8. Click the *Apply Retroactive Benefits* button.

Updating Verification Information

1. Follow the instructions for finding a student.
2. Click the application number shown in the second column.
3. Update the application with any new information received.
4. Click the *Verification* tab.
5. Click *Complete Verification*.
6. Select the *Verification Proof* for each student listed.
7. Click *Complete Verification* to save your changes.

After completing verification updates, be sure to send verification change letters. You should send a letter to each household, even if there was no change in benefits, to let them know that you have completed their verification and what the results are.

Family Portal

Applications → Family Portal

Introduction

The USDA requires that Local Education Authorities (LEA's) be responsible for approving all meal benefit applications. As a result, a few simple steps are necessary to finish applications that parents have submitted electronically through Family Portal.

When new applications have been received via Family Portal, you will see a message in the *Important Notices* section of the *Dashboard* indicating that there are applications ready to process. You can click the *Go* button or use the menus to get to this section.

Process Applications

You can click the *View Submission* button at any time to see the electronically-submitted information in a report format. If desired, you can print this representation for your physical files.

To approve an electronic application, you first must associate the students on the application with their student ID numbers. Click the *???* in the *ID#* column. The software will search your customers, attempting to match the information entered, and then present any matches.

If the *Search Results* show the correct student, click *Select* to make the connection and assign the ID number. If the student was not found, there are additional ways to attempt to find the child.

If a match could not be made because the student is new to the district, enter the student ID number in the *Create New Student* section and click the *Create* button.

Be sure to enter the ID number exactly as it is in the district's Student Information System. If not entered properly, any future imports will not match.

If a match could not be made because of incorrect information, such as typographical errors, you can edit the information shown under *Student Lookup* and then click the *Search* button to try matching again.

It is possible that the student is not enrolled in your district. When this is the case, click the *Non-student* button to treat the person as a non-student household member.

If you determine that a submitted case number is invalid, mark it as such. This will deny the application, and an appropriate notification letter will print when Eligibility Letters are created.
If you would like to add notes to the application, you may enter them in the provided text box.

If a student has been marked by the applicant as homeless, migrant, or runaway, you will see *Please Choose* in the *Special* section These circumstances need to be verified with the appropriate district liaison and then processed as appropriate based on the results.

Once all of the students on the application have been matched to students in your system, you are ready to complete the process. Click the *Complete Application* button to finish processing the application.

It is possible that two or more students exist on separate applications. If this is the case, you need to decide which application to update or if you should create a new application. Keep in mind, if these students exist on other applications and there are other students on those applications as well, the changes you make will affect everyone. To find additional information about the applications on which the students already exist, hover the mouse pointer over the number in the *App ID#* section. You then will see information regarding the student's previous application to assist you in your decision.

To temporarily skip an application, click the *Skip Application* button. It is recommended, however, that you process all applications in the order received.

You can delete an electronically submitted application by clicking the *Delete Application* button. This can be used if an application was submitted to your district by mistake.

Deleting a submission cannot be undone. Do not delete an application unless you are certain it does not belong to any student in your district.

Once a Family Portal application is processed, the information is accessible like any other application.

Direct Certification

Applications → Direct Certification

Introduction

If your State agency provides a compatible electronic file of students that qualify for benefits due to participation in qualifying programs, such as Supplemental Nutrition Assistance Program, you can match those benefits to customers in Meal Magic Cloud.

The State file must be accessible from your computer. If necessary, copy the file to your system. Also, the data in the file must be formatted as CSV, tab-delimited, or fixed width.

Matching Direct Certifications

1. Make sure the State file is located on or accessible from your computer. If necessary, copy the file to your system.
2. If the *Match* tab is not selected, click it.
3. In the *Authority* dropdown box, indicate if the file contains foster care children, SNAP children, TANF children, Medicaid children, FDPIR children, or a mix of more than one. If *Mixed* is selected, an *Authority* field is added to the list. Move the field as needed to match your file layout, and set *Options* as appropriate.
4. In the *Fields* list, put a check mark in the box next to the items that make up the records in the file. If the file is formatted with fixed-width fields, you also need to enter the size of each field in the box to the right of their descriptions.
5. Some fields have options that appear on the right when selected. The Options section tells the system how to interpret that field. For example, many files have designations for the authority providing the direct certification, such as TANF, SNAP, Medicaid, FDPIR, and Foster Care. Be sure to enter any needed settings.
6. If the State file contains multiple school districts, you must include the *District Name/ID* field so only students in your district are included. You also must enter the designation for your district in the *District Filter* text box exactly as it appears in the State file.
7. If you selected the *Birthday* field, choose the appropriate *Date Format* from the dropdown box.
8. If you need to indicate a placeholder field, i.e., a field whose datum will be ignored, click the + button to add a *Skip* indicator. You can have as many *Skip* fields as needed.
9. Arrange the fields in the proper order using the up arrow and down arrow buttons within the *Fields* list.
10. Select the appropriate *File Format*.
11. Using the calendar, choose the *Effective Date* that benefit changes should begin. If this date is earlier than the current date, backdating must be enabled.
12. Optionally, mark the *Override Homeless Status* check box. Because homeless students might qualify for additional benefits, do not override this status unless you are confident that doing so is appropriate.

13. Optionally, mark the *Include Family Members* check box. Doing so will extend benefits to all students known by *Meal Magic Cloud* to be part of the household if their sibling has a FDPIR, SNAP, Medicaid, or TANF designation. See USDA Policy 38-2009 for more information.
14. If you want matching to include students that are inactive in Meal Magic Cloud, mark the *Match Inactive Students* check box.
15. Click the *Browse* button.
16. In the pop-up box that appears, navigate to the location of the State file to be imported.
17. Click the filename and then click the *Open* button.
18. Click the *Preview* button.
19. Make sure the information in each column corresponds with the field titles shown at the top.
20. If everything appears OK, continue to the next step; otherwise, make any necessary adjustments.
21. Click the *Match* button.
22. A pop-up box will appear to show an approximated percentage of students whose status will be changed. If the percentage is reasonable, enter the confirmation code in the text box and click the *Continue* button. If the percentage seems too high, cancel and recheck your file format and settings.
23. When matching completes (see below), click the link to do another direct certification import or view skipped students.

A message showing the progress of matching will appear while the file is being processed. Another message will appear when matching is complete.

If everything was done properly, the message will indicate the date and time of completion, how long the process took, the number of matches, and the number of skips.

If there were skips, click the *Skipped* tab to view or save the list of unmatched students.

For family members that were not in the state file, as provided under USDA Policy 38-2009, simply add them to the same application as their directly certified siblings. Leave the basis for these additional students as income so they can easily be identified as receiving shared benefits.

Notifying Parents

If you want to notify parents about direct certifications, Meal Magic Cloud will generate letters for you.

1. Click the link indicated as *Generate Direct Certification Reports for customers affected by the last match*.
2. When the pop-up appears, select the settings you would like to use.
3. Click the link to view the report.

How Matches Are Determined

Meal Magic Cloud tries multiple ways to match students in the State file to students in your district. Matches on the following fields will mark students as having been directly certified by the State:

- State ID
- Social Security Number (Last four digits). First Name, and Last Name
- ID Number, First Name, Last Name, and Middle Name
- ID Number, First Name, and Last Name
- ID Number, Birthday, and Street Address
- ID Number, Birthday, Parent's First Name, and Parent's Last Name
- ID Number, Street Address, Parent's First Name, and Parent's Last Name

If there are students in the State file that do not match the above criteria but should be included, you need to enter their direct certification status manually by selecting the appropriate *Basis*.

