

Mobile Application Users Guide

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NOTE: *This document contains side-by-side screenshots.*

Android device images are on the left, Apple device images are on the right, unless noted otherwise.

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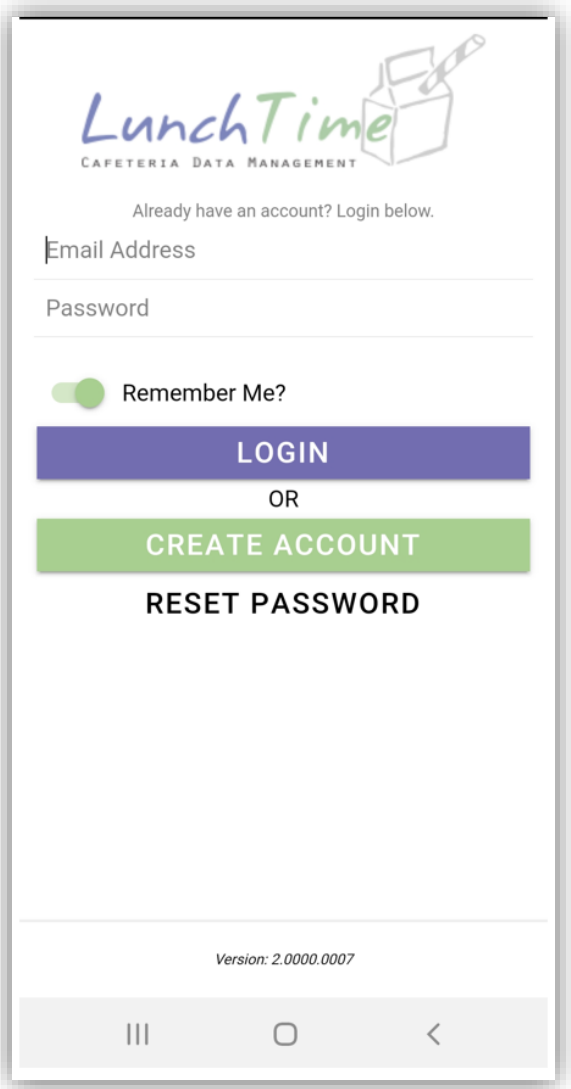
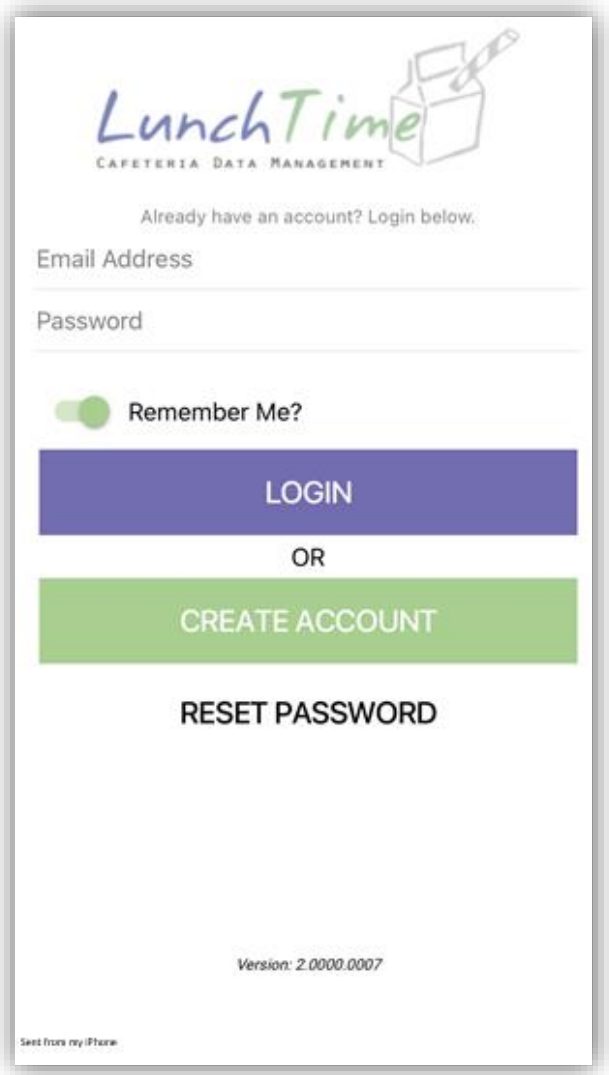
Create Account

For **New Users** - with your Android or Apple device, choose **CREATE ACCOUNT**.





You can save your login credentials by enabling the Remember Me? Toggle. (Green indicates that it has been enabled)

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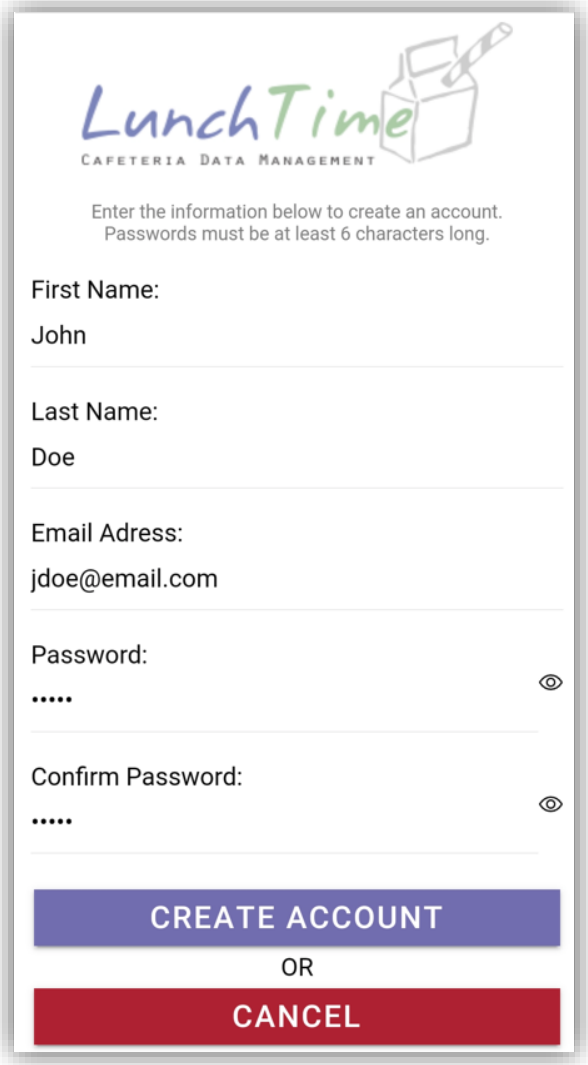
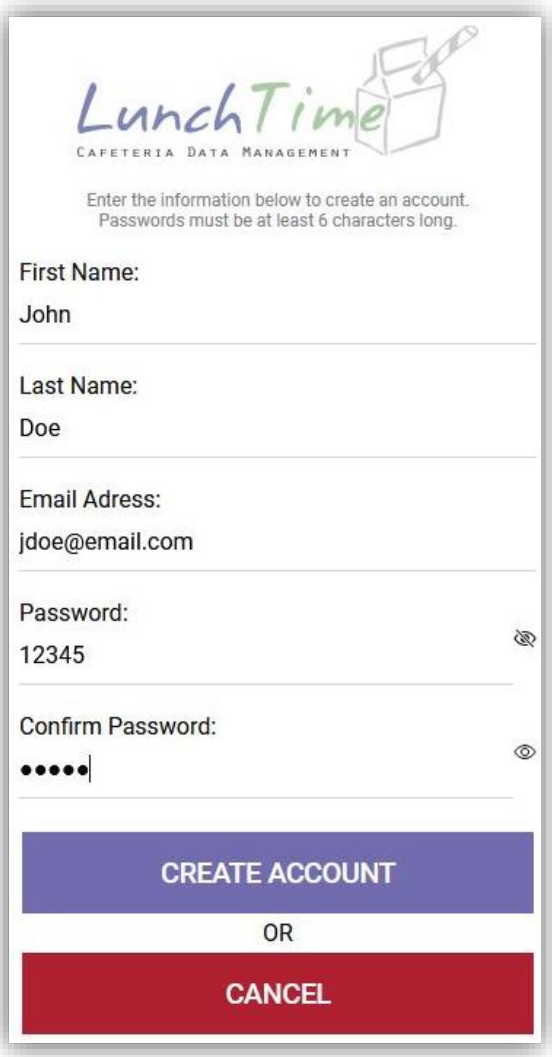
All fields are required. Tap **CREATE ACCOUNT** once all information has been entered.





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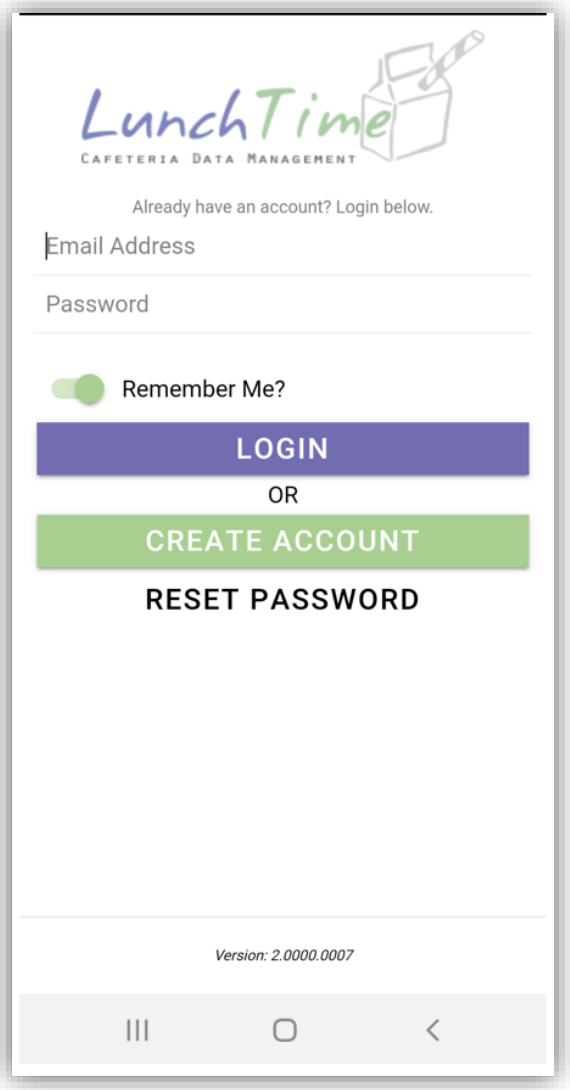
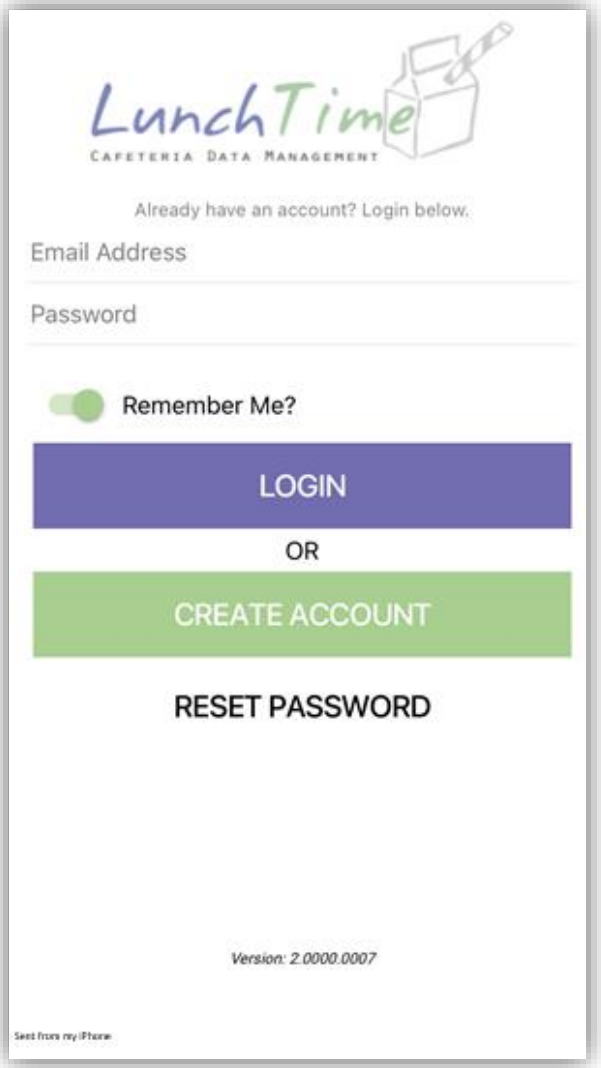
Login to account

To login to an existing account, tap **LOGIN**





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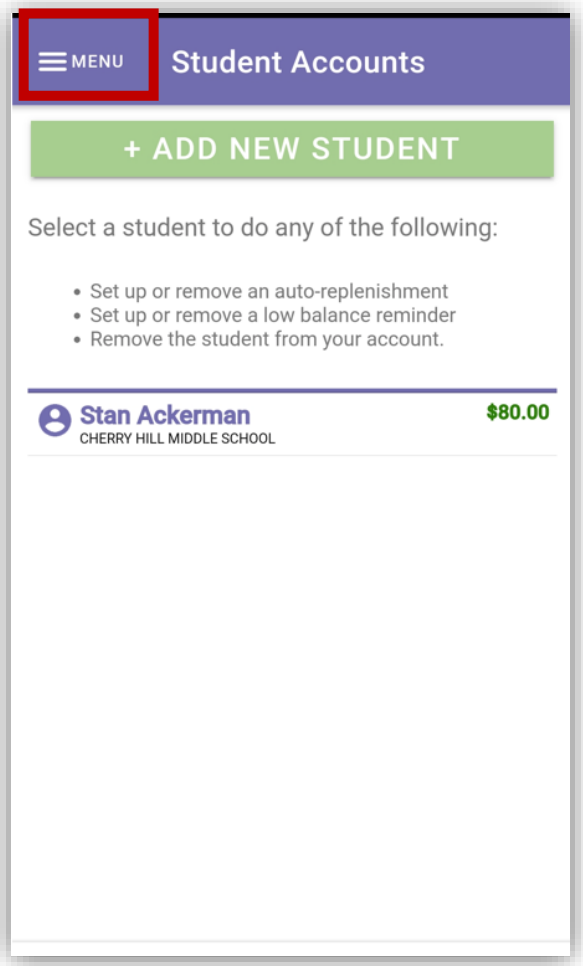
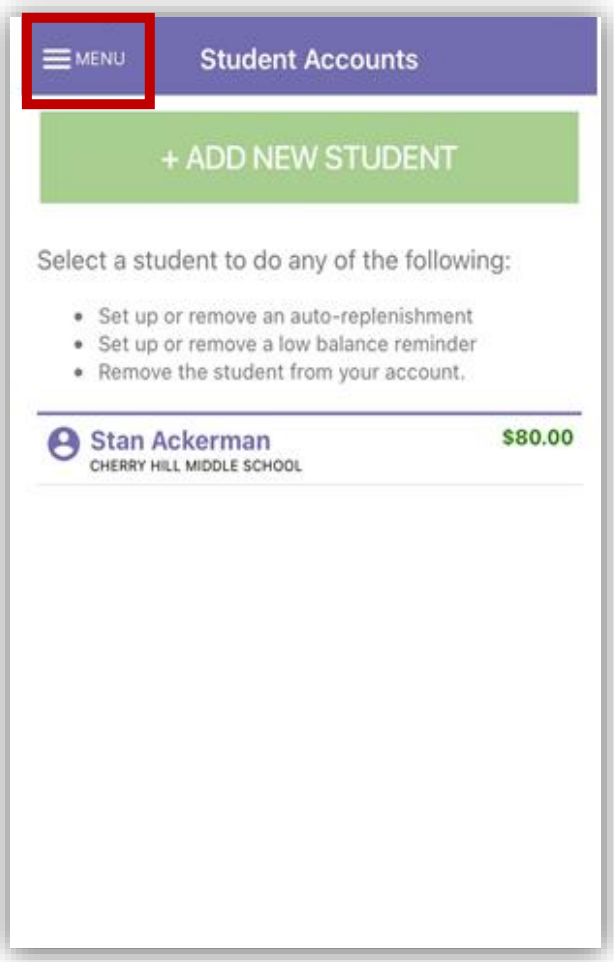
Main Menu

To access the Main Menu, click on **Menu** in the top right corner of the screen.





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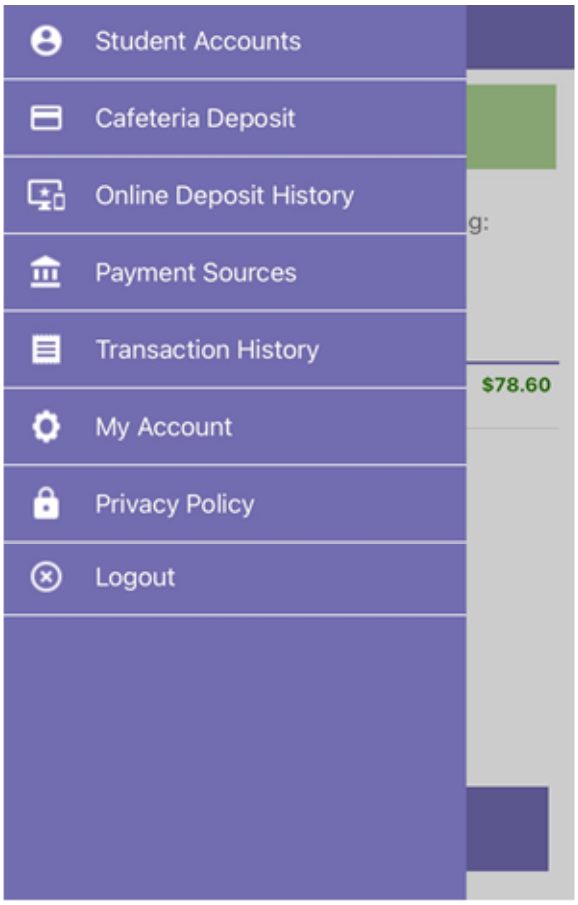
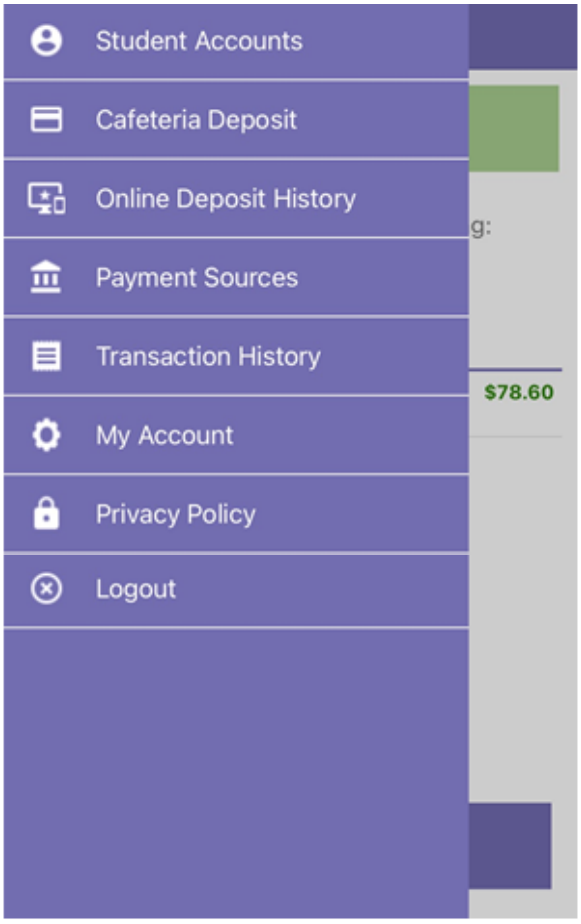
The Main Menu displays all functions of the app.





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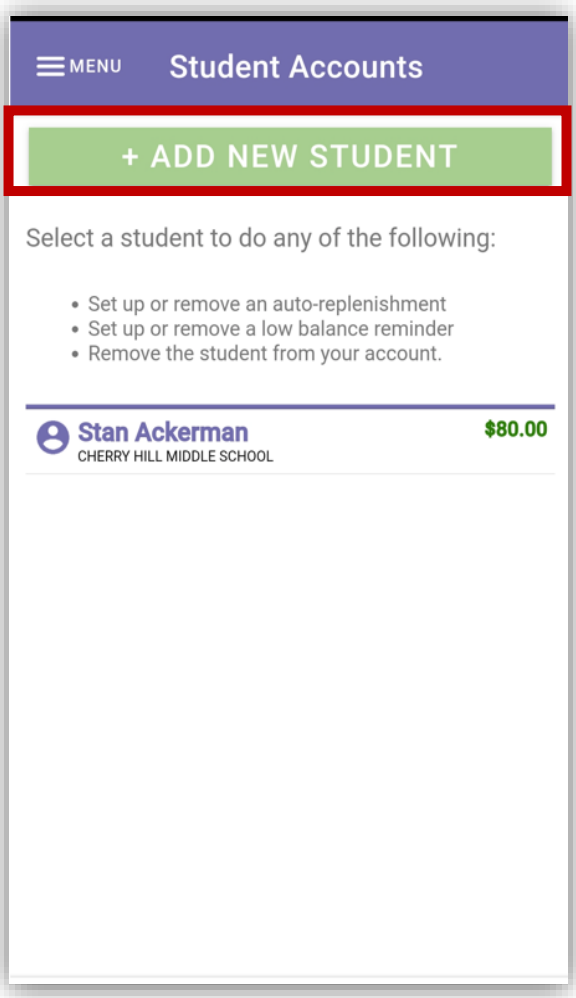
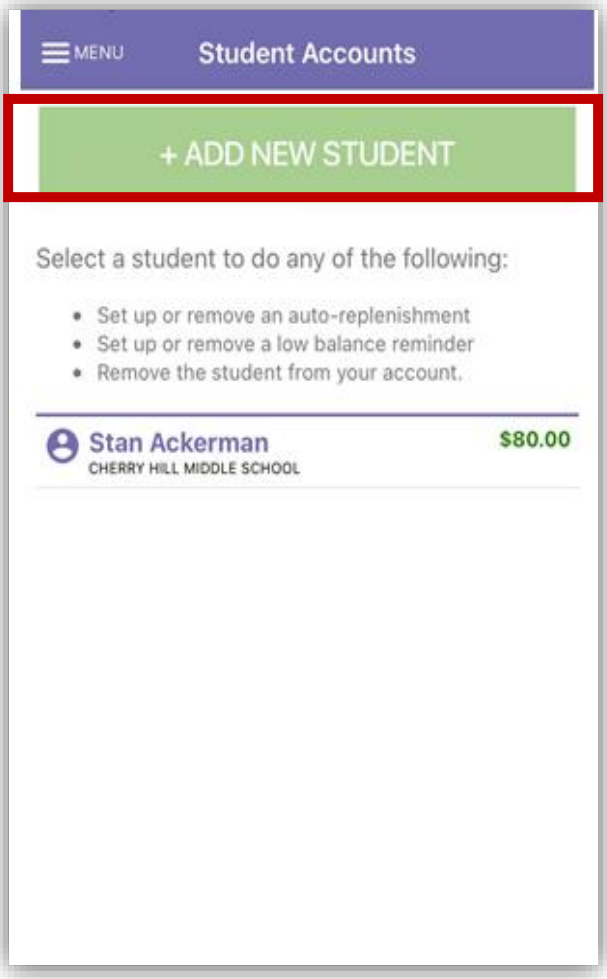
Adding Students to Account

From the Student Accounts page, Click on **+ADD NEW STUDENT**





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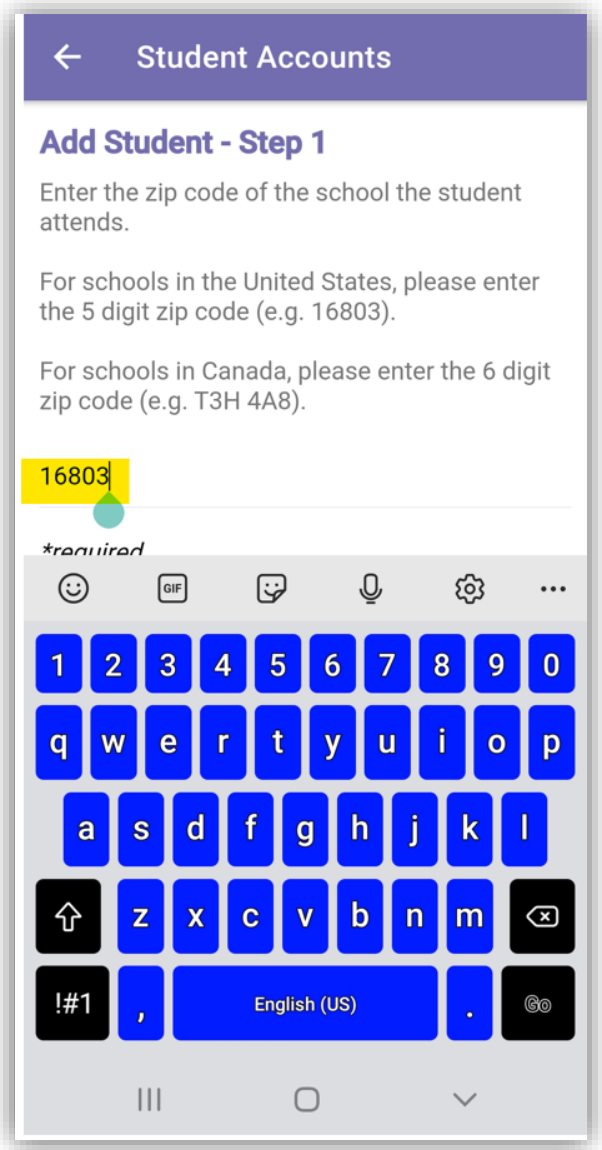
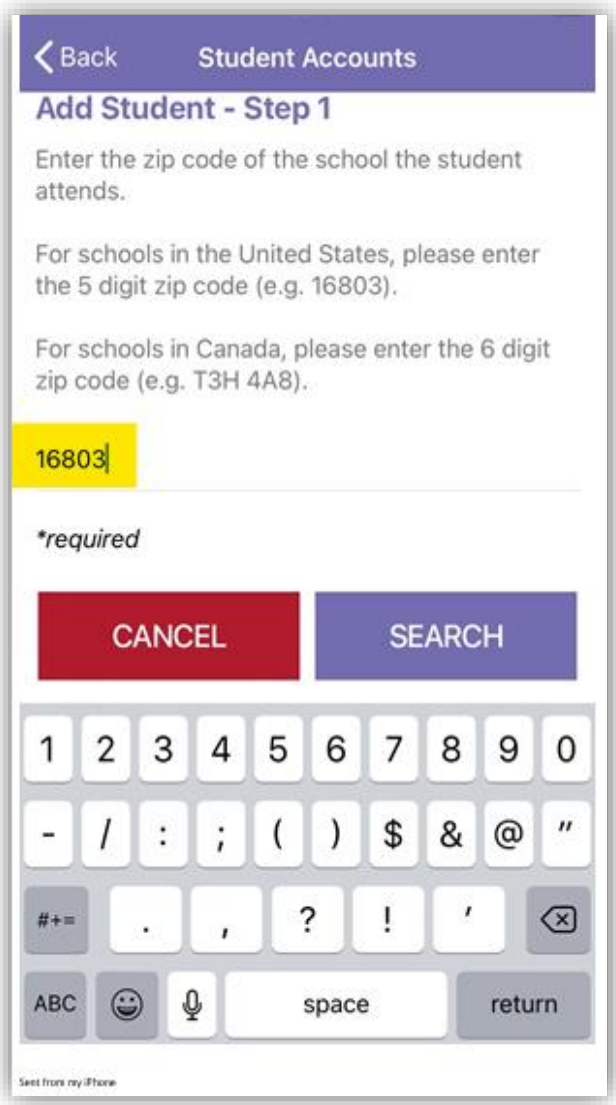
Step 1 - Enter the zip code of the school the student attends.





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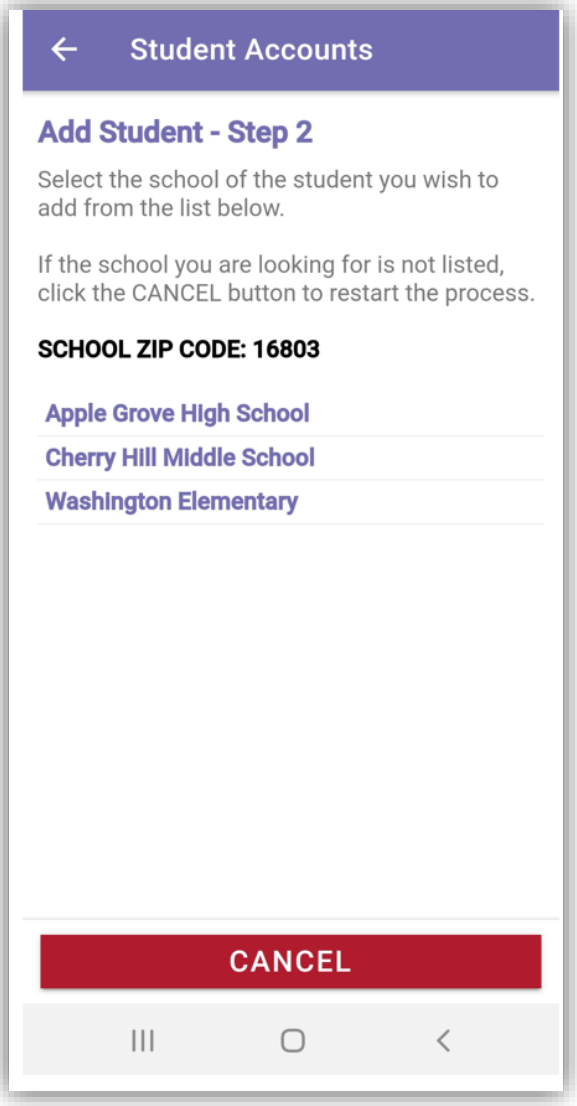
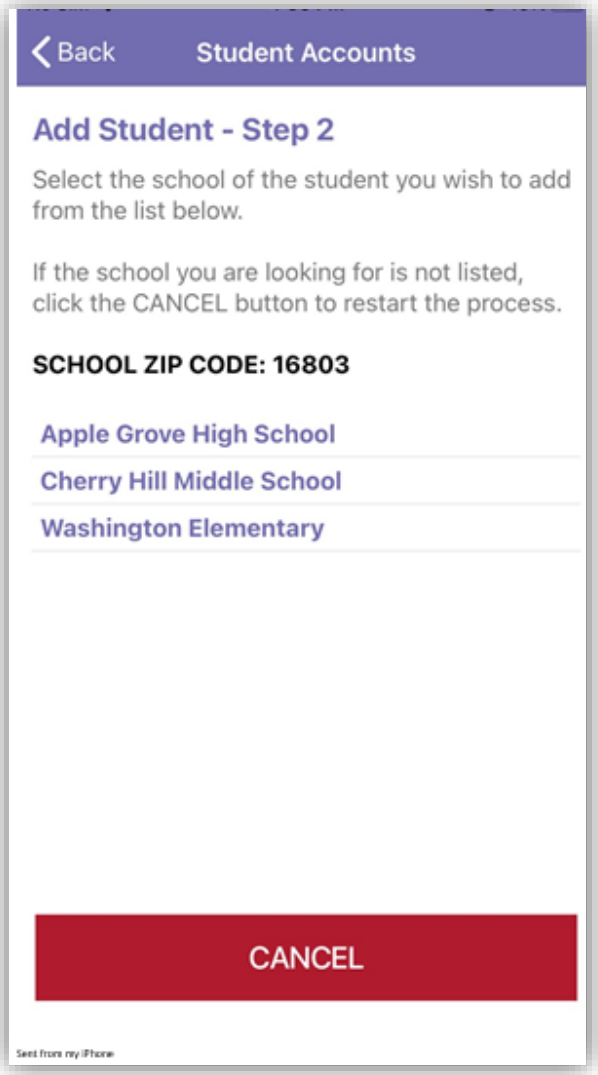
Step 2 – Select the school of the student you wish to add from the list below.





