



10.2 Release Notes

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Front Office

Accountability

- **Site-Level Charge Limit Management**

Districts now have greater flexibility in managing Charge Limits across their schools. Charge Limits can be managed at the individual site level when different locations require different policies. At the same time, districts can continue using a single set of District Default Charge Limits when consistent settings are preferred.

Sites using the District Default will continue to work as before, with changes to the district-level limits automatically applying to those sites. For districts with sites that need different charge policies, individual sites can now be given custom Meal and A La Carte limits without affecting the rest of the district.

The new management experience also makes it easier to identify which sites have customized settings, quickly apply defaults or custom limits to multiple sites, and review who made changes.

Accountability > Settings

Configuration

[CHARGE LIMITS](#)
[DEFAULT RESTRICTIONS](#)
[REVIEW REASONS](#)
[QUICK LINKS](#)

District Default Charge Limits

Patron Type	Meal	A La Carte
Free	\$1.00	\$1.00
Reduced	\$2.00	\$2.00
Paid	\$3.00	\$3.00
Staff	\$4.00	\$4.00
Visitor	\$6.00	\$6.00
Prog Adult	Unlimited	Unlimited

Charge limits determine how far an account is allowed to go into a negative balance before further purchases are restricted. Meal and A La Carte purchases have separate charge limits and are tracked independently.

Tips

- Setting a charge limit to \$0.00 will block all charges for that category.
- Meal and A La Carte charge limits are tracked separately.
- Changes affect future purchases only.
- Sites with Custom overrides are not affected when District Default values change.

Site Charge Limits

[SET ALL SITES TO DISTRICT DEFAULT](#) [+ EXPAND ALL](#)

	☐	Site	Status	Overrides	Action(s)
>	☐	162 - Texas ISD Elementary	Default		✎ 🔄
>	☐	163 - Texas Elementary	Custom	Free, Reduced, +3 more...	✎ 🔄

Highlights:

- **Keep it simple with District Defaults:** Continue managing one set of charge limits for the entire district when site-specific settings are not needed.
- **Customize Individual Sites:** Give specific sites their own Meal and A La Carte charge limits when their operational needs differ.
- **Quickly Identify Differences:** See which sites are using District Defaults and which have custom charge limit overrides.

- **Make Changes in Bulk:** Select multiple sites to apply District Defaults or configure custom limits without updating each site individually.
- **Unlimited Charge Limits:** Leave a limit blank to allow unlimited charges for that patron type.
- **Review Changes with Confidence:** View the history of charge limit changes, including who made the change and when.
- **Maintain Control:** Permissions can be used to limit who can edit District Defaults or apply the District Default across all sites.

Existing charge limit behavior is preserved under the District Default, so districts that do not need site-specific limits can continue managing charge limits as before while gaining the flexibility to customize individual sites as needed.

Note: This feature is not available when custom grade groups are enabled ('Price according to Site Type or Grade Group' Internal setting).

A new special role permission has been added for changing District Defaults called 'Edit District Defaults.'

Accountability > Settings > Configurations > Charge Limits tab

Account Management

- **Updated Behavior for the 'Maximum a la carte purchases allowed per day' Restriction**

The 'Item(s) per day' setting behavior has been fixed. Previously, a la carte items were only restricted by meal type, not by day.

Account Management > Accounts

Family Hub

- **Display Menu Item Details by Serving Size**

Menus are now enhanced to display serving sizes, nutritional information, and any related Menu Item details when accessing online, based on the selected grade or patron. Previously, serving size and nutrition information were only based on the Menu Item's default serving size.

Family Hub > Menus > School Menus > Menu Item Details

Back Office

***This section offers a quick overview of updates in Menu Planning and Production. For additional details, refer to the [Menu Planning & Production Release Guide](#).**

Menu Planning

- **Menus Redesigned**

We're excited to introduce a completely redesigned menu experience. Menus no longer require users to choose between view and edit modes before opening; a single click now takes you straight into the menu, in whatever state it's in. Menu serving and serving group details, which used to take up a lot of screen space, are now tucked away in slide-outs, allowing users to see more Menu Items without scrolling.