Viewing Matched Students

If desired, you can view a list of all newly certified students.

1. Click the link indicated as *Generate Direct Certification Reports for customers affected by the last match*.
2. When the pop-up appears, select *Direct Cert List* and any settings you would like to use.
3. Click the link to view the report.

EBFs

Applications → Edit EBFs

Introduction

This section is for districts that have schools operating under the Community Eligibility Provision (CEP). Instead of meal applications, families submit household information reports or surveys (collectively, EBF) that allow districts to validate CEP classifications and generate benefit counts for other state and federal programs.

⚠ Do not enter free and reduced meal or milk benefit applications in this section. Doing so can cause erroneous numbers to be reported.

Finding a Student on an EBF

Whether you are adding a new EBF or updating an existing one, the process begins with finding a student associated with the EBF.

1. From the *Search by* dropdown list, choose which information will be searched. Choices include student name, home phone, street address, birth date, report number, and student ID number.
2. Enter what you want to find in the *Search for* text box. You may enter partial information, such as *Smi* to find every name that begins with those letters.
3. Click the *Search* button.

Students can be on multiple EBFs. If a student is already on an EBF, the corresponding report number is shown in the *Edit* column. Students that are not on a current-year EBF will not be shown with a report number.

Adding an EBF

1. Follow the instructions listed above for finding a student.
2. Place a check mark next to each student that you want to include on the EBF.
3. Click the *Add to Household* button.
4. If you need to add additional students to the household, for example, if there are students with different last names than those already added, change the search criteria, click the *Search* button and repeat Steps 2 through 4.
5. Enter the total number of household member in the *Size of Family* text box.
6. Enter any address information in the *Address* text box
7. If the family indicated that a student qualifies as Homeless, Migrant, Runaway, or Foster, select the corresponding program for the student.
8. If a case number was provided, go to the *Current Benefits* section.
   A. Enter the name of the person who receives the benefit.

   B. Enter the case number.
   C. Select the case type from the list.
9. If incomes were provided, go to the *Total Household Income* section.
   A. Select either *Monthly* or *Annual* for the income frequency.
   B. Enter each income type or the total income.
10. If the EBF was signed, enter the name of the *Signer* in the text box.
11. Click the *Save* button to complete the report.

Recalling

When an EBF is saved, Meal Magic Cloud returns to the *Find* tab, which then includes the status of the last report processed. To go back to the report, click the *Recall* button.

Editing an EBF

1. Follow the instructions for finding a student
2. Click the report number shown in the first column.
3. Update the report as necessary.
4. If necessary, you can remove a student by clicking the red *X* button next to the student's name.
5. Click the *Save* button to finish editing.

You can delete an EBF by clicking the *Delete Report* button while editing an EBF.

Processing an EBF Received through Family Portal

If you accept EBFs through Family Portal and there is an awaiting submission, you will see a message stating "There is an unprocessed EBF received through Family Portal" along with a *Load Submission* button. Proceed as follows to process the EBF.

1. Click *Load Submission*. Upon loading the EBF, you will see the information that was entered on Family Portal.
2. Each person in the *Unmatched Students* section will need to be matched to an existing student. Follow the steps under *Finding a Student on an EBF* to locate the person.
   A. If a match is found
      i. Click the circle in the *Match* column under *Unmatched Students* and under the search results to indicate a matching pair.
      ii. Click *Add to Household*.
   B. If no match can be found
      i. For the student that cannot be found, click the circle in the *Match* column under *Unmatched Students*.

    ii. Click *Non-Student*.

3. After all students have been matched, click *Save* to finalize processing.

If you do not want to process an EBF for some reason, you can click the *Skip* button to go to the next one.

If you determine that an EBF cannot be processed, you can click the *Remove* button to delete it; however, once removed, you will not be able to retrieve it again.

Verification

Verification Process

Introduction

Meal Magic Cloud takes much of the labor out of the verification process by doing most of the work for you, such as counting and classifying applications, making selections, generating notifications, reporting the results, and tracking grace periods.

Quick Overview Of The Verification Process

1. Adjust settings if necessary.
2. Make selections.
3. Review selections and make adjustments as needed.
4. Print and mail verification request letters.
5. Edit applications as households respond and send verification change letters.
6. If necessary print and mail second request letters.
7. Continue editing applications and sending change letters as information is received.
8. Make any adjustments to the verification summary.

Verification Methods Supported

- *Standard*, also known as *Basic* or *Error-Prone*
- *Alternate 1*, more commonly called *Random*
- *Alternate 2*, better known as *Focused*

Run / Edit Verification

Applications → Verification → Run/Edit Verification

Adjusting Settings

Typically, the only setting changes you need to make are the selection of a *Verification Method*, entry of response times, entry of an *Application Cut-Off* date, and entry of a *Count Day*. Under normal circumstances, you will not need to change any of the percentages or maximums shown on the *Settings* tab.

1. Click the Settings tab if it is not already selected.
2. Use the *Verification Method* dropdown to pick the method required for your district.
3. If your regulatory agency has changed percentages and maximums for your chosen method, or requires a different error-prone variance, enter the new values in the appropriate text boxes.
4. Enter the number of days for *Response - First Request*, *Response - Second Request*, and *Status Change*. The first two numbers indicate how long a household has to respond after a request for information has been initiated. The value for *Status Change* is how many days students will retain current benefits if a reduction in benefits is determined to be required.
5. Enter the *Application Cut-Off* date. Applications received after this date will not be included in the verification sample pool.
6. Enter the *Count Day*, which usually is the last serving day in October.
7. Click *Save*.

Make Automatic Selections

1. Click the Run Verification tab.
2. Click *Select for Verification*.

Review Selections and Make Changes

To see a list of applications selected for verification, click the *Selection* tab. In addition to the applications, selection counts are indicated. If you determine that one or more of the selected applications should not have been included in the sample pool, you can make alternate selections up to a maximum of 5% of the pool size.

1. Place a check mark in the *Remove* column next to each application that you want to replace.
2. Click *Reselect*.

Selecting Applications “For Cause”

“For Cause” verification allows you to request proof of qualification for benefits from a household at will when an application appears to be suspicious. These verifications are included in the appropriate section on the Verification Summary. You can perform “for cause” verifications at any time during the year.

1. Click the *For Cause* tab.
2. From the *Search By* dropdown list, choose which information will be searched. Choices include name, student ID, application number, and street address.
3. Enter what you want to find in the *Search for* text box. You may enter partial information, such as *Smi* to find every last name that begins with those letters.
4. Click the *Search* button.
5. From the search results, click the *Add* link next to the application you want.
6. Repeat Steps 2 through 5 for each application you want to add.
7. To remove an application from “For Cause” selection, click the *Remove* link next to the application.

Printing Verification Letters and Reports

To access verification letters and reports, select *Reports* from the main menu and then *Applications* from the dropdown list.

Verification List

This report lists everyone chosen for verification along with their current statuses in the verification process. Students chosen “for cause” are listed in their own section.

Verification Request Letters

These are letters you send to the households to request information for verifying their eligibility for benefits. You can edit this letter by clicking the *Edit Template* button.

Verification Change Letters

Send these letters to all households that were chosen for verification. You can edit this letter by clicking the *Edit Template* button.

Verification Sampling Statistics

This report documents all the specific numbers and categories related to verification selection.