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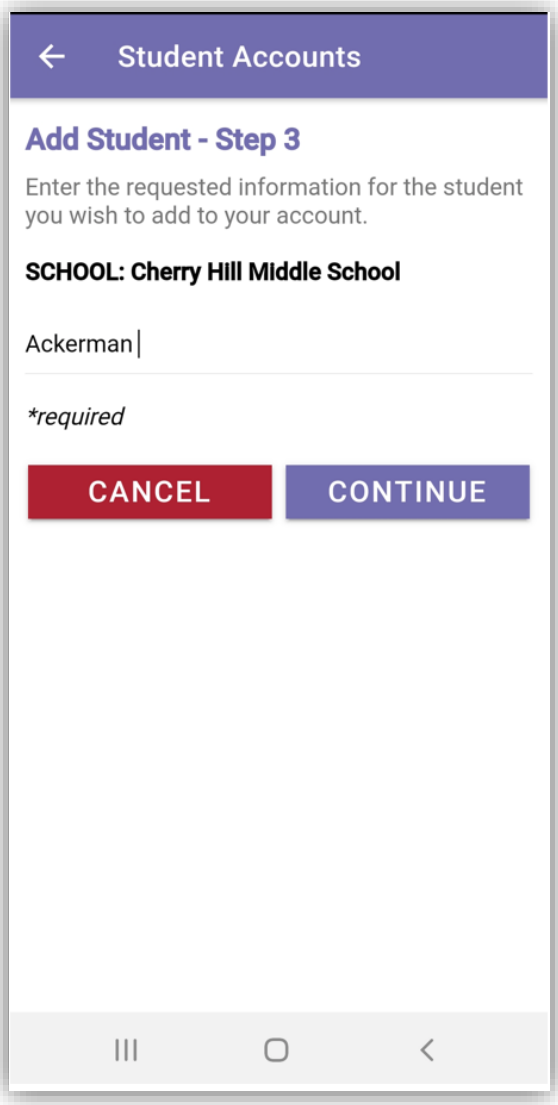
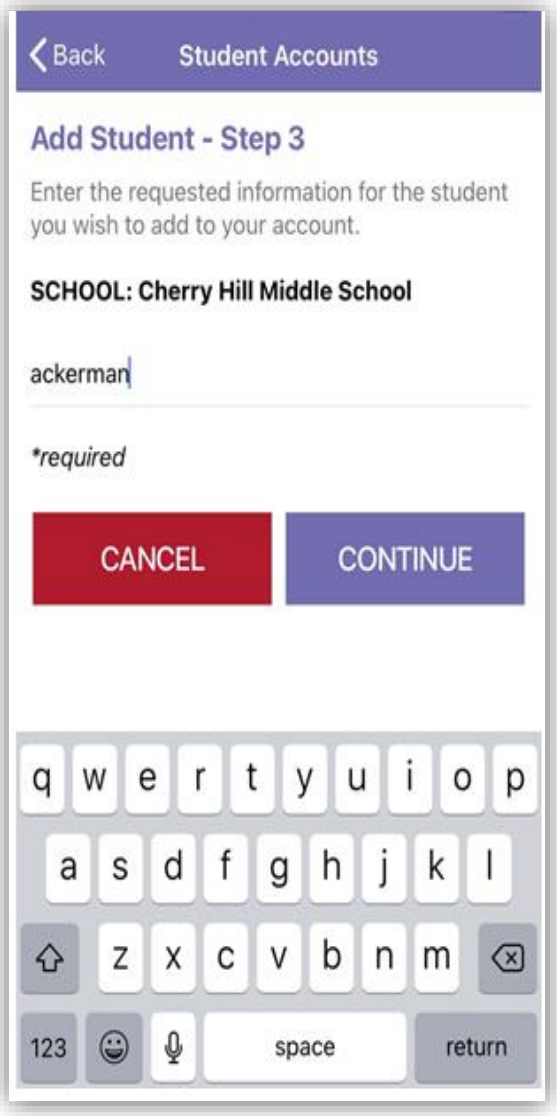
Step 3 - Enter the required information for the student you wish to add to your account. Contact the School the student attends for the required information.





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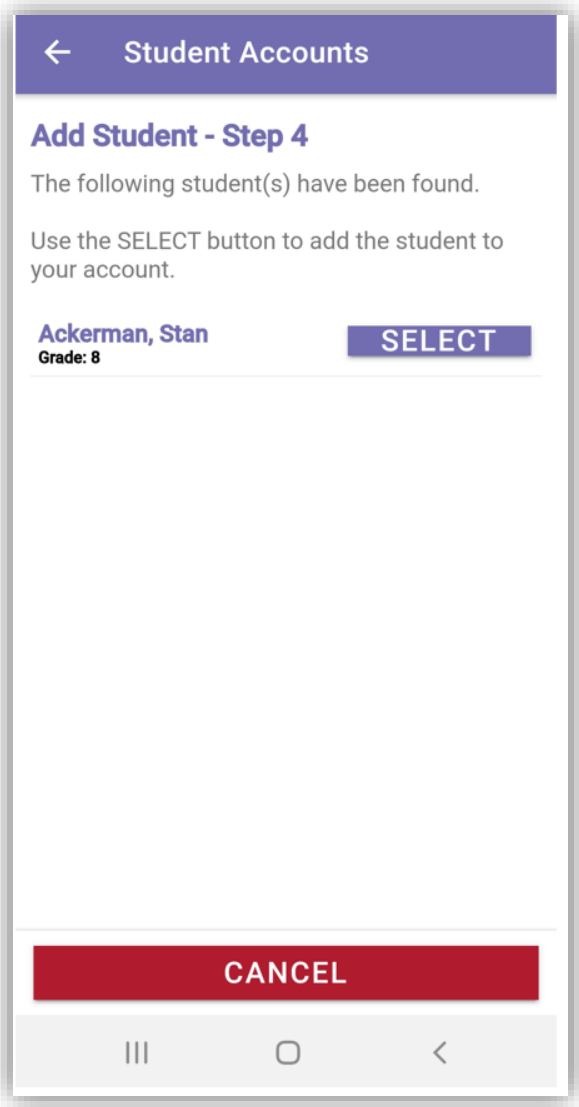
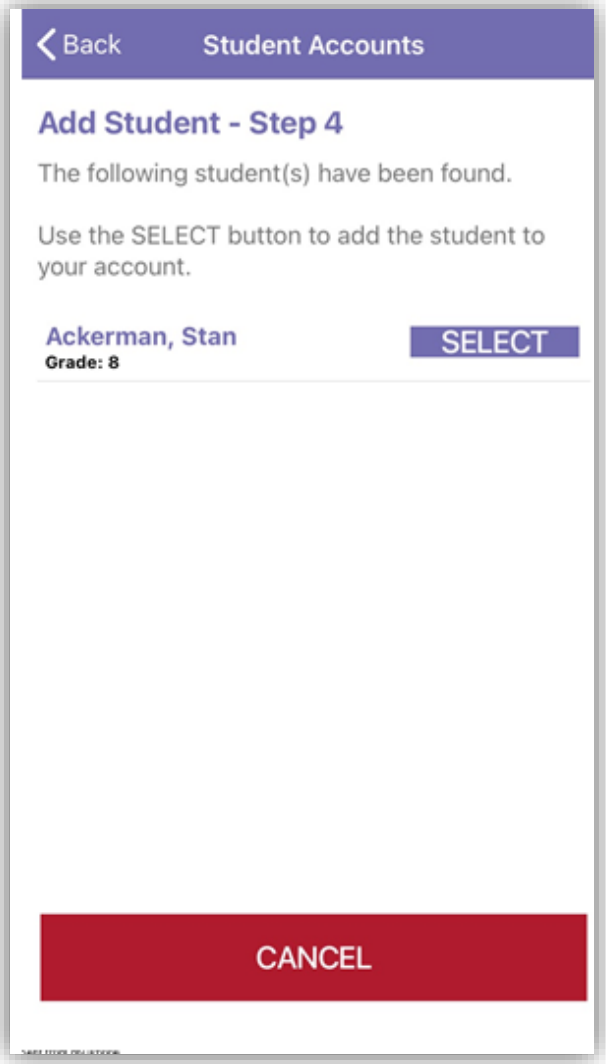
Step 4 – Use the **SELECT** button to add the student to your account.





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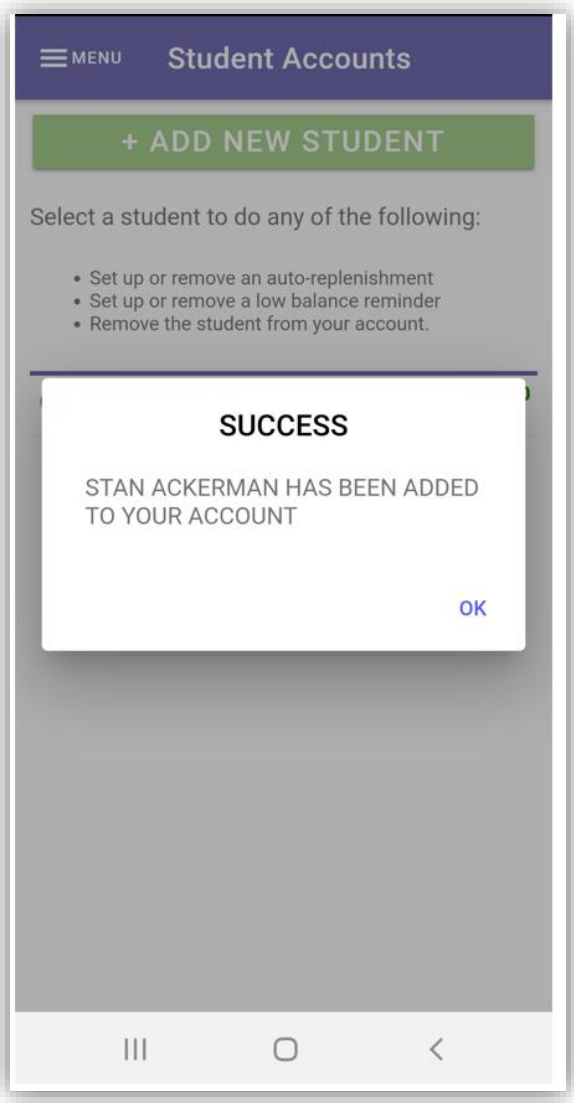
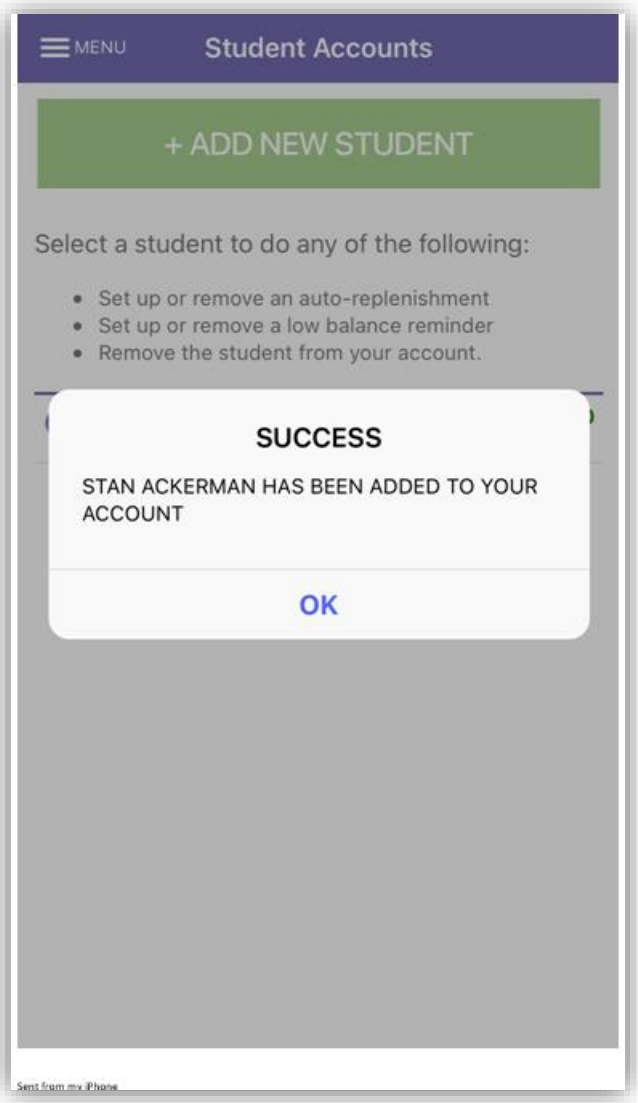
You have successfully added a student to your account. Click **OK**.

To add additional students to your account, follow Steps 1 through 4 (pages 9-13 of this document).





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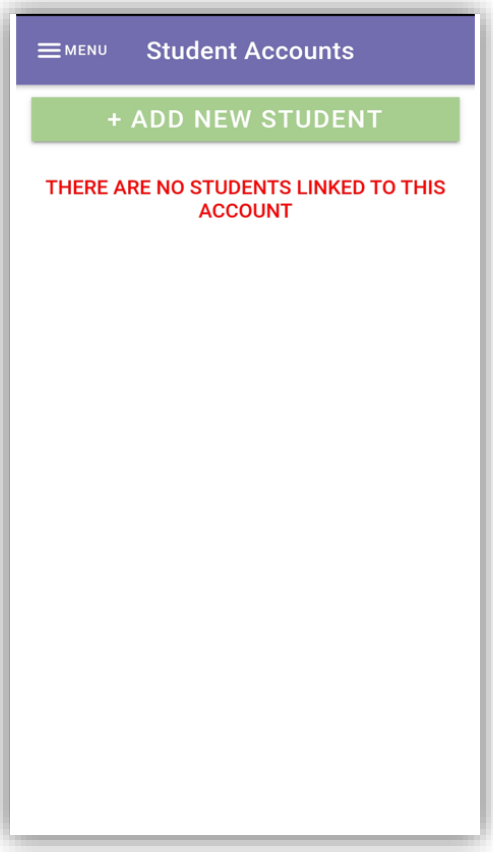
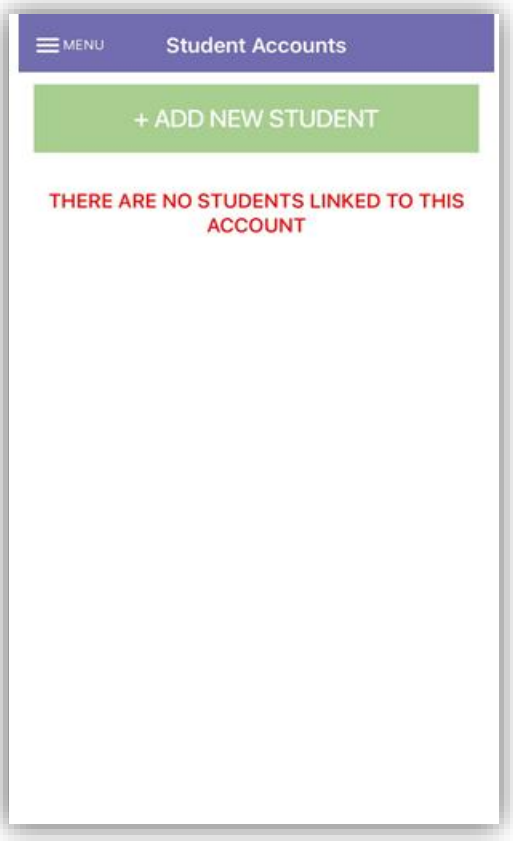
Student Accounts

This is the **Home** screen. Wherever you see the **Home** icon in the upper right corner, this is the page that you'll be directed to.





Selecting Student Accounts from the Main Menu directs you to the Student Accounts page. The options available here are:

Adding New Students – Used for adding new students to the account (refer to Steps 1-4 on pages 9-14 of this document)

Removing Students - Remove Student(s) from the account

Setting Auto-Replenishments – Set up, remove or edit an auto-replenishment

Setting Reminders – Set up, remove or edit a low balance reminder

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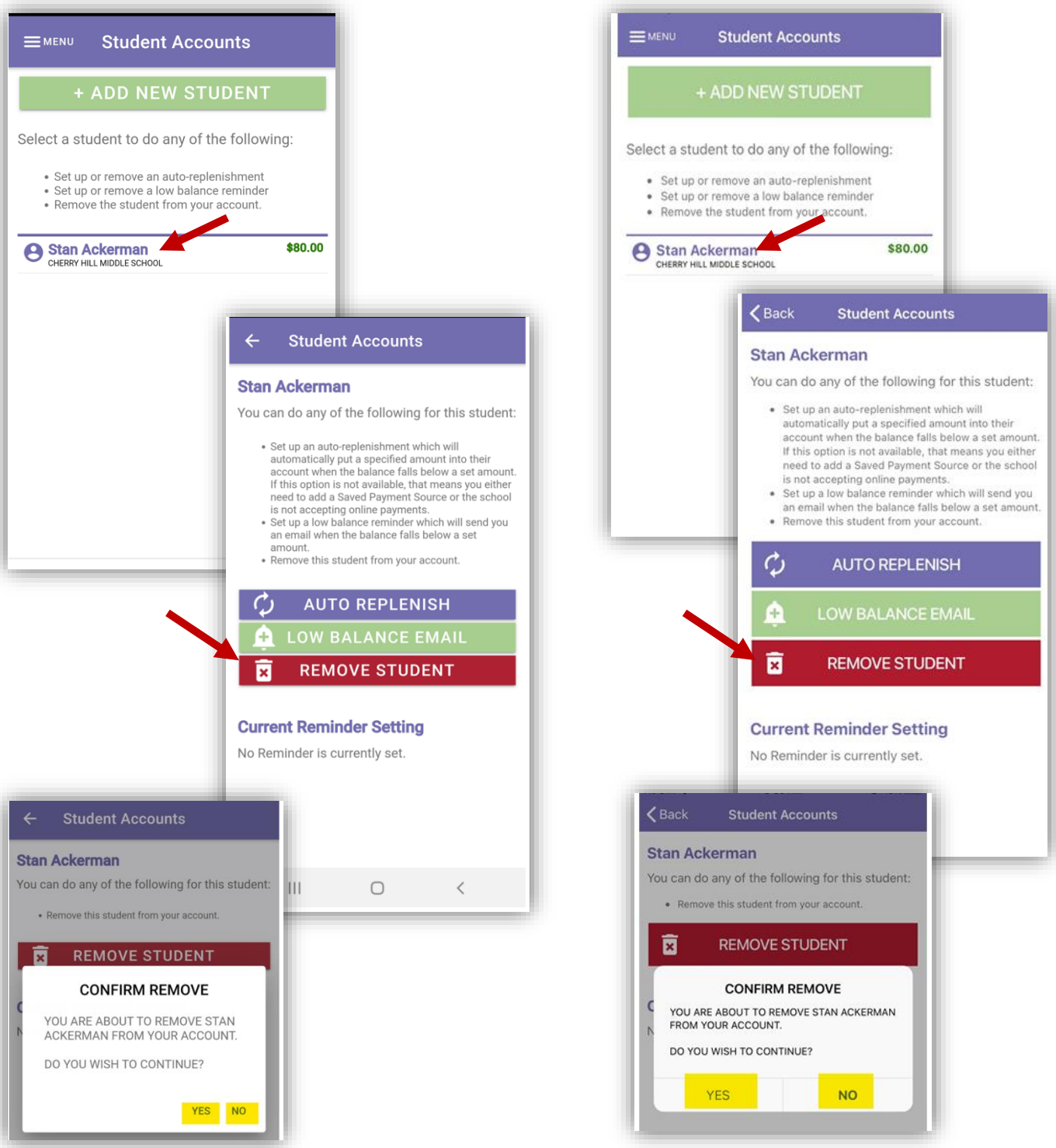
Removing Student(s) – From the Student Accounts page, tap the Student's name.

Choose **YES** to Continue or **NO** to Cancel this action.



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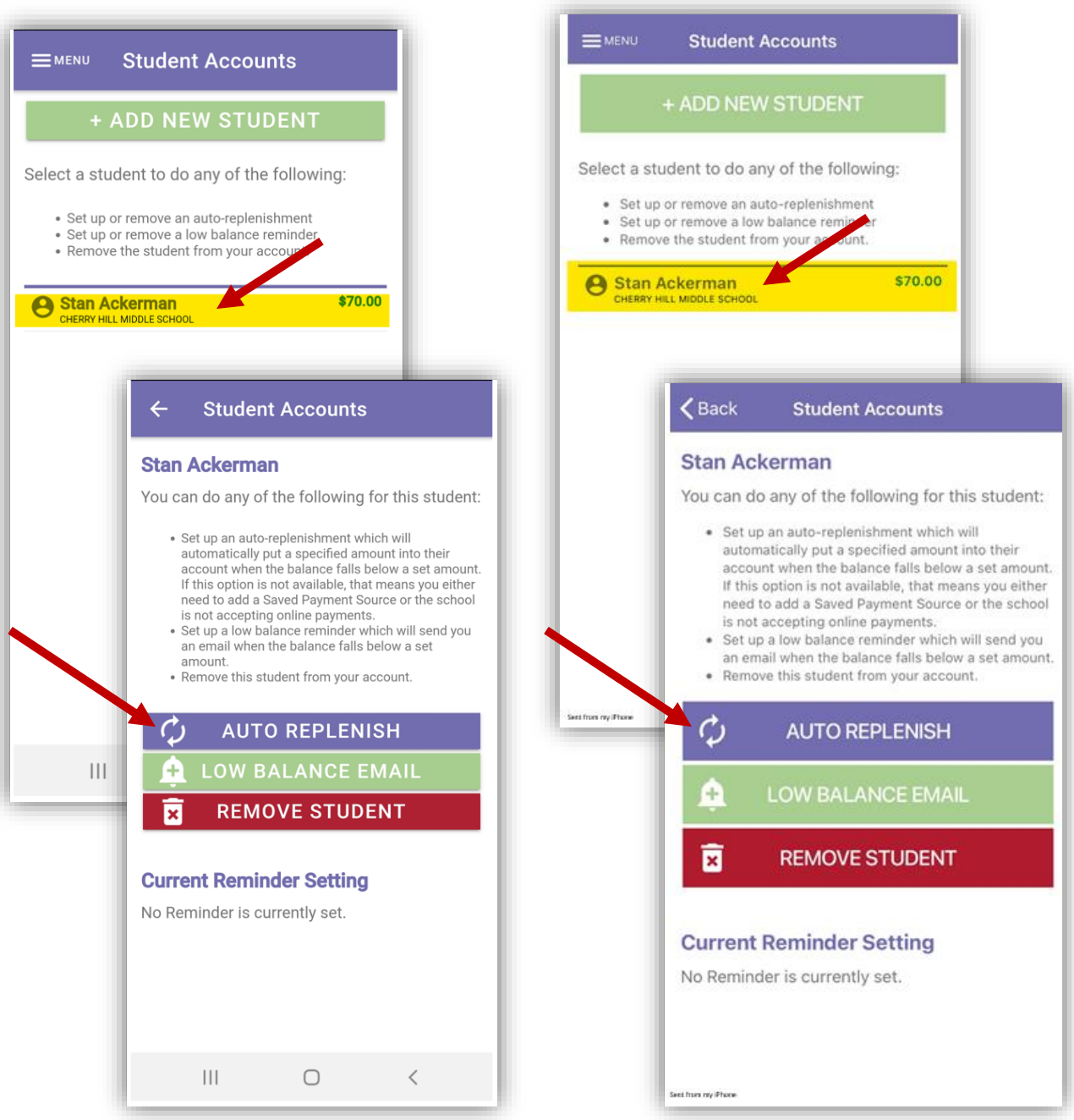
Setting Reminders

AUTO REPLENISH – From the Student Accounts page, tap the Student name, then click **AUTO REPLENISH**



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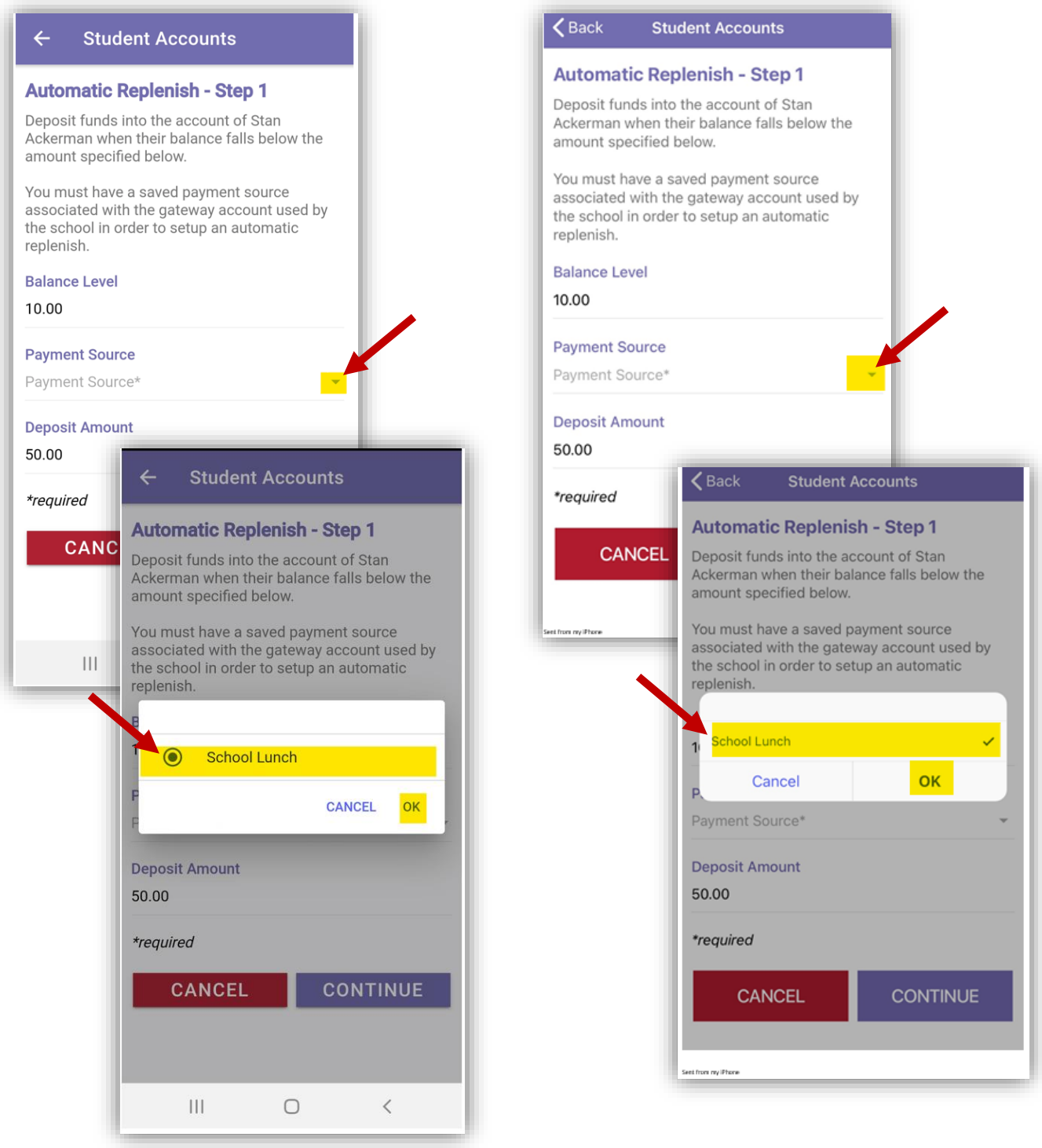
Step 1 – Set the amount of funds to deposit into the student account when their balance calls below the amount specified. You must have a saved payment source associated with the gateway account used by the school in order to set up an automatic replenish.



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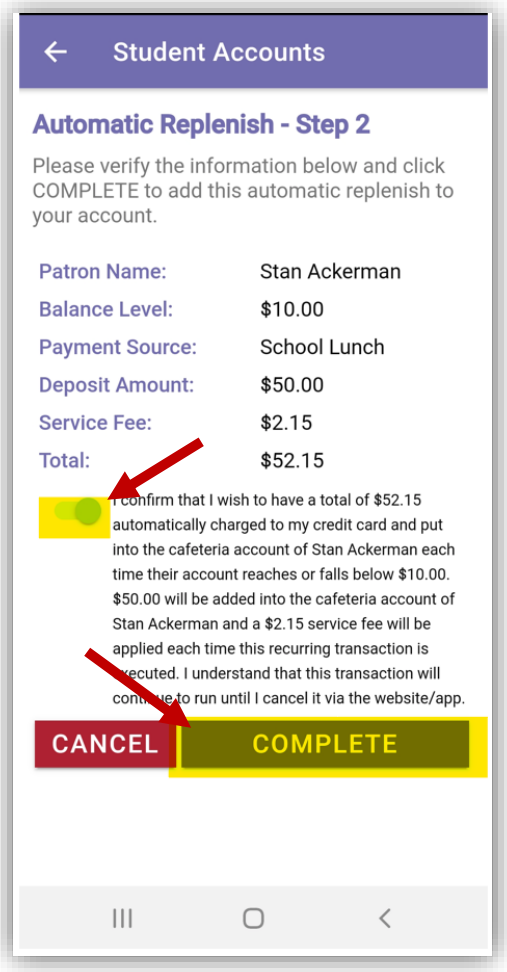
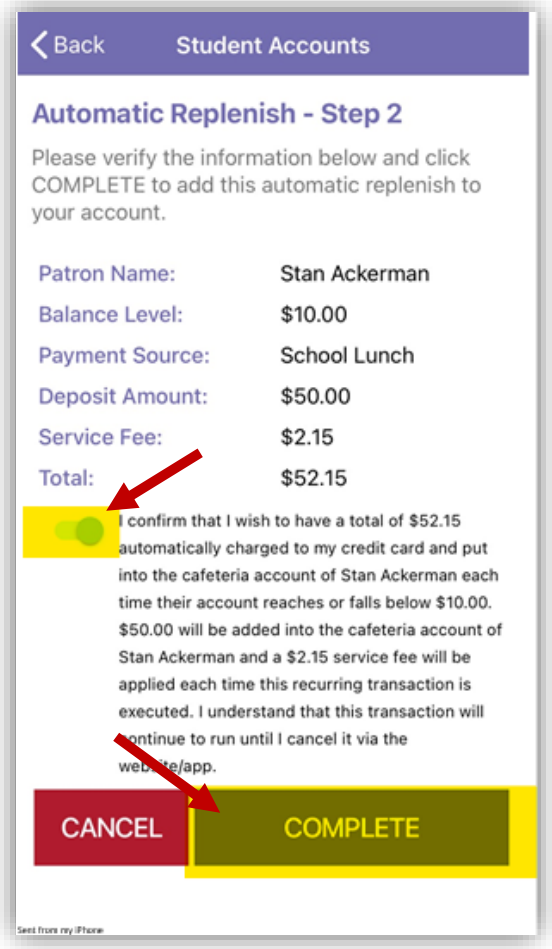
Step 2 - Verify the information and click **COMPLETE** to add this automatic replenish.





