



# 9.3 Release Notes



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**Accountability**

- **Report Updates Across the Accountability Module**

Following up on the last few releases, we have finished updating the reports in Accountability to roll out multi-select dropdowns where appropriate.

*Accountability > Reports*

- **Menu Item Sales now has a Performance Report**

We have added a new option to the Menu Item Sales Report - the Performance version! This report aims to show how items have performed. You can select multiple items and sites to see how sales have progressed over time!

*Accountability > Reports > Menu Item Sales*

- **Enhancements to Transaction Adjustments**

We have made some usability enhancements to the Transaction Adjustments grid.

- Site Selector is now a multi-select, and the Date Selector has been updated.
- Nested expanders have been removed.
- New columns include Serving Site, Enrollment Site, and User Name.
- Search filters have been added to several columns.
- An Export feature has also been added to send the grid results to Excel.

*Accountability > Transactions > Adjustments tab*

- **Continued Rollout of CACFP Support**

We are continuing to enhance our ability to support CACFP by updating the Revenue Report. You can now select CACFP and view related revenue information.

We have also updated Reimbursement Rates (in the System module) to allow CACFP rates to be entered. We will use these rates for future updates to the Activity Report and eventually for a CACFP Reimbursement Claim.

*Accountability > Reports*

## POS

- **Warnings for Post-Dated Sessions at the POS**

We have added a confirmation prompt at the POS if a date that is not today is selected for opening a session. There are also some visual warnings (dates highlighted in red) at the POS after opening a session. This is to help ensure sessions are recorded on the correct date.

*Accountability > POS*

- **Served Sites feature for Shared Campus scenarios**

We are happy to announce the release of the Served Sites feature, aimed at shared campus scenarios where a cafeteria may serve multiple schools at a central location. This can be configured via the Site Configuration page (**System > Sites & Users > Site Configuration**).

Feature Highlights:

- Faster Line Speeds!
  - Preloads student data at the primary site and any connected served sites upon launching the POS.
  - Suppresses the visiting student pop-up for students at the connected sites.

Meals will still be claimed per the usual configuration options. Please try this out and let us know how it goes!

*Accountability > POS*

## Eligibility

- **Copy Feature for Optional Benefits**

We have added a Copy feature to the Optional Benefits page to allow for configurations to be copied year over year. Unless any accounts currently use those benefits, it will delete anything configured for the target year! Be careful!

*Eligibility > Settings > Optional Benefits*

- **Report Updates for the Eligibility Module**

Following our updates to the Accountability module, we have updated the following reports:

- Application Counts
- CEP Identified Students
- Direct Certification Counts
- Economically Disadvantaged %
- Eligibility Summary
- Income Surveys

All reports have had their dropdowns expanded to multi-select where appropriate, and the date selector has also been updated.

*Eligibility > Reports*

- **Access to Uploaded Direct Certification Files**

Files uploaded on the Direct Certification page will now be available in the Documents section for easy access. They were previously available on the Data Exchange page but are now directly accessible from the relevant file after processing is complete.

*Eligibility > Direct Certification > Files*

## **Account Management**

- **Refunds via Check**

We have updated how refunds are processed to allow the option to record one via Check. Previously, Cash was the only option.

As part of this update, we have also made changes to:

- Receipts → You can see if the refund was performed by a Cash or Check.
- Transaction Grids → You can also see whether it was Cash or Check here.
- Cash Collection Report → An option to include Refunds has been added to the report.

*Account Management > Accounts > Refunds*

## Family Hub

- **Publish Menus to the Family Portal Based on Planned Production Counts**

Now, users can publish their Production Plan details to the Family Portal instead of publishing based on the Menu Calendar. (This setting requires a Menus & Nutrition license and the setting, "MNUPUBMTHTD" set to publish menus based on the Production Plan.)

*System > Configuration > Settings*

## Back Office

### Item Management

- **Conversion for Veg-BP to MMA Contribution**

Users can now set up a conversion for using Veg-BP (Beans, Peas, and Lentils) as MMA under the Contribution Info section for items and recipes. This will allow users to define how much MMA is equivalent to the amount of Veg-BP if used as a substitution on a menu.

*Item Management > Items, Recipes*

Item Management

Item Details

Item LI-0417

Active

Units

Locked

Menu Enable

Item Description

Celery, raw (CN 11143)

Item Category

Vegetable - Fresh

Brand

Storage Category

Cooler

Manufacturer

Valuation Category

Commodity

Product Code

Description

Bag

1 Nlea Serving

1 Cup Chopped

100 Gram

NUTRIENT INFO

MENU & POS INFO

POS PRICING

INVENTORY INFO

Nutrient Details

Serving Size: 100 Gram ( 100.000 g )

Nutrient	Per Serving	% of Calories
Calories	14 Kcal	
Total Fat	0.17 g	10.93 %
Saturated Fat	0.042 g	2.70 %
Trans Fat	0 g	
Cholesterol	0 mg	
Sodium	80 mg	

Contribution Information | (LI-0417) Celery, raw (CN 11143)

Serving Size: 1/2 Cup (60.000 g)

Food Component	Contribution	Variety
Fruits		<input type="checkbox"/> Fruit Juice
Meat/Meat Alternates		
Whole Grain Rich		<input type="checkbox"/> Grain-Based Dessert
Non-Whole Grain Rich		
Fluid Milk		
Vegetables		<input type="checkbox"/> Vegetable Juice

1/2

Cups

2

Oz Eq.