Verification Summary

This report details all necessary information for reporting your verification efforts. It is similar in format to the USDA form FNS-742.

Edit Summary

Applications → Verification → Edit Summary

Changing the Verification Summary

If necessary, you can change the values that appear on the Verification Summary report.

1. Enter appropriate header information, such as *State Agency Name*, *SFA ID#*, *SFA Name*, *Type of SFA*, *SFA City*, and *SFA ZIP*.
2. Enter any necessary information in the provided *Override* text boxes.
3. Click *Save*.

Sales

Edit Sales

Sales → Edit Sales

Introduction

You can adjust daily sales information using Meal Magic Cloud Administration. This feature is handy for making corrections.

Find a Customer

1. Type all or part of the customer's last name, ID number, or Quick ID number in the text box.
2. Check the *Include Inactive Customers* box to search all customers, or uncheck the box to search only active customers.
3. Click *Search*.
4. Click *View* next to the customer for which you were searching.

> If the search results in only one match, you are taken directly to *Edit Sales* for the matching customer, bypassing Step 4.

Adding a Sale

1. Find the customer as described above.
2. Click *Add*.
3. Choose the appropriate meal period from the dropdown list.
4. Locate the sale date on the calendar and click it.
5. Click *Next*.
6. If the sale will be billed to a group, use the dropdown list to select the desired group.
7. Select an item from the list on the left. The list shows available items.
8. Click the > button to move the item to the list on the right. This list shows items sold to the customer.
9. If you sold more than one of the item to the customer, adjust the quantity in the box preceding the item's description.
10. If you need to remove an item from the list of items sold, click the *Remove* link next to the item.
11. Repeat Steps 6 through 10 as necessary.
12. Click *Save*.
13. Confirm the sale in the pop-up box.
14. You can add or void more sales for the customer if necessary. When you are finished editing sales for the customer, click *Done*.

Voiding a Sale

1. Find the customer as described above.
2. Click *View* next to the sale you want to void.
3. Click *Void*.
4. Confirm that you want to void the sale by responding to the pop-up box that appears.
5. Click *Done*.
6. You can add or void more sales for the customer if necessary. When you are finished editing sales for the customer, click *Done*.

If there are more sales than fit on the screen, you can use the *Previous* and *Next* buttons as needed to see the additional sales.

Mass Void Sales

Sales → Mass Void Sales

Introduction

Mistakes happen and sometimes the mistakes are BIG. Two examples are entering an entire day's worth of sales on the wrong date or making all your lunch purchases while in the breakfast meal period. Fortunately, Meal Magic Cloud provides an easy way to undo these types of mistakes.

Before voiding sales en masse, you should print the *Transactions* report so you have a list of sales that need to be re-entered.

Mass Voiding Sales

1. Use the dropdown lists to select the erroneous sales date, cafeteria, and meal period.
2. If the error occurred only at one sales register, select that register; otherwise, changes will be applied to all sales registers within the selected cafeteria.
3. Enter the *Confirmation Code* shown on screen.
4. Click the *Void Sales* button and confirm that you really want to void multiple sales.

BE EXTREMELY CAREFUL! Once sales are voided there is no way to restore them automatically. Double-check every setting before clicking the *Void Sales* button.

Edit Receipts

Sales → Edit Receipts

Introduction

Receipts allow you to record payments received from cash-out and billing groups.

Saved receipts cannot be removed. To lower an incorrectly entered receipt, record a new receipt, entering the difference as a negative amount in Step 4.

Recording Payments

1. From the list on the left, choose the *Billing Group* or *Cash-Out Group* from which you received money.
2. Select the *Cafeteria* where you want the money listed or select *Administration*.
3. Choose the *Date* the money was received.
4. Enter the *Amount* received.
5. In the *Notes* section, enter all information, if any, you want listed with the receipt.
6. Click the *Save* button.

Edit Cash-outs

Sales → Edit Cash-outs

Introduction

Edit Cash-outs allows you to enter or edit monies reported for sales registers and vending machines.

Make Changes to a Cash-out

1. Select a *Cafeteria* from the dropdown list near the top, right-hand corner of the page.
2. Use the calendar button to select a date.
3. Select the sales register or vending machine from the list on the left.
4. Enter or edit any coins or bills in the designated text boxes.
5. Enter or edit *Beginning Cash* and *Transfers*.
6. To confirm checks, mark the checkboxes next to them. Leave the boxes unchecked for checks you cannot confirm.
7. Type any *Comments* you want to save with the cash-out.
8. Click the *Save* button.

Enter CEP Sales

Sales → Enter CEP Sales

Introduction

Districts that participate in the Community Eligibility Program have the option of recording sales using a POS sales register at the serving site or by entering meal counts in Meal Magic Cloud's Administration using this function.

⚠ If both methods are used for a site, the total from the sales register and the number entered here will be added together, which could overstate the site's participation.

⚠ Counts entered through Meal Magic Cloud's Administration are treated as anonymous cash sales. If per-customer accountability is required, do not use this method.

Add or Edit CEP Sales

1. Select the *Date* and *Meal Period*.
2. Enter the total meal count for each building in the *CEP Sales* text boxes.
3. Click the *Save* button.

Enter SSO/USC Counts

Sales → Enter SSO/USC Counts

Introduction

Districts that distribute meals under the Seamless Summer Option or the Unanticipated School Closures program can enter child and package counts in Meal Magic Cloud's Administration using this function.

⚠ This feature handles anonymous distributions only. If per-customer accountability is required, do not use this method.

Add or Edit SSO/USC Sales

1. Select the *Date* the meals were distributed.
2. For each distribution location, enter the number packages distributed in the *Children* column for each meal type, and enter the number of meals in each package in the *Meals In Package* column.
3. Click *Save* when all the numbers have been entered.

The system multiplies Children by Meals In Package to determine total meals distributed.

Example: The district distributed seven days worth of lunches to 200 children on a single day. For that day, under the Lunch columns, you would enter 200 for *Children* and 7 for *Meals In Package*. The software counts 1,400 meals having been distributed.

For a day-by-day breakdown of distributions totaled by month, visit *Reports, POS, SSO/USC Counts*.

⚠ Because of the inherent lack of accountability with anonymous sales, numbers entered here do not flow to reimbursement claims. We highly recommend using regular sales, classroom sales, express sales, or preordering to track sales by customer.

Sell Orders

Sales → Sell Orders

Introduction

At the end of the serving day, after all preorders have been distributed, you can use this option to convert the preorders into sold meals. Prior to doing so, however, any unclaimed preorders should be removed through the *Cancel Orders* option of the sales kiosk; otherwise, they will be converted to sales too.

Selling Orders

1. Enter the *Serving Date* associated with the orders or use the calendar to select the date.
2. Click *Submit*.

Because each order needs to be processed separately to ensure proper charging, the process can take a while to complete.

Deleting All Orders

If you took orders for a day but then did not serve them, instead of selling orders, use this process to remove all orders so they do not get sold accidentally at a later time.

1. Enter the intended *Serving Date* associated with the orders or use the calendar to select the date.
2. Mark the *Cancel All Orders* checkbox.
3. Click *Submit*.

Unclaimed Meals

Sales → Unclaimed Meals

Introduction

This process removes any unclaimed pickup meals and optionally allows you to debit accounts for the cost of pickup orders that were placed but not claimed.

Process Unclaimed Meals

1. Enter the *Pickup Date* for the service.
2. Mark the *Debit Accounts* checkbox if you will charge parents for unclaimed meals.
3. Click *Submit*.

