



MCS Newton

LAUSD Manager User Guide

MCS Newton Cafeteria Management

765 Jefferson Road #400

Rochester, NY 14623

Heartland

A Global Payments Company

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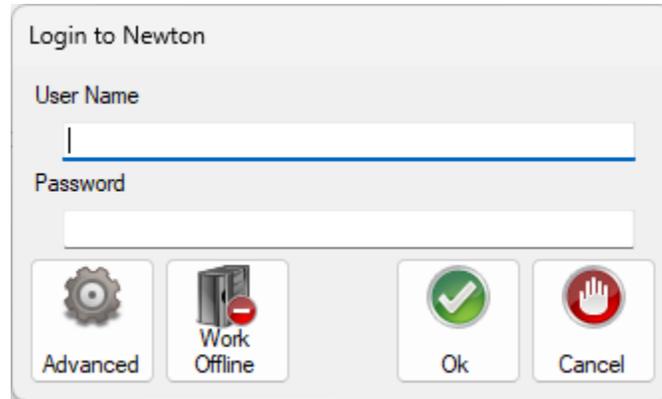
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Log In

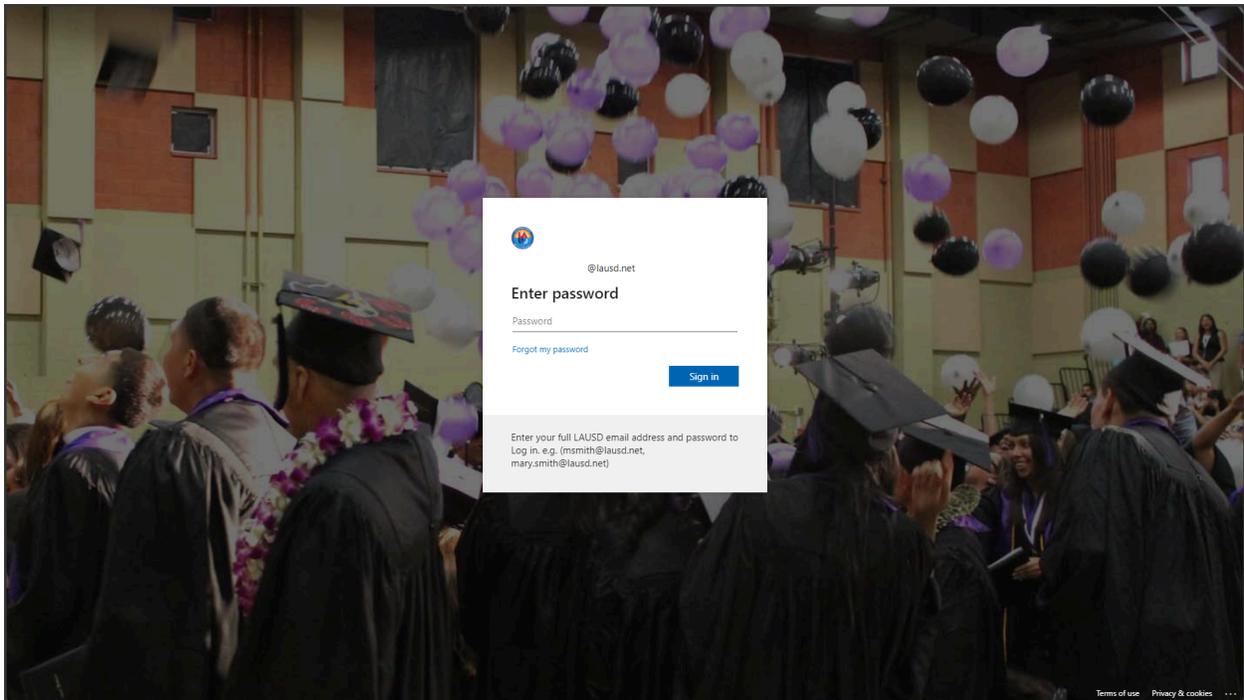


1. Double click the Newton Icon on your desktop >>

2. Leave the fields blank. Click **"Ok"**

A dialog box titled "Login to Newton" with two input fields: "User Name" and "Password". Below the fields are four buttons: "Advanced" (gear icon), "Work Offline" (server icon with a red stop sign), "Ok" (green checkmark icon), and "Cancel" (red hand icon).

3. A window will pop up for Secure Sign On. Log in with your LAUSD credentials.

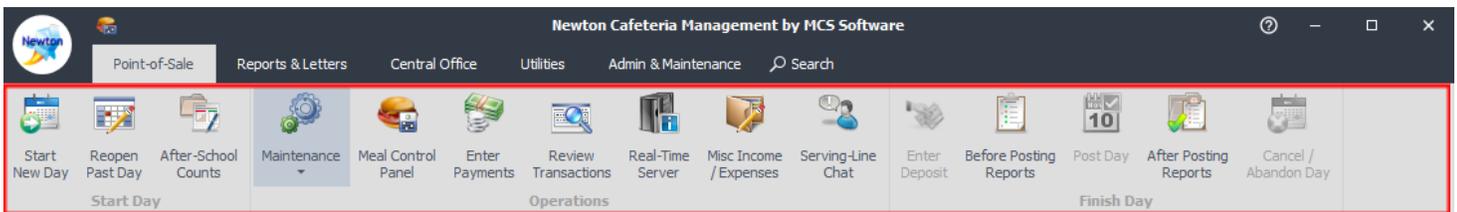


Navigation

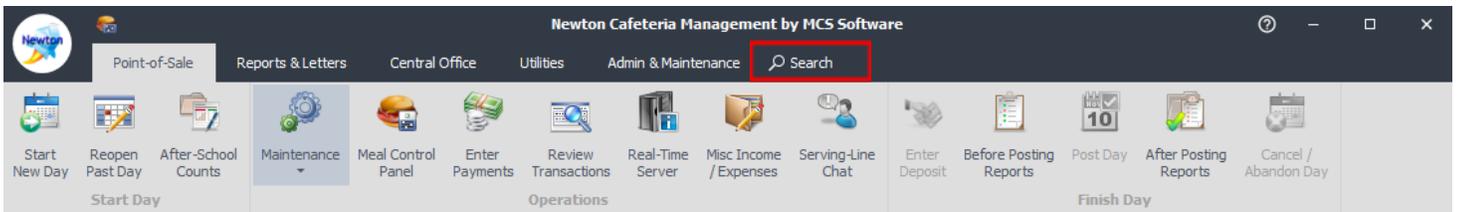
Tabs: Located at the top of the ribbon menu for quick navigation between operations within the system.



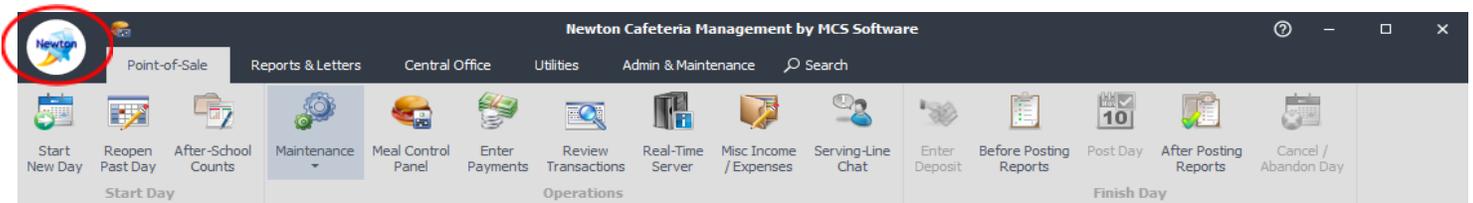
Ribbon Menu: Consists of icons to allow quick access to tasks and operations. Typically broken down into groups of actions that are performed in sequence.



Search: You will find a search field at the top of the ribbon menus. Click Search to enable the field, and then type a topic to display.