Editing has also been reorganized into focused modes such as Items & Counts, Serving Details, and Sorting, allowing users to focus on the main editing task at hand. A new Analysis bar displays real-time compliance/nutrition results directly on the Menu screen as you build it, ensuring as much system feedback as possible to create compliant menus. The detailed slide-out is still available anytime you need to dig into the specifics, and it includes a new "Reasons for Concern" section to help users pinpoint where a menu is failing/low. And for the first time, you can set a custom display order for Menu Items and categories, rather than relying on alphabetical sorting alone, and carry this sorting configuration over to the Family Hub Menus.

Menu Planning > Menu

- **Autofill**

Autofill gives users a good starting point for entering counts. Enabled by default for all categories in a menu, the system will automatically generate percentage-based counts as you add or remove items. When a user decides to enter their counts manually, it will turn off that specific category and allow the user to enter counts that best suit their operation.

Menu Planning > Menu

- **Menu Item Info Panel**

The redesigned Menu Item Info panel replaces the small pop-up and displays relevant information for selected items: servings, cost, and contributions for Direct Menu Items; a full ingredient breakdown for recipes; and all included Menu Items for Variety Menu Items.

Menu Planning > Menu

Menu Cycles

- **Menu Cycles Unified**

"Standard" and "Menu Planner" have been merged into a single Menu Cycle experience. Previously, choosing Standard allowed the user to see a preview of the menus and rearrange them, but not edit them. The menu planner allowed for editing but was limited (no editing counts or sorting). That trade-off is gone, complete view/edit functionality is in one place, and a simple toggle lets you switch to a lighter, simplified view whenever you like, without losing access to full detail.

Menu cycles open by default in an "All Weeks" view, giving you the entire cycle on one screen rather than scrolling endlessly through individual weeks. Live analysis is available at both the day and week level, with quick-glance pass/fail indicators for every week and plain-language explanations of what's driving any compliance concerns.

Menu Planning > Menu Cycle

Menu Versioning

- **Automatic Menu Versioning**

This release introduces automatic version history for every menu. Menus are never "locked"; you can make changes at any time, and the system determines whether a change is significant enough to warrant a new version. When a new version is created, any production records that are already complete stay tied to the version that was active at the time, preserving an accurate record for audits, while anything not yet complete automatically carries forward to the latest version.

A new version log shows you exactly which version is currently active, how many production records and plans are tied to it, and its effective date range. Past versions can be viewed at any time, restored to make them current again, or copied into a brand-new menu if you would like to branch off in a new direction. This eliminates the need to manually create and manage menu copies whenever changes are needed, a process that, for some districts, has resulted in thousands of near-duplicate menus over time.

Menu Planning > Menu

Production

- **Plan & Record Redesigned**

Production Plan and Record have been redesigned to match the new Menu experience, with the same emphasis on compact, readable layouts. Both now have a genuine read-only view once complete, rather than showing editable fields regardless of status, and column headers stay in view as you scroll, so you never lose track of which serving group you're working with.

Variety Menu Items are also easier to manage. Once selections have been made, a VMI condenses into a single row with a convenient panel for adjusting which varieties are active and in what quantities, rather than requiring a long list of individual toggles to stay visible on screen.

Production > Calendar > Plan, Record tabs

- **Food Required & Food Used**

Food Required and Food Used are now tracked at the ingredient level and can be edited directly as needed, providing flexibility when the system's calculated quantity doesn't quite match what happened in the kitchen. Any adjustments you make automatically flow through to the rest of the system, including inventory for production withdrawals, so records stay accurate to the true quantities used.

Production > Calendar > Plan, Record tabs

Configurable Production Records

- **Production Record Configuration**

Production Records can now be tailored to match your state's specific requirements. From the Production Record Configuration screen, you can turn on only settings that apply to your specific district, including temperature tracking, a personnel hygiene checklist, digital signature requirements for completing a record, cost per serving, customizable tracking for non-reimbursable servings, and the ability to track additional meal or tray types individually rather than all at once. Each setting works independently so that you can build exactly the record your operation needs.

Production > Record Configuration

USDA Compliance

- **Whole Milk & Final Milk Rule Support**

In line with USDA's new Final Milk Rule, whole milk can now be offered under NSLP, SBP, and CACFP for ages 3 and up. Saturated fat is automatically excluded from weekly nutrition calculations for any milks, so offering whole milk won't unexpectedly affect your nutrient compliance results.

- **Faster CN Database Updates**

The CN database now updates on a quarterly basis instead of once a year, providing updated data regularly to ensure users receive the most up-to-date information