Although unclaimed meals cannot be counted for reimbursement, the USDA does allow districts to charge parents for the cost of the meals they ordered but did not take. Most schools do not do this to prevent bad press.

Reports

Built-In Reports

Reports → Applications / EBFs, POS, or Nutrition

Introduction

It's not often we get to use the word *plethora*, so it is with pleasure that we mention that Meal Magic Cloud comes with a plethora of standard reports to serve your needs. For convenience, the included reports are grouped by subject.

Most standard reports have many options that can be set to refine the information that is included on them or the order in which information is listed. Through use you will discover that many of these settings are self-explanatory. This chapter concentrates on settings common to many of the reports.

Generating a Report

1. Click the name of the report in the list on the left of the page.
2. Set any sorting or filtering options that appear on the right.
3. Click the *Run Report* button.

The page will change to indicate that the report is being produced. When it is ready, the status will read *Completed. Click here to view the report*. Click the link to display the report. When you are done viewing it, click the *Close Window* button.

Scheduling a Report

Reports can be viewed right away, as described above, or they can be scheduled to be generated later, either once or on a recurring schedule. Scheduling reports that you need often is a great time saver.

1. Click the name of the report in the list on the left of the page.
2. Under the *When should the report run?* section, select either *Once* or *Repeating* from the *Run Type* dropdown list.
3. If you selected *Once*, enter a date and time for *Run Time*. This is when the report will be created.
4. If you selected *Repeating*, select a frequency from the *Run* dropdown list and adjust the schedule according to your needs.
5. Set any sorting or filtering options that appear on the right.
6. Click the *Schedule Report* button.

Naming a Report

If desired, you can change the name that will be assigned to a report in the *Report Queue*. This can make it easier to find a specific report.

Selecting Report Options

Most report options are selected by checking boxes, choosing from dropdown lists, or picking single radial buttons from groups of related choices. Sometimes you might need to enter text in boxes or use a pop-up calendar to select a date.

If an option is shown with a magnifying glass icon, click the description to reveal a pop-up box of choices. Put a check mark next to each choice you want to select, and then click the *Done* button.

Some reports allow you to add more filters on the fly. For example, the *Nutrient Food List* lists a single filter for *Nutrient Requirements* but you can add more. To add a filter, complete the one shown and then click the *Add* button. After setting the new filter, you can add another if desired. To remove an on-the-fly filter, click the *Remove* button following it.

Email a Report

If desired, you can have Meal Magic Cloud email a report to one or more recipients after it is created. You even can attach comments to the email.

1. Prepare the report according to *Generating a Report* or *Scheduling a Report* .
2. Before running or scheduling the report, check the box next to *Email This Report When Finished*.
3. For each recipient, enter the recipient's email address in the *Email Address* text box and then click the *Add New Email* link to add the address to the list on the left.
4. If you want to remove a recipient from the list, click the email address shown in the list and then click the *Remove Selected Email* link.
5. If you want to include comments with the email, put a check mark in the box preceding *Include Comments* and type the comments in the text box that appears.
6. Run or schedule the report.

Custom Reports

Reports → Customer Reports

Introduction

In addition to the plethora—you knew we had to say *plethora* again, it's such a fun word—of standard reports, Meal Magic Cloud ships with its own custom report writer so you can make your own reports. It even includes pre-defined templates that can be used to get you started.

The list of custom reports appears on the left side of the page. The list is divided into two sub-lists: Pre-defined Reports and User-defined Reports. Pre-defined reports cannot be altered directly, but they can be copied and then the copies can be changed.

Custom reports are defined by *templates* that indicate what information to include and where to place it on the report. You can create templates for letters, lists, labels, cards, envelopes, and calendars.

Generating a Custom Report

1. Click the name of the report in the list on the left of the page.
2. To set filtering or sorting options, click the corresponding tab and then select the options you want.
3. Click the *Scheduling and Running* tab if it is not selected.
4. Click the *Run Report* button.

The page will change to indicate that the report is being produced. When it is ready, the status will read *Completed. Click here to view the report*. Click the link to display the report. When you are done viewing it, click the *Close Window* button.

Choosing a Medium

Custom letters can be destined for paper, email, or a combination thereof as needed. Be sure to select the *Medium* that best suits your desired results.

Paper specifies that all letters will be printed.

Paper If No Email prints letters only for those recipients that do not have an email address.

Email sends emails to everyone with an email address. The document is attached to the email as a PDF.

Smart Choice prints letters for those without an email address and sends emails to those with an email address.

File Copy generates printable letters for everyone selected but also emails those with email addresses. The printable copies will include the email address in red at the top for those who received copies via email, allowing them to be kept on file as proof of email notification.

There are no restrictions on how many times you can email a letter to a recipient, so please be careful not to SPAM everyone.

If you select Email, Smart Choice, or File Copy, you also must choose an *Email Source*. This can be the list of email addresses on the customer's account, the email address on the customer's application, or both.

As previously noted, letters sent via email contain the document as a PDF attachment. If desired, you can include additional information in the body of the email.

1. Mark the *Include Comments* check box.
2. Type in the provided text box the information to be included in the body of email.

You also can select to *Append comment to applications included in report* if you would like to add a note to applications when application-related reports are generated.

Scheduling a Custom Report

Reports can be viewed right away, as described above, or they can be scheduled to be generated later, either once or on a recurring schedule. Scheduling reports that you need often is a great time saver.

1. Click the name of the report in the list on the left of the page.
2. Click the *Scheduling and Running* tab if it is not selected.
3. Under the *Run or schedule* section, select either *Once* or *Repeating* from the *Run Type* dropdown list.
4. If you selected *Once*, enter a date and time for *Run Time*. This is when the report will be created.
5. If you selected *Repeating*, select a frequency from the *Run* dropdown list and adjust the schedule according to your needs.
6. To set filtering or sorting options, click the corresponding tab and then select the options you want.
7. Click the *Scheduling and Running* tab if it is not selected.
8. Click the *Schedule Report* button.

Selecting Filters and Sorting

Most report options are selected by checking boxes, choosing from dropdown lists, or picking single radial buttons from groups of related choices. Sometimes you might need to enter text in boxes or use a pop-up calendar to select a date.

If an option is shown with a magnifying glass icon, click the description to reveal a pop-up box of choices. Put a check mark next to each choice you want to select, and then click the *Done* button.

Some reports allow you to add more sorting choices on the fly. To add a sort, set the one shown and then click the *Add* link. After setting the new sort option, you can add another if desired. To remove an on-the-fly sort option, click the *Remove* link following it.

Not all custom reports have selectable filters and sorting. Calendars, for instance, have none.

Email a Report

If desired, you can have Meal Magic Cloud email a report to one or more recipients after it is created. You even can attach comments to the email.

1. Prepare the report according to *Generating a Custom Report* or *Scheduling a Custom Report* .
2. Before running or scheduling the report, check the box next to *Email Final Document When Completed*.
3. For each recipient, enter the recipient's email address in the *Email Address* text box and then click the *Add New Email* link to add the address to the list on the left.
4. If you want to remove a recipient from the list, click the email address shown in the list and then click the *Remove Selected Email* link.
5. If you want to include comments with the email, put a check mark in the box preceding *Include Comments (Also include in Email Text)* and type the comments in the text box that appears. These comments also are included when you mass email letters.
6. Run or schedule the report.