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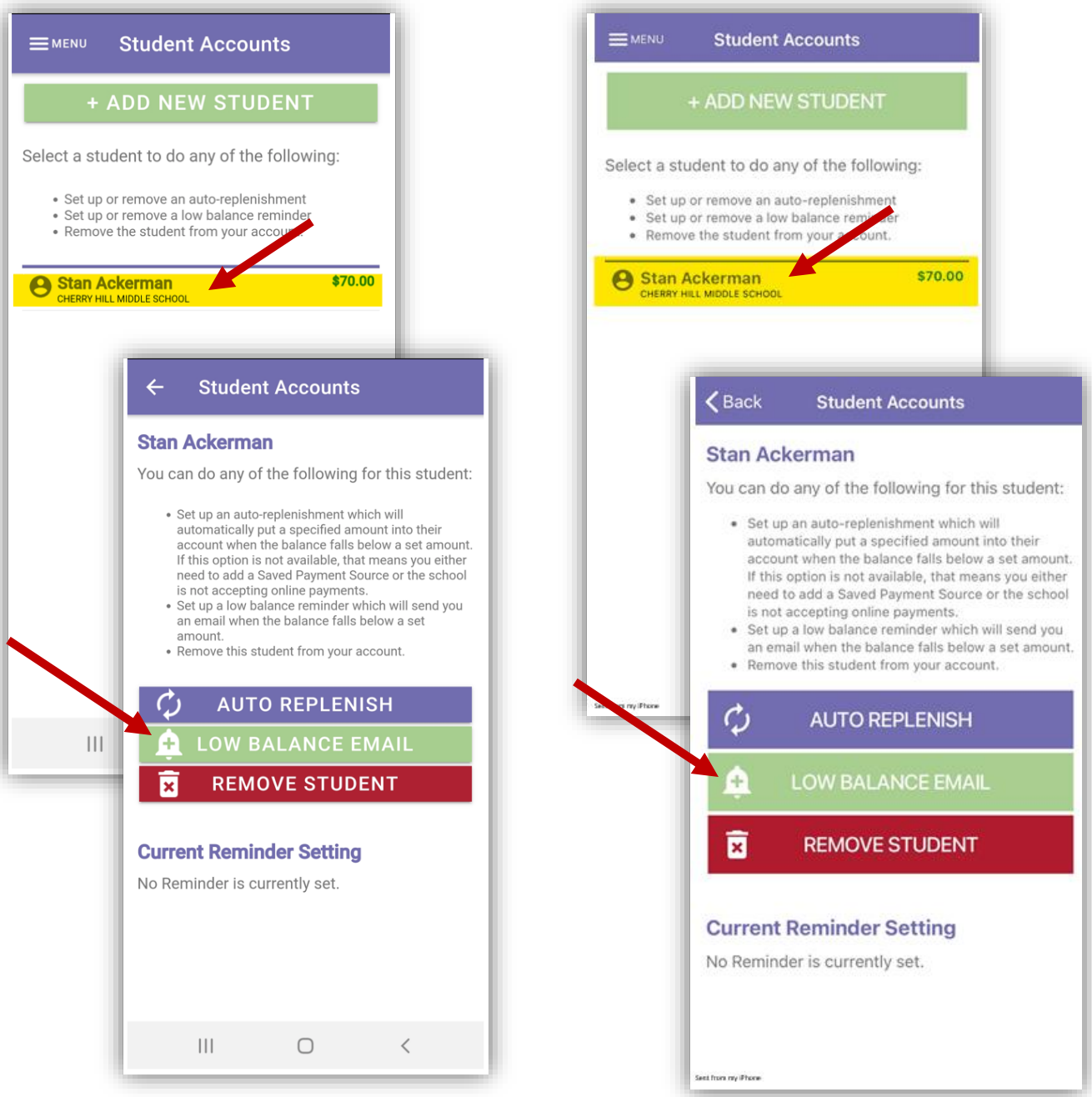
LOW BALANCE EMAIL - To set up or remove a low balance reminder, tap the Student name and choose **LOW BALANCE EMAIL**



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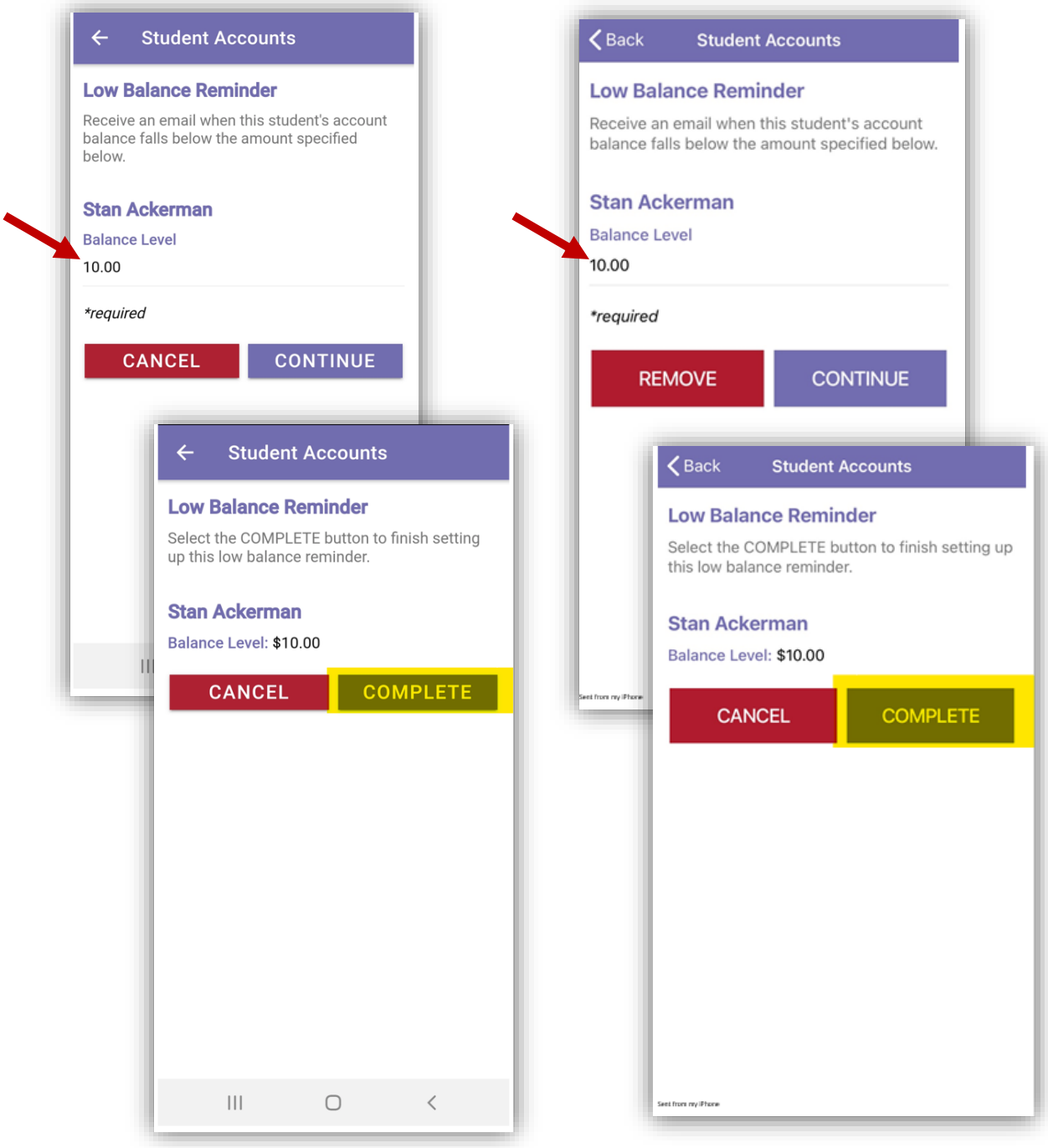
When the account reaches the Balance Level, an email will be generated. Set the Balance Level and click **CONTINUE**. Click **COMPLETE** to finish setting up this Low Balance Reminder.



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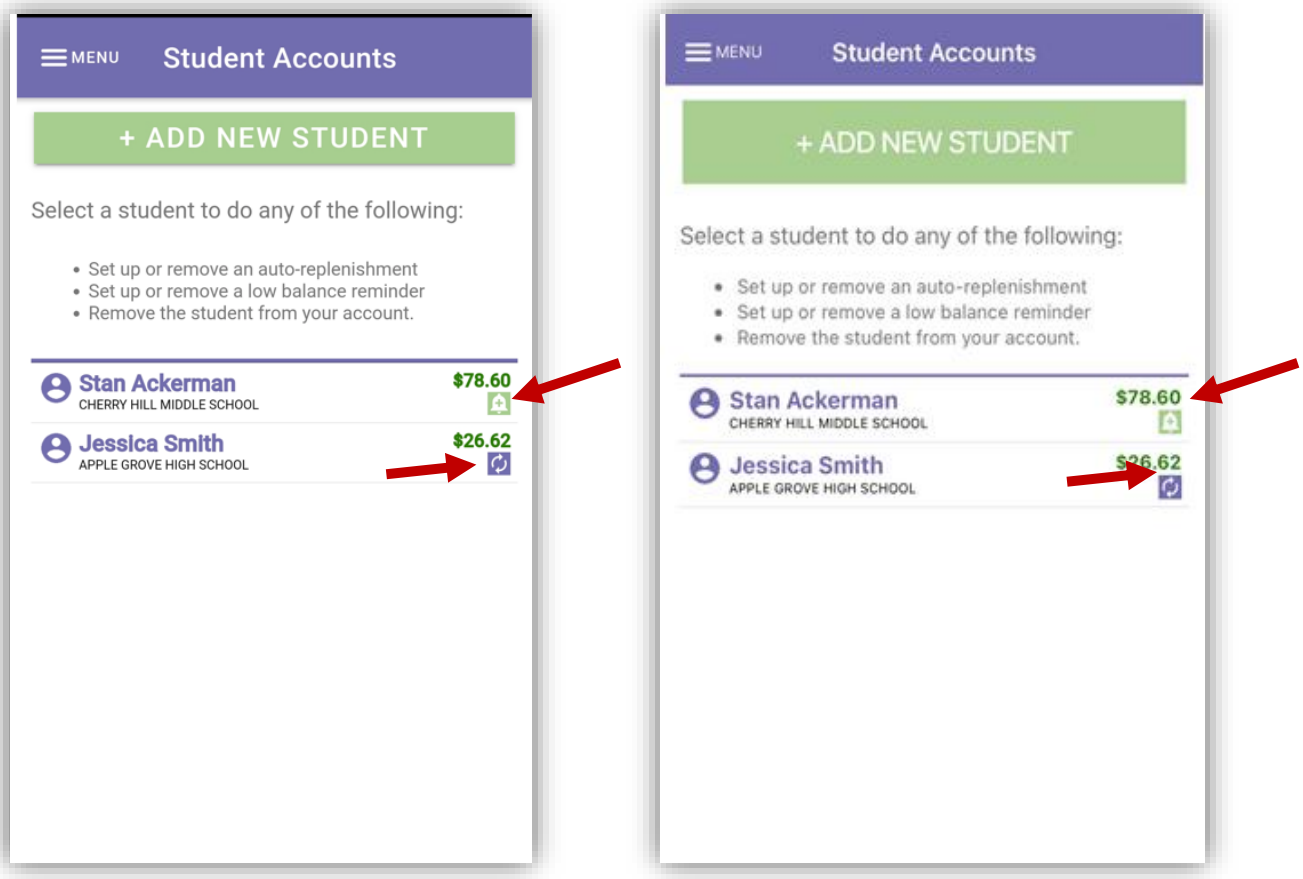
Once the Low Balance Email or Auto-replenish has been set up, a bell icon will appear next to the Student name on the Student Accounts page indicating the email reminder has been setup for this student. A circular arrow icon will appear indicating the auto-replenish is setup for this account.



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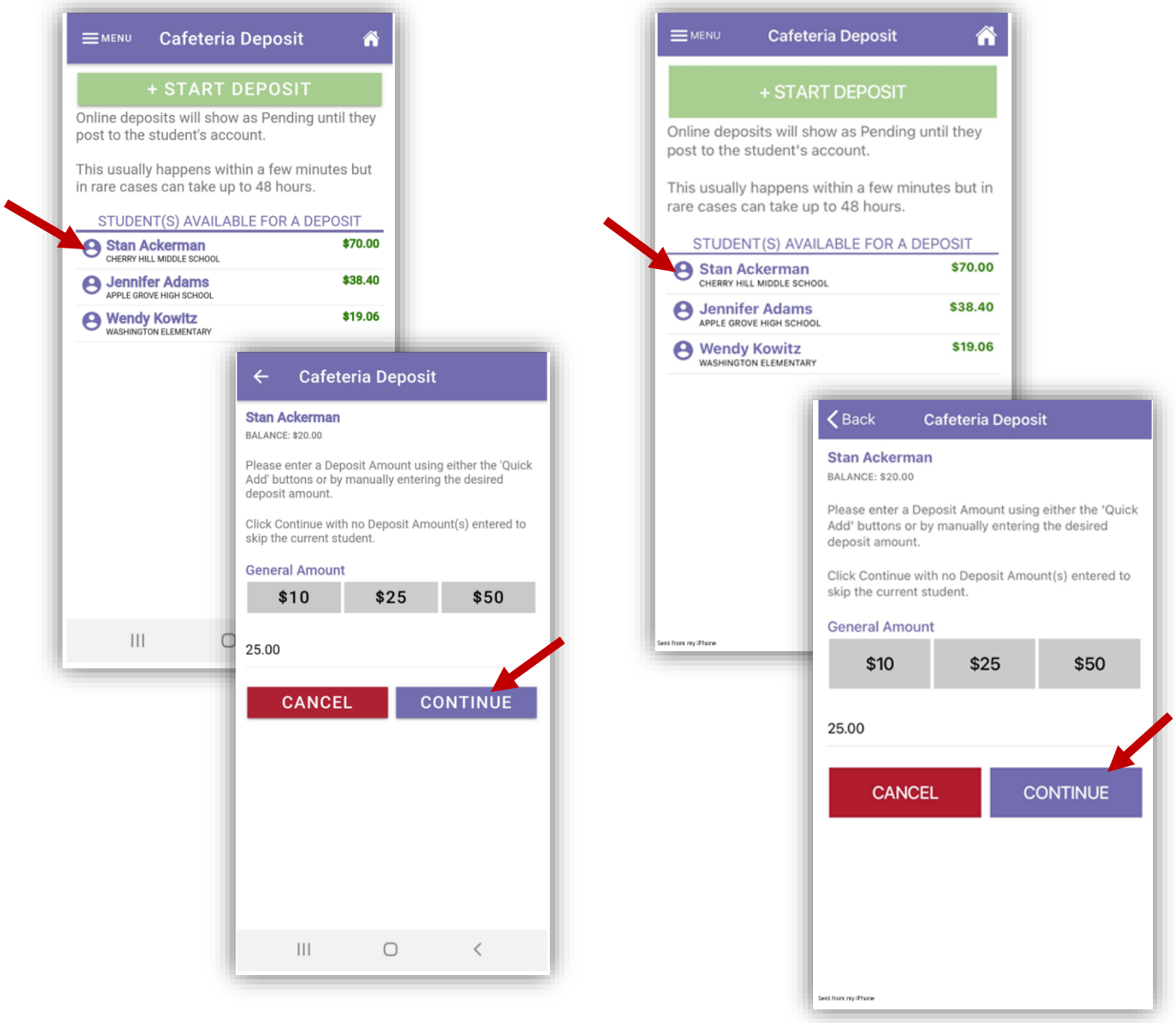
Cafeteria Deposit

To make deposits to the account, click the Student Name or the **+START DEPOSIT** button.

Enter a deposit amount using either the Quick Add buttons or by manually entering the desired deposit amount. Clicking **CONTINUE** will take you to A) the next student on the account or B) to the Deposit Summary screen.

NOTE: *Clicking Cancel will clear out all pending deposits and they will need to be re-entered. A prompt confirming this action will appear prior to processing the cancellation.*



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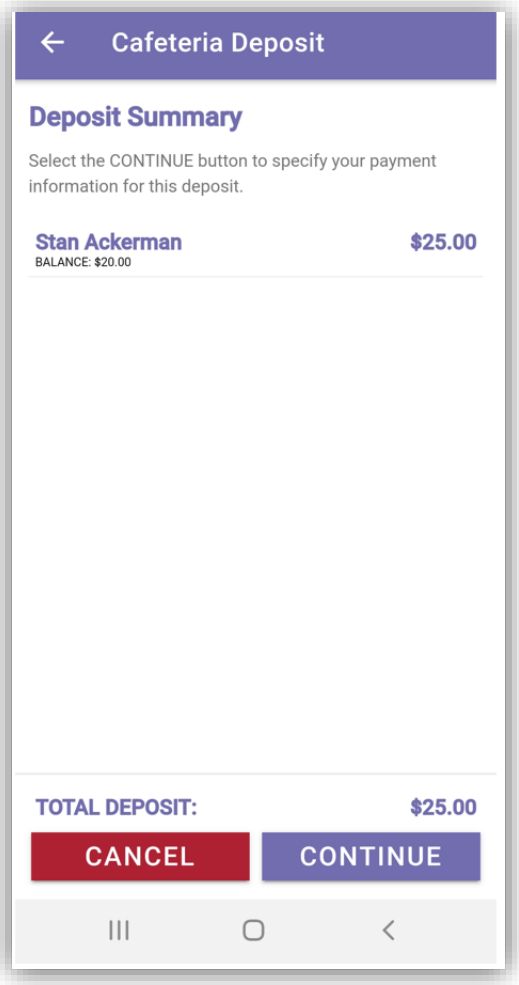
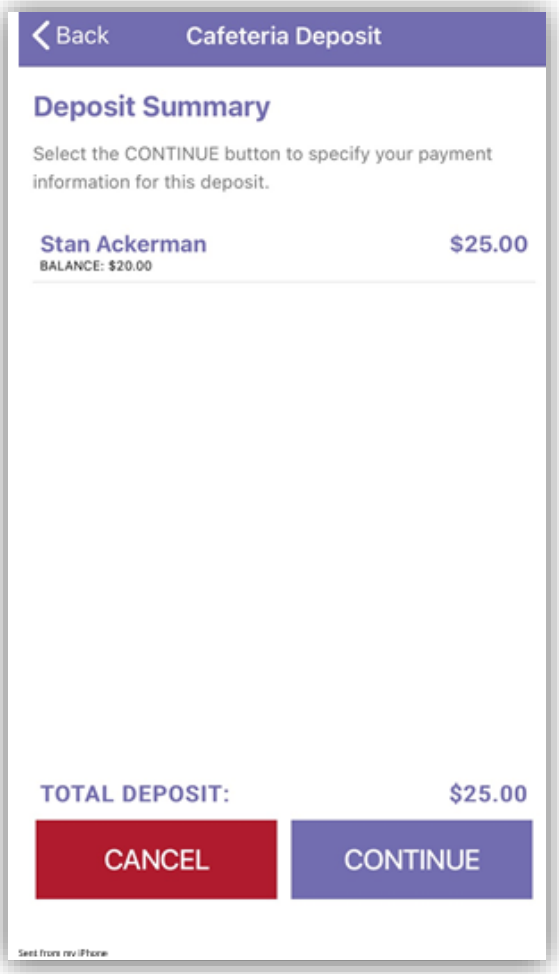
In the Deposit Summary screen, click **CONTINUE** to specify your payment information for the deposit.





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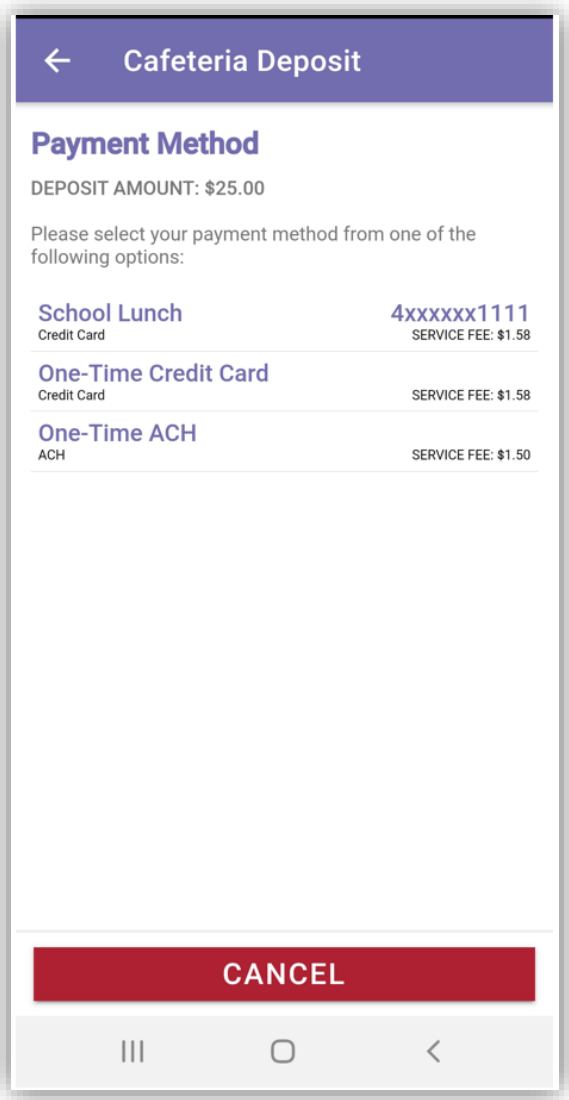
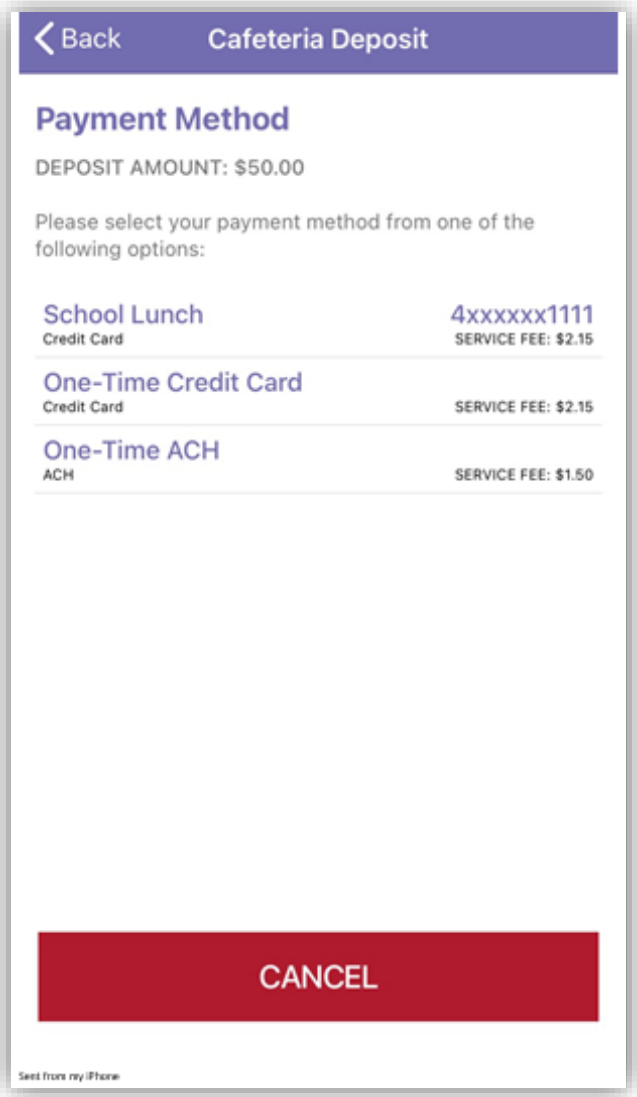
Select your payment method from one of the options:

Saved Payment Source – Uses the payment source on file to pull the funds from.

One-Time Credit Card – Choose this option when using a credit card that has not been set as a saved payment source or is only being use this one time.

One-Time ACH – Choose this option when using an online checking account that has not been set as a saved payment source or is only being used this one time.





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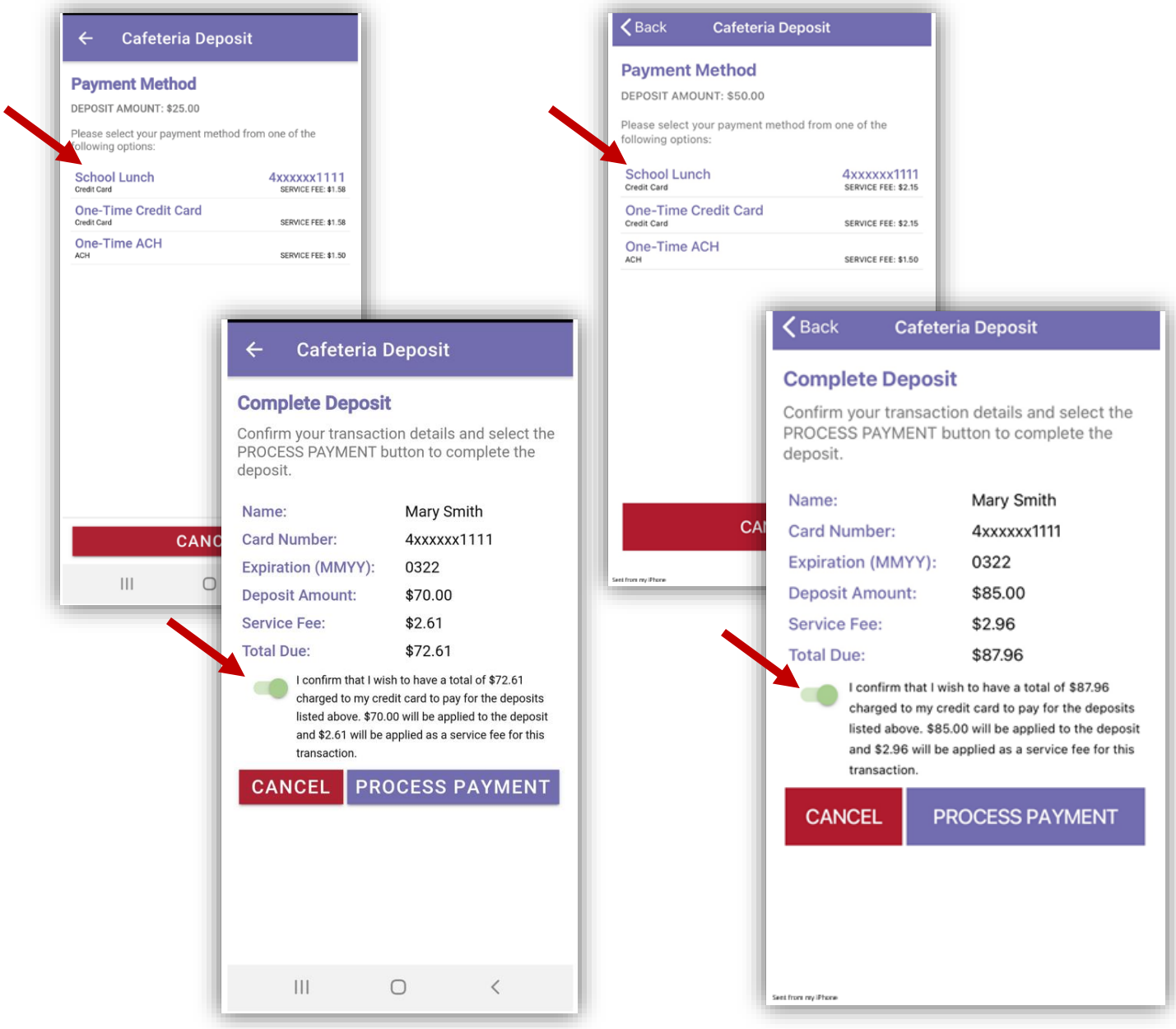
Using a Saved Payment Source Payment Source

If choosing this payment method, the saved payment source on file will be used to process the deposit. (for instructions on how to create a saved payment source, see Payment Sources on page 36.)

Tap the name of the saved payment source (sample uses School Lunch). Click to slide the confirmation of payment (This will be green when enabled). Click **PROCESS PAYMENT**



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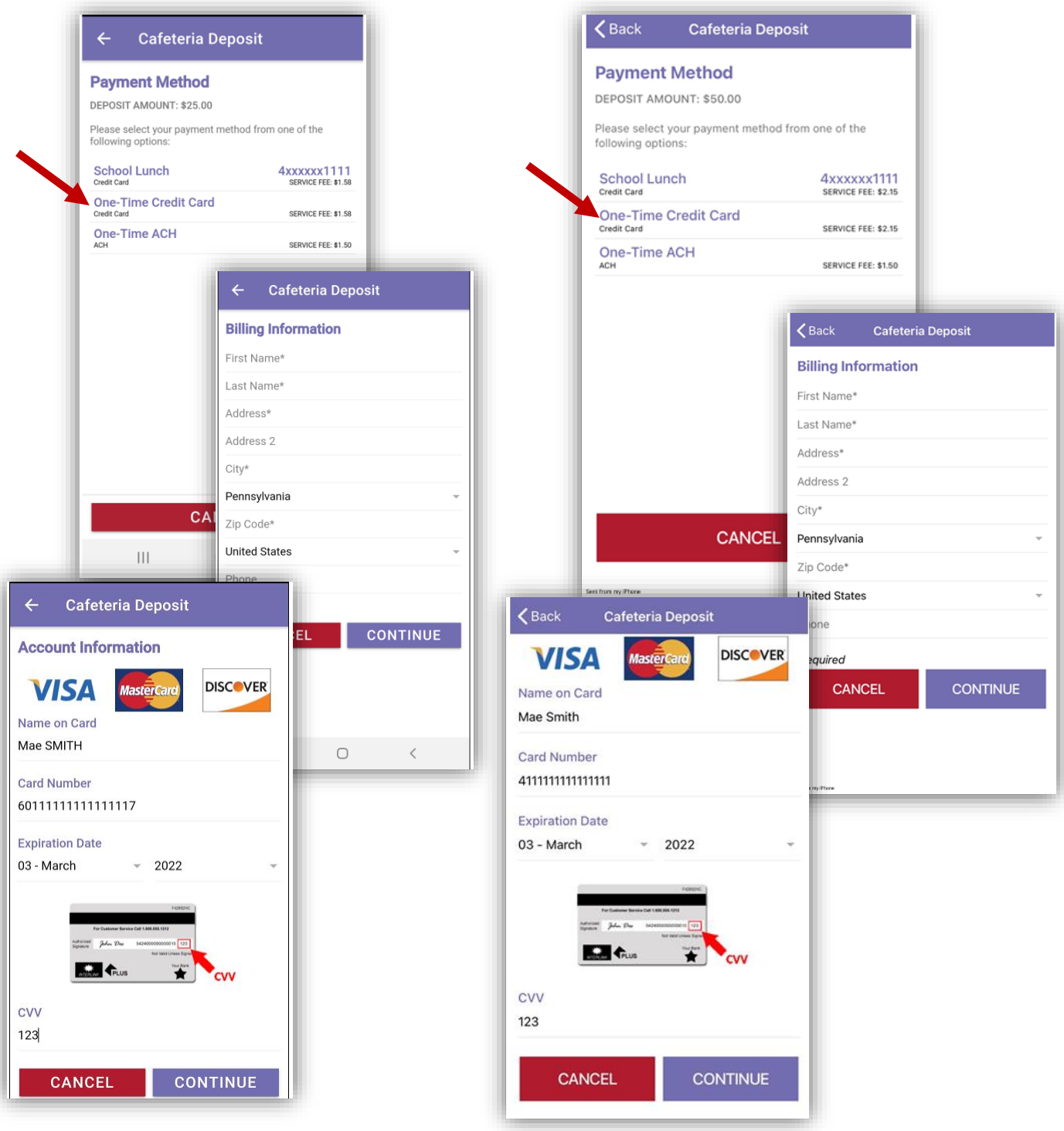
Using a One Time Credit Card Payment Method

Choose this option when using a credit card that has not been set as a saved payment source or is only being use this one time. Enter the Billing Information, click **CONTINUE.** Enter the Account Information, choose **CONTINUE**



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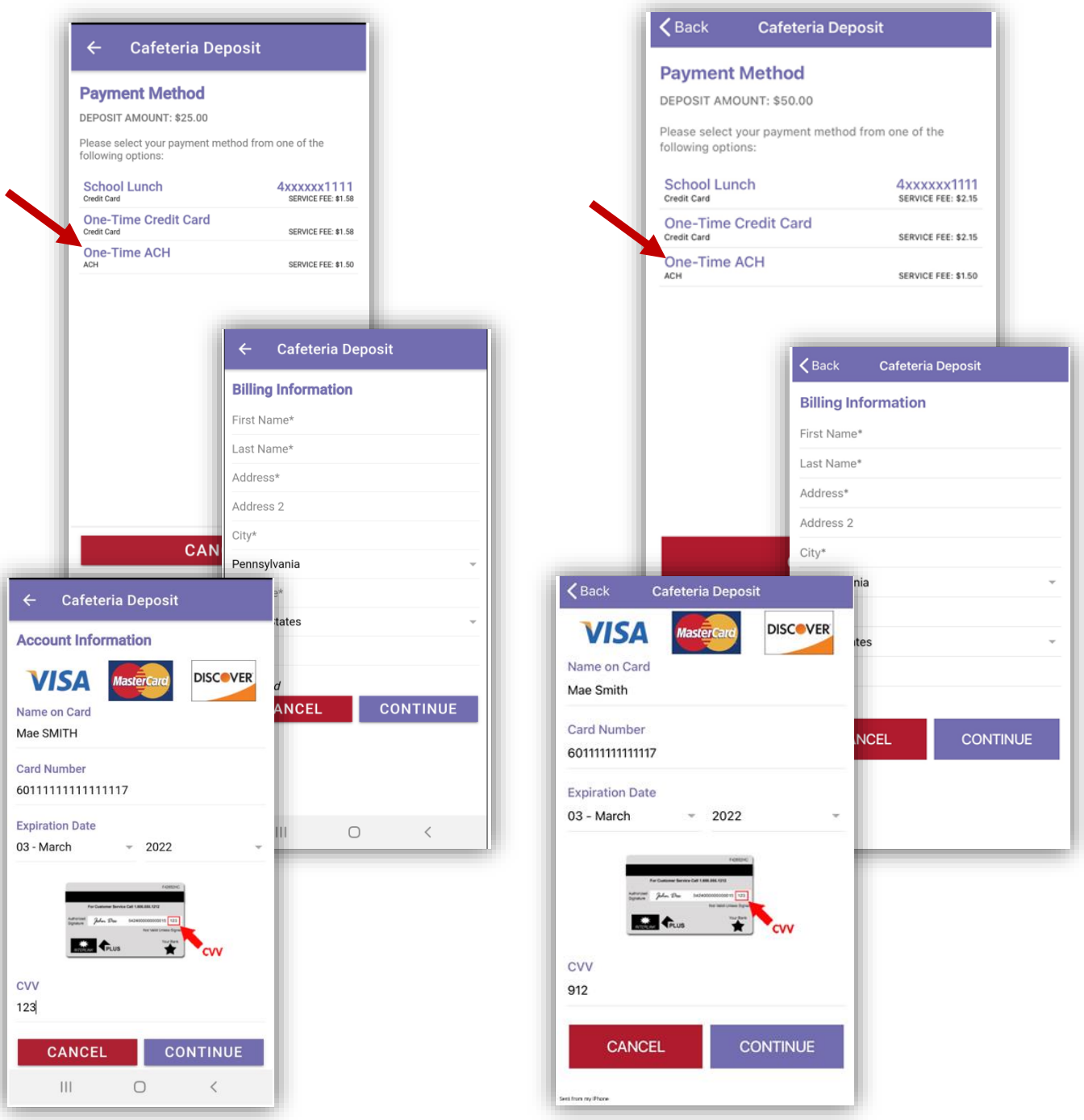
Using a One-Time ACH Payment Method