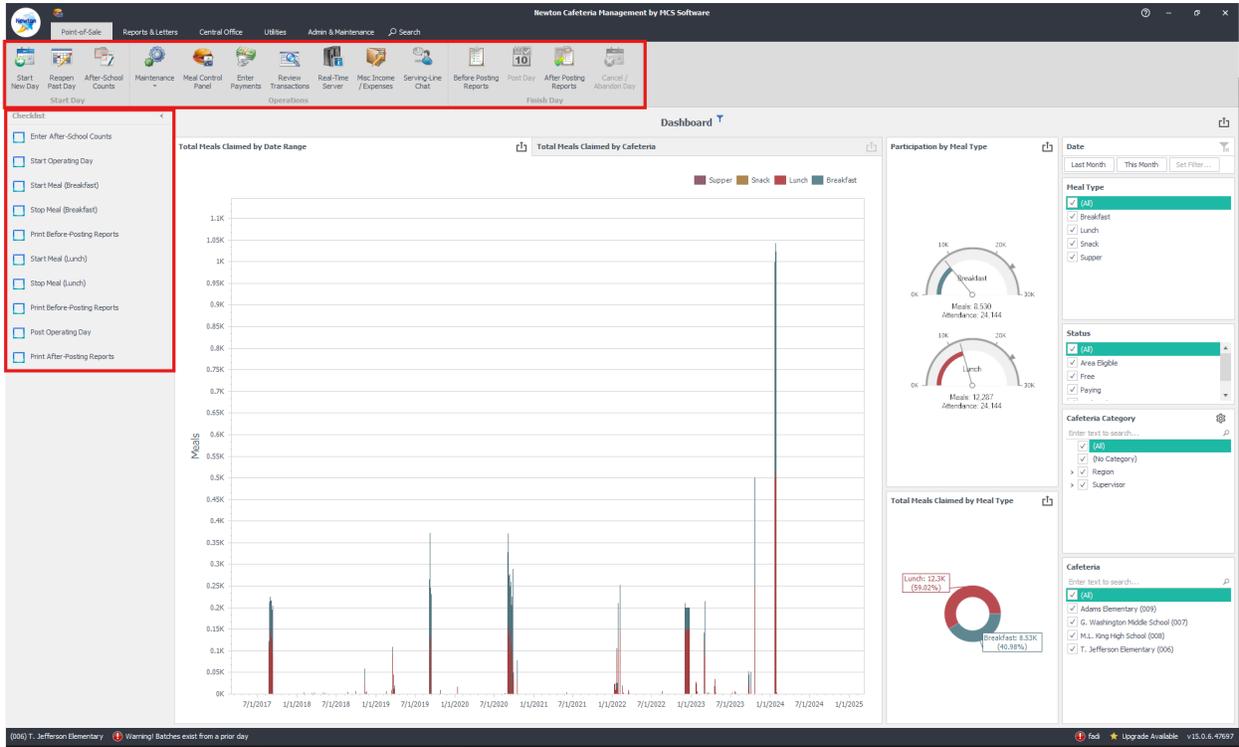
Newton icon: Select the Online User Guide to view a comprehensive website with answers to all of your questions about Newton.



Home Page Overview

Daily operations for the Cafeteria Manager (Back Office) are completed by using the Ribbon at the top of the screen OR the Checklist to the left of the screen.

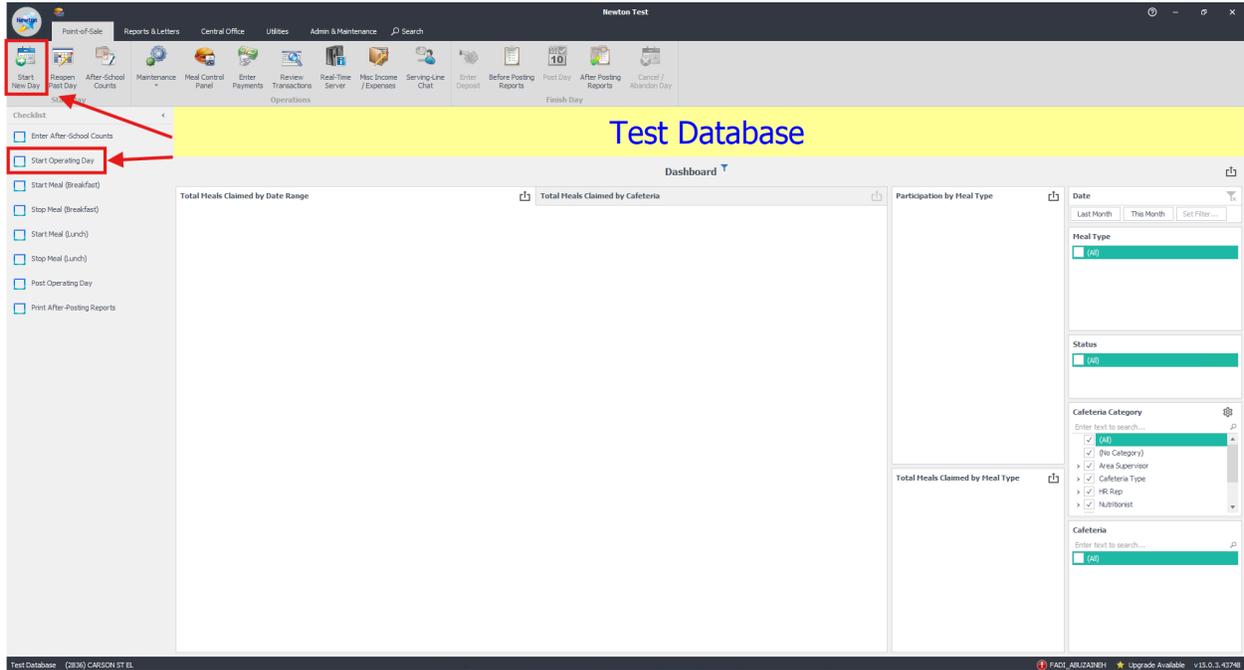
As system checklist tasks have been completed, a checkmark is placed in the box. Custom checklist tasks will need to be checked off by the user once complete.



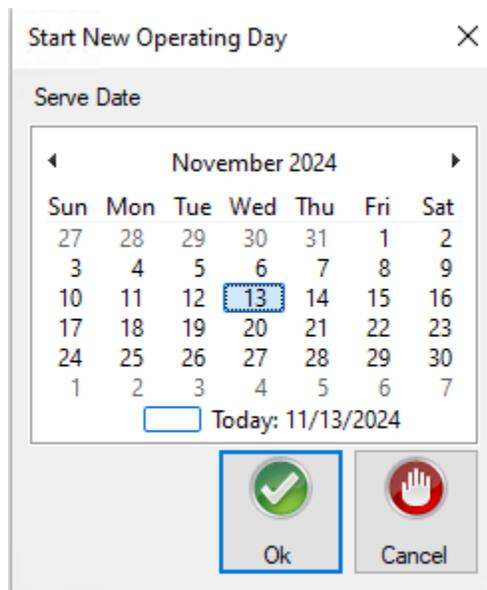
Note: If you reopen a previously posted day or did not post the prior day, Newton displays the operating day at the bottom of the screen. You will also be notified if there are existing batches (group of transactions) for a day other than the current operating day.

Start New Operating Day

1. Click on Start Operating Day from the checklist or Start New Day from the Point of Sale ribbon. **Note – only one day can be open at a time. If the Start New Day button is grayed out, then another day is still in progress. You must finish that day before opening a new day. Refer to the Cancel/Abandon section for more information.**



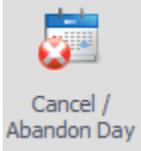
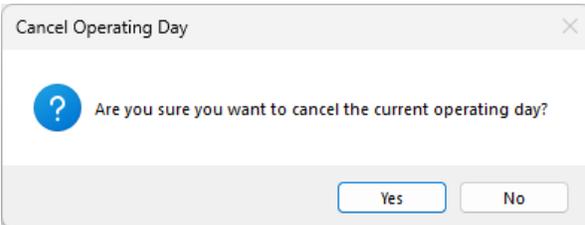
2. Verify the selected day. Click "Ok"



Cancel/Abandon Day:

There may be times that it is necessary to cancel or abandon the current operating day. **This should never be done while serving.**

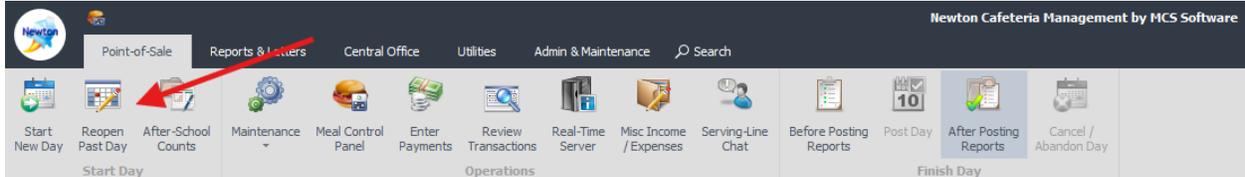
You may choose to cancel/abandon the day in order to post a different operating day, if issues exist on a previous day and that day is still active, or if some updates affecting daily operations has occurred. Cancel/Abandon Day does NOT remove or delete batches or transactions!