Beans, Peas & Lentils

+

BP to M/MA Conversion Value

BACK

SAVE

Item Management

## Recipe Details

Recipe LR0953 Active #

Menu Published >

Recipe Description  
Barbecue Chicken Salad

Allergens  
Contains Soy, Tomato, May Contain Gluten

Overview  
-

Servings

Description # of Servings

Entire Recipe --

2/3 Cup 6

NUTRIENT INFO ✓ STEPS & INGREDIENTS ✓ MENU & POS INFO ✓ POS PRICING

Nutrient Details Serving Size: 2/3 Cup (189.024 g) MANUALLY ENTERED

Nutrient	Per Serving	% of Calories
Calories	210.069 Kcal	
Total Fat	2.953 g	12.65 %
Saturated Fat	0.19 g	0.81 %
Trans Fat	0.001 g	
Cholesterol	22.154 mg	
Sodium	532.239 mg	
Carbohydrate	36.574 g	69.64 %

Contribution Information | Barbecue Chicken Salad

Serving Size: 2/3 Cup (189.024 g) ⚠ APPLY RECOMMENDATION

Food Component	Contribution	Variety	Recommendation
Fruits	<input type="text"/>	<input type="checkbox"/> Fruit Juice	
Meat/Meat Alternates	1 1/4 <input type="text"/>	<input type="checkbox"/> Grain-Based Dessert	3/4 M/MA
Whole Grain Rich	<input type="text"/>		3/4 WGR
Non-Whole Grain Rich	<input type="text"/>		
Fluid Milk	<input type="text"/>		
Vegetables	<input type="text"/> 1/8 <input type="text"/> 1/2 <input type="text"/>	<input type="checkbox"/> Vegetable Juice <span>Beans, Peas &amp; Lentils</span> <span>+</span> <span>⊗</span>	1/8 Veg-RO

< BACK SAVE

- **Product Based Added Sugar Flag**

Based on new USDA regulations, there are now product based added sugar requirements that must be enforced in the nutritional analysis. Under the Menu Item tab in Item Management, a designation is now available to mark a Menu Item as product based, with options for Breakfast Cereal, Yogurt, or Flavored Milk. Any Menu Item marked with this designation will be flagged for the nutrient analysis to check against the added sugars per ounce and will be flagged if the amount of added sugar exceeds the maximum amount assigned by USDA.

*Item Management > Items, Recipes > Menu Item tab*

Item Management
Item Details
← BACK

Item LI-0406
Active

Units

Images & Docs









Item Description  
Cereal, Chex, Blueberry, 2oz Bowl (INV)



Item Category  
Cereals
Brand  
General Mills

Storage Category  
Dry
Manufacturer  
General Mills

Valuation Category  
Non-Commodity
Product Code  
-

Locked
Menu Enabled

Description	Weight	Cost / Value	Identifiers
Case	120.000 Ounce	\$104.71	  
60x Each	2.000 Ounce	\$1.75	
1 Ea	56.000 Gram	\$1.73	   

NUTRIENT INFO
MENU INFO
INVENTORY INFO

Menu Item MI-0029
Favorite
Enable POS Item
CANCEL
SAVE

Menu Item Name\*  
Cereal, Chex, Blueberry, 2oz Bowl

Marketing Name & Description  
Blueberry Chex Cereal
Tags

Menu Item Category\*  
Entree
Preparation Site Item

Leftover Category  
Return to Stock
Show in Summary

Added Sugar Product

Steps

0
HACCP Process: Complex food
Prep Time: 0:0 | Cook Time: 0:0

No steps added.

- **CNDB Monthly Database Update**

The Child Nutrition Database (CNDB) is now being updated monthly. The current update is version CN2025.08.

*Item Management > Items > CNDB Items tab*

## Menu Planning

- **Menu and Menu Cycle Analysis: Grains and MMA Updates**

The Menu/Menu Cycle Analysis has been updated for the SBP 14+ Meal Pattern, incorporating requirements to combine Grains and Meat/Meat Alternate when calculating component requirements and values.

*Menu Planning > Menu, Menu Cycle, Menu Planner*

*Production > Reports > Pre-Production Analysis, Post Production (Offered) Analysis*

- **Menu and Menu Cycle Analysis: Fruit and Vegetable Updates**

The Menu/Menu Cycle Analysis has been updated for SBP 14+ Meal Pattern, incorporating requirements to combine Fruit and Vegetable when calculating component requirements and values.

*Menu Planning > Menu, Menu Cycle, Menu Planner*

*Production > Reports > Pre-Production Analysis, Post Production (Offered) Analysis*