Choose this option when using an ACH (online checking) payment method that has not been set as a saved payment source or is only being use this one time. Enter the Billing Information, click **CONTINUE.** Enter the Account Information, choose **CONTINUE**



NOTE: *This document contains side-by-side screenshots.*

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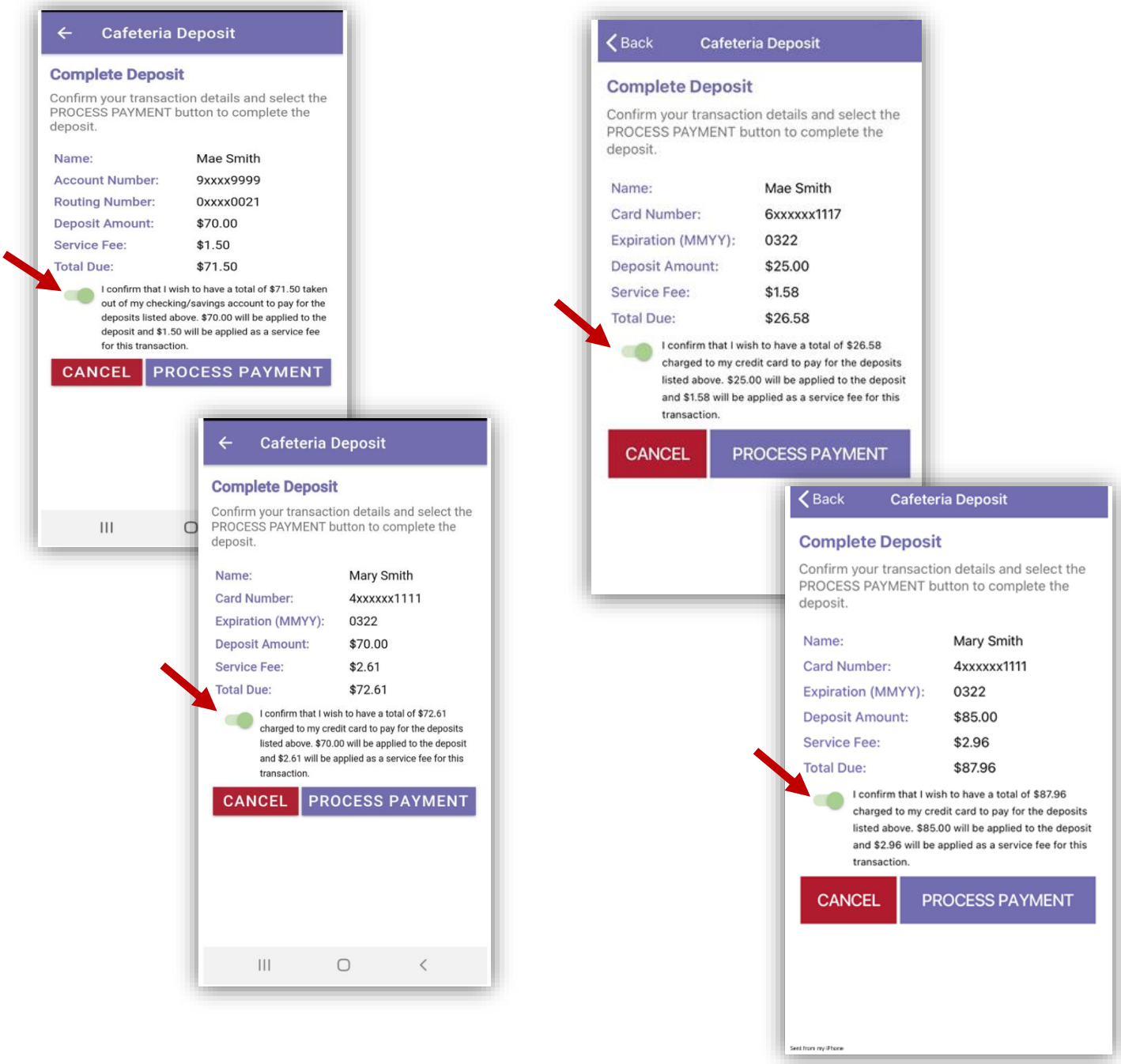
Click to slide the confirmation of payment (This will be green when enabled). Click **PROCESS PAYMENT**



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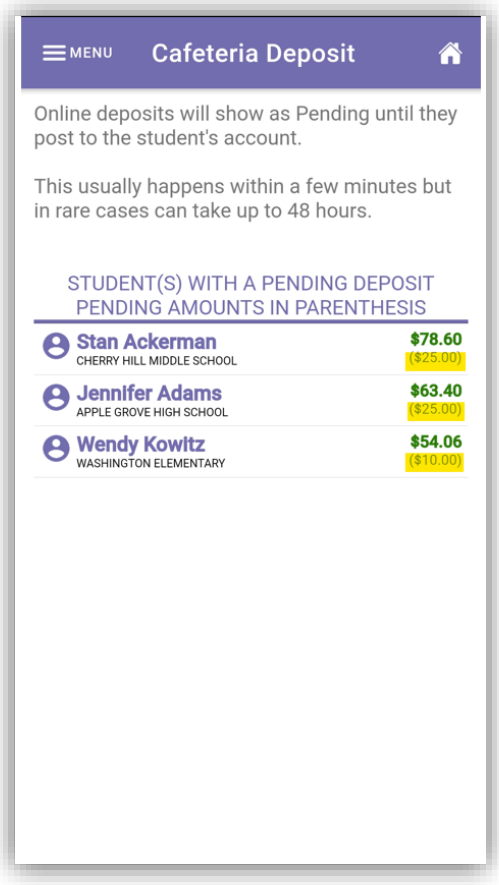
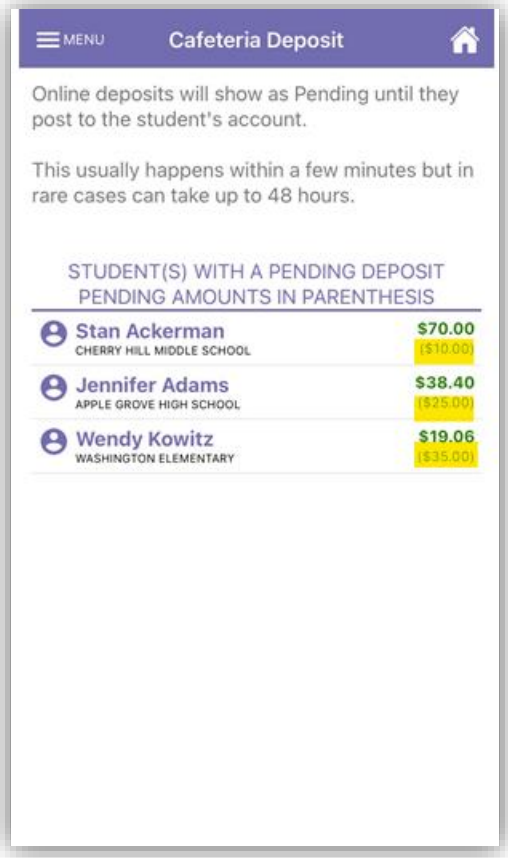
Online deposits will show as Pending with the amount in parenthesis until they post to the student's account. Click the **Home** icon to return to the Student Accounts page, click **MENU** to open the Main Menu options.





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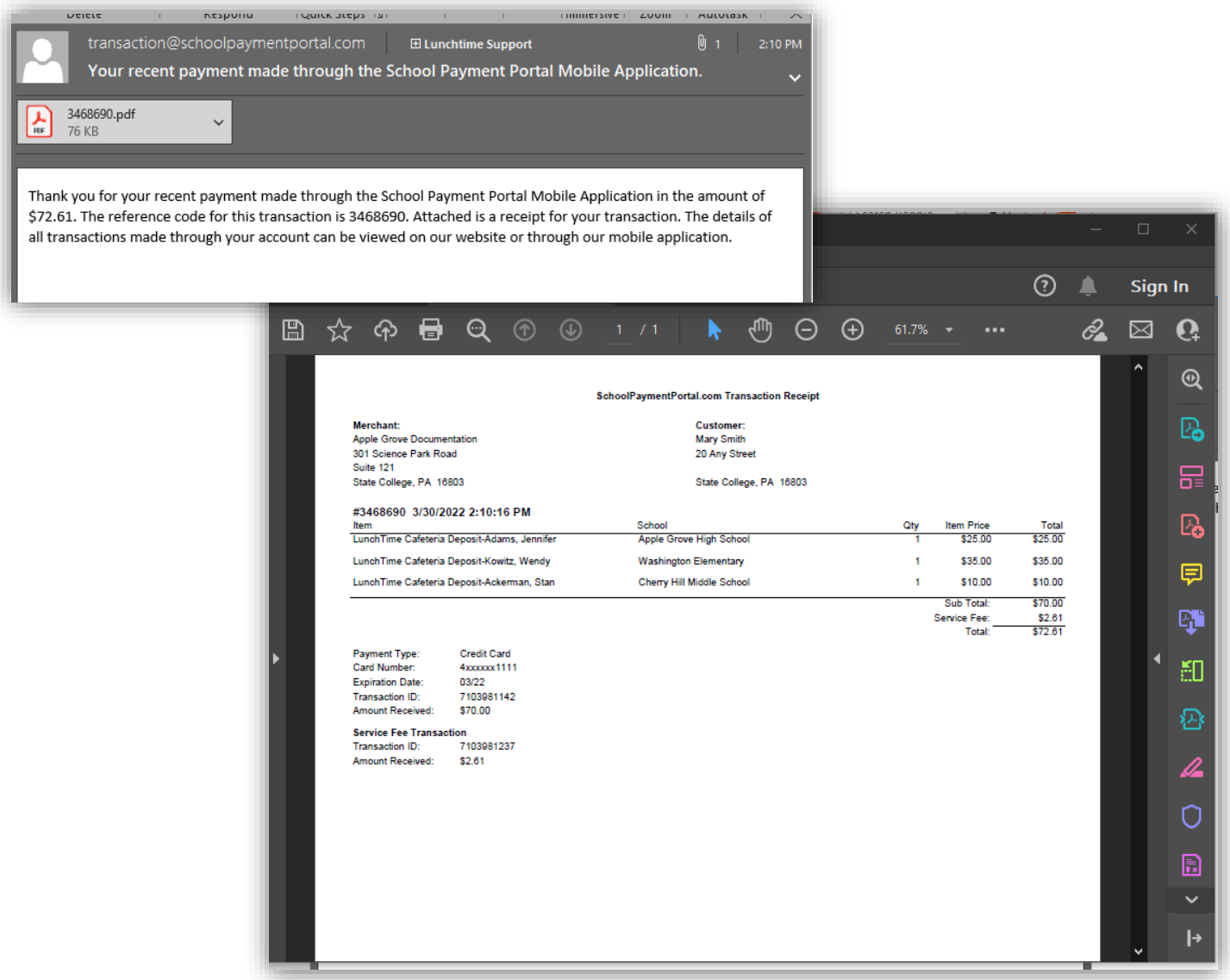
An email message will be generated and sent to the email address used to create the account. A receipt will be attached to the email.



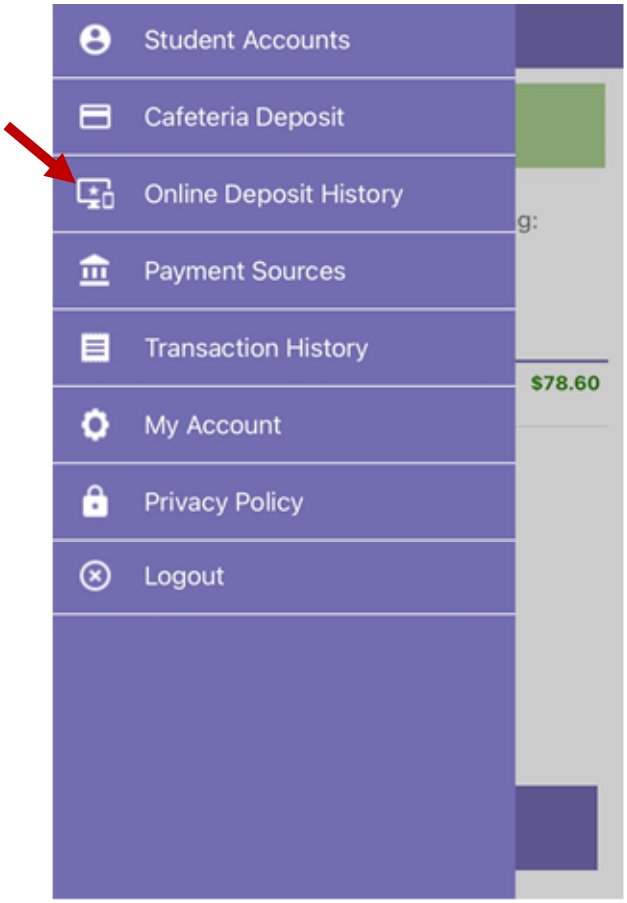
NOTE: *This document contains side-by-side screenshots.*

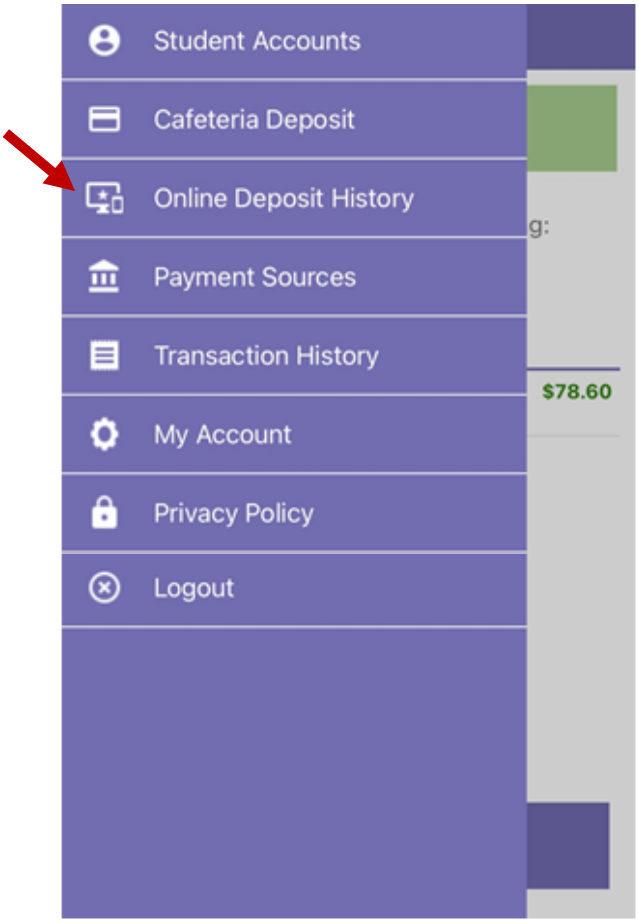
Android device images are on the left, Apple device images are on the right, unless noted otherwise.

Online Deposit History

The Online Deposit History to view deposits made during the current school year only.

From the Main Menu, choose **Online Deposit History**.

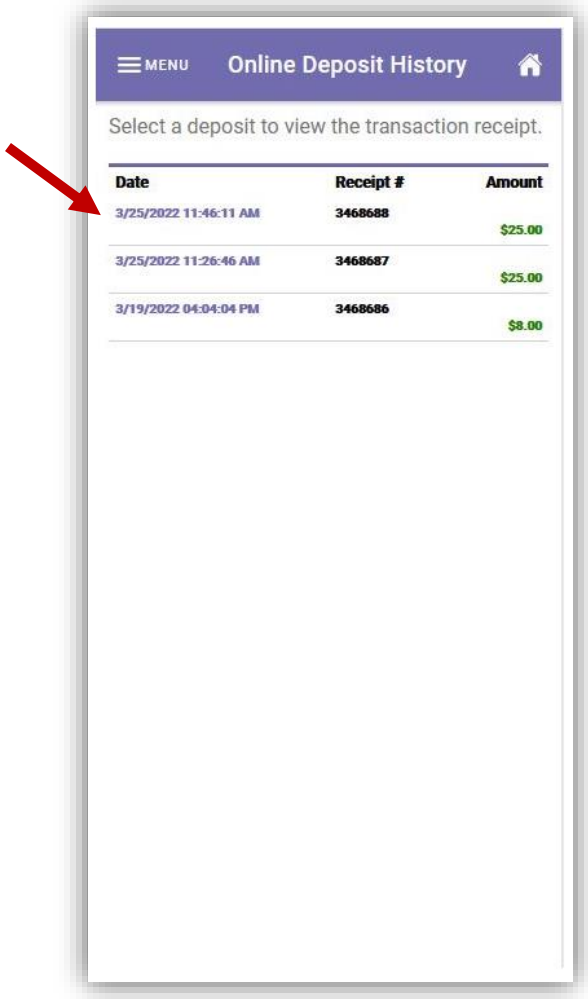


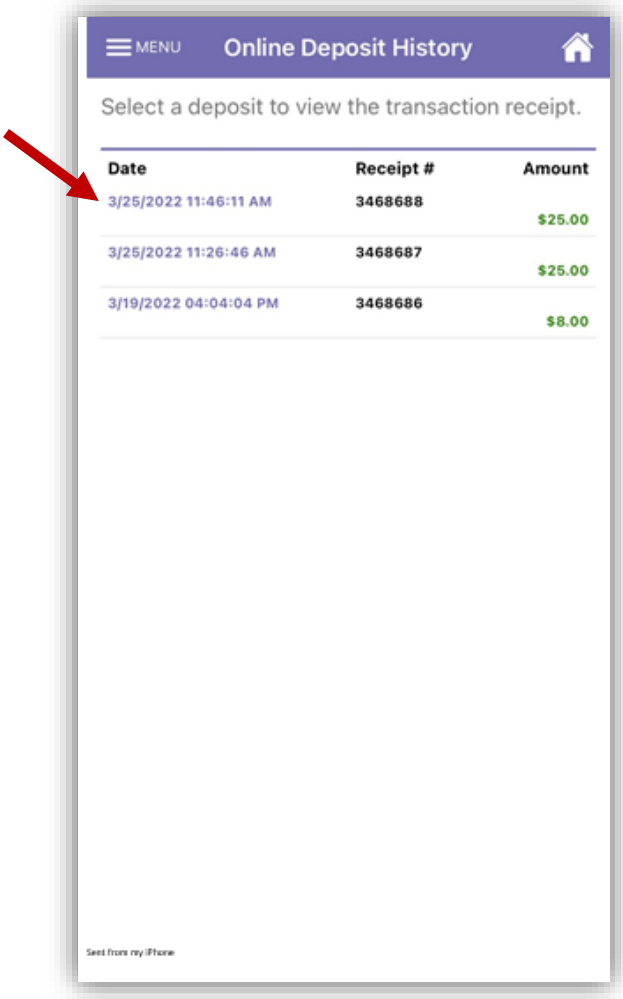


NOTE: *This document contains side-by-side screenshots.*

Android device images are on the left, Apple device images are on the right, unless noted otherwise.

Select a deposit to view the transaction receipt.

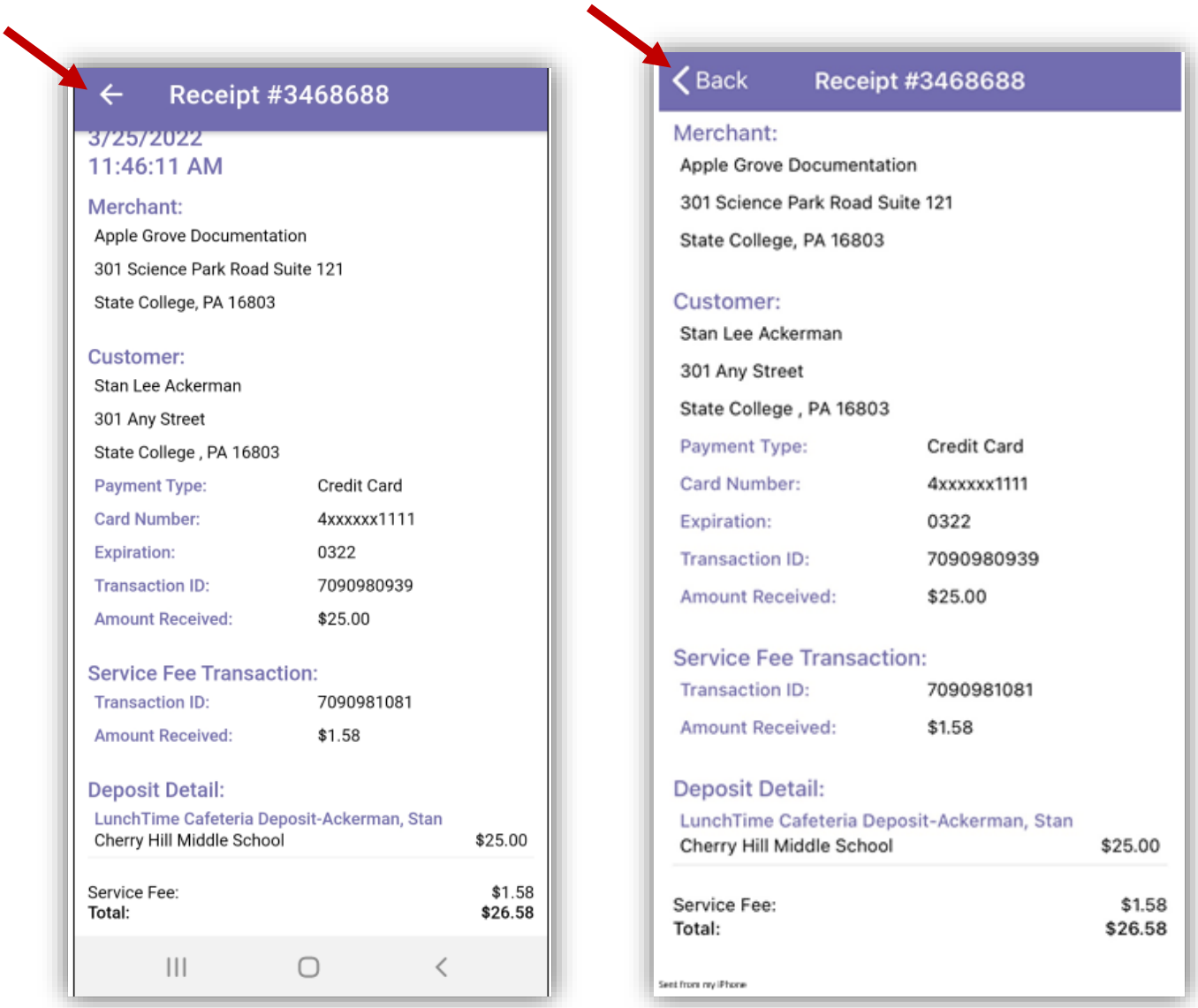




NOTE: *This document contains side-by-side screenshots.*

Android device images are on the left, Apple device images are on the right, unless noted otherwise.

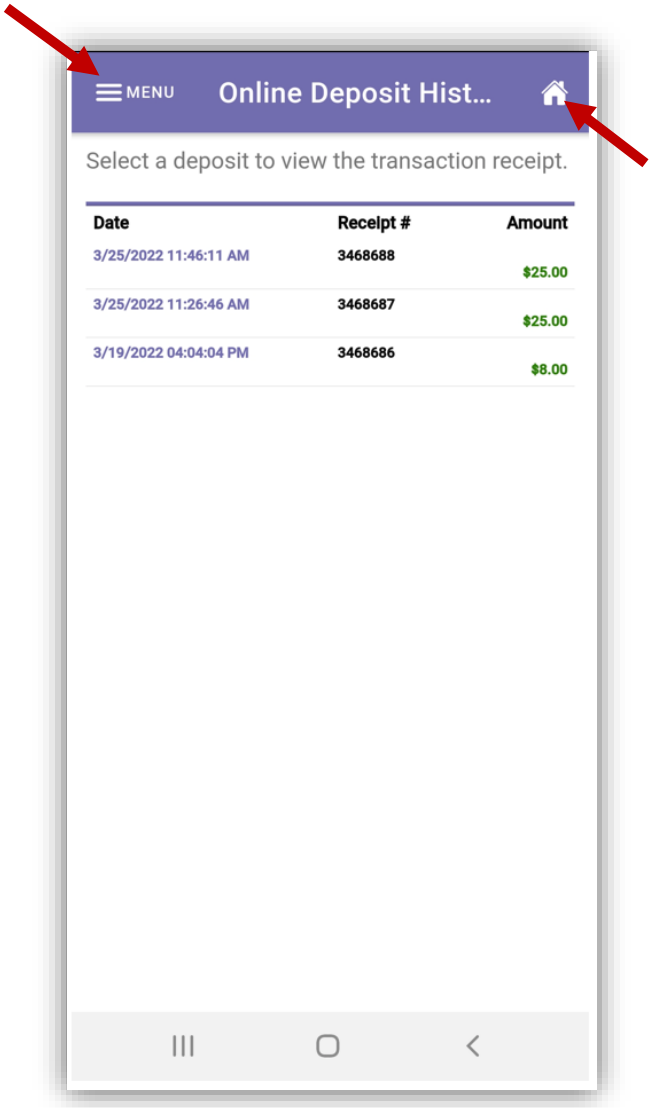
Choose the back arrow to return to the Online Deposit History list

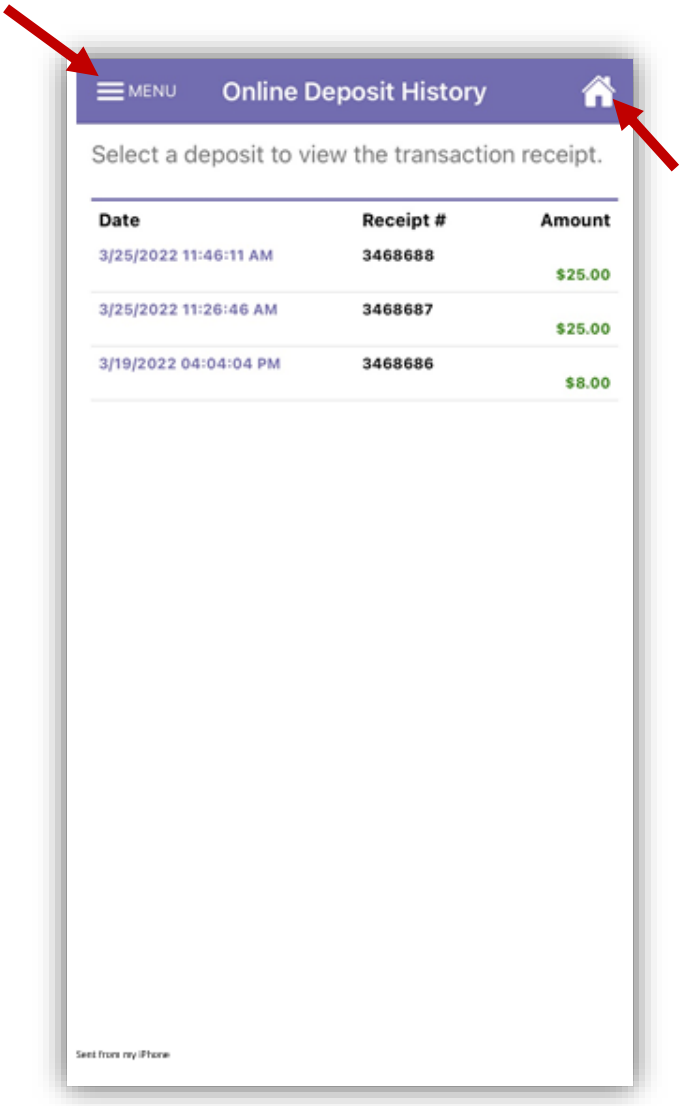


NOTE: *This document contains side-by-side screenshots.*

Android device images are on the left, Apple device images are on the right, unless noted otherwise.

Choose the Home icon to return to the Student Accounts page or choose **MENU** to return to the Main Menu options.





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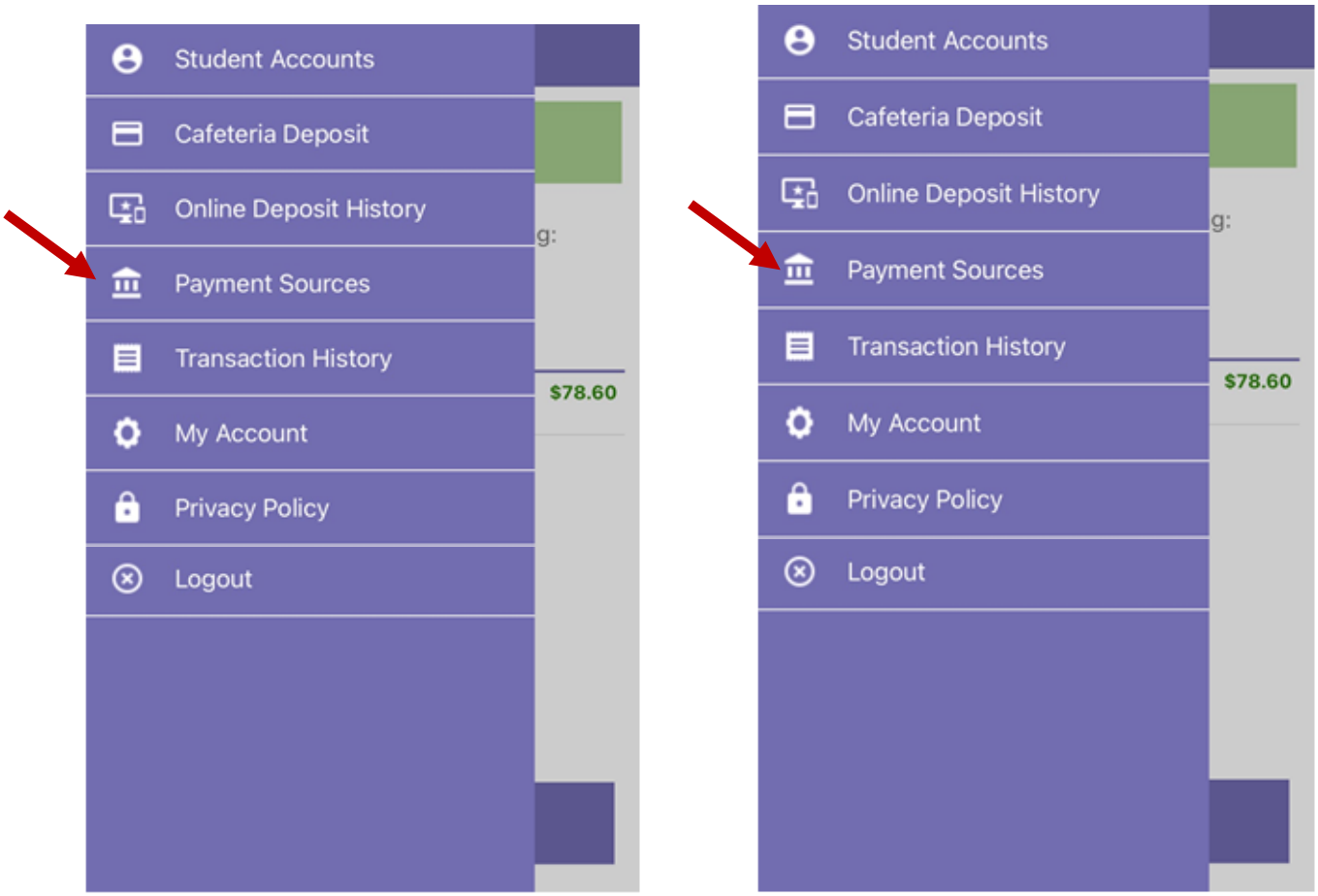
Payment Sources

This mobile application includes a feature that offers the ability to identify a payment method and save that payment method to use as an auto-replenish for the student(s) account(s).