From the Point of Sale tab, click "Cancel/Abandon Day"	 A button with a calendar icon and a red 'X' over it, with the text "Cancel / Abandon Day" below it.
Click "Yes" to confirm	 A dialog box titled "Cancel Operating Day" with a close button (X) in the top right corner. It contains a question mark icon and the text "Are you sure you want to cancel the current operating day?". At the bottom, there are two buttons: "Yes" and "No".

Reopen Previous Day

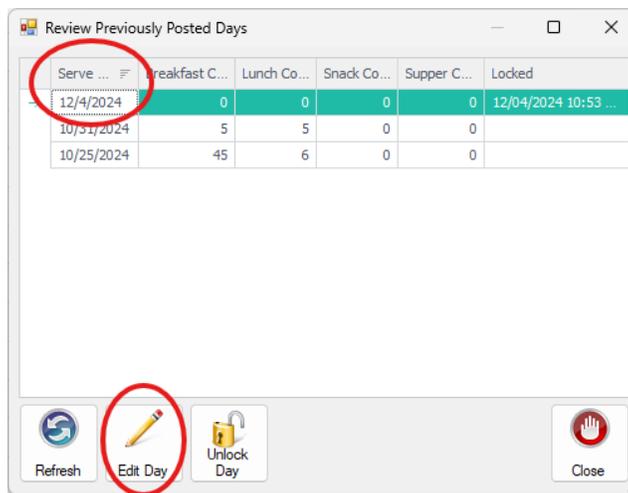
This allows you to make edits or add transactions to a day that has already been posted.

1. Click on "Reopen Past Day"

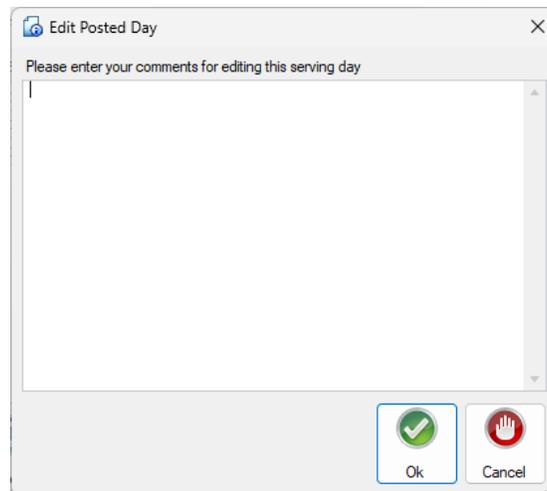


2. A Review Previously Posted Days window will appear.

3. Select the day from the list and click "Edit Day"



4. Enter a comment explaining the reason you are editing the previous serving day and click "Ok"

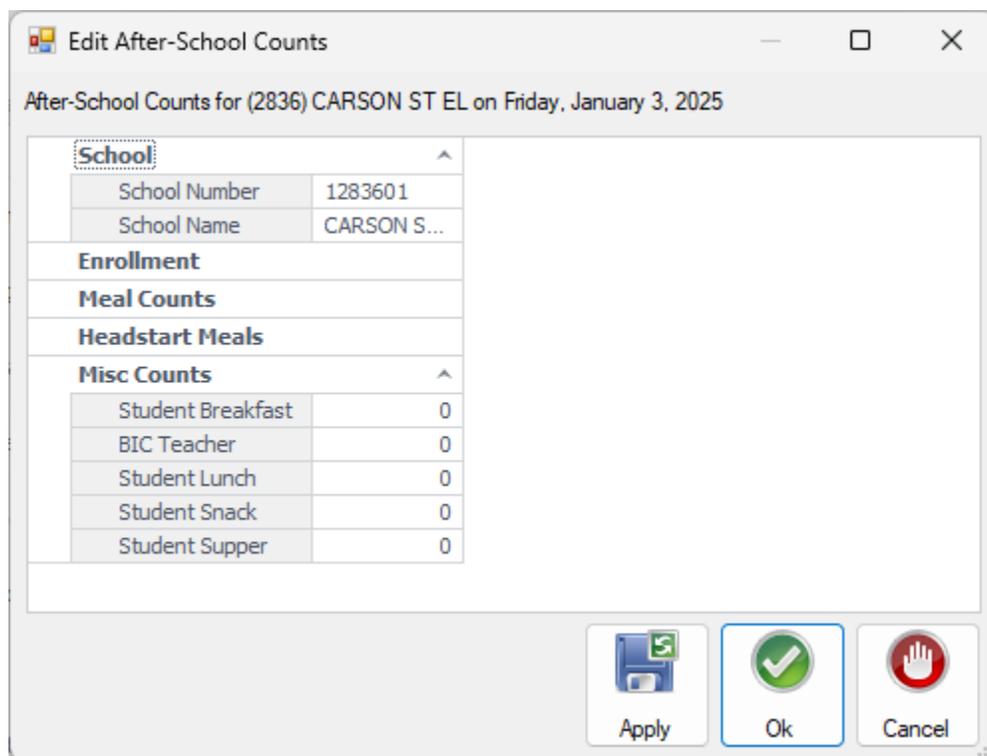


5. You will need to re-post this day first. You cannot have two operating days open at once. Proceed to instructions for **Post Operating Day**.

After-School Counts

The After-School Count feature allows you to post specific meals (supper, field trip, etc.) that occurred after the last meal of the last operating day without having to re-open and re-post the day. If a second operating day has been started, the ability to select the previous operating day is available. Editing after-school counts can only occur once in the below procedures. Additional edits must occur by re-opening and re-posting a day.

1. In the Point of Sale tab, click on **"After-School Counts"**
2. Select which operating day you wish to enter school counts. Then, click **"Ok"**
3. Enter count numbers for each meal (and fed-by school, if applicable). Then, click **"Ok"**



The screenshot shows a software window titled "Edit After-School Counts" for school (2836) CARSON ST EL on Friday, January 3, 2025. The window contains several sections:

- School**: A dropdown menu showing "School Number: 1283601" and "School Name: CARSON S..."
- Enrollment**: A section header.
- Meal Counts**: A section header.
- Headstart Meals**: A section header.
- Misc Counts**: A table with the following data:

Misc Counts	Count
Student Breakfast	0
BIC Teacher	0
Student Lunch	0
Student Snack	0
Student Supper	0

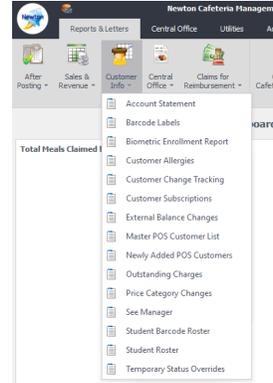
At the bottom of the window are three buttons: "Apply" (with a floppy disk icon), "Ok" (with a green checkmark icon), and "Cancel" (with a red hand icon).

Out of Café Meals (Field Trips, ESE, VE, Clinic, ISS, etc)

Once you have started a New Day, you can utilize the POS terminal to ring up Out of Café Meals. See the Cashiering manual for instructions on ringing in individual meals served outside the Cafeteria.