View a Template

Viewing a pre-defined custom report's template will give you an idea of what information the report will produce and how to layout similar reports that you create. Report templates seem strange and overwhelming to beginners, but with a bit of experience and practice, they become easy to create and edit.

1. Click the name of a pre-defined custom report in the list on the left of the page.
2. Click the *View Template* button.

The template is displayed in a *Template Editor*. When you are done viewing it, click the *Cancel* button to return to *Custom Reports*.

Copy a Template

Any existing template can be copied. Copying an existing template gives you a big head start on creating a new version of a custom report.

1. Click the name of the report in the list on the left of the page.
2. Click the *Copy* button. After the template is copied, a pop-up box appears.
3. In the pop-up box, enter a *Template Name* and, if desired, a *Template Description*.

4. Click the *Done* button.

Delete a Template

You can delete any user-defined custom report that you no longer need, but you cannot delete pre-defined custom reports.

1. Click the name of the report in the list on the left of the page.
2. Click the *Delete* button.
3. Confirm that you want to delete the custom report by clicking the *Delete Template* button when prompted, or click the *Cancel* button to keep the report.

Create a Template

Creating new customer report templates in Meal Magic Cloud is quite easy. The creation wizard guides you through the process. You make choices based on the type of template you select, and the program does the work of creating the template so you can get your custom report going with minimal effort.

Letter Template

The use of these templates allows you to send form letters or notes to groups of customers. Letters include a page header, body, and page footer. One letter is generated for each individual or family.

1. Click the *Create New Template* button.
2. Click the *Letter* icon on the pop-up window.
3. Select how many letters print per page (1, 2, 3, or 4). When multiples are selected, the page is divided horizontally.
4. Select the page orientation from the *Orientation* dropdown list. *Portrait* places the narrower edge along the top, and *Landscape* places the longer edge along the top.
5. Select the size of paper from the *Page size* dropdown list. *Letter* is 8.5 inches by 11 inches, and *Legal* is 8.5 inches by 14 inches.
6. Enter a name for the template in the *Name* text box.
7. Click the *Create* button.

List Template

Lists include a page header, typically used for column descriptions, and a body section. Information about individuals prints in one or more columns. Each page fills with as many individuals as there is room.

1. Click the *Create New Template* button.
2. Click the *List* icon on the pop-up window.
3. Select how many columns to print per page. When multiples are selected, the page is

divided vertically.

4. Select the page orientation from the *Orientation* dropdown list. *Portrait* places the narrower edge along the top, and *Landscape* places the longer edge along the top.
5. Select the size of paper from the *Page size* dropdown list. *Letter* is 8.5 inches by 11 inches, and *Legal* is 8.5 inches by 14 inches.
6. Enter a name for the template in the *Name* text box.
7. Click the *Create* button.

Label Template

Labels are a series of small bodies of text containing information about one individual. In addition to mailing labels, business card and name badge stock can be used.

1. Click the *Create New Template* button.
2. Click the *Label* icon on the pop-up window.
3. Select the type of labels from the list.
4. Select the page orientation from the *Orientation* dropdown list. *Portrait* places the narrower edge along the top, and *Landscape* places the longer edge along the top.
5. Enter a name for the template in the *Name* text box.
6. Click the *Create* button.

Card Template

Card templates are used to create customer ID cards. Information can be output to large Dymo address labels or standard plastic ID card stock. One card is produced for each selected individual.

1. Click the *Create New Template* button.
2. Click the *Card* icon on the pop-up window.
3. Select the type of cards from the list.
4. Select the page orientation from the *Orientation* dropdown list. *Portrait* places the narrower edge along the top, and *Landscape* places the longer edge along the top.
5. Enter a name for the template in the *Name* text box.
6. Click the *Create* button.

Envelope Template

Support for a variety of common envelope sizes makes mass mailing easy.

1. Click the *Create New Template* button.
2. Click the *Envelope* icon on the pop-up window.
3. Select the type of envelope from the list.

4. Enter a name for the template in the *Name* text box.
5. Click the *Create* button.

Calendar Template

Publishing daily menus or event calendars is a breeze when you use calendar templates.

1. Click the *Create New Template* button.
2. Click the *Calendar* icon on the pop-up window.
3. Select the *Month* and *Year* for the calendar using the dropdown lists.
4. Mark the *Include weekends* check box if you want Sundays and Saturdays to be included; otherwise, unmark it for a Monday through Friday calendar.
5. Enter a name for the template in the *Name* text box.
6. Click the *Create* button.

Edit a Template

Creating a template as described in the previous section establishes a basic format for the information to be output. It does not set details about what information is printed or where the information appears on the report. The custom report designer enables you to define those details.

1. Click the name of the report in the list on the left of the page.
2. Click the *Edit Template* button. The template will load in a *Template Editor* momentarily.
3. Some templates allow you to resize the *Page Header*, *Body*, and *Page Footer* sections. To resize a section, position the mouse cursor over the bottom border of the section. When the resize cursor displays, click and hold the left mouse button and drag the border up or down as needed.
4. Use the *Add Content* menu to design your template.
5. When you are done editing, click the *Save Template Changes* button.

Add Content

The various design elements for custom report templates are listed under the *Add Content* dropdown on the left side of the page. Which elements are listed depends on the type of template you are editing.

Add an Element

1. Click the *Add Content* dropdown.
2. Click the element you want to add.
3. If you want to resize the element, position the mouse cursor over one of the element's corners, click and hold the left mouse button, and then move the mouse to stretch or shrink the area. Release the mouse button when the desired size is reached.

4. To move a placed element, position the mouse cursor over the center of the element, click and hold the left mouse button, and then move the mouse to move the element. Release the mouse button when the element is in the desired location.
5. Select all the desired properties for the element.

Delete an Element

1. Click the element that you want to remove from the template.
2. Press the *Delete* key on the keyboard.

Text Elements and Properties

Text elements are placeholders for fixed or variable information. Fixed information includes words, sentences, and paragraphs that are repeated verbatim on the report. Variable information includes items specific to an individual, such as name or address. Text areas can contain a mixture of fixed and variable information.

Each text element can have its own background color, border style, and border color. If desired, everything in a text area can be forced to output in all capital letters.

To enter text, you select the text element and then click the *Edit Text* button in the properties section. This opens a text editor where you can type, select font styles, make alignment choices, and add data fields. Editing and formatting text is similar to creating form letters in a word processor.

Text elements have multi-lingual support. Select the language in the dropdown window and enter the appropriate text and data fields. When the report is run, text will be output from the appropriate language based on customer settings.

Page Number Elements and Properties

Typically page numbers are used on lists. After positioning a *Page Number* element on the report, you can set properties for alignment, font size, and style.

Barcode Elements and Properties

The *Barcode* element displays a scannable barcode on the custom report. Properties include choosing one of three barcode styles, including a readable caption below the barcode, and a choice of which ID to print as a barcode.

Student Photo Elements and Properties

Especially useful for card templates, the *Student Photo* element displays a picture of the individual being reported. There are no special properties for this element.

Clip Art Elements and Properties

The *Clip Art* element can be used to insert a graphic, such as a school logo, on the report. The *Select Image* button, as well as double clicking the element, displays a dialogue for selecting the graphic to be displayed. New graphics can be uploaded as needed. Selecting the *Background image* property forces the graphic to be displayed behind any overlapping elements.

Rectangle Elements and Properties

Rectangle elements draw square or rectangular blocks on the report, for example, to focus attention on specific information. *Background Color*, *Border Color*, and *Border Thickness* can be specified.