NOTE: *This document contains side-by-side screenshots.*

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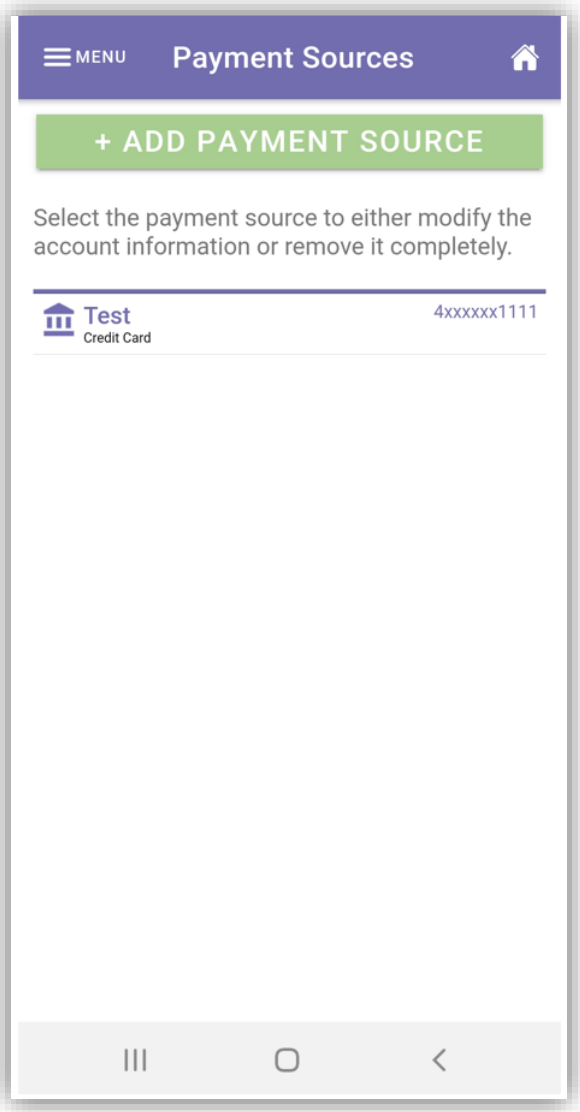
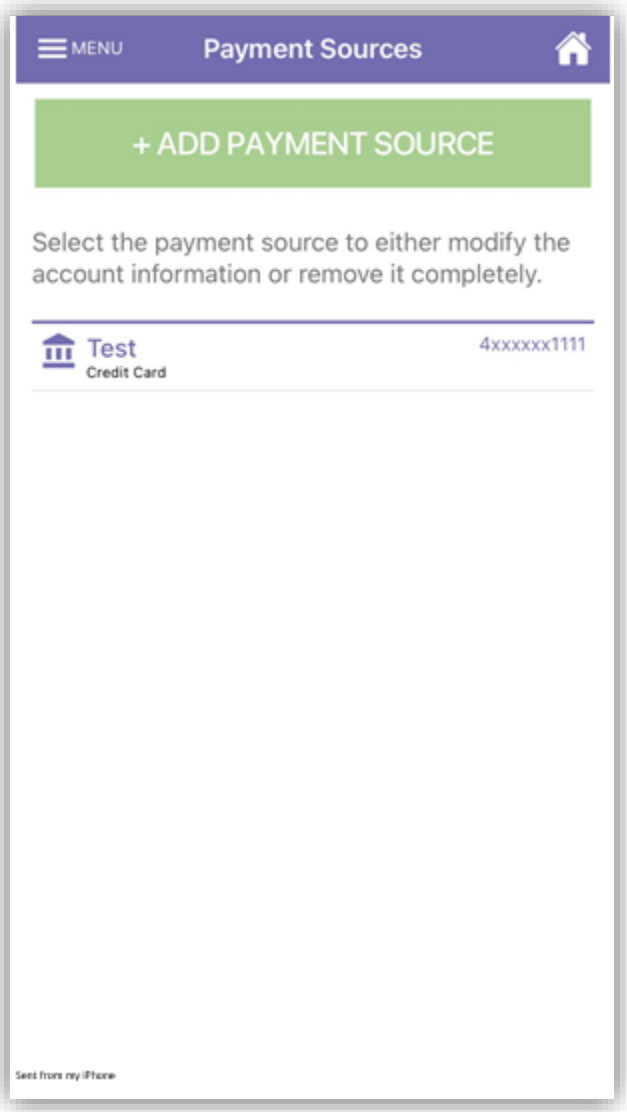
To begin, touch the **+ADD PAYMENT SOURCE** button.





NOTE: *This document contains side-by-side screenshots.*

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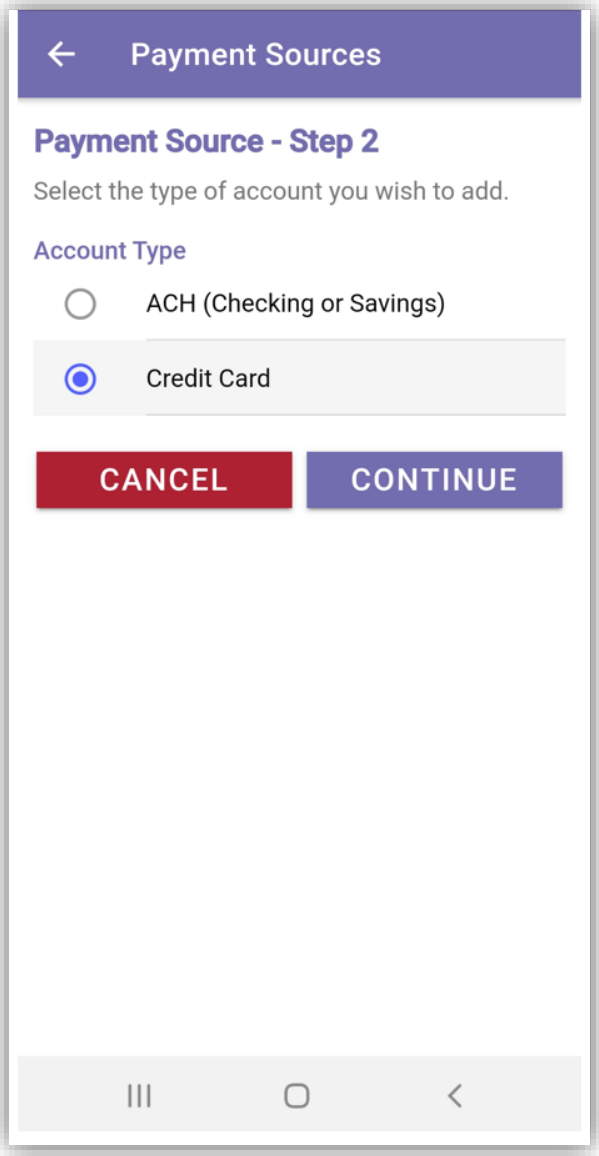
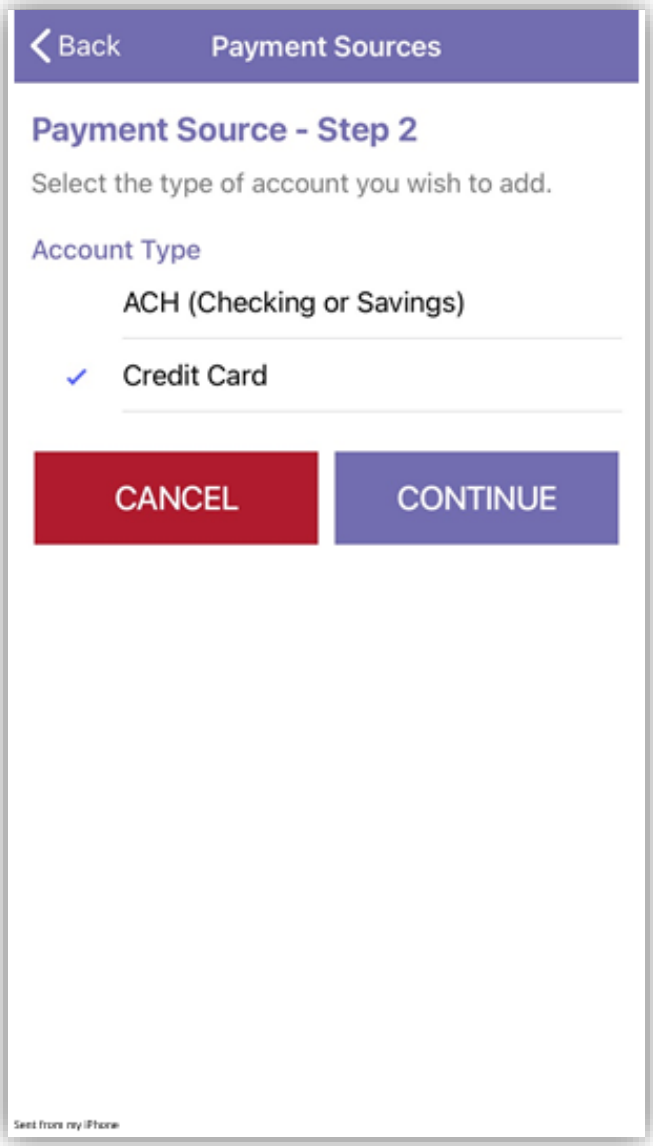
***NOTE**: In the event that you have students existing across multiple districts, you first need to select the appropriate gateway for each student's school district.*

For Step 2, select the type of account you wish to add. Touch **CONTINUE** to advance to Step 3.





NOTE: *This document contains side-by-side screenshots.*

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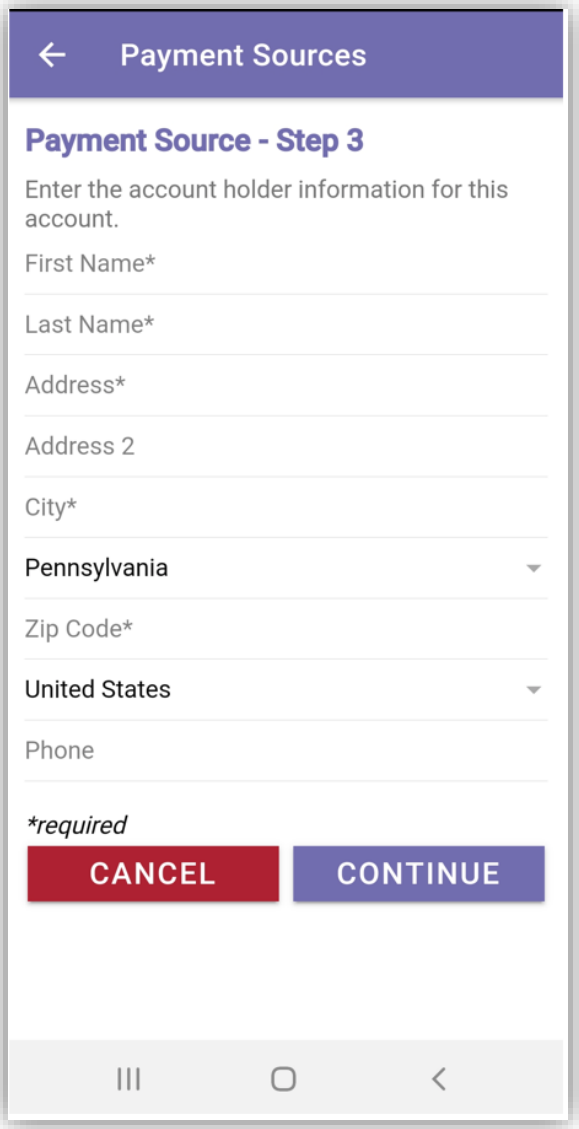
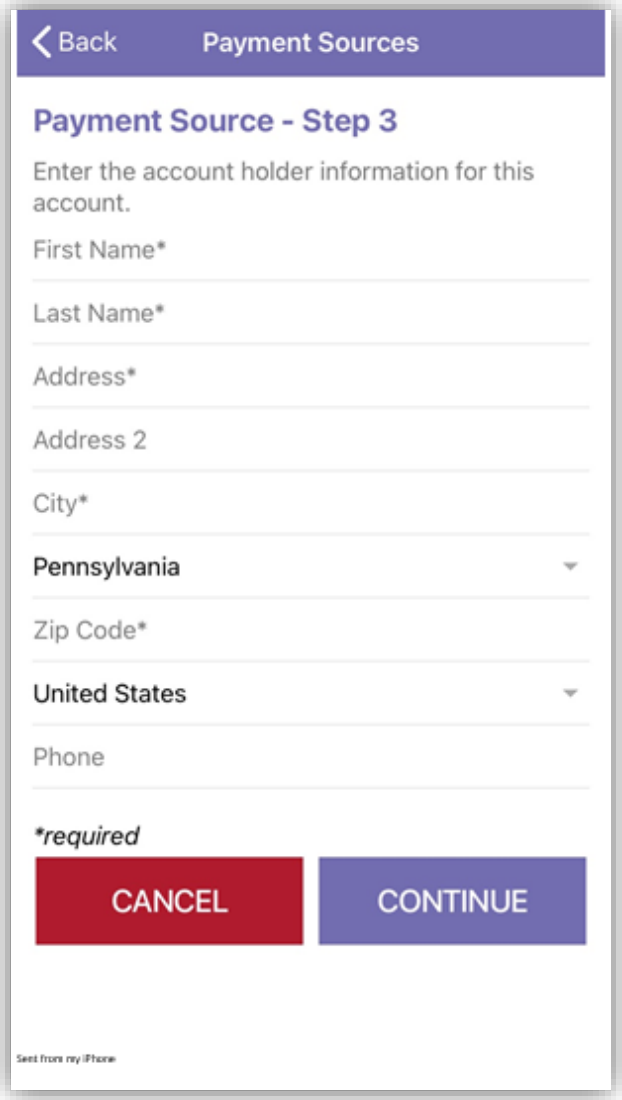
Enter the account holder information for this payment account. Choose **CONTINUE** to advance to Step 4.

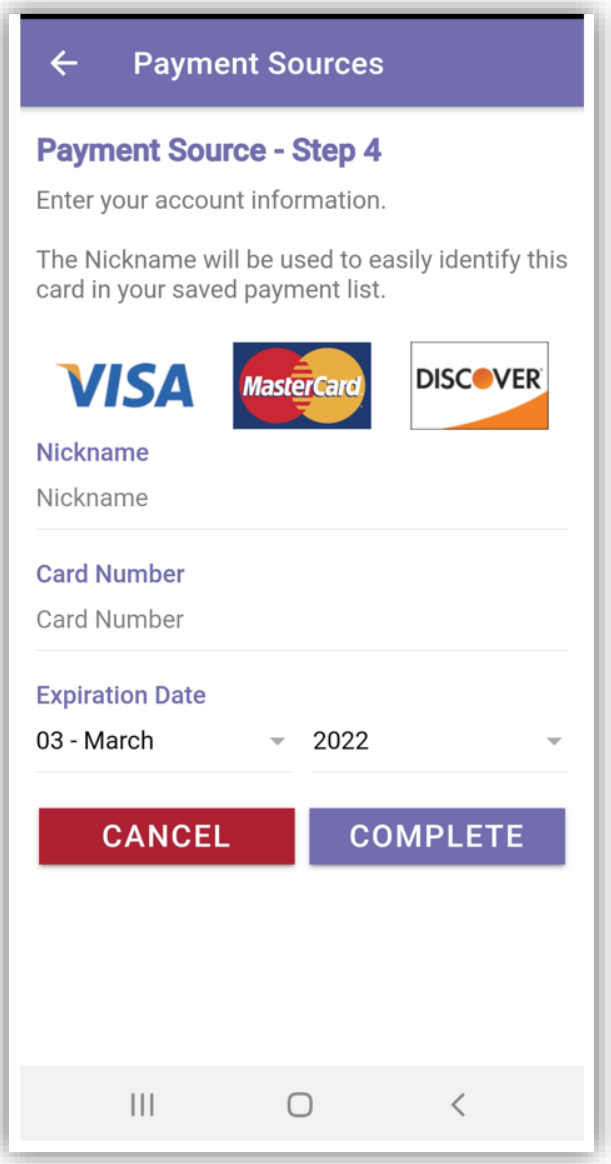


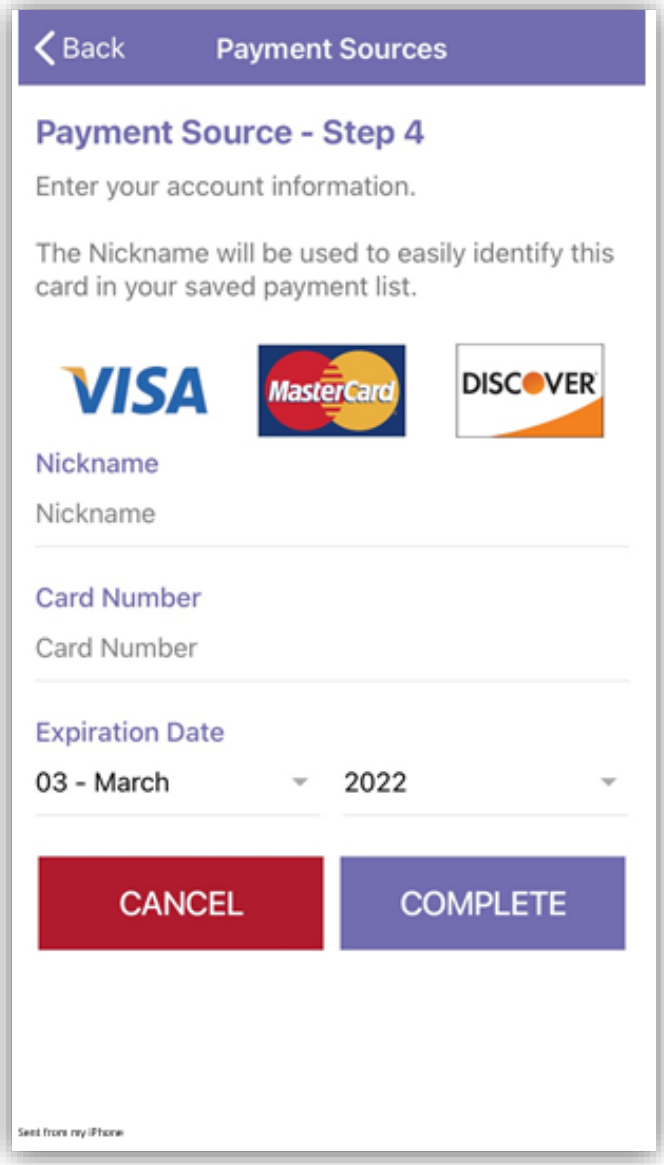


NOTE: *This document contains side-by-side screenshots.*

Android device images are on the left, Apple device images are on the right, unless noted otherwise.

Step 4 – Enter your account information. The Nickname will be used to identify this card in your saved payment list. Choose **COMPLETE** when finished.





NOTE: *This document contains side-by-side screenshots.*

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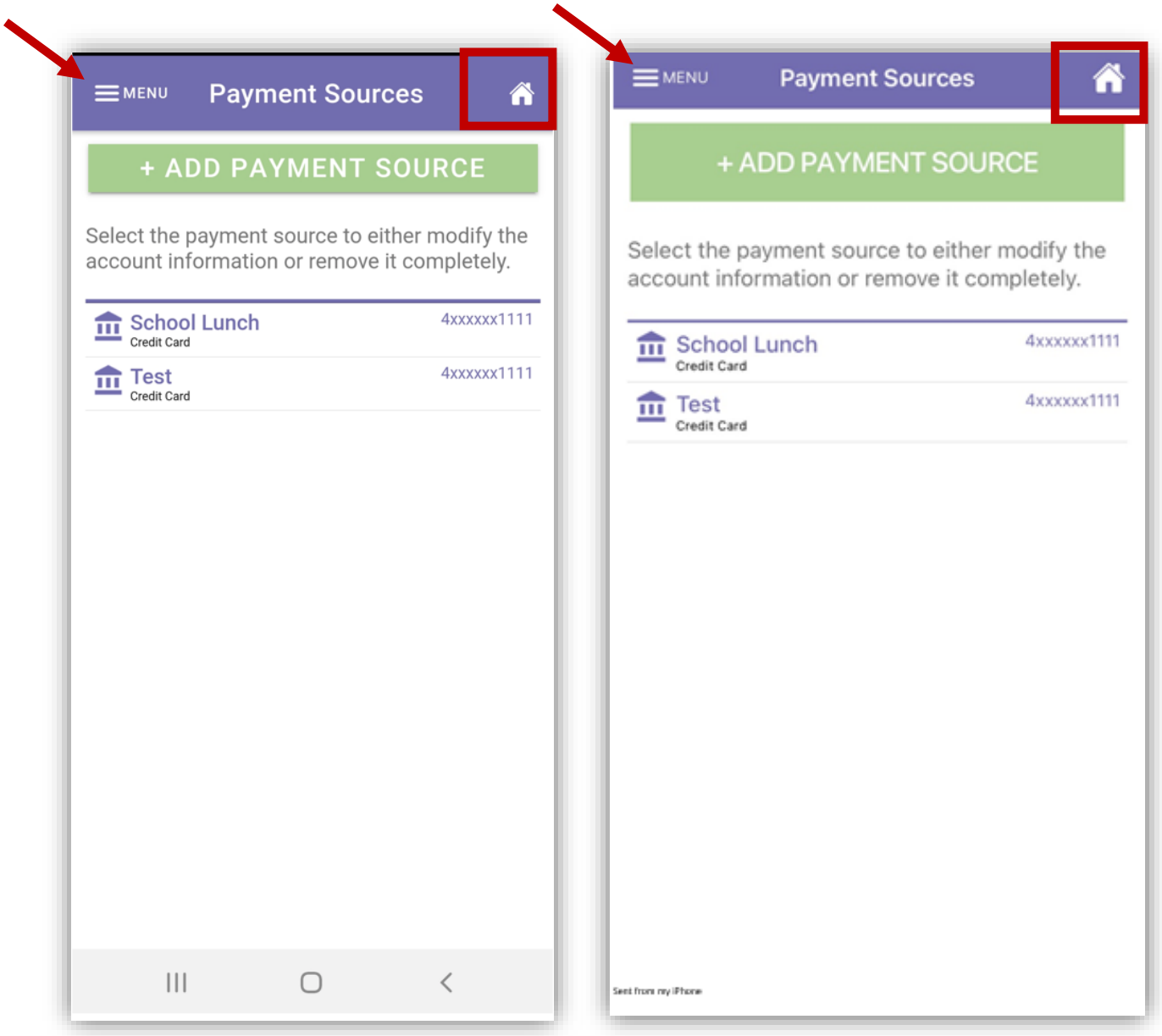
The Payment Sources should reflect each payment source you've saved. To save other payment sources, repeat the steps on pages 37-40 of this document.

Choosing the **Home** icon will return you to the Student Accounts page. Choosing **MENU** returns you to the Main Menu options.

Clicking on an existing payment source will give you the options to modify or remove it. When modifying the payment source, repeat steps 3 and 4 above.



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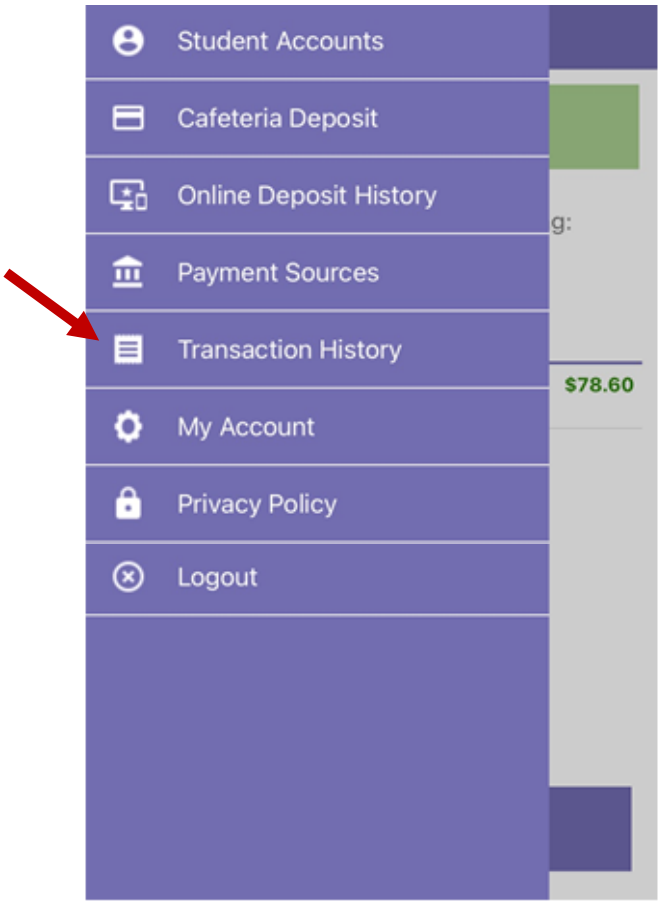
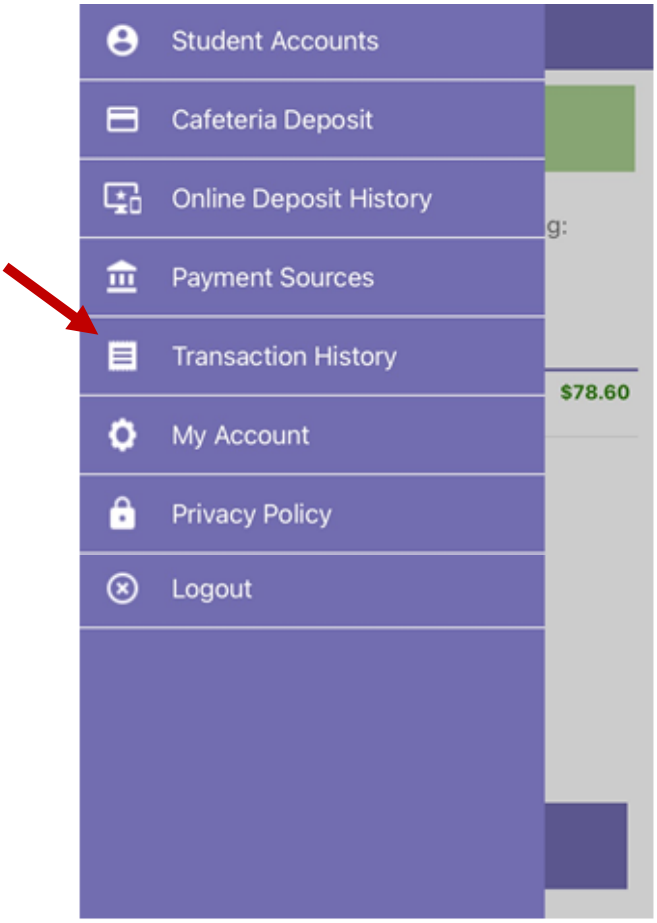
Transaction History

View the history of transactions recorded to each student account.

Choose Transaction History from the Main Menu.

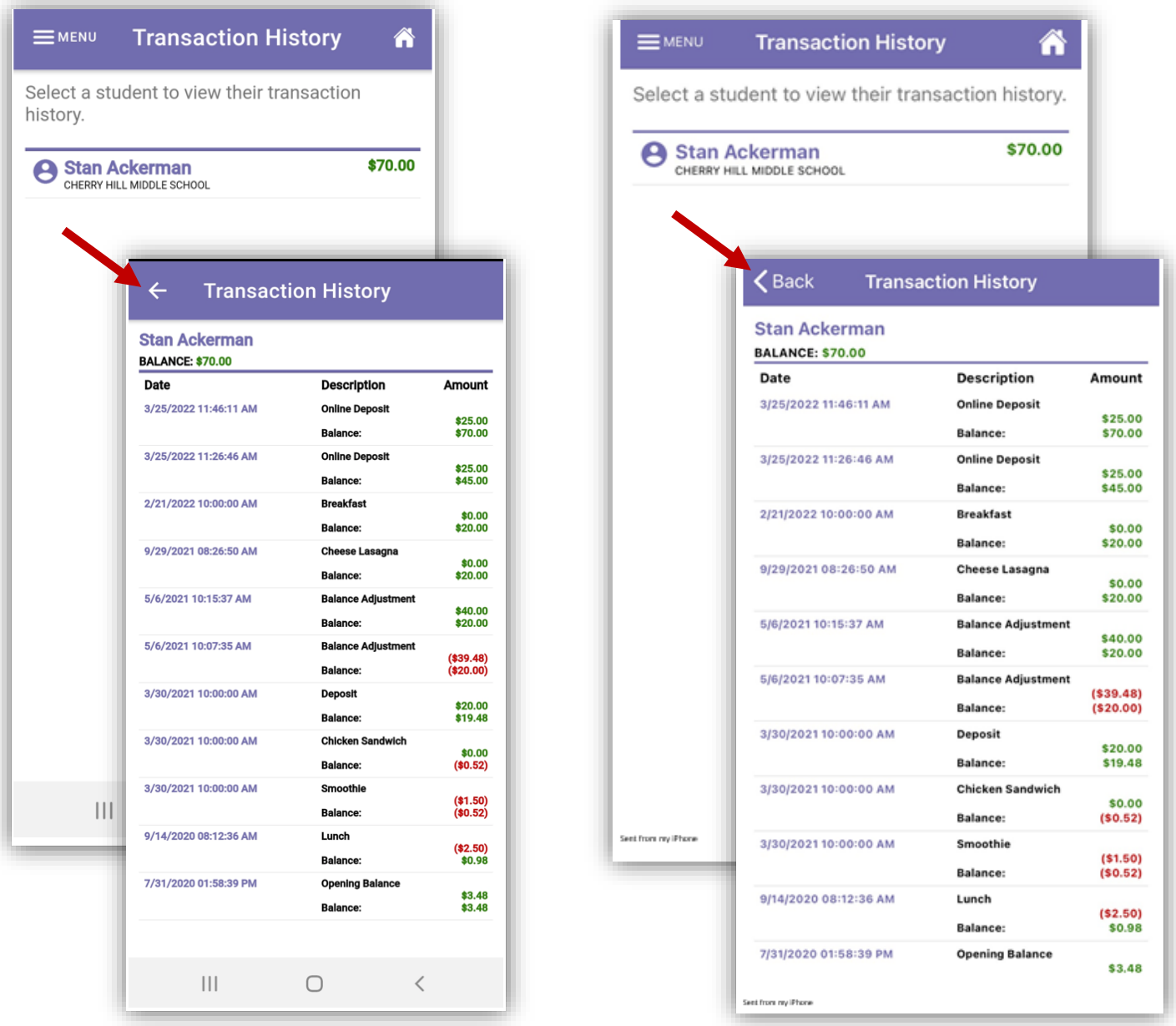




NOTE: *This document contains side-by-side screenshots.*

Android device images are on the left, Apple device images are on the right, unless noted otherwise.

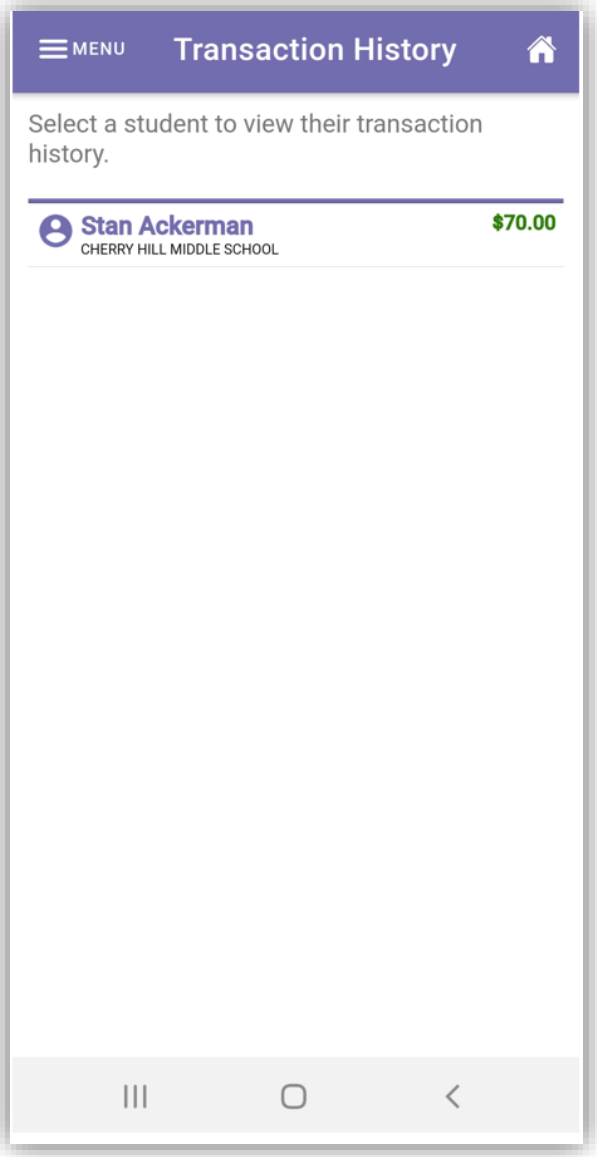
Next, select a student to view their transaction history. Choose the back arrow to return to the Transaction History.