Print a Roster

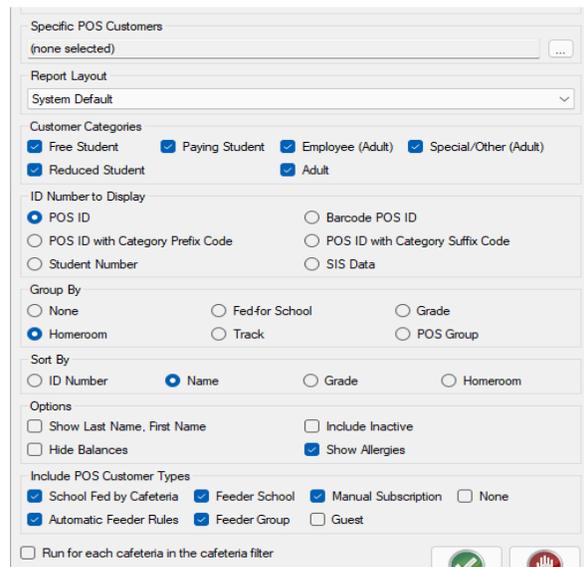
1. From the ribbon, select **“Reports & Letters → Customer Info → Student Roster”**



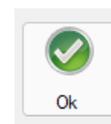
2. The Student Roster window will open. Filter by Cafeteria name. Your cafeteria should be in the dropdown by default



3. Select the other options you would like: ID number, group by homeroom, sort by name or homeroom, and/or show allergies, etc.



4. Click **“Ok”** and then opt to print or export your report



Print a Customer List

1. On the ribbon, find **Reports & Letters** → **Customer Info** → **Master POS Customer List**
2. The Master POS Customer window will open. Filter by your Cafeteria Name
3. Select the other options you would like.
4. Be sure to toggle the option in the Show Meal Status to **"Coded"**

The screenshot shows the 'Master POS Customer List' window with various filter and display options. The 'Show Meal Status' section is highlighted with a red box, showing the 'Coded' radio button selected.

Filter by Cafeteria

- Cafeteria: (901) Anclote Elementary
- Region: Default
- Cluster: Charter 9-12
- Entire District

Customer Categories

- Free Student
- Paying Student
- Employee (Adult)
- Special/Other (Adult)
- Reduced Student
- Adult

Balance

- Customers with any balance
- Only customers with balances less than \$ 0.00
- Only customers with balances greater than \$ 0.00
- Only customers with zero balances
- Only customers with non-zero balances

ID Number to Display

- Student Number
- POS ID
- SIS Data

Group By

- None
- Fed-for School
- Grade
- Homeroom
- Track
- POS Group

Sub-Group By

- None
- Fed-for School
- Grade
- Homeroom
- Track
- POS Group

Sort By

- ID Number
- Name
- Grade
- Homeroom

Options

- Show Last Name, First Name
- Show Balance
- Include Inactive
- Include DC Students Only
- Include Multi-Reimbursables
- Include Permanent Statuses
- Include Future-Change Statuses
- Include Temporary Override Statuses
- Include Prior-Year Only

Show Meal Status

- Full Description
- Coded
- Hidden

Include POS Customer types

- School Fed by Cafeteria
- Automatic Feeder Rules
- Feeder School
- Feeder Group
- Manual Subscription
- Guest
- None

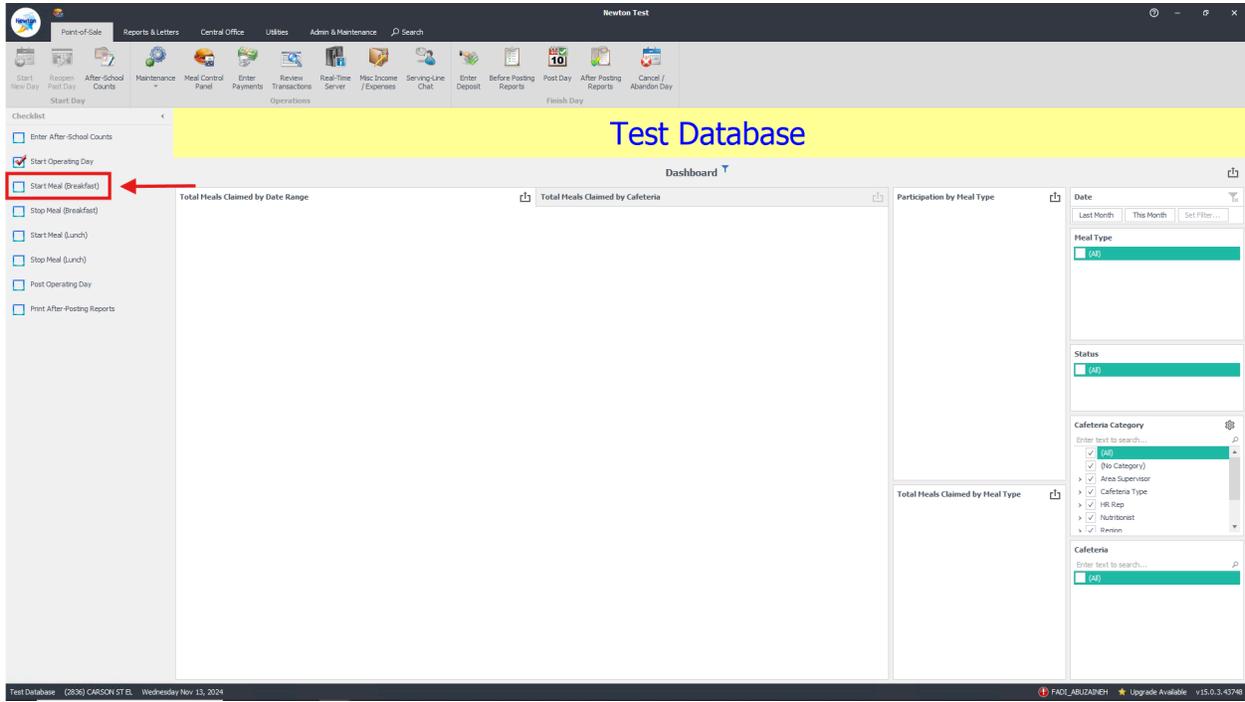
Run for each cafeteria in the cafeteria filter

Ok Cancel

5. Click **"Ok"** and then opt to print or export your report.

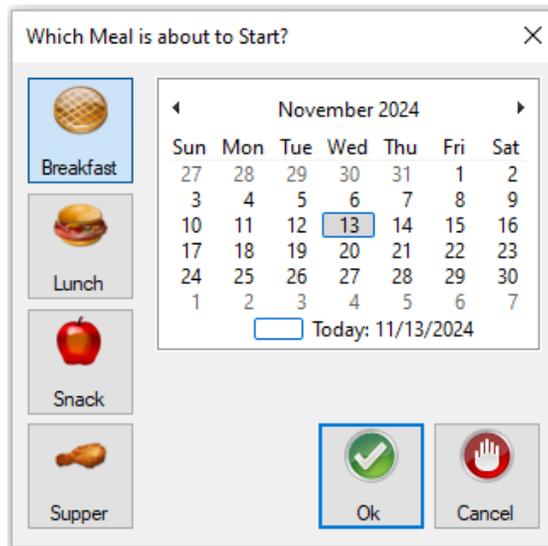
Start/Stop a Meal Session

1. Click on Start Meal (Breakfast or Lunch) on the checklist. Notice that there is now a check mark in the box on the checklist.



2. Verify the selected Meal and Date in the **“Which Meal is about to Start?”** box (Breakfast, Lunch, Snack, Supper).

Click **“Ok”** to start the meal. The cashiers can now launch Newton POS on their touch screens.



3. A Meal Control Panel window will appear. Click **"Close."** This allows you to go about your normal business while the POS terminals are running. To bring the Meal Control Panel back up, you can use the Checklist by clicking on Start Meal.