Sub-Report Elements and Properties

Sub-Report elements insert pre-defined blocks of information into reports. For example, an individual's account history can be added by placing the *Account History* sub-report on the template, or a list of family members can be included by adding the *Family Members* sub-report. Selectable properties vary depending on the *Type* of sub-report used.

Low-Balance Emails

Reports → Low-Balance Emails

Introduction

Low-Balance Emails are used to notify parents when their children's' accounts are running low on funds or have gone negative. Up to three jobs can be configured depending on circumstances and who should be notified. Active jobs are run nightly. To prevent excessive notifications, each email address listed for customers will receive no more than one email every four days.

Districts that take deposits via Family Portal can configure two jobs, and Family Portal users can opt to have Family Portal send reminders at levels set by the users. Those who opt into these emails will not receive district-configurable low-balance email. No email will be sent to anyone who has opted out of all emails.

Create an Email Job

1. Click the *Create New Emailer* button.
2. Mark the *Paused* check box to create an email job but leave it suspended from working, or leave the check box unmarked to activate the job upon saving.
3. Optionally, check the box next to *If customer email is blank, use application email.* When you do so, if no email exists for the customer, then any email associated with the customer's application will be used instead.
4. Indicate the range of balances that trigger this email. The first text box specifies a minimum balance and the second text box specifies a maximum balance. You must specify at least a maximum balance. Leaving the minimum balance blank will include everything below the maximum balance entered.
5. Mark the *Exclude customers with zero balance* check box if you do not want emails sent to customers with no money on account and no money due; otherwise, unmark it to include them.
6. If you want to specify which sites to target with this email, click the *Sites* magnifying glass icon, mark the desired sites, and then click the *Done* button. By using this filter, you can create emails tailored by location.
7. Use the *Run for* dropdown list to indicate which group of customers will receive this email. If you choose to target selected grades, click the magnifying glass icon at the end of the line, mark the desired grades, and then click the *Done* button.
8. To target customers with specific benefits, click the magnifying glass icon following *Benefits*, mark the desired benefits, and then click the *Done* button.
9. If you want to change or supplement the standard email text with an additional message, enter the message in the *Low-balance Message* text box. You can use placeholder text to place variable information into the message. Just click the desired placeholder text at the right to insert it into the message.
10. If desired, click the *View preview* button to see samples of the emails that will be output by this email job. The dropdown list at the top of the pop-up allows you to see samples based

on various balance conditions. When you are done previewing the emails, click the *Close* button.

11. Click the *Create* button to finalize the creation of this email job.

Edit an Email Job

1. Move the mouse cursor over the email job that you want to edit and then click it.
2. Make whatever changes you want using *Create an Email Job* as a guideline.
3. Click the *Save* button.

Pause or Unpause an Email Job

1. Place a check mark in the box preceding the email job's description. You can select multiple jobs if desired.
2. Click the *Pause* (or *Unpause*) button as appropriate.

Delete an Email Job

1. Place a check mark in the box preceding the email job's description. You can select multiple jobs if desired.
2. Click the *Delete* button.
3. Click the *Delete* button when prompted to confirm the deletion, or click the *Cancel* button to keep the email jobs.

Queue

Reports → Queue

Introduction

Report Queue allows you to manage all scheduled and unseen reports. Information within Report Queue is organized by job status: active, completed, and error.

The *Active Reports* tab lists reports that are currently being processed along with reports that are scheduled to run in the future; the *Completed Reports* tab lists one-run reports that have finished processing but have not been either viewed or deleted; and the *Errors* tab lists reports that have encountered a problem while being prepared.

Filtering Report Queue Results

By default, when you enter the Report Queue, it is filtered to show only the reports you have run in the past month. You can change which reports are listed by selecting filters for the following: job number, report type, reports completed between certain dates, site, cafeteria, meal period and even the person who requested the reports.

1. Set the filters for your desired results. Use the text boxes, drop downs, and/or calendars to choose what will be listed.
2. Click the *Filter Queue* button.

> The *Reset Filters* button resets the screen to only show the logged-in user's reports for the past month.

Sorting Results

You can sort results by clicking the column headers near the top of the currently selected tab. The first click will sort the reports in ascending order for that header. Clicking the column a second time will reverse the results into descending order.

Refreshing Results

Click the Refresh link in the top-right area of the screen to update the status of reports in *Report Queue*.

Viewing Report Criteria

To view sorting and filtering criteria used to process a listed report, click the line on which the report is listed, and the results are listed below. Click the line again to hide the information.

Viewing A Completed Scheduled Report

1. Select the *Active Reports* tab.

2. Click the line on which the report is listed.
3. Click the *View Completed Reports* button.
4. From the chronological list of completed reports, click the link to view the desired report.
5. After viewing the report, click the *Close Window* button at the bottom of the page.
6. Repeat Steps 4 and 5 as desired.
7. Click the *Return to Report Queue* button to go back to *Report Queue*.

You can delete any listed report by clicking the *Delete* button next to it and responding to the prompt that appears.

Manually Running a Scheduled Report

1. Select the *Active Reports* tab.
2. Click the line on which the report is listed.
3. Click the *Run Now* button.
4. Click the *Click here to view the report* link when it appears.
5. After viewing the report, click the *Close Window* button at the bottom of the page.

Editing Filters for a Scheduled Report

1. Select the *Active Reports* tab.
2. Click the line on which the report is listed.
3. Click the *Edit Filters* button.
4. Make any desired changes to the filters that appear.
5. Click the *Save Updated Filters* button.

Pausing and Unpausing a Scheduled Report

1. Select the *Active Reports* tab.
2. Click the line on which the report is listed.
3. To temporarily pause an active report, click the *Pause Report* button.
4. To restore a deactivated report to active status, click the *Unpause Report button*.

Viewing a Completed Report

1. Select the *Completed Report* tab.
2. Click the line on which the report is listed.
3. Click the *View Report* button.
4. After viewing the report, click the *Close Window* button at the bottom of the page.

Restarting a Report with Errors

1. Select the *Errors* tab.
2. Click the line on which the report is listed.
3. Click the *Restart Report* button.

> Once completed, the restarted report will be listed on the appropriate tab based on its *Run Type*.

Deleting a Report

1. Click the line on which the report is listed.
2. Click the *Delete Report* button.
3. Click the the deletion by answering the prompt.

Deleting a Running Report

Reports that span many dates or that contain a lot of information due to lack of filtering can take an excessive time to complete. These reports can bog down the report service and delay other reports from running. If desired, you can delete these reports before they finish running.

1. Select the *Active Reports* tab.
2. Click the name of the report.
3. When the report expands, click the *Delete Report* button.
4. Confirm that you want to delete the report.

Appendices

Using CloudWS

Introduction

Meal Magic CloudWS is a small program that can be used to communicate with Meal Magic Cloud web services. Web services provide access to your information through a variety of Application Programming Interface (API) methods and can be used to automate tasks that you perform regularly.

You can download the newest version of the CloudWS program from *Management Security Licenses* (see *Download CloudWS*. You can use the program directly or within a script that can be scheduled using Task Scheduler (Windows) or Automator Tasks (macOS).

All CloudWS methods require an API key (apiKey) that identifies your district. The key can be found under *Management Security Licenses*.