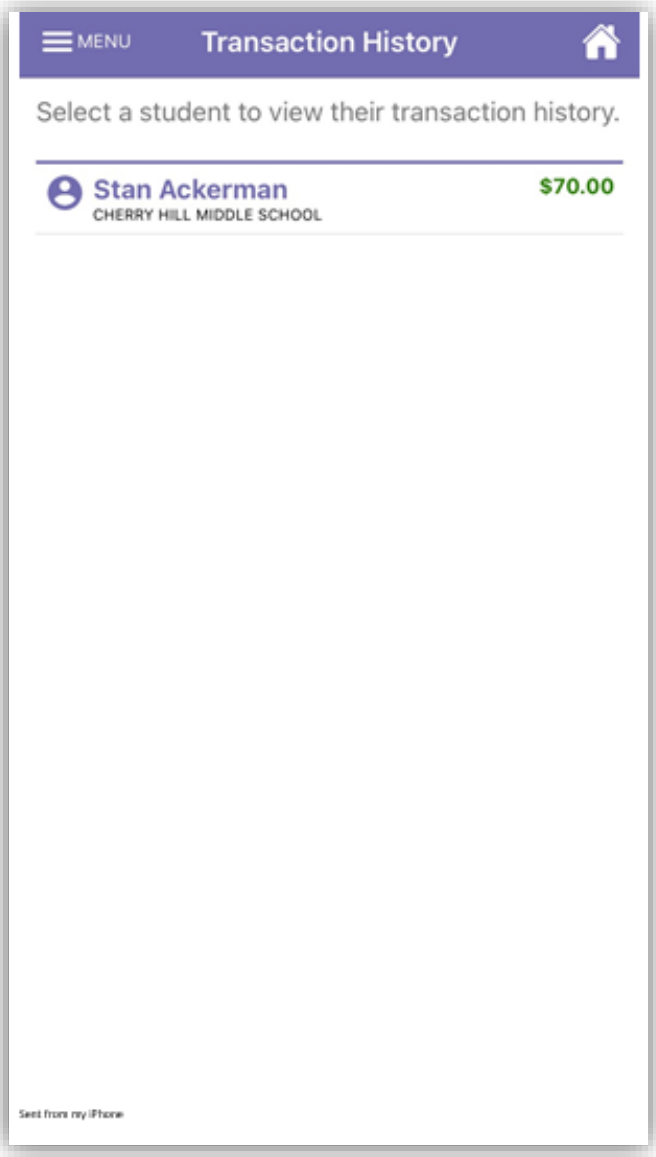


NOTE: *This document contains side-by-side screenshots.*

Android device images are on the left, Apple device images are on the right, unless noted otherwise.

Use the Home icon to return to Student Accounts or MENU to bring up the menu options.





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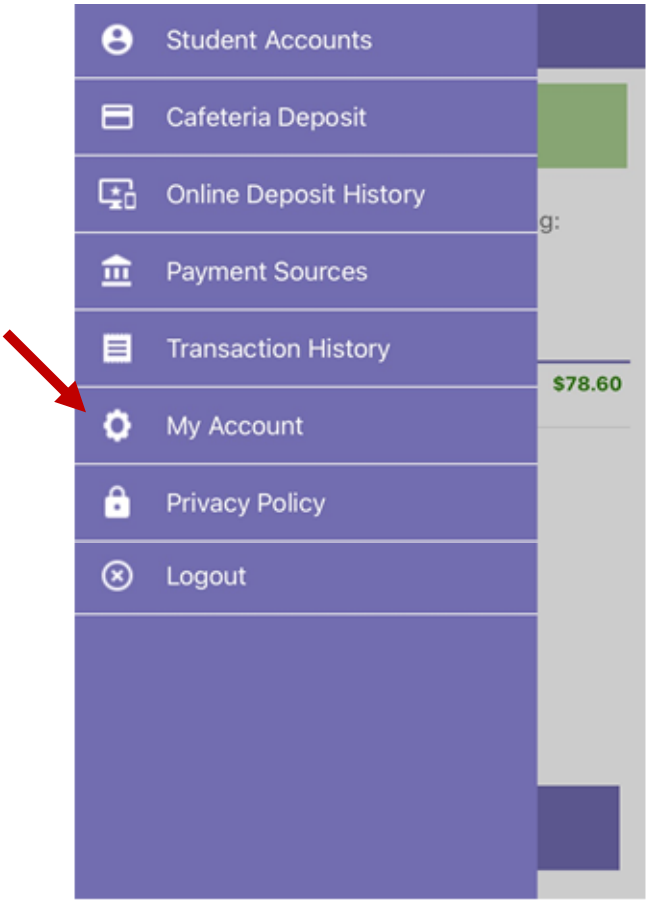
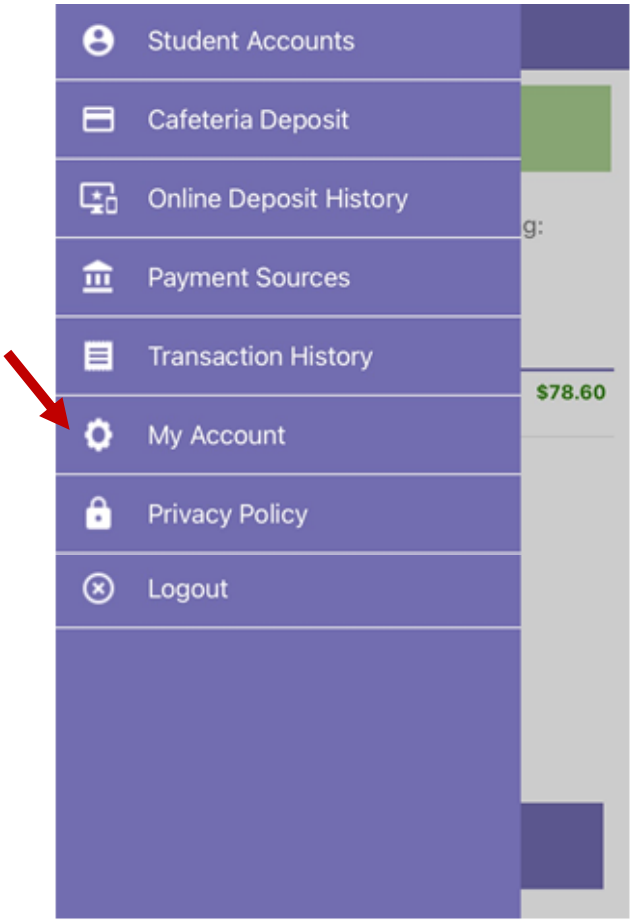
Android device images are on the left, Apple device images are on the right, unless noted otherwise.

My Account

Update the account details such as new email address, name change and password change.

To edit account details, choose My Account from the Main Menu.





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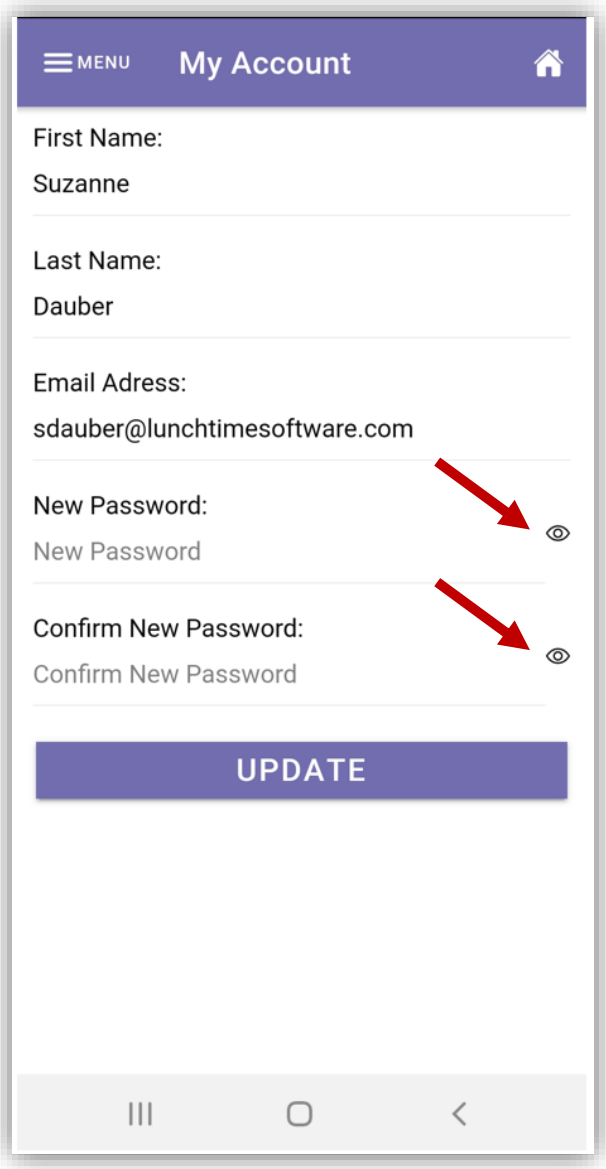
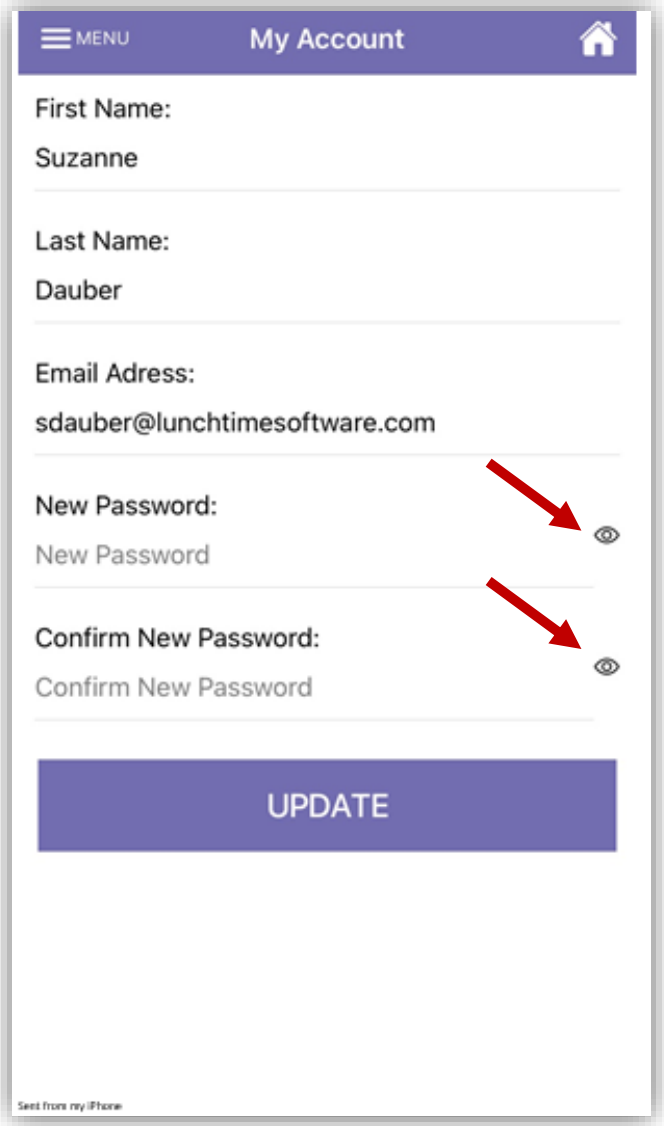
To update the account details such as new email address, name change and password change, enter the information that needs updating. If you are changing a password, clicking on the 'EYE' icon will enable viewing of the text being entered into those fields.



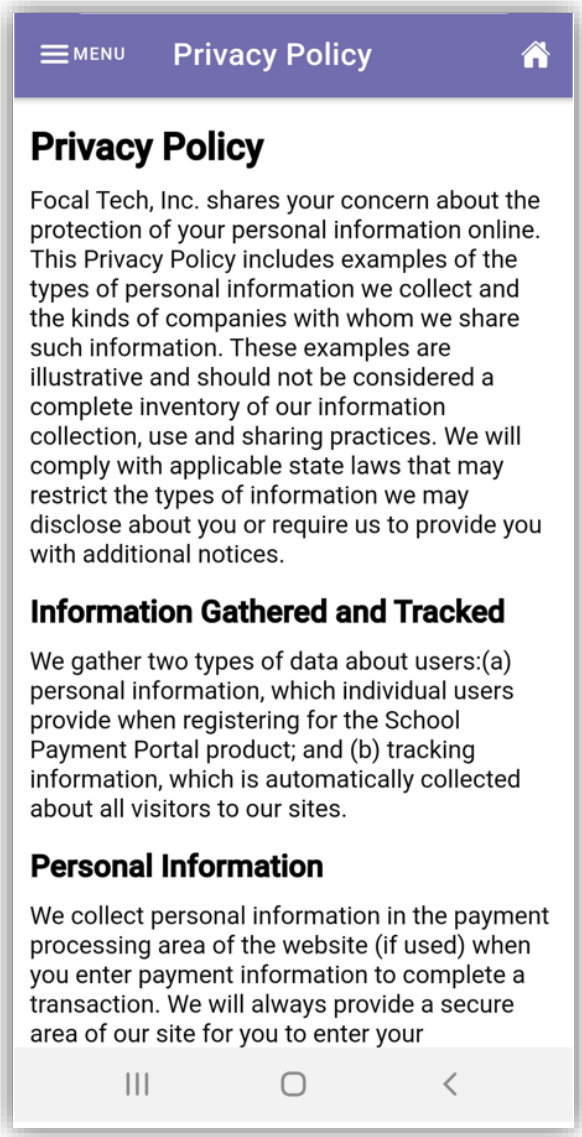


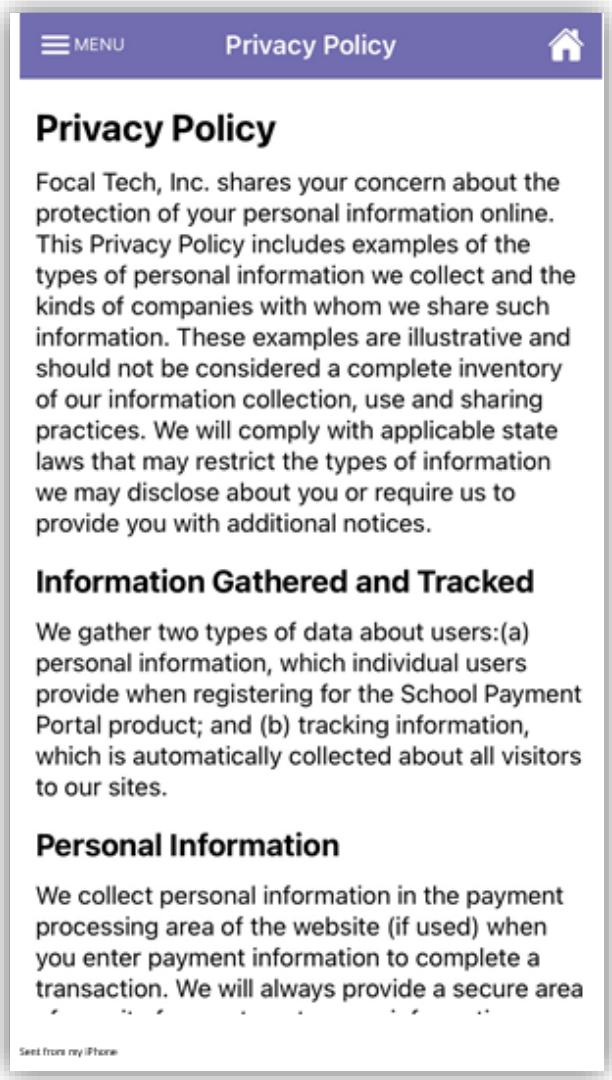
NOTE: *This document contains side-by-side screenshots.*

Android device images are on the left, Apple device images are on the right, unless noted otherwise.

Privacy Policy

Describes what Focal Tech, Inc does with Personal information shared with us.





NOTE: *This document contains side-by-side screenshots.*

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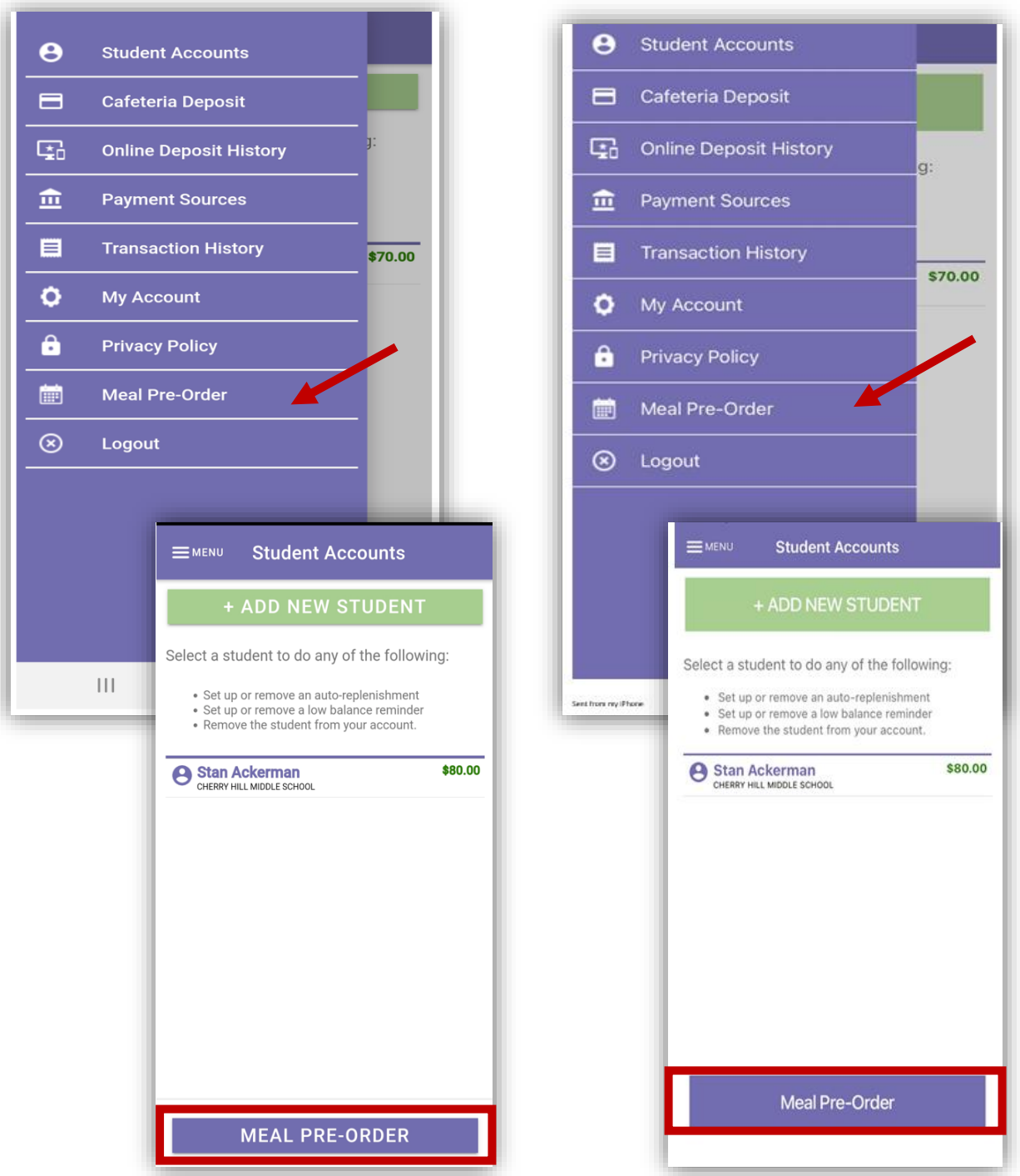
Meal Pre-Order

If your school has chosen to use the Meal Pre-Order feature, choose Meal Pre-Order from the Main Menu or the Meal Pre-Order button at the bottom of the Student Accounts page to begin. You'll be directed to the Students screen. (If the school is not offering meal pre-ordering, this option will not be present on this menu.)



NOTE: *This document contains side-by-side screenshots.*

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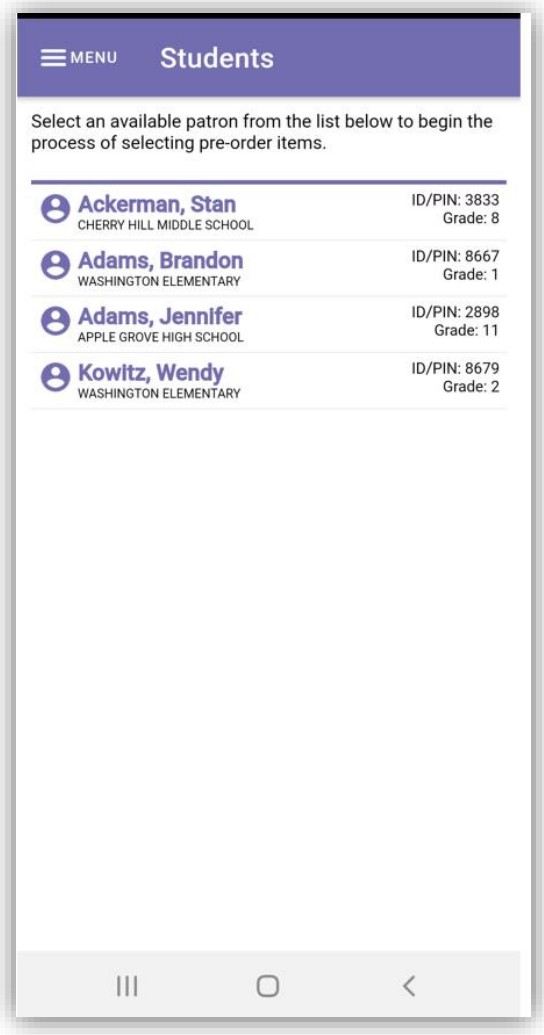
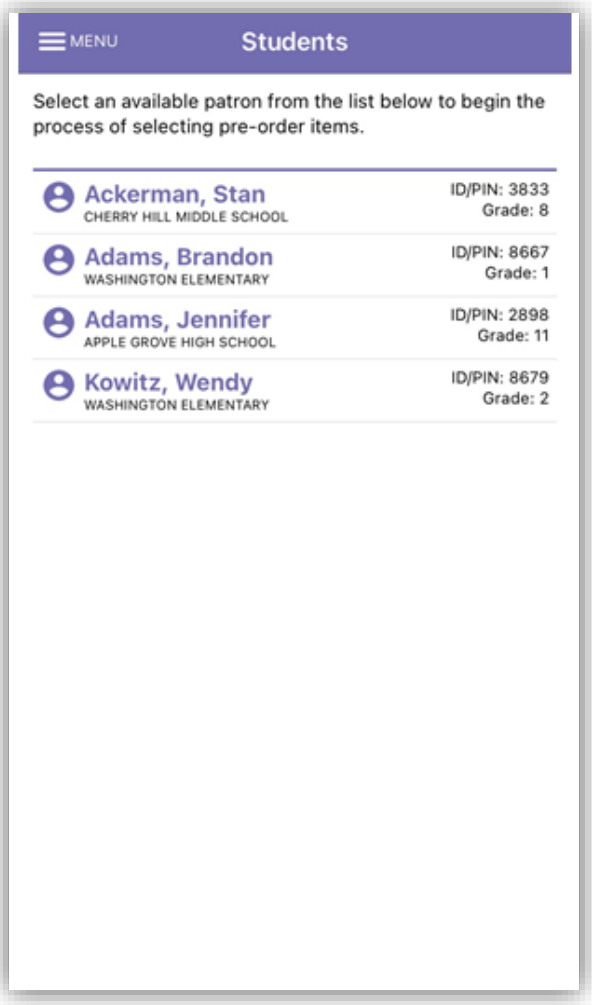
Select an available patron from the list below to begin the process of selecting pre-order items.

Users are able to submit multiple Pre-Order selections, meal periods and serving dates, for each student where Pre-Order has been made available.





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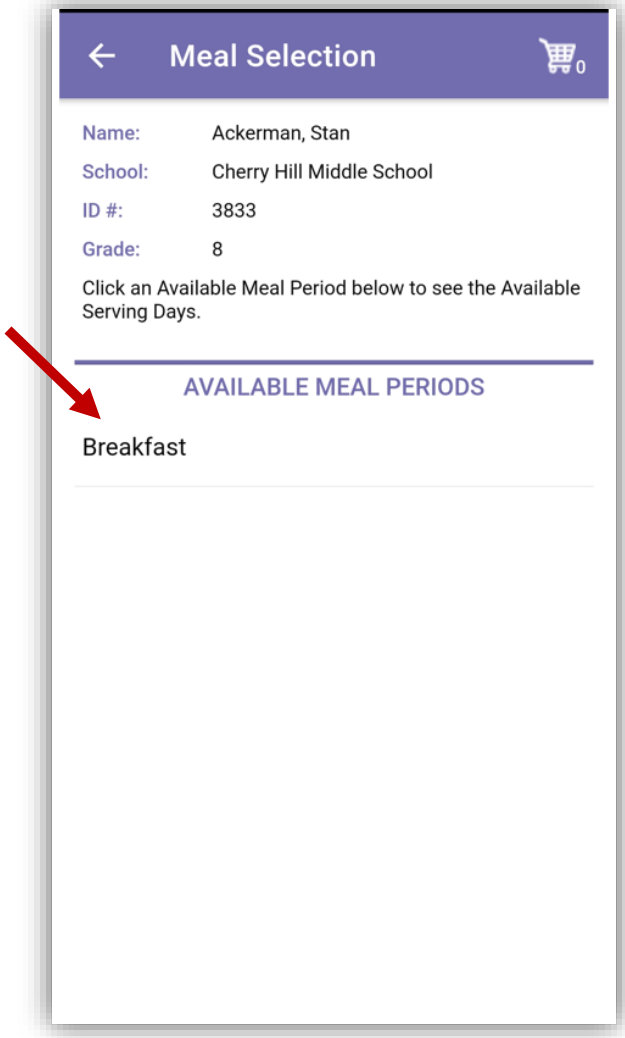
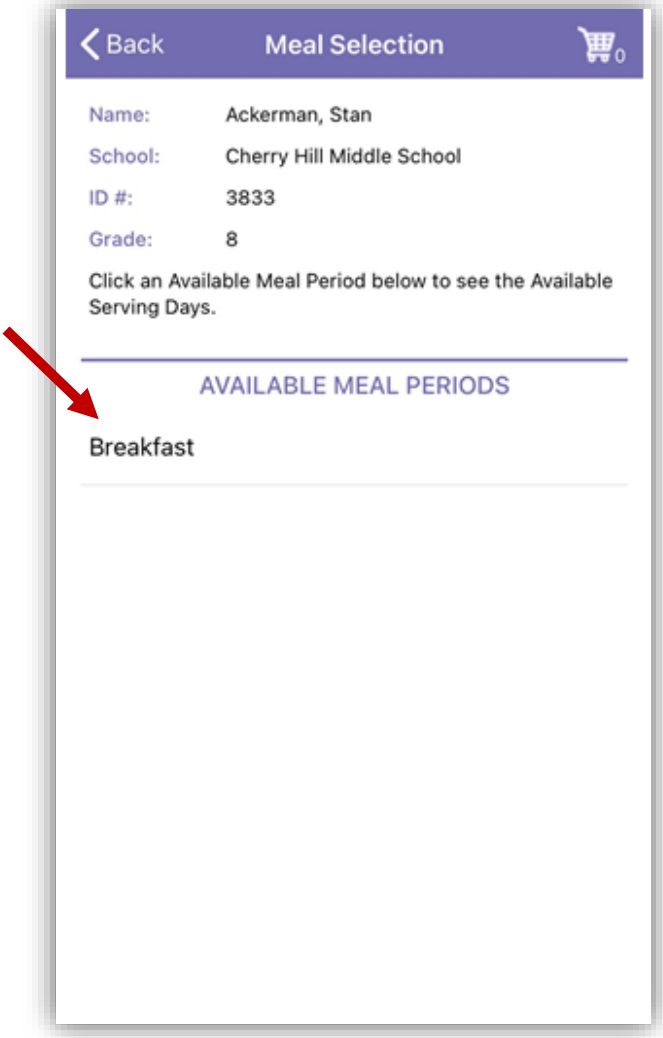
Select the meal period from the AVAILABLE MEAL PERIODS list.





NOTE: *This document contains side-by-side screenshots.*

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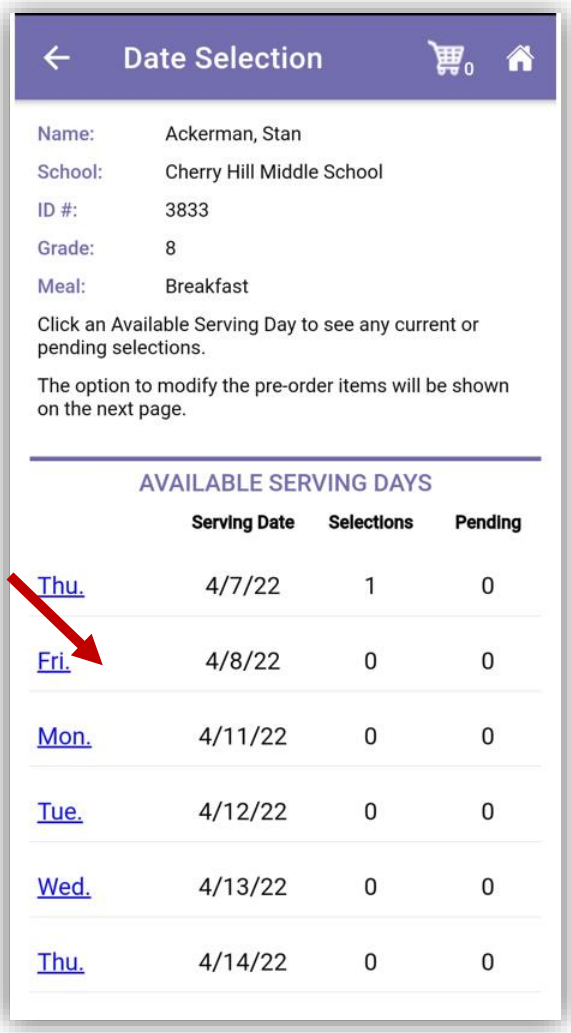
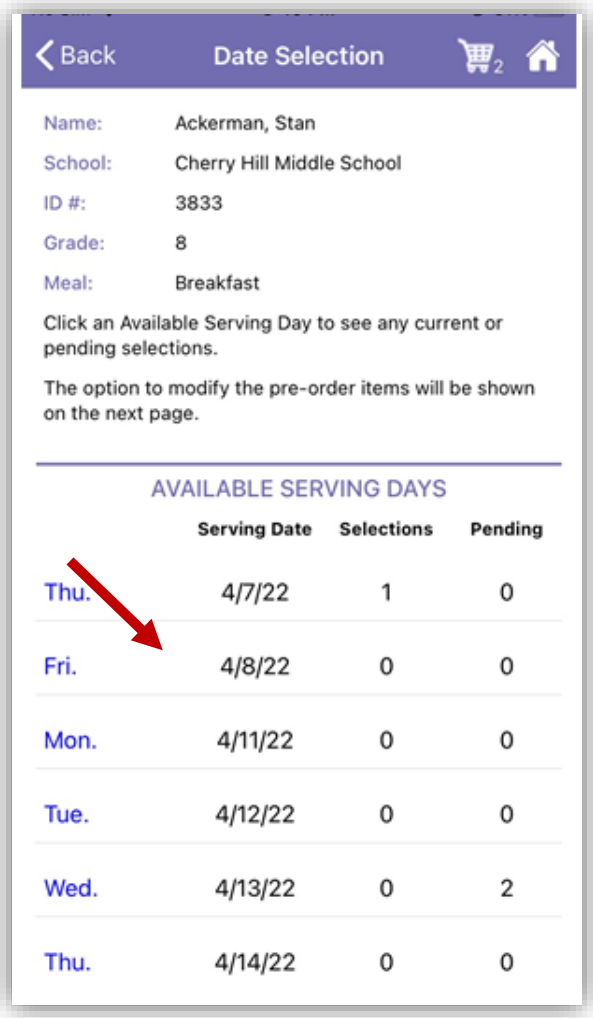
Select a meal period (i.e. Breakfast, Lunch, etc.) If the school offers multiple meal periods, the dropdown list will contain each of the meal options.

Select a serving date.