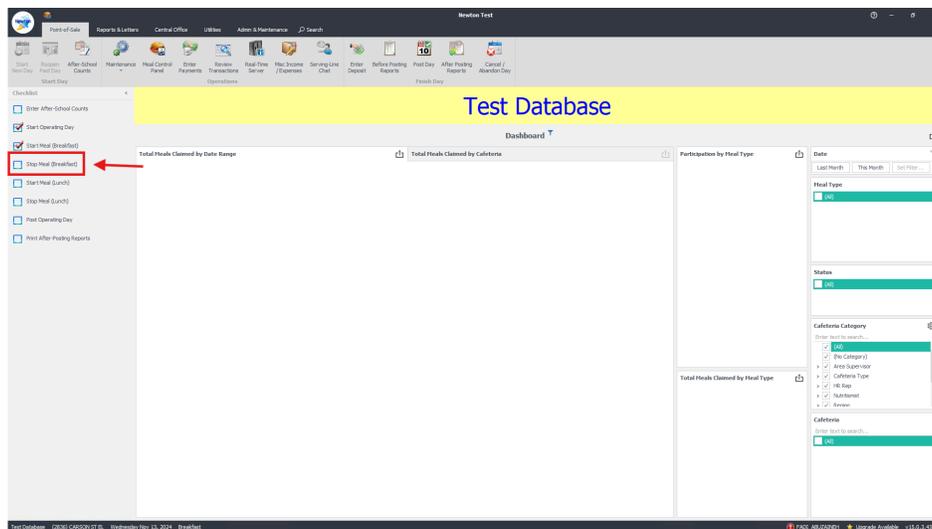


4. Go about your daily operations during meal service.

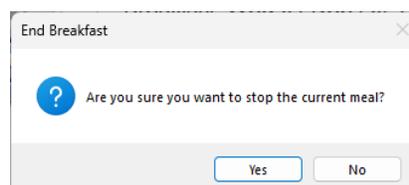
5. When lines are done, cashiers will count their cash drawer, enter it into the POS system at the line, and bring it to you (if applicable). See Cashiering manual.

6. Once you are sure all meal service is concluded, click on **"Stop Meal"** from the checklist.

Before closing the meal service on your computer, make sure that all POS terminals are closed.



7. You will be asked if you're sure you want to close the current meal service. Click **"Yes"**



Opening Main Machine POS Serving Line:

1. To enter POS transactions from the office PC, click the **"Meal Control Panel"** button on the **Point of Sale** tab
2. Click the **"Main Machine"** button
3. If prompted, select **"Line 1 – Manager"** and then click **"Ok"**
4. Log into **NewtonPOS**
 - a. Note: Do NOT select a different date or meal than what was selected when the meal was started
5. To get back to **Newton** without closing the POS, press **Alt + Tab** on your keyboard
6. Click the **"Close"** button on the **Meal Control Panel** tab to close that window. This does NOT stop the meal.



Cashiering

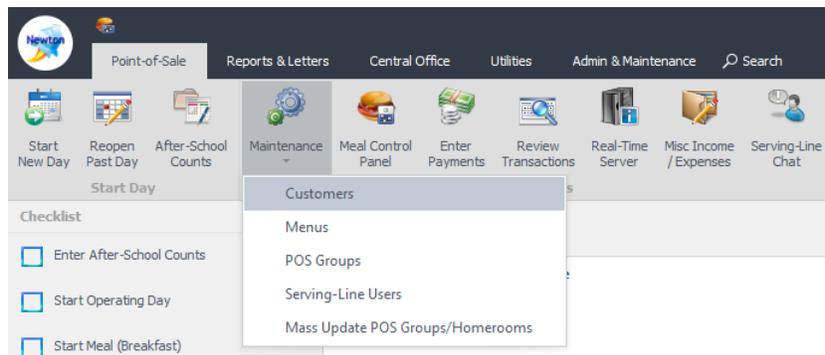
These instructions are for front-of-the-house cashiering at the POS terminal.

REFER TO YOUR CASHIERING MANUAL

Serve Guest Student or Subscribe to New Customer

Note: This can only be done by Central Office, please contact them to Add New Customers or Guest Students

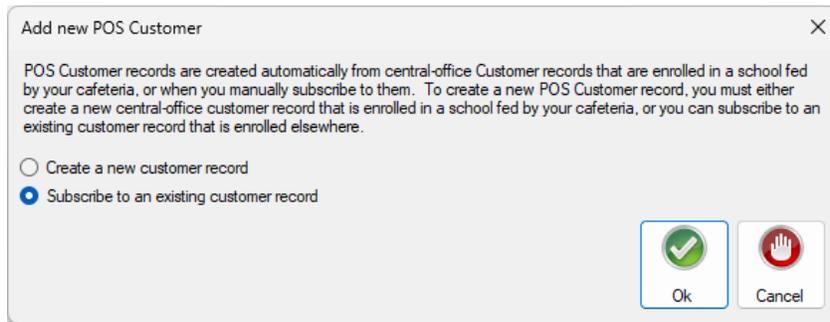
From the Point-of-Sale tab click on **Maintenance** → **Customers**



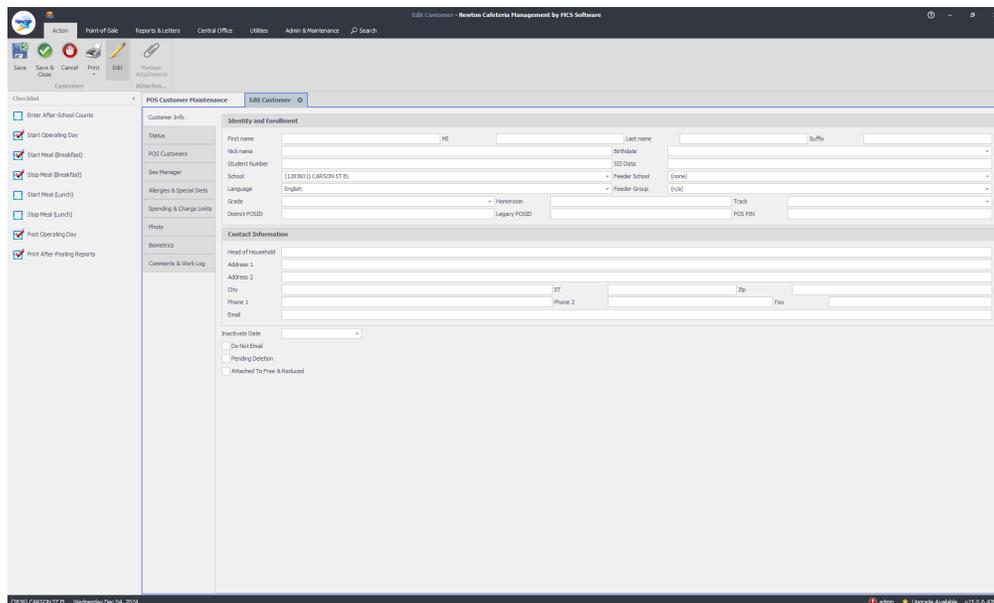
1. Click **"Add New POS Customer"**



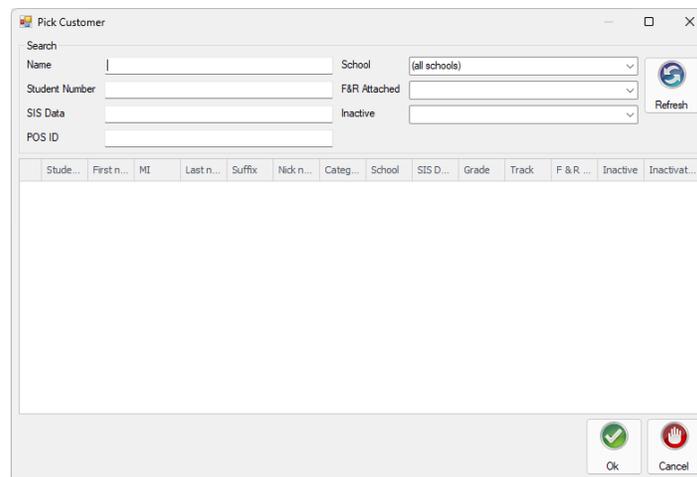
a. Subscribe to an existing customer record (if student's primary school is NOT changing; they are a guest)



2. If you create a new customer record, the Edit Customer window will show. You must complete the information as you would when completing customer maintenance.