General Usage

The general format for CloudWS commands is:

WINDOWS
cloudws methodName,apiKey[,parameter1]...[,parameterN]

MACOS
dotnet cloudws.dll methodName,apiKey
[,parameter1]...[,parameterN]

CloudWS is the name of the program, *methodName* identifies the task you want to use, and *apiKey* is a unique key that identifies your district. Some tasks will require additional information included as a series of parameters separated by commas.

Available Tasks

Import Customer Information

WINDOWS
cloudws RunImport,apiKey,templateName,fileName

MACOS
dotnet cloudws.dll RunImport,apiKey,templateName,fileName

templateName is the name of the import template that describes how information is stored in the file
fileName is the file, including path, that will be uploaded to Meal Magic Cloud and then imported

Example: cloudws RunImport, a2b4w-123s-djkk-mkwv, “Nightly Import”, “d:\data\students.csv”

Export Customer Information

WINDOWS
cloudws RunExport,apiKey,templateName,fileName

MACOS
dotnet cloudws.dll RunExport,apiKey,templateName,fileName

templateName is the name of the export template that describes how information will be stored in the file

fileName is the file, including path, that will be written locally, assuming the user has sufficient rights to create it

Example: cloudws RunExport, a2b4w-123s-djkk-mkwv,"Nightly Import", "d:\data\students.csv"

Upload A Picture (filename matches customer ID number)

WINDOWS
cloudws PutPicture,apiKey,fileName

MACOS
dotnet cloudws.dll PutPicture,apiKey,fileName

fileName is the photograph file, including path, that will be uploaded to Meal Magic Cloud

Example: cloudws PutPicture, a2b4w-123s-djkk-mkwv, "d:\pictures\123.png"

This example would attempt to upload a photograph named 123.png from d:\pictures and save it to the customer with ID number 123.

Upload A Picture (specifying a customer ID number)

WINDOWS
cloudws PutPicture,apiKey,customerID,fileName

MACOS
dotnet cloudws.dll PutPicture,apiKey,customerID,fileName

customerID is the ID number of the customer whose photograph is being uploaded
fileName is the photograph file, including path, that will be uploaded to Meal Magic Cloud

Example: cloudws PutPicture, a2b4w-123s-djkk-mkwv, 10726, "d:\pictures\jaimie.jpg"

In the example, a photograph named jaimie.jpg, locatred in d:\pictures, is uploaded to Meal Magic Cloud and saved to the customer with ID number 10726.

Upload Groups of Pictures

You can upload multiple pictures by expanding the command you use to call cloudws into action:

WINDOWS
for %x in (*.png) do cloudws PutPicture,apiKey, %x

macOS
for X in *.PNG;
do dotnet cloudws.dll PutPicture,apiKey, $X; done

These commands find all files of type PNG in the current folder and sends each one to Meal Magic Cloud. You can change *PNG* to specify other file types, such as JPG, GIF, and TIF.

If you have several different types of photograph formats, you can include all of them at once. For example:

WINDOWS
for %x in (*.png, *.jpg, *.gif) do cloudws PutPicture,apiKey, %x

macOS
for X in *.PNG *.JPG *.GIF; do dotnet cloudws.dll
PutPicture,apiKey, $X; done

In this example, files with PNG, JPG, or GIF extensions will be uploaded to Meal Magic Cloud. You can specify a folder as part of your command:

WINDOWS
for %x in (d:\pictures*.jpg) do cloudws PutPicture,apiKey, %x

macOS
for X in ~/pictures/*.JPG; do dotnet cloudws.dll
PutPicture,apiKey, $X; done

This command will attempt to upload all JPG files found in the specified folder on your system.

Working with Cloud-hosted Data

Windows examples shown in this section are typed at a command prompt to upload pictures en masse. You also can use the commands within scripts or batch files. To do so, change each occurrence of *%x* to *%%x*. If %x is already used in your script, you can use a different letter.

When specifying files under macOS, names are case-sensitive, so example.png and example.PNG are two different files.

Importing and Exporting

CloudWS is a program that can be downloaded through Meal Magic Cloud. Within the software, navigate to Management, Security, and then Licenses to access the software, which will need to be extracted. We recommend placing its contents into the same folder from which it will be run.

On the same screen, you will find API keys required by CloudWS. Potentially, there can be three different keys: District, for accessing the API from within the district; SIS, for access by a student information system located outside the district; and Payment, for obtaining deposits uploads from a payment provider. You also will see a checkbox with the description Allow Administration API Usage. This box must be marked; otherwise, CloudWS will not be able to access your cloud-based information. Also, to prevent unauthorized access to your data, you will need to indicate on that same screen an IP address or range of addresses from which API calls will occur. For more information, see the Meal Magic Cloud Administration Guide.

To import or export information using CloudWS, you first need to create templates describing the data file. Within Meal Magic Cloud, navigate to Customers and then Import/Export. When you select an existing template or create a new one, you will see a checkbox with the description API following the name of the template on the right. You must mark this box on each template that you want to access through CloudWS. If the box is left unmarked, CloudWS will not be able to use the associated template.

Once you have CloudWS downloaded and installed, have your API key, have checked the appropriate boxes along the way, and have had your IP address or range approved, you are ready to import and export information. For the following examples, let's assume the following:

WINDOWS

API Key	ABCDE-1234-5678-90AB-VWXYZ
Import Template Name	New Students
Export Template Name	Student Benefits
Existing Student Data File	D:\SIS.csv
Receiving File	D:\CurrentBenefits.csv

MACOS

API Key	ABCDE-1234-5678-90AB-VWXYZ
Import Template Name	New Students

Export Template Name	Student Benefits
Existing Student Data File	~/SIS.csv
Receiving File	~/CurrentBenefits.csv

To manually import students into Meal Magic Cloud from a command prompt (CMD), you would enter the following on one line:

WINDOWS

CloudWS RunImport, ABCDE-1234-5678-90AB-VWXYZ,
"New Students", "D:\SIS.csv"

MACOS

dotnet CloudWS.dll RunImport,
ABCDE-1234-5678-90AB-VWXYZ, "New Students",
"~/SIS.csv"

CloudWS will attempt to read the contents of the named file and send the information to Meal Magic Cloud. Meal Magic Cloud will use the "New Students" import template to match and translate information as necessary.

Manual exporting is just as easy. Here is how you would download benefits from Meal Magic Cloud, given the information above:

WINDOWS

CloudWS RunExport, ABCDE-1234-5678-90AB-VWXYZ,
"Student Benefits", "D:\CurrentBenefits.csv"

MACOS

dotnet CloudWS.dll RunExport,
ABCDE-1234-5678-90AB-VWXYZ,
"Student Benefits", "~/CurrentBenefits.csv"

In this case, CloudWS would request that Meal Magic Cloud use the "Student Benefits" export template to generate a file containing the appropriate information. That file would be transferred to your computer and saved as in the specified filename.

Suppose, now, that you want these two tasks to happen automatically on a schedule. First, you would put the appropriate command into a script file, for example, DailyImport.bat. Then you would configure Windows Task Scheduler to execute the script file according to the schedule you need. With these two, simple steps, you have created the necessary automation to exchange information with Meal Magic Cloud on a schedule.

Presently, the end-of-year process disables the Allow Administration API Usage setting to prevent accidental exchanges of mismatched information. When the close process is finished, you must mark this setting to re-enable automated imports and exports.

Loading Photographs

Meal Magic Cloud stores pictures in your database, making them available to all devices with no effort beyond uploading the pictures once. The CloudWS utility is used to assign photographs to customers.