NOTE: *This document contains side-by-side screenshots.*

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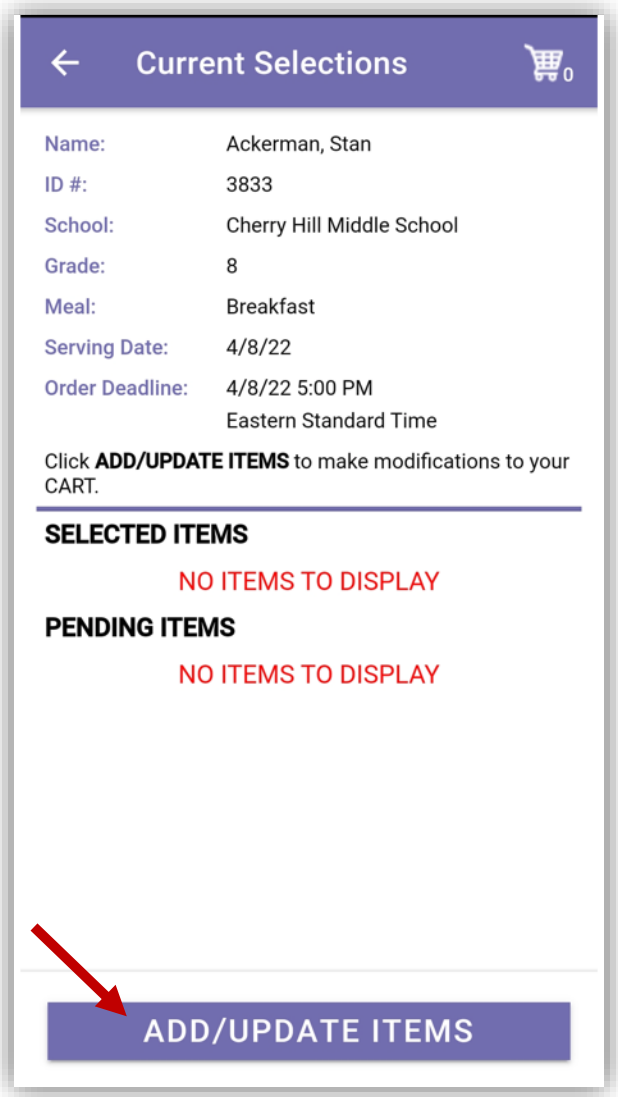
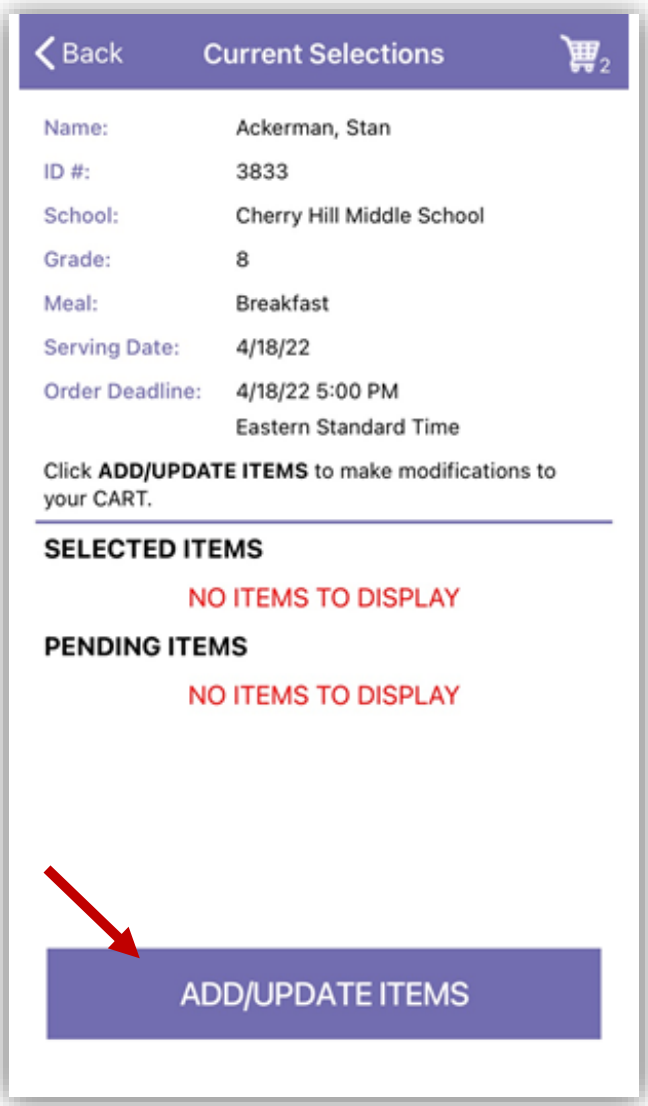
Click on ADD/UPDATE ITEMS





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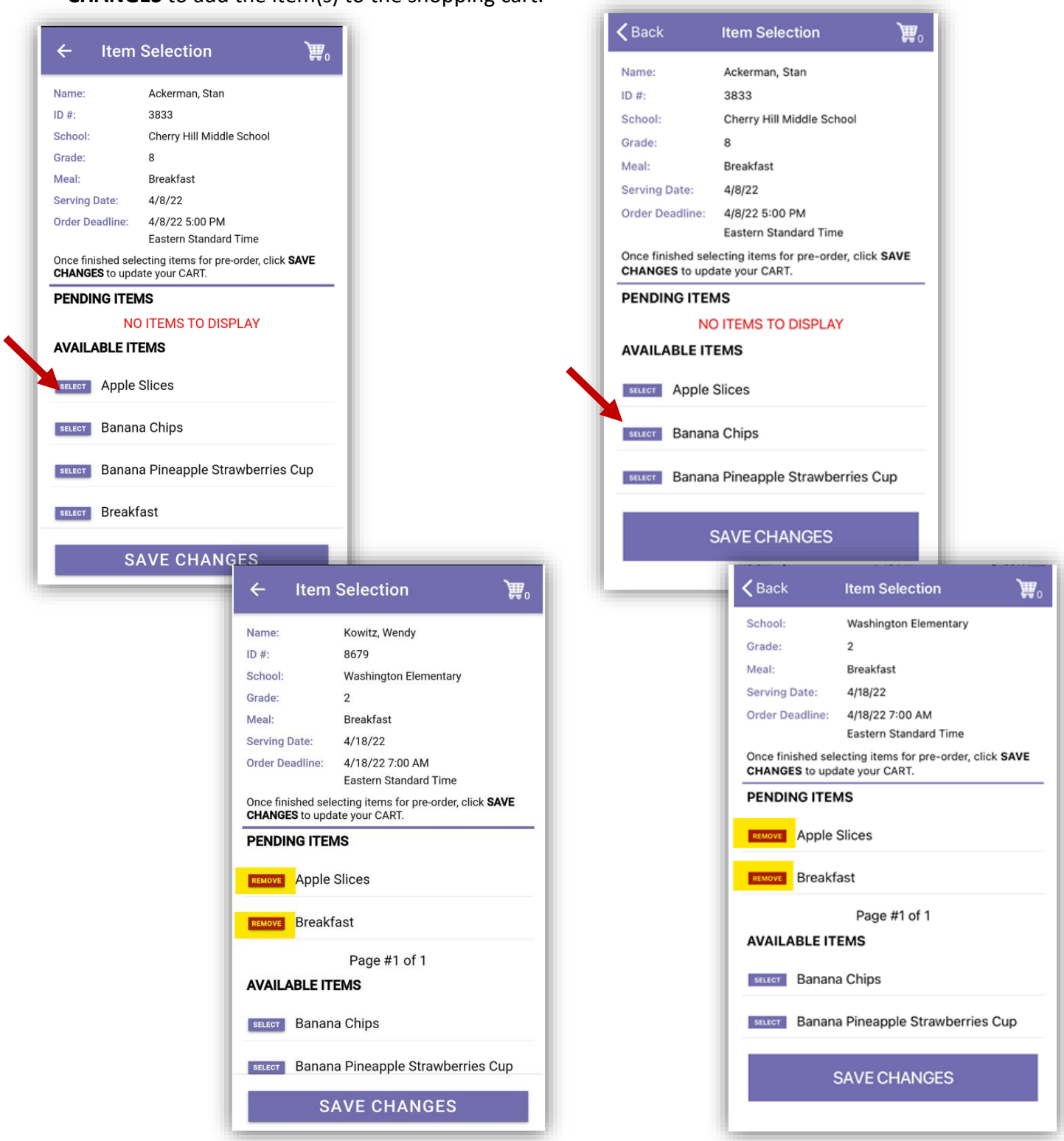
To choose an item, click on the word **SELECT** next to an item in the AVAILABLE ITEMS list. To Remove items from the Pending Items list, click **REMOVE** next to the Pending Item. Click **SAVE CHANGES** to add the item(s) to the shopping cart.



NOTE: *This document contains side-by-side screenshots.*

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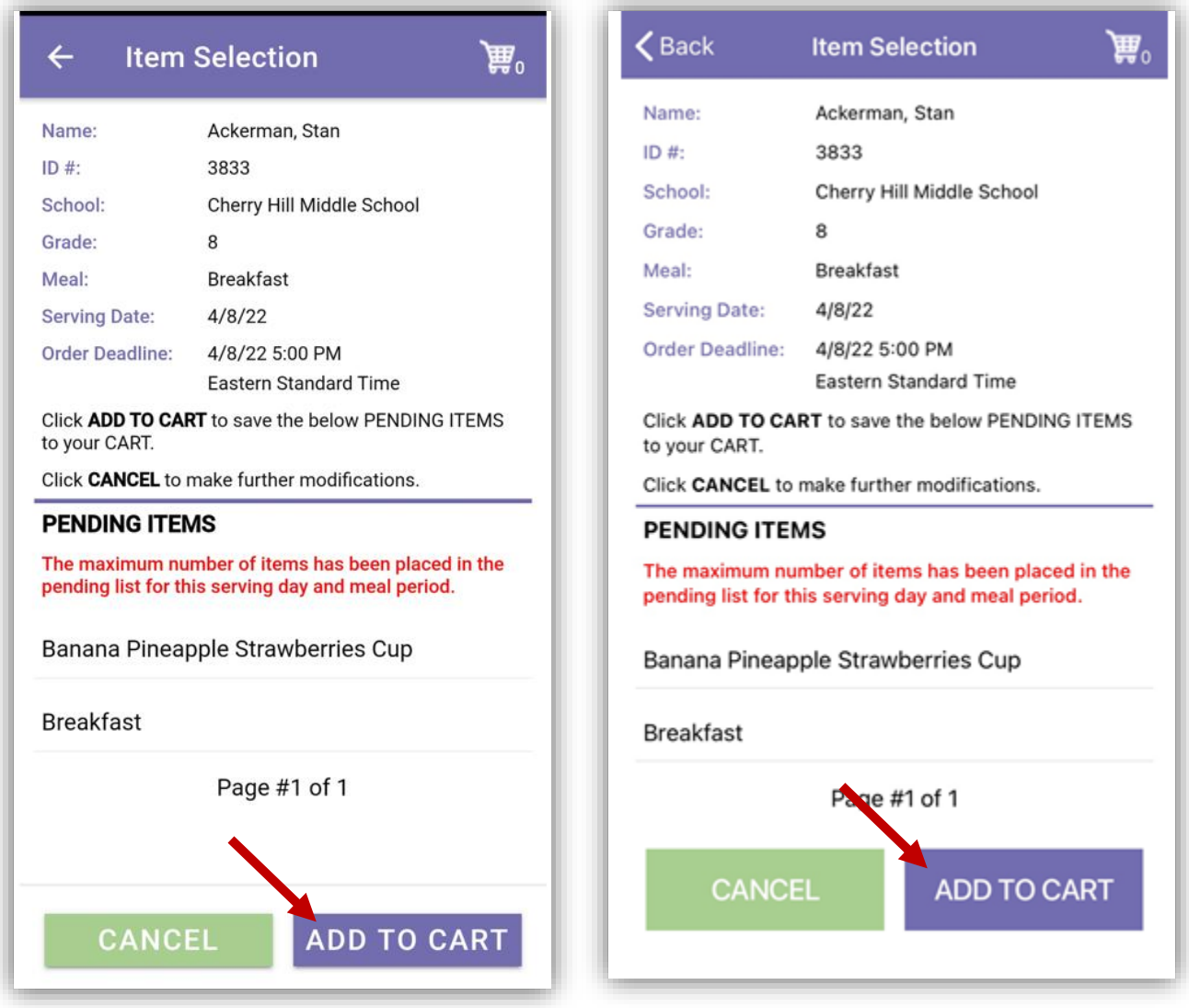
Click ADD TO CART to save the selections as PENDING ITEMS.



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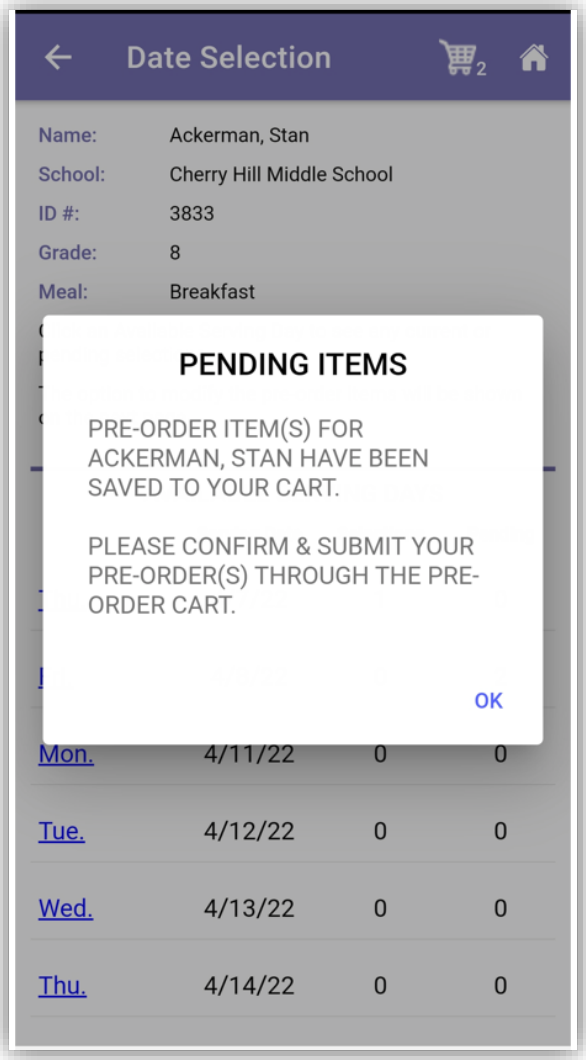
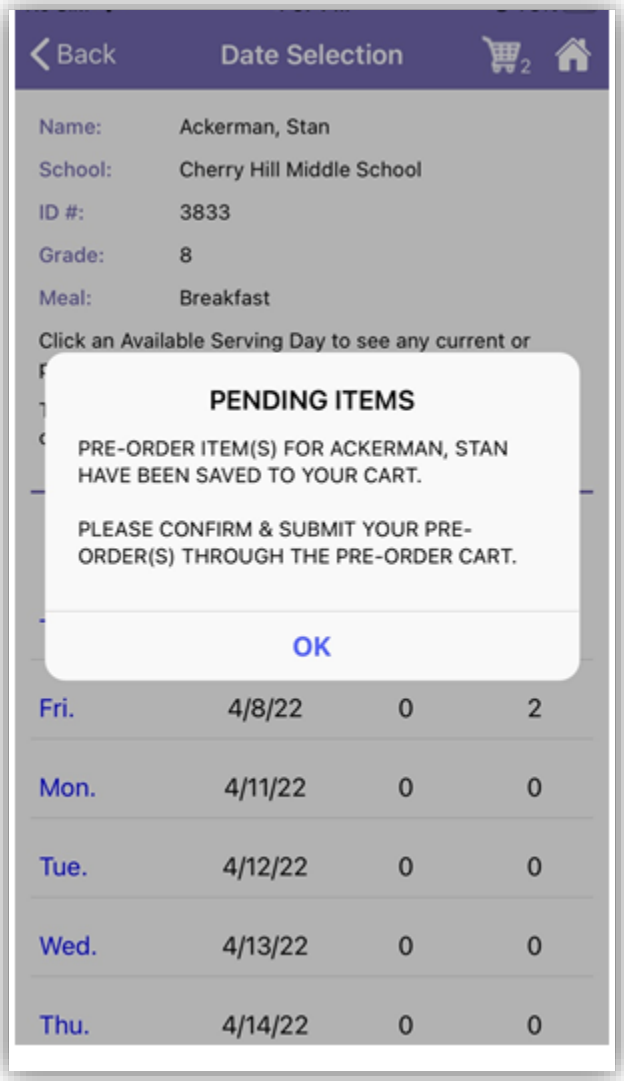
You'll receive confirmation that the pending items have been saved, click **OK**.

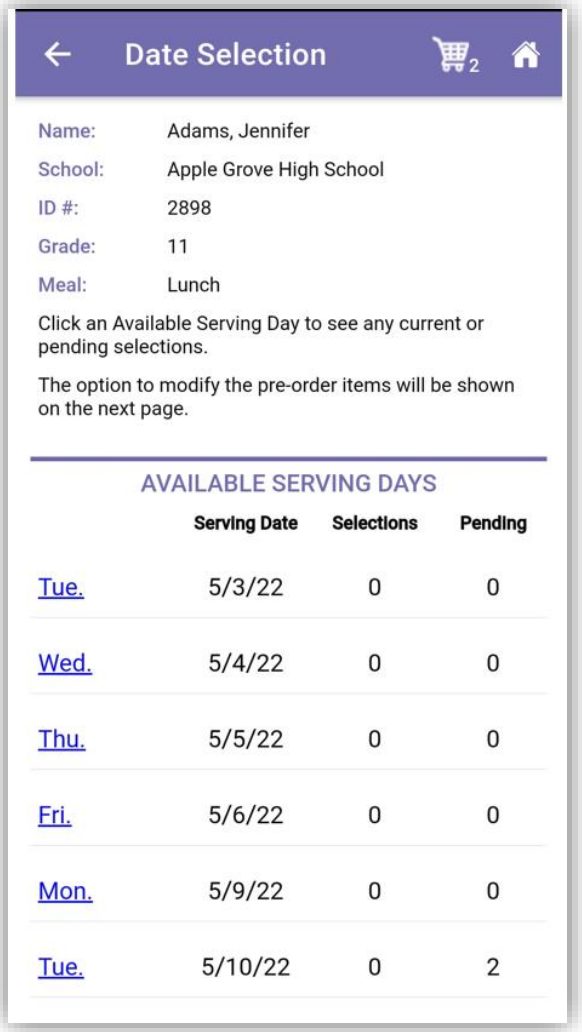


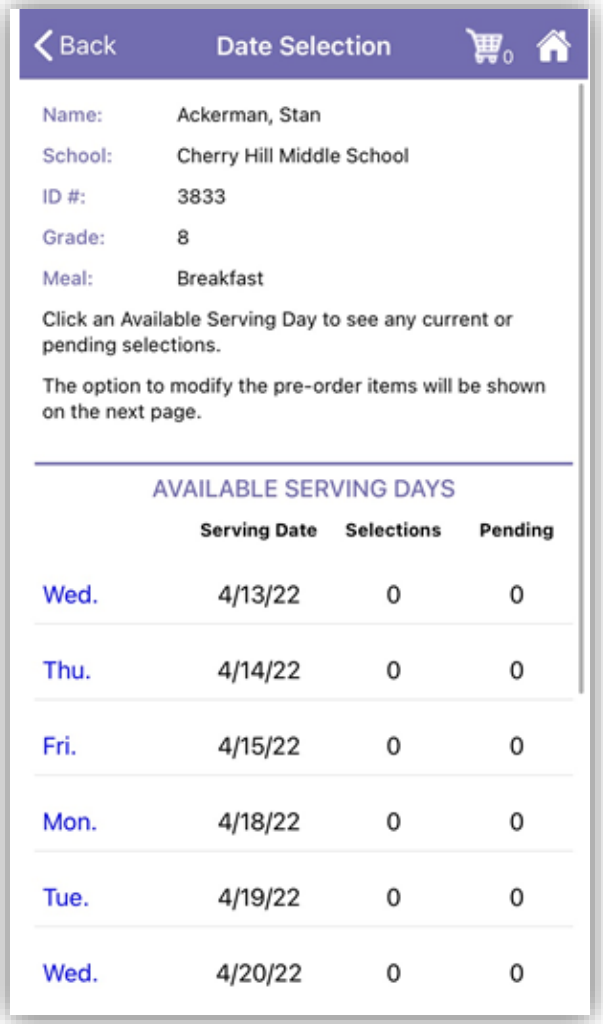


NOTE: *This document contains side-by-side screenshots.*

Android device images are on the left, Apple device images are on the right, unless noted otherwise.

Click on the Shopping Cart in the upper right corner of the screen to open the Pre-Order Cart.





NOTE: *This document contains side-by-side screenshots.*

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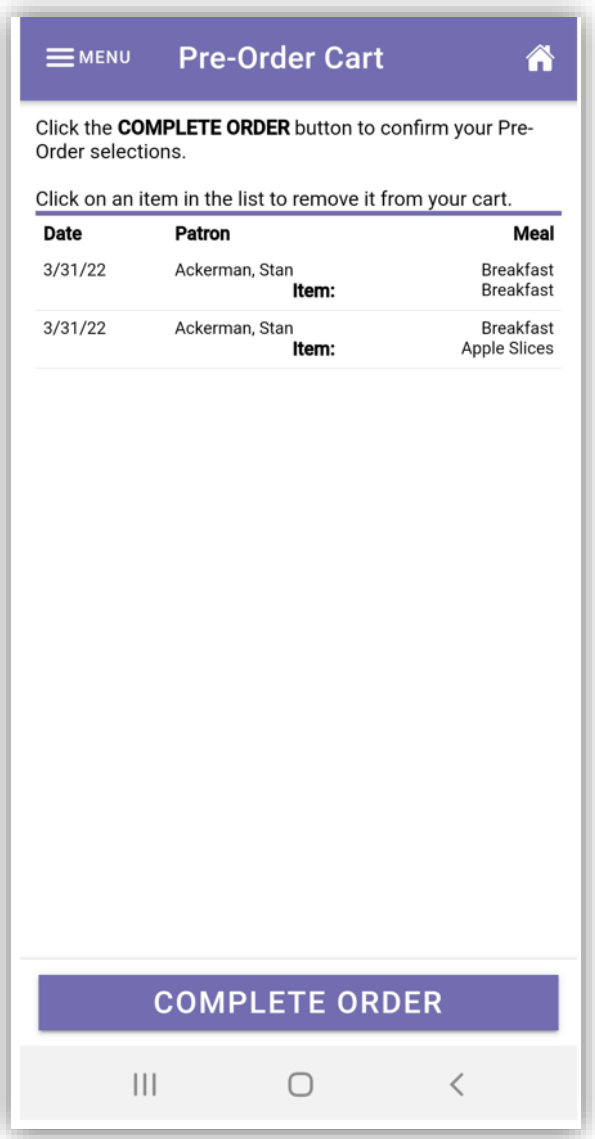
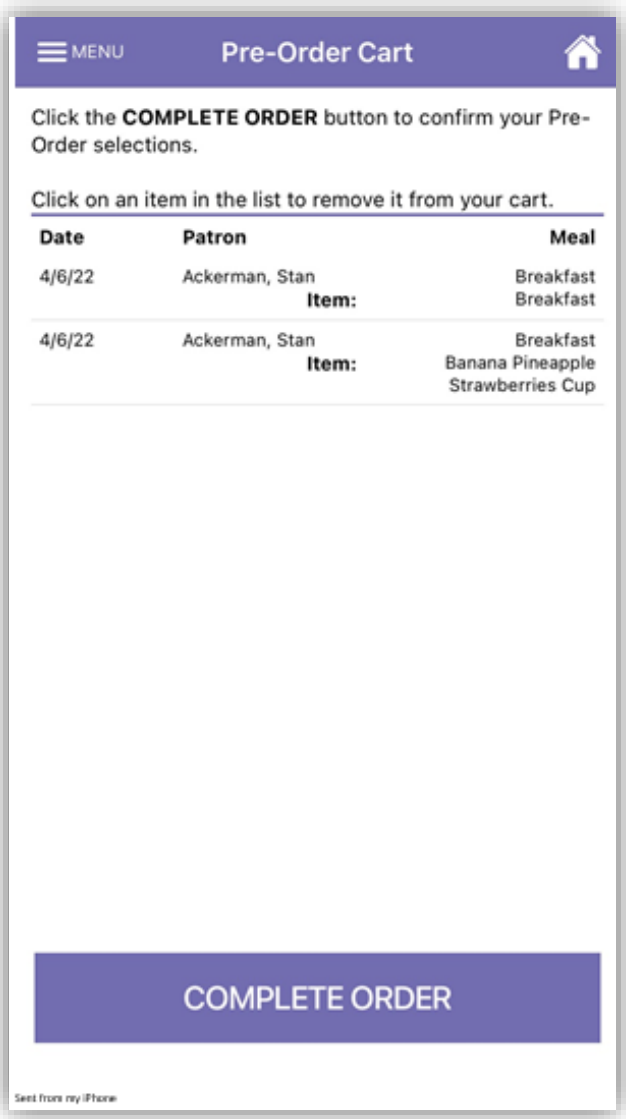
On the Pre-Order Cart page, you'll see a list of all pending Pre-Order Selections for your account. Click **COMPLETE ORDER** to confirm and submit your Pre-Order selections.





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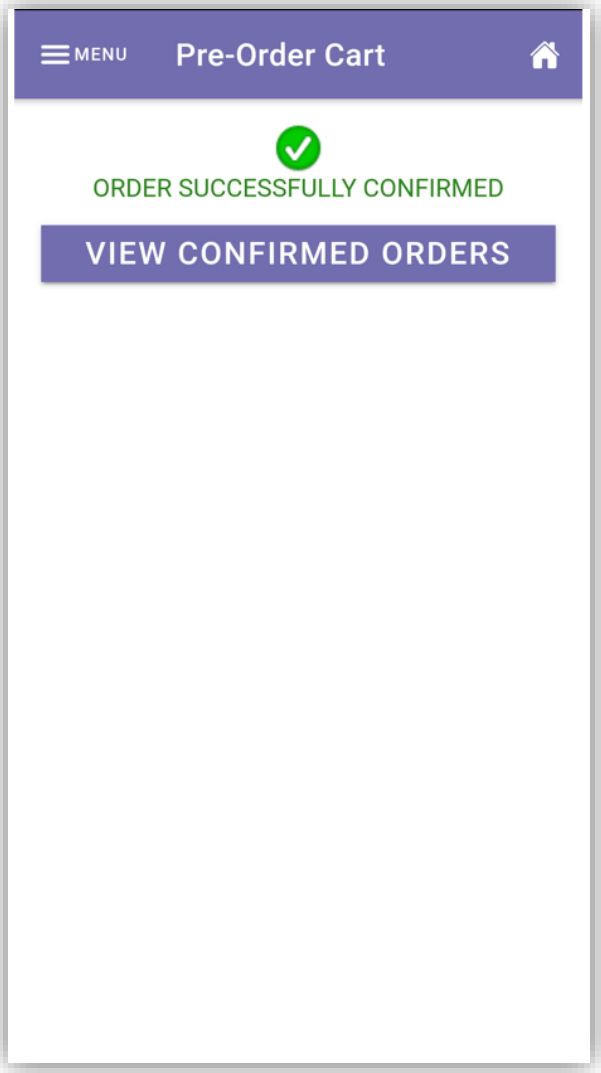
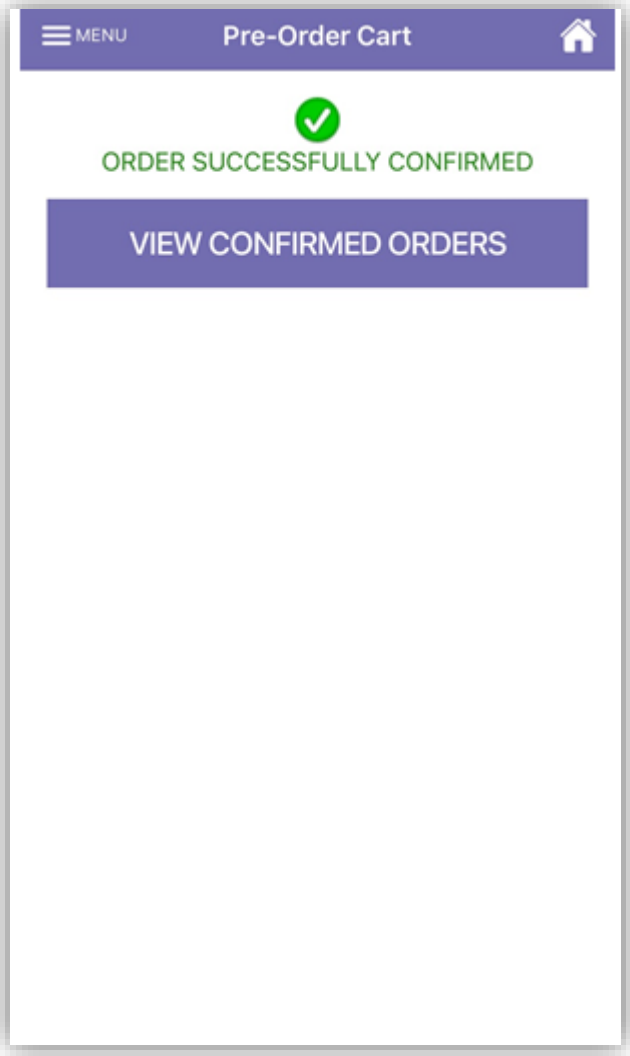
A successful order confirmation appears once the pre-order has been completed.

Click the Home icon to return to the Students list if you are pre-ordering for more than one student. Click on MENU to return to the Pre-Order menu options.





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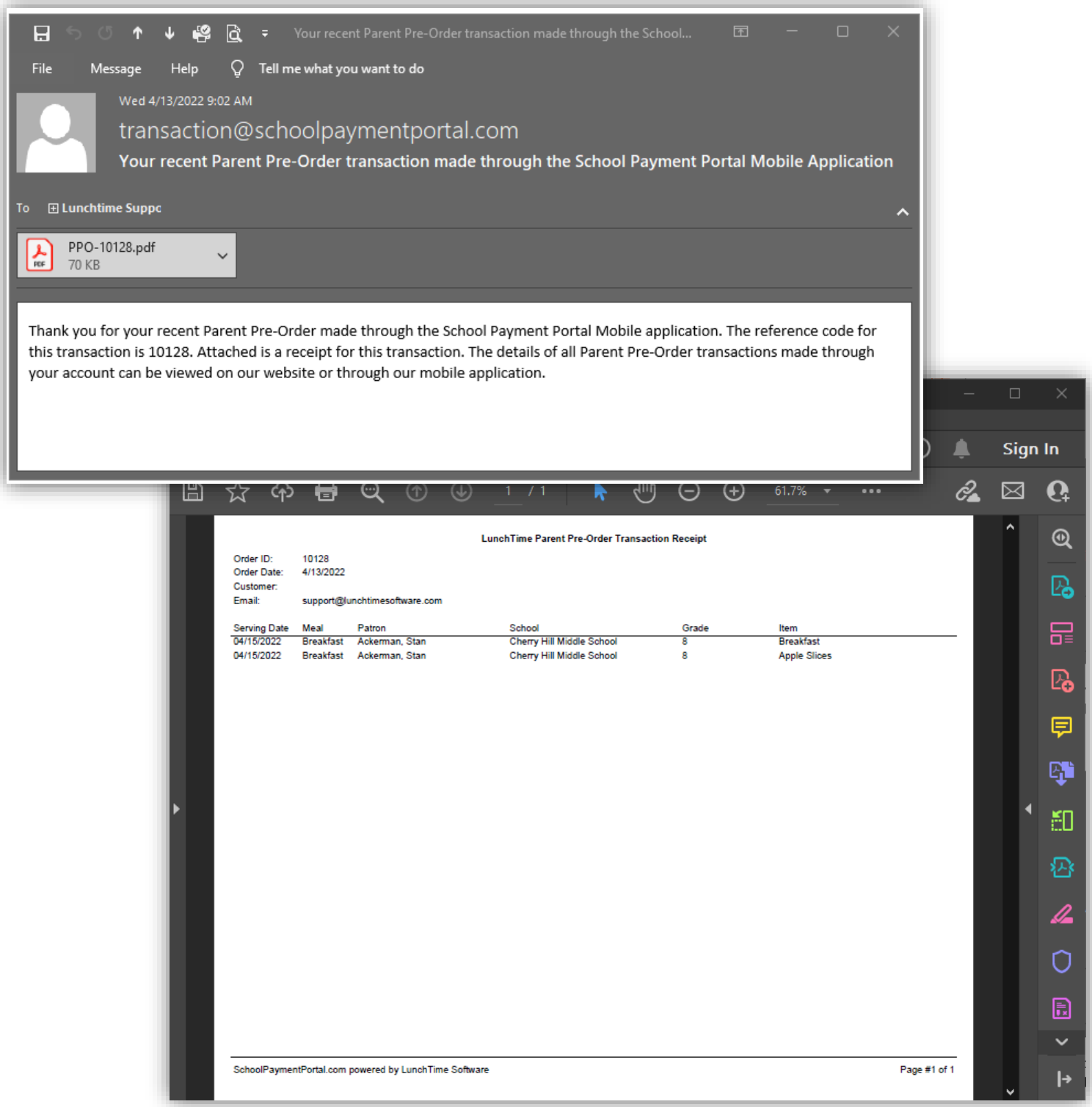
You will receive an email confirmation with a receipt attached to the email address used to create the account.