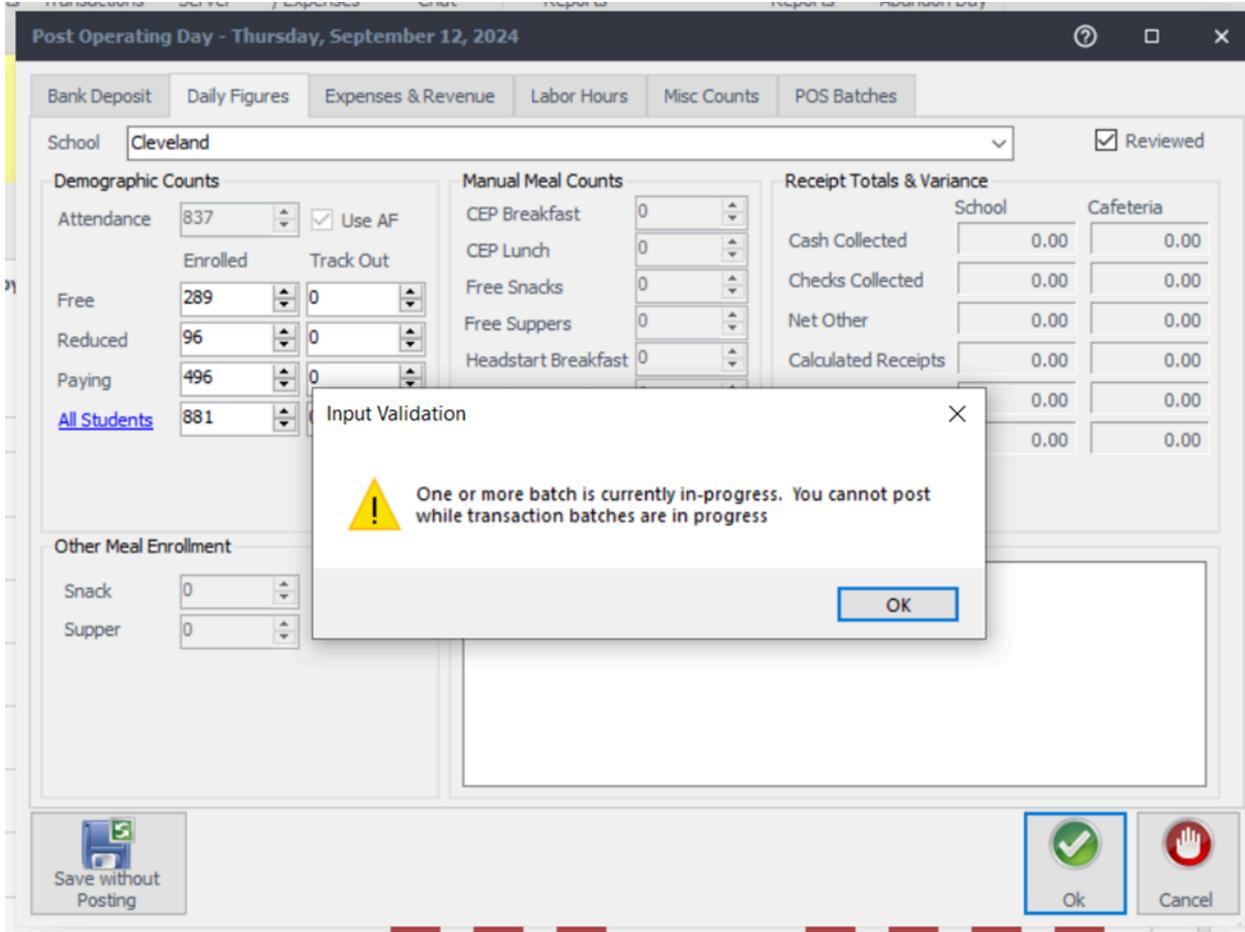


3. If you are subscribing to a student at another feeding site, the Pick Customer window will pop up. Select the customer by entering the name and click "Ok"



Batch in Progress

There might come a time when a site goes to post their end of day and they get the following message:



To resolve this issue, click **"Ok"** and then click on **"Save without Posting"** to exit the screen.

On your home screen, under your point of sale tab, you will click on **"Review Transactions."** You want to see which batch has the issue.

Note that in this case, one of the breakfasts says **"In Progress"** in the **"Status"** field. Click on Close to get out of this screen.

Batch #	Status	Tag	Meal Type	Transaction Count	Line #	Line Description	Serve Date	Line Start
16	Awaiting Posting		Lunch	2	20	012 Manager Line	9/12/24	1:27 PM 9
17	Awaiting Posting		Breakfast	1	20	012 Manager Line	9/12/24	1:50 PM 9
18	Awaiting Posting		Lunch	1	20	012 Manager Line	9/12/24	1:54 PM 9
19	In Progress		Breakfast	1	20	012 Manager Line	9/12/24	10:21 AM

Now go back to your checklist and click on **"Start Meal (Breakfast)"**. You are going to go through the steps as if you were going to serve breakfast.

Checklist

- Start Operating Day
- Start Meal (Breakfast)
- Stop Meal (Breakfast)
- Start Meal (Lunch)
- Stop Meal (Lunch)
- Post Operating Day
- Print After-Posting Reports

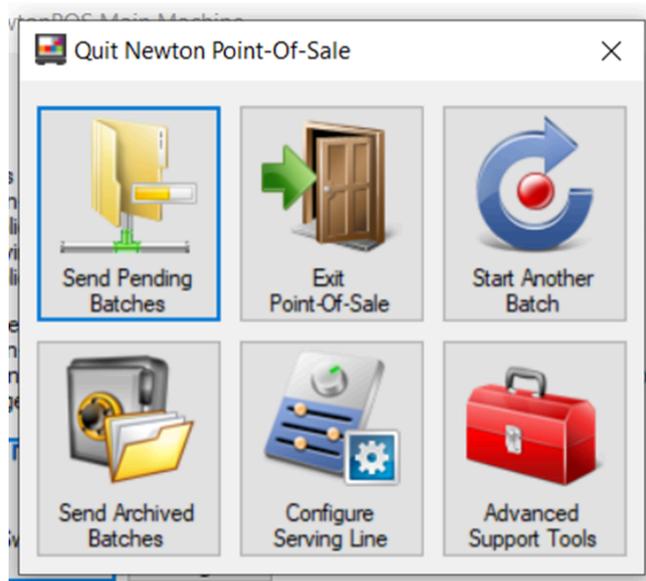
Total Meals Claimed by Date Range

Meals

18K
16K
14K
12K
10K
8K
6K

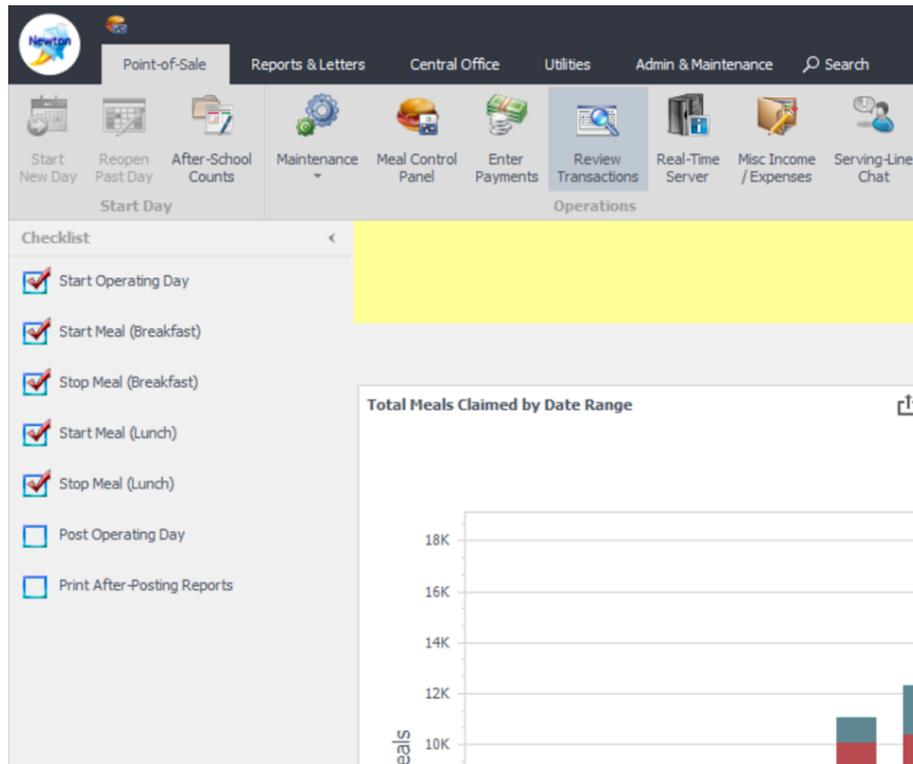
When you reach the POS screen, don't login. Click on **"Cancel"**. Note the following screen shows up. Note the button that shows **"Send Pending Batches"**. Click on that button first then click on **"Exit Point-of-Sale"**.