Let's assume the following for our examples:

Windows

API Key	ABCDE-1234-5678-90AB-VWXYZ
Location of Photographs	D:\Student Photos
Photo Filenames	Same as customer IDs
Photo File Extension	PNG
Individual File	123456.GIF

macOS

API Key	ABCDE-1234-5678-90AB-VWXYZ
Location of Photographs	~/StudentPhotos (macOS)
Photo Filenames	Same as customer IDs
Photo File Extension	PNG
Individual File	123456.GIF

To manually upload all photographs in the specified location to Meal Magic Cloud from a command prompt (CMD), you would enter the following on one line:

Windows

```
for %F in ("D:\Student Photos\*.png") do CloudWS PutPicture,
    ABCDE-1234-5678-90AB-VWXYZ, %F
```

macOS

```
for F in ~/StudentPhotos/*.PNG; do dotnet CloudWS.dll
    PutPicture, ABCDE-1234-5678-90AB-VWXYZ, $F; done
```

macOS is case-sensitive; therefore, png is not considered the same as PNG, so take care to ensure that all your files have consistent case usage.

These commands leverage the power of scripting to pass the name of each PNG file within the named folder, one at a time, to CloudWS. In turn, CloudWS attempts to send the contents of the passed filename to Meal Magic Cloud.

If you have pictures in various formats, for example, some PNG and some JPG, you could specify both by changing the previous command to this:

Windows

```
for %F in ("D:\Student Photos\*.png", "D:\Student Photos\*.jpg")
    do CloudWS PutPicture,
    ABCDE-1234-5678-90AB-VWXYZ, %F
```

macOS

```
for F in ~/StudentPhotos/*.PNG ~/StudentPhotos/*.JPG;
    do dotnet CloudWS.dll PutPicture,
    ABCDE-1234-5678-90AB-VWXYZ, $F; done
```

Similarly, you could specify multiple folders by changing the path, such as:

WINDOWS

```
for %F in ("D:\High School\*.jpg", "D:\Elementary\*.gif")
        do CloudWS PutPicture,
        ABCDE-1234-5678-90AB-VWXYZ, %F
```

MACOS

```
for F in ~/HighSchool/*.JPG ~/Elementary/*.GIF;
        do dotnet CloudWS.dll PutPicture,
        ABCDE-1234-5678-90AB-VWXYZ, $F; done
```

The examples above handle multiple photographs at once. To upload a single picture, such as "123456.GIF", you could issue the following command:

WINDOWS

```
CloudWS PutPicture, ABCDE-1234-5678-90AB-VWXYZ,
        123456.GIF
```

MACOS

```
dotnet CloudWS.dll PutPicture,
        ABCDE-1234-5678-90AB-VWXYZ, 123456.GIF
```

These commands would upload the contents of "123456.GIF" and assign it to customer 123456. If you have a photograph with a name that doesn't match the customer ID number, you could specify the ID number to use:

WINDOWS

```
CloudWS PutPicture, ABCDE-1234-5678-90AB-VWXYZ,
        123456, "JohnDoe.GIF"
```

MACOS

```
dotnet CloudWS.dll PutPicture,
        ABCDE-1234-5678-90AB-VWXYZ, 123456, JohnDoe.GIF
```

These commands upload a picture named "JohnDoe.GIF" to customer 123456. Hopefully, customer 123456 really is John Doe!

Uploaded photographs remain in the database until replaced. Ideally, keep photographs in a local folder, use CloudWS to upload them, and then delete them. As new photographs become available, copy them to the folder and repeat the procedure. A simple addition to our first example can be used to do this:

WINDOWS

```
For %F  in ("D:\Student Photos\*.png")
        do CloudWS PutPicture, ABCDE-1234-5678-90AB-VWXYZ,
         && DEL %F
```

macOS

```
for F in /~StudentPhotos/*.PNG;
    do dotnet CloudWS.dll PutPicture,
    ABCDE-1234-5678-90AB-VWXYZ, $F || rm $F; done
```

As before, these commands loop through all the PNG files in the specified folder, uploading each using CloudWS. If CloudWS does not return an error uploading a given picture, then that file is deleted.

Presently, the end-of-year process disables the Allow Administration API Usage setting to prevent accidental exchanges of mismatched information. When the close process is finished, you must mark this setting to re-enable automated imports and exports.

Extending Carryover Benefits

Background

In late 2020, the USDA implemented a waiver to allow carryover benefits from the 2019-2020 school year to extend through the 2020-2021 school year and into the 2021-2022 school year for families that did not apply for benefits during the 2020-2021 school year.

Unfortunately, in many cases, carryover benefits already had expired in Meal Magic Cloud by time this waiver was issued. To compensate for this timing issue, Meal Magic Cloud allows districts to reinstate expired carryover benefits and extend them through the end of the current school year, assuming no intervening events prevent doing so. This, in turn, allows those benefits to be carried to the new school year during year-end closing.

Enable Extended Benefits

⚠ If you would like to implement the necessary changes, proceed as follows. If you are unsure if you should do this, check with your State first.

To enable the extension of benefits through the current school year with carryover into the next school year, proceed as follows. You must have the Administrator web role to access the special page.

1. Log into Meal Magic Cloud.
2. In your browser address bar, navigate to:
   https://xxxxxx.mealmagic.cloud/admin/extendbenefits.aspx
   where *xxxxx* is your *District ID*.
3. Enter the confirmation code exactly as shown.
4. Click the *Submit* button.

When successful, you will get a message stating that “Hold Carryover Benefits” is turned on. You should leave it on if you want benefits to flow to the next year.

Extended Benefits Apply to Food Service Only

Per the USDA, extended benefits apply only to school meals. Non-meal programs such as Title I do not get to use extended benefits. For this reason, *non-food benefit* and *non-food inferred benefit* are available for exporting. These fields work the same as their counterparts, *benefit* and *inferred benefit*, except that they treat benefits per their normal handling without consideration of extensions. If you extend carryover benefits per a USDA waiver, you should use these non-food fields for benefit counts being applied outside of food service.

How Extended Benefits Work

When you enable extended carryover benefits, if there are unexpired carryover benefits, then the expiration dates applied to those benefits are removed, allowing students to retain their benefits through the current school year. In other words, the applications will remain “bumped” from the prior year with no pending expiration.

If carryover benefits already have expired when you enable extended carryover benefits, those benefits will be reinstated if the students remained on the same application from the previous year. In this case, the system removes the history records that indicate that the benefits have expired, and it removes any expiration dates. Additionally, the system will re-evaluate any meals served to ensure those meals show the prior-year carryover benefit.

During the close-year process, with extended benefits enabled, any remaining benefits that carried over and through the current year will carry into the new school year. After the close, the new school year will not have extended benefits enabled.

Turning Extended Benefits Off

If for any reason you need to disable this special handling for carryover benefits, go to district settings and uncheck the *Hold Carryover Benefits* checkbox. Note that this box can be unchecked, but it cannot be checked. It is checked only when the Enabled Extended Benefits process is run.

When turned off, an expiration date will be applied to all carryover applications. The date will be the original carryover grace period if not passed or the current date.

User Advisory

Although Meal Magic Corporation has made a “best effort” attempt to handle this unusual circumstance, there are numerous underlying situations that might cause the processes described herein not to produce 100% accurate results, including other waivers or manual mishandling of benefits and expirations due to conflicting directions from State and Federal authorities.

Users are advised to verify the accuracy of benefits before and after extending benefits and to double check all benefits carried into the new school year before serving meals.