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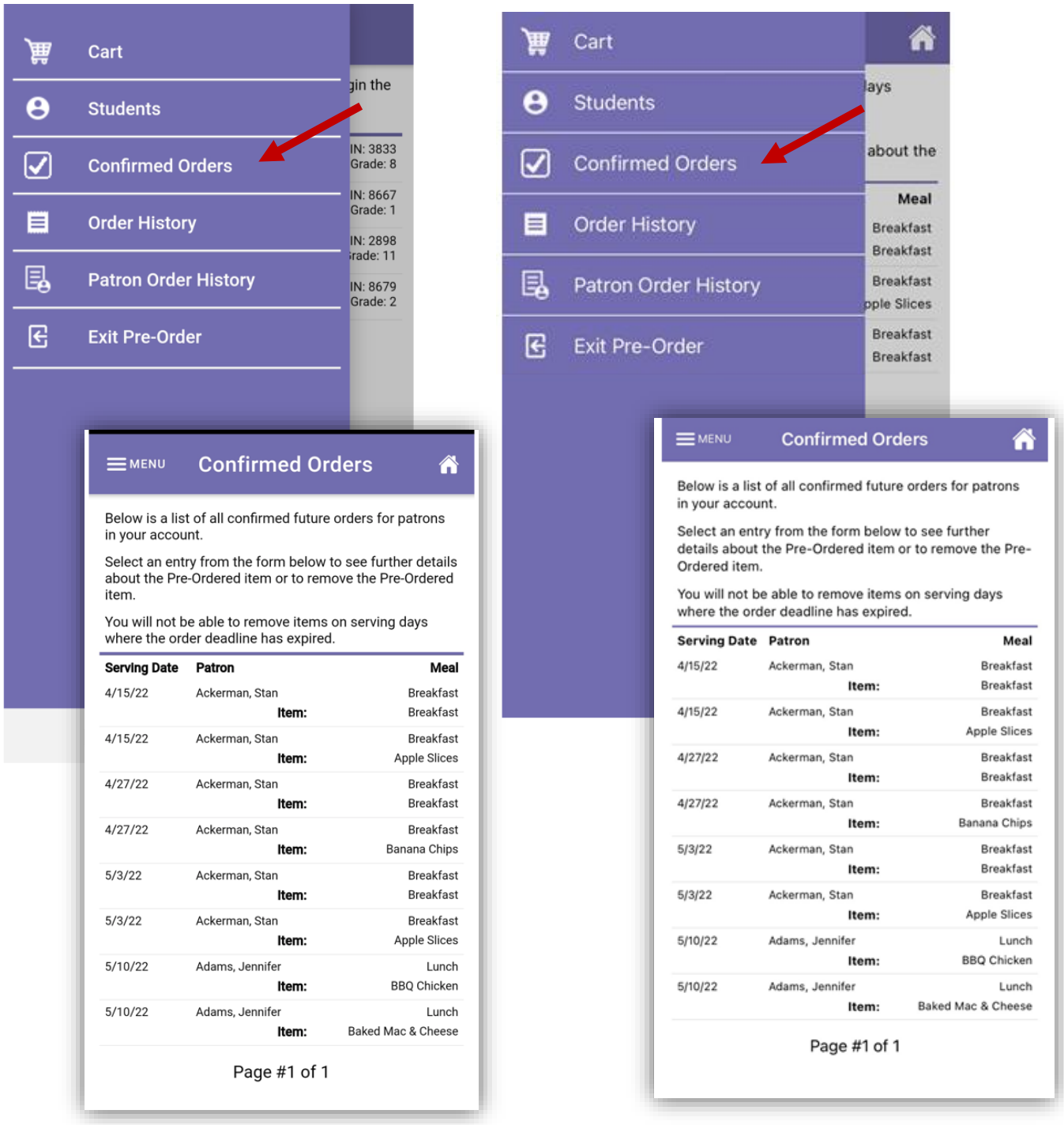
CONFIRMED ORDERS

Displays a list of orders that have been submitted.



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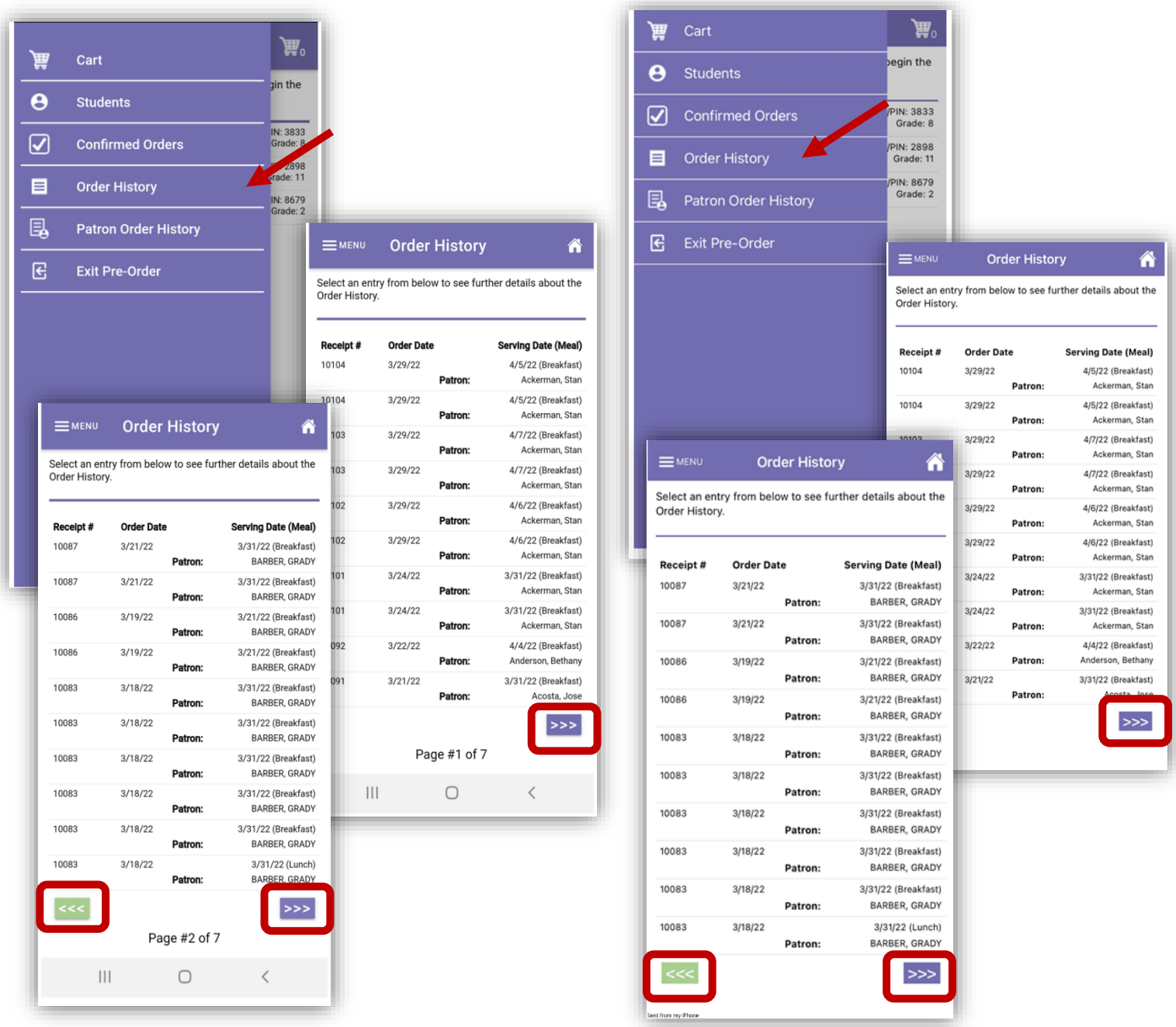
Pre-Order Menu

In the Pre-Order menu, click **Order History**

Order History

To see the order history details, select an entry from the list. At the bottom of each page of orders, use the blue arrows to advance through multiple pages. Use the green arrows to navigate through previous pages. Each page displays 10 orders.



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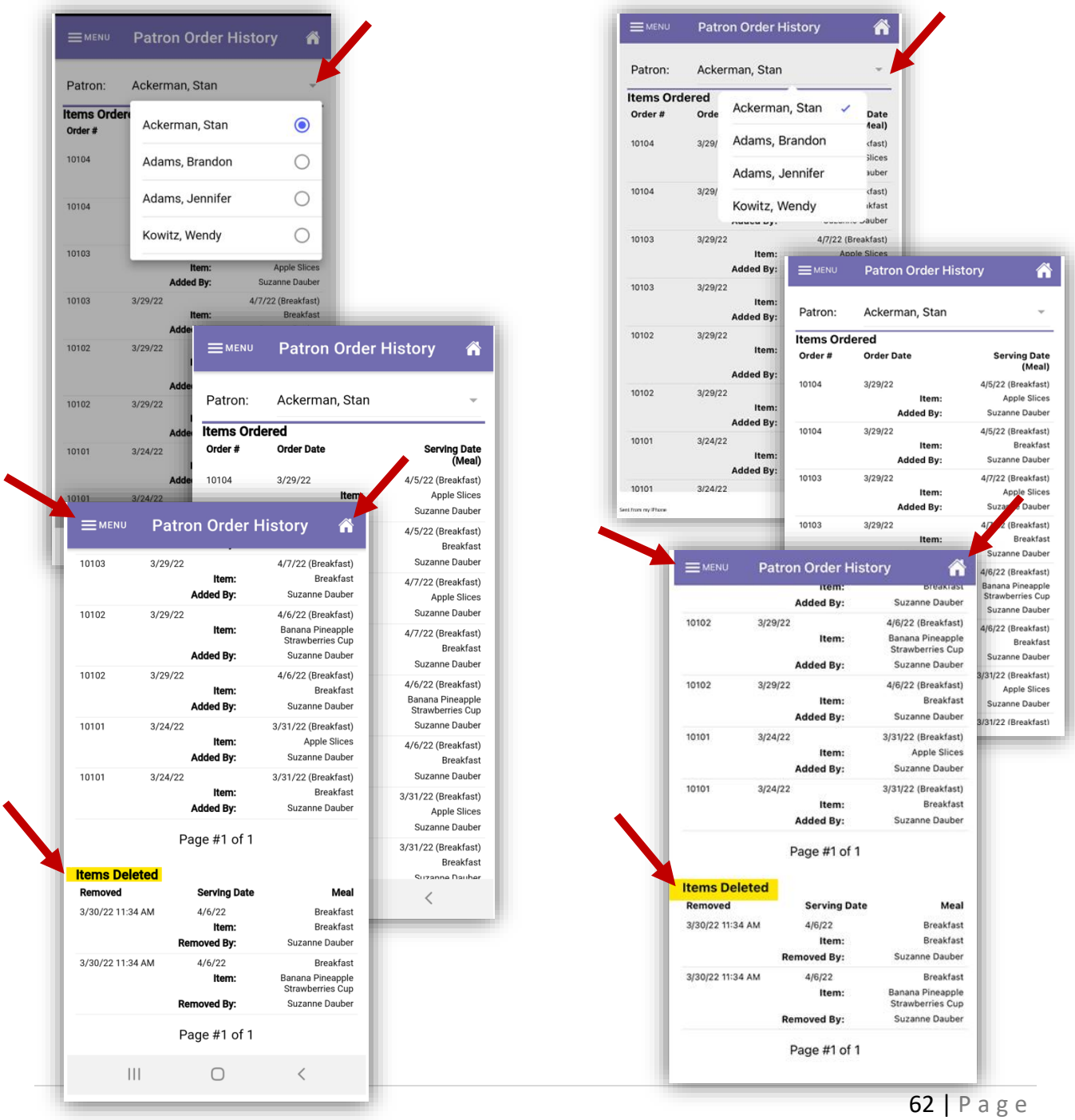
Patron Order History

To see order history details by patron, select a patron name from the dropdown list.

At the bottom of the order history list, the deleted items are displayed as well as the date/time of the deletion and name of the person who made the deletion.

The Home icon will direct you back to the Students page. The MENU will direct you back to the Pre-Order menu.



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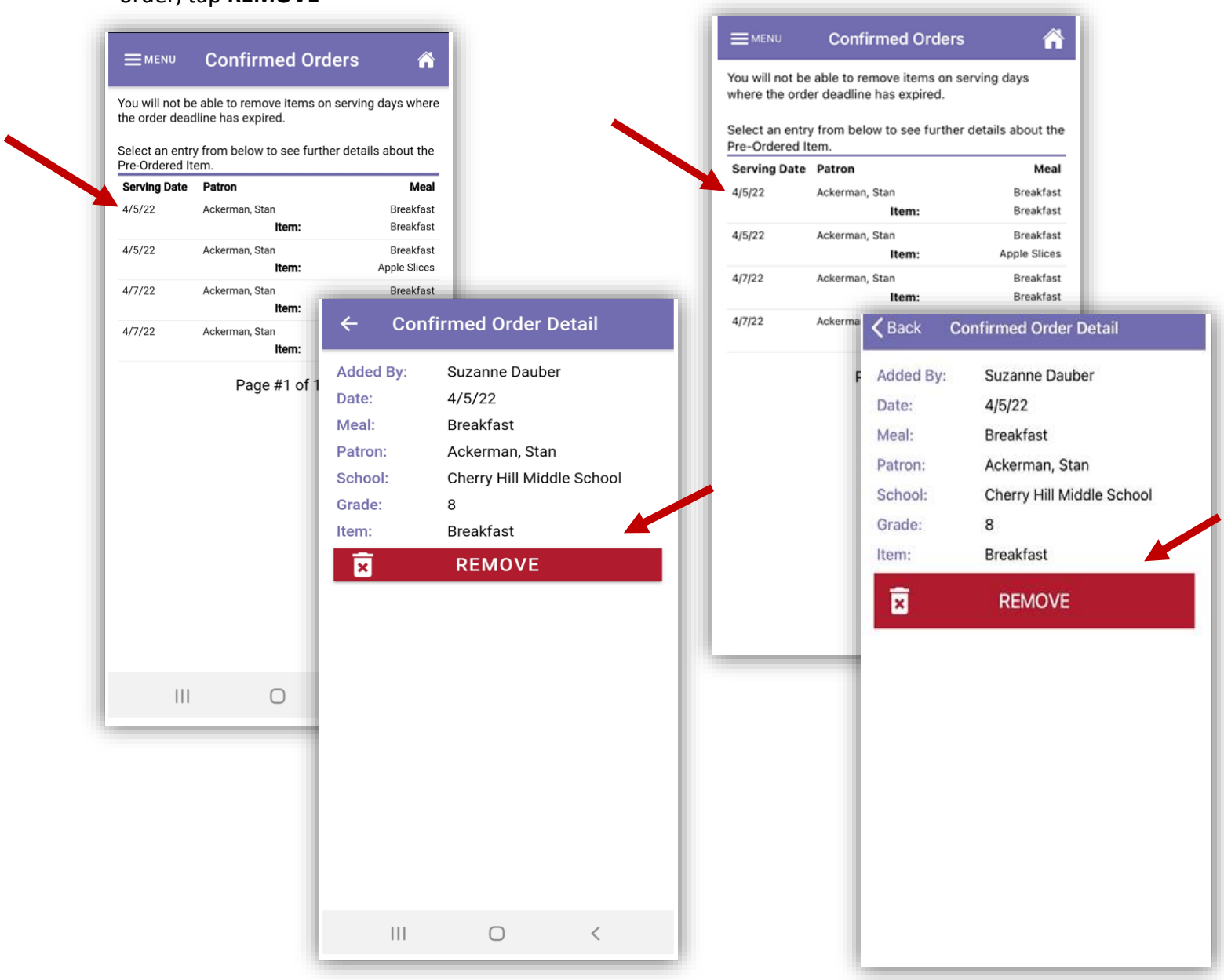
To see the details of a confirmed order, tap on the entry.

The detail screen information also gives the option to remove the order. You will not be able to remove items on serving days where the order deadline has expired. To return to the Confirmed Order screen, tab the **Back** arrow. To proceed with removing the item from the order, tap **REMOVE**



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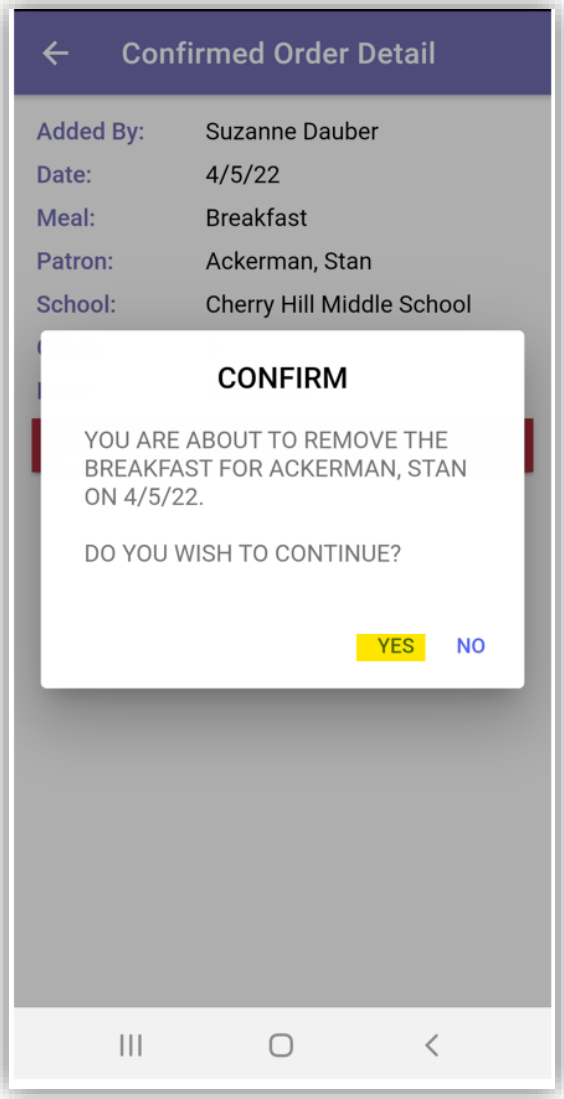
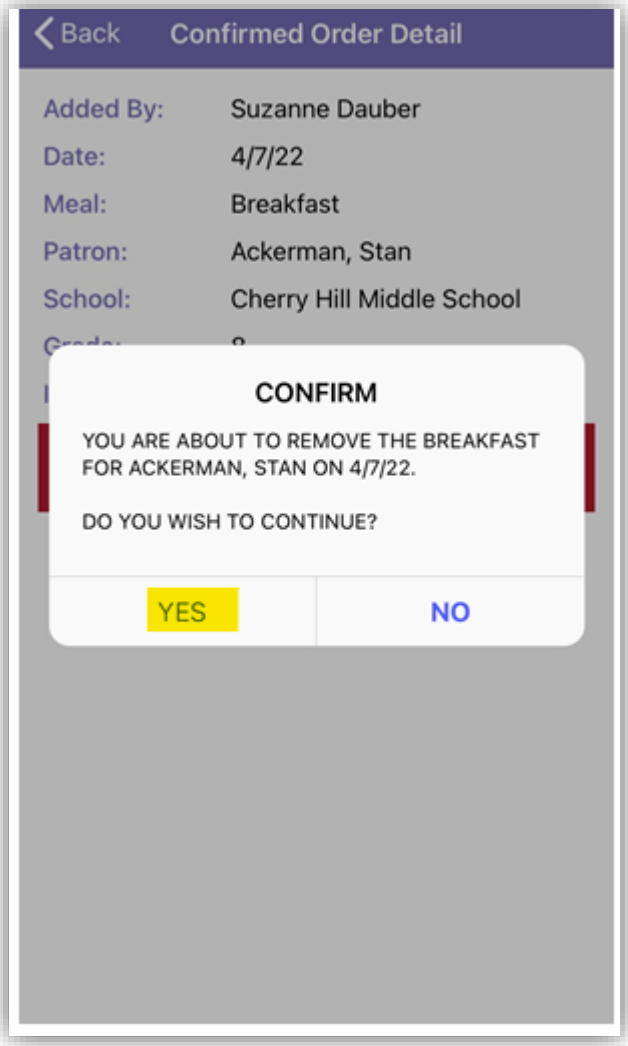
Click **YES** to confirm the that you want to remove the item.





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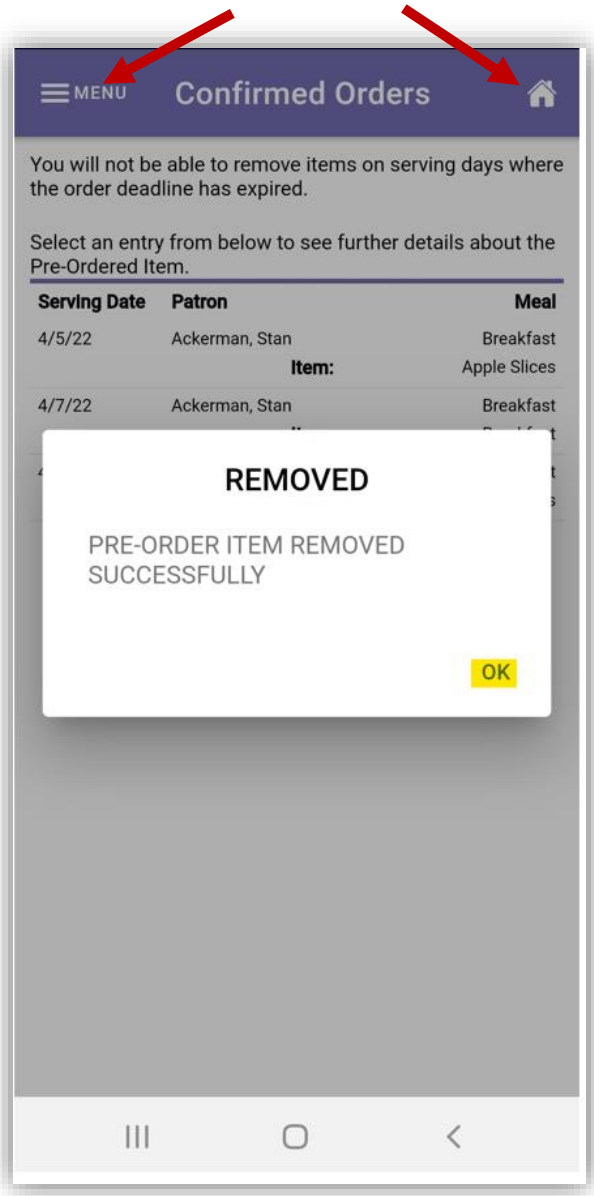
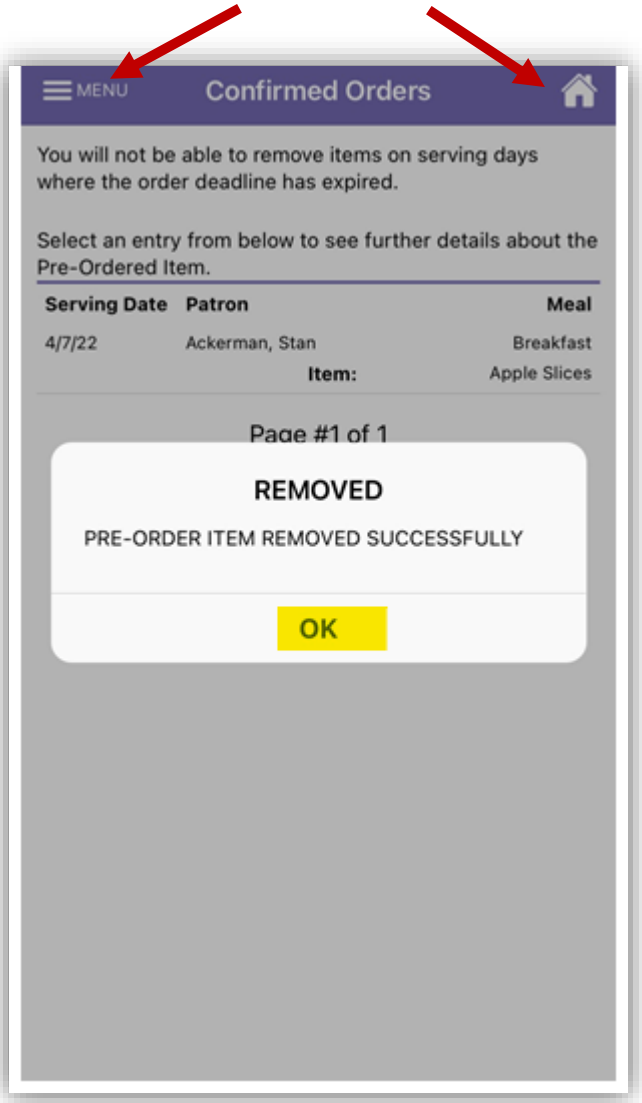
Click **OK** to acknowledge the removal of the item.

To return to the Students page, click the Home icon.

Click **MENU** to bring up the Meal Pre-Order menu.





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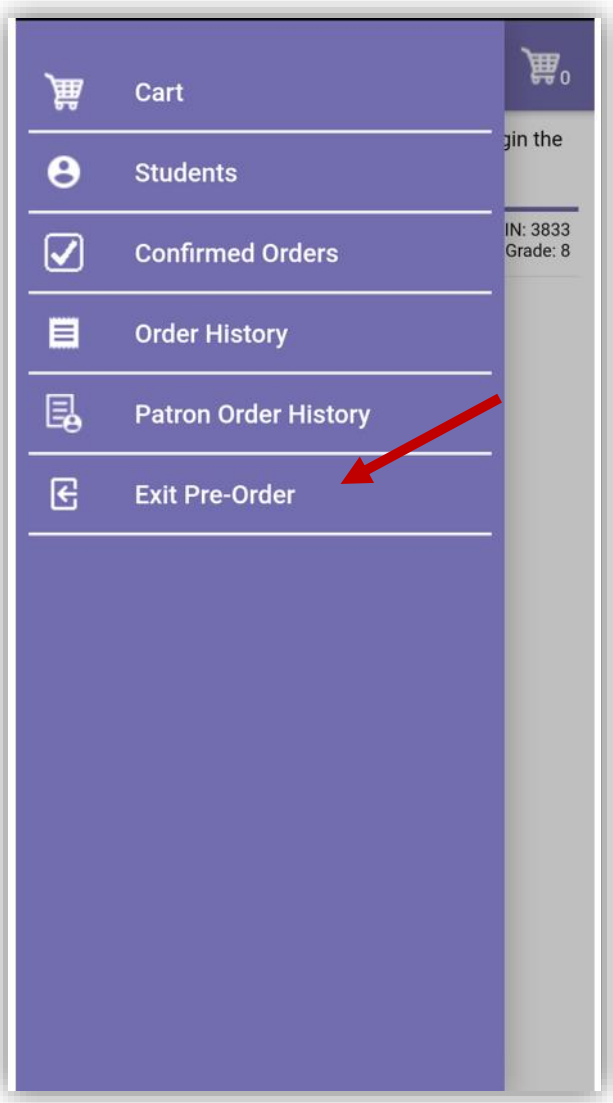
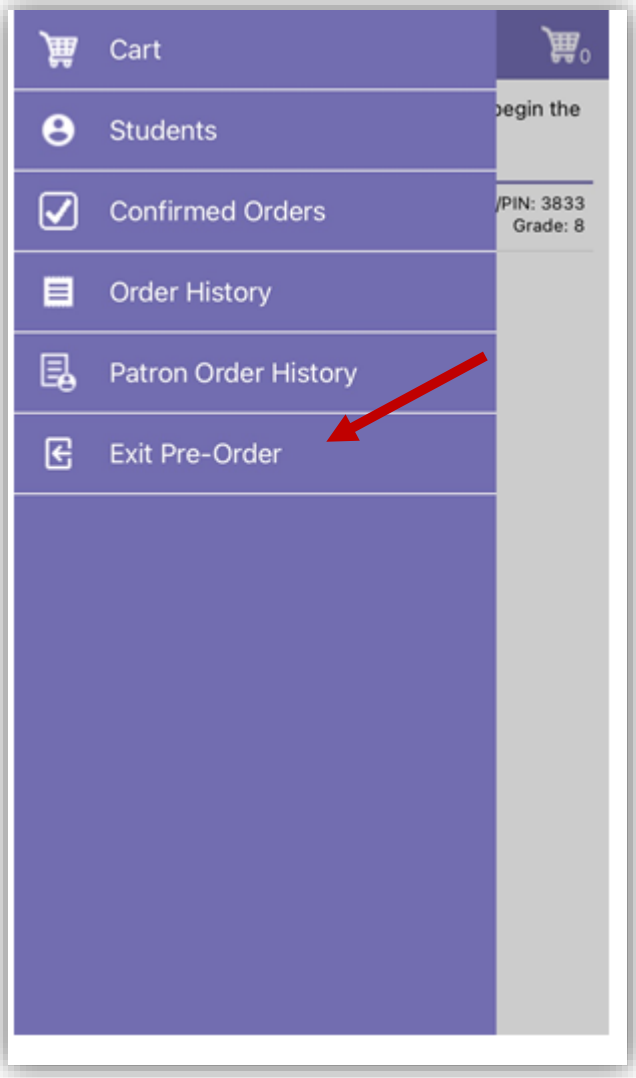
Exit Pre-Order

To exit out of Pre-Order, choose Exit Pre-Order from the MENU. You'll be directed to the Students Account page.

NOTE: You will be prompted if any pending pre-orders exist in your cart to confirm you still wish to exit the pre-order pages. Your pre-order cart will be cleared upon logging out.





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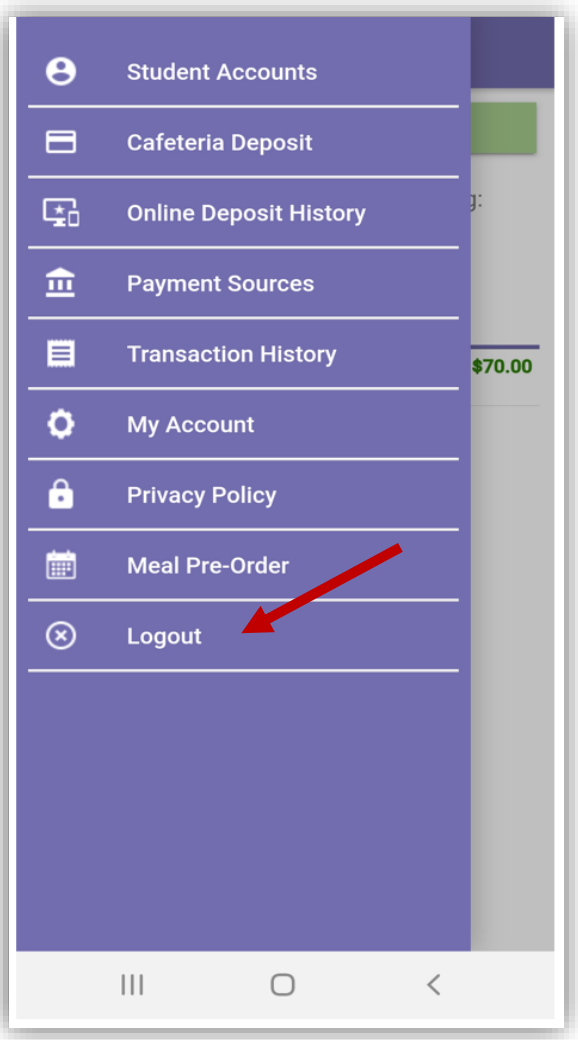
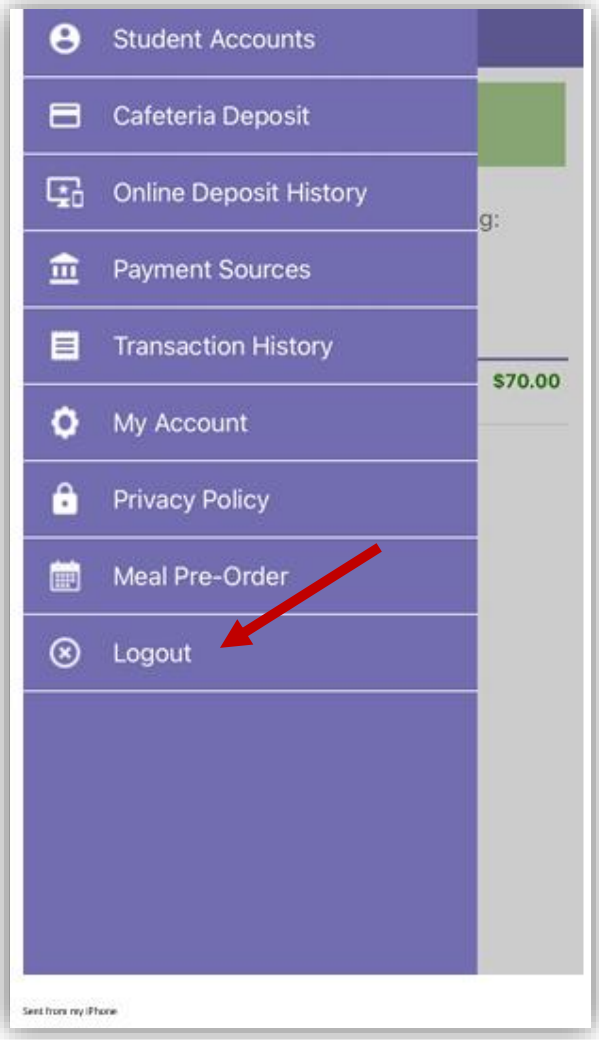
Logout

When you are finished, choose Logout from the MENU. You will be redirected to the Login screen.





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