Now, you might run into a situation where this button is simply grayed out. In that case, simply click on **“Exit Point-of-Sale”**.

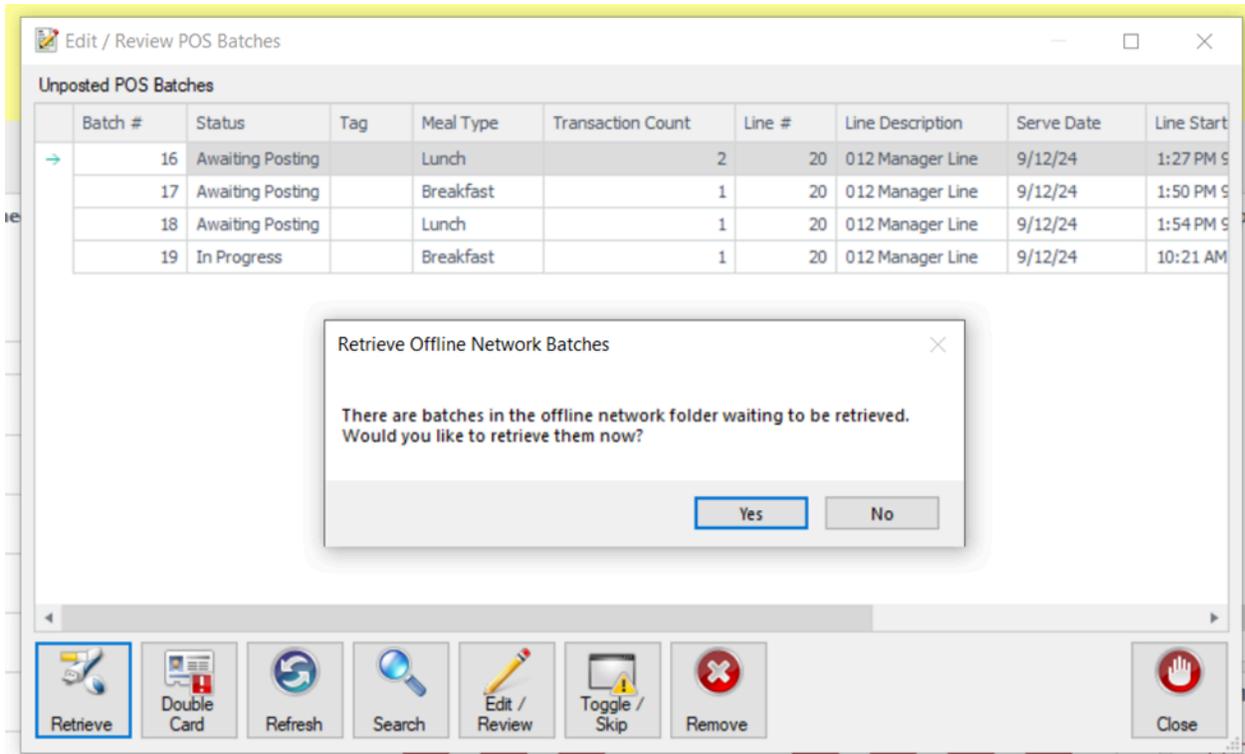


Once you return to the Newton screen, stop the meal.

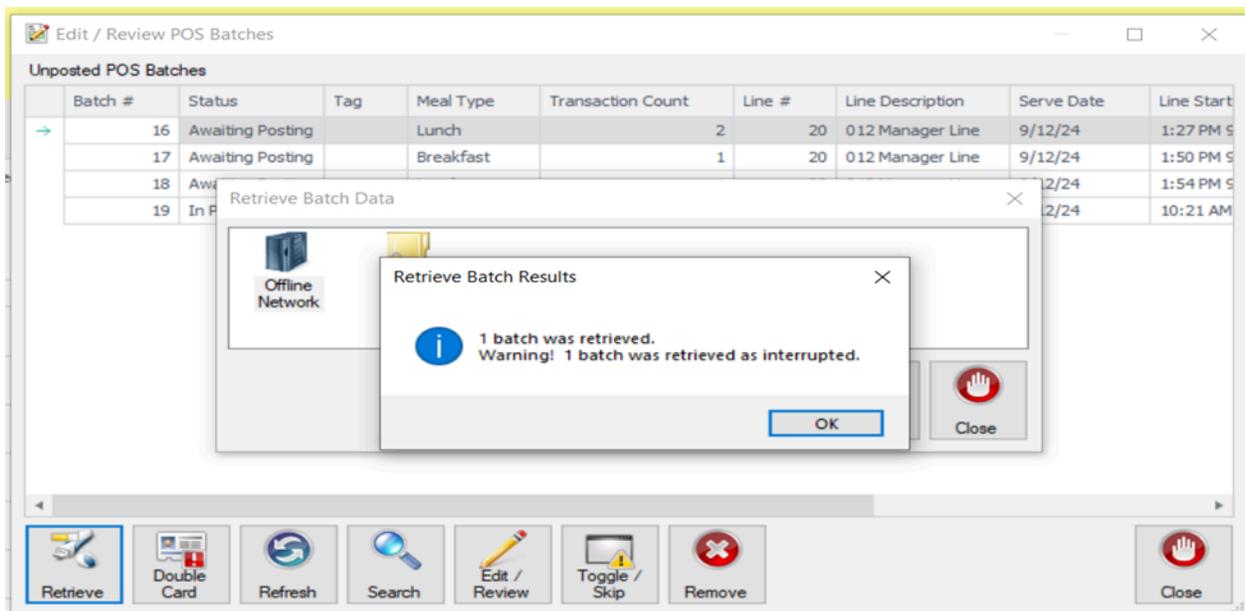
Now that you have stopped the meal you will return to **“Review Transactions”**



Note that when you click on **“Review Transactions”** you will get a message that looks like this. Click on **“Yes”**

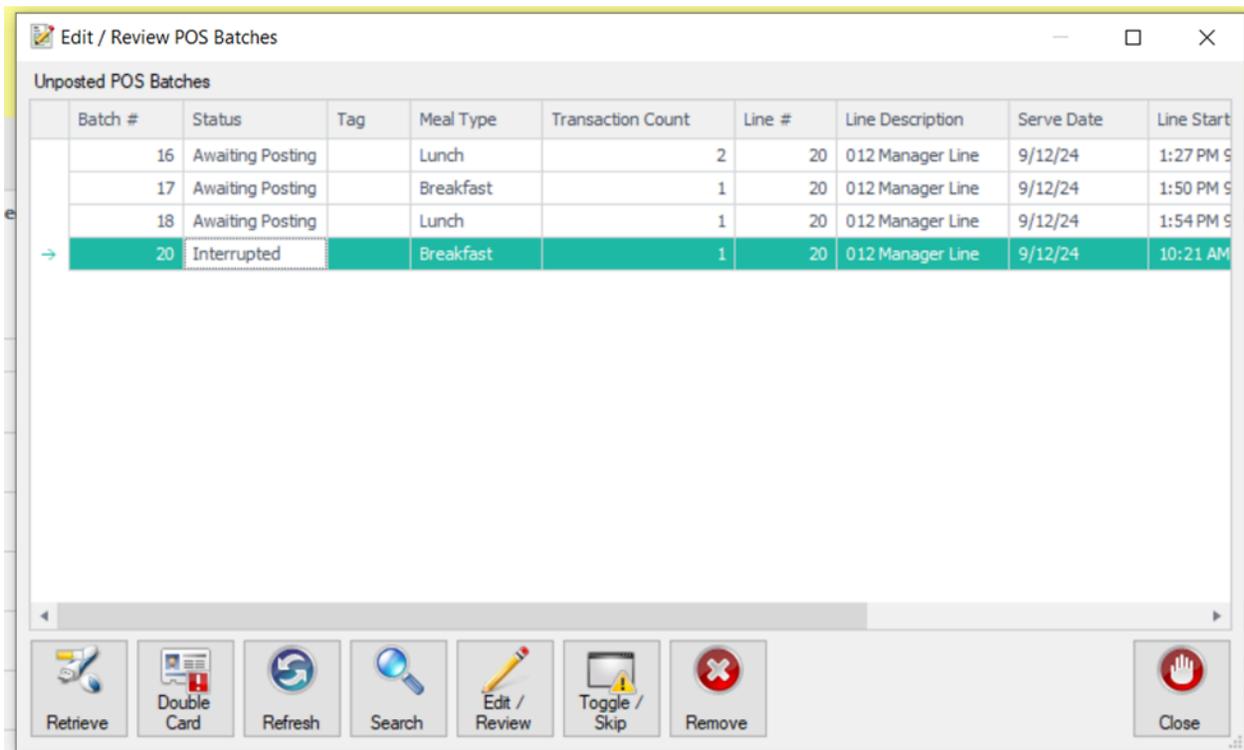


After clicking on **"Yes"** you will get a message similar to this



Click on **"Ok"**

Note now that the batch that said **"In Progress"** says **"Interrupted"**. To correct this issue, Select the **"Interrupted"** batch by clicking on it once. Then click the **"Toggle Skip"** button.

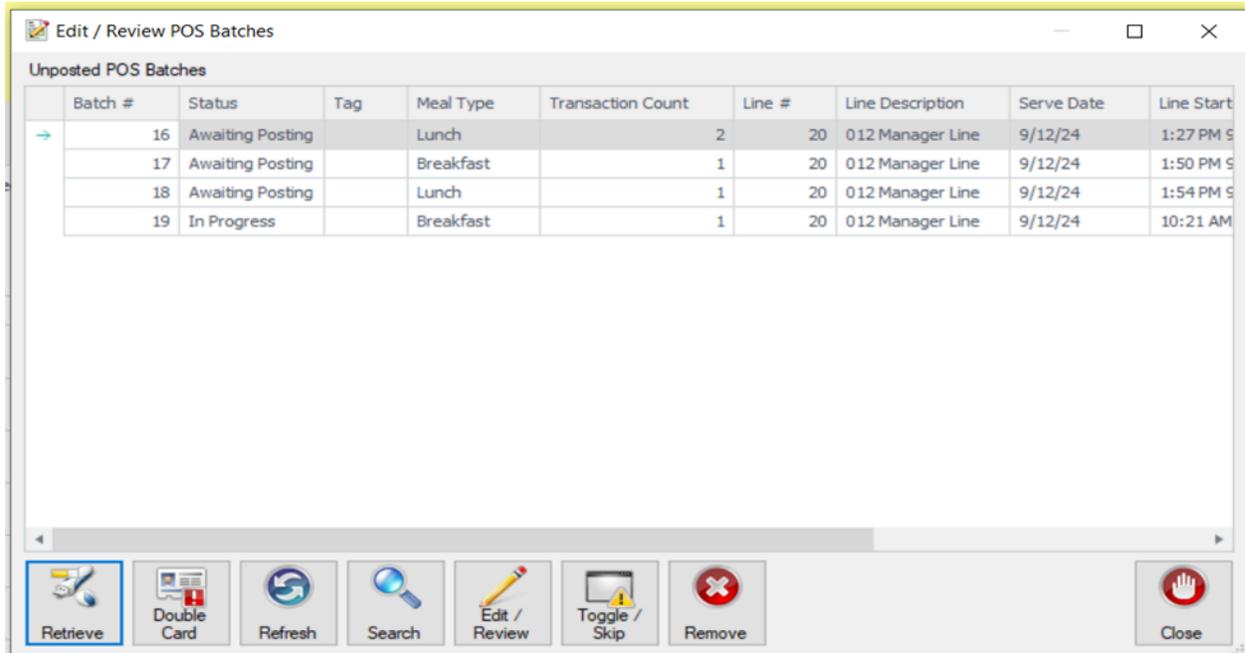


Now the **"Interrupted"** batch will change to **"Awaiting Posting"**. Click on **"Close"** and now you can post.

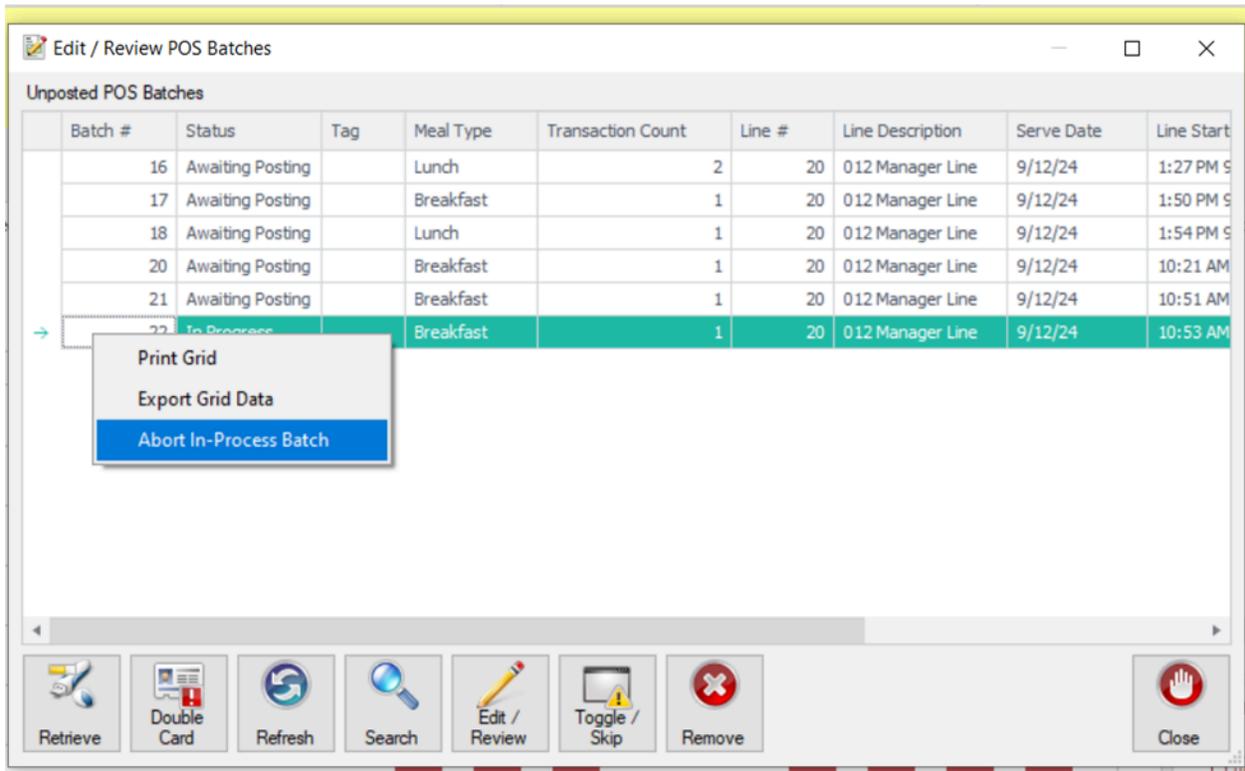
Another scenario that can happen is that you followed all the steps above and the batch still says in Progress. In that case you follow these steps:

Verify that no Meal is currently running. You can see this if you look at the bottom left of your Newton window and next to the cafeteria name it doesn't show either **"Breakfast"** or **"Lunch"**.

You will see that the batch is still **"In Progress"**. You are going to right click on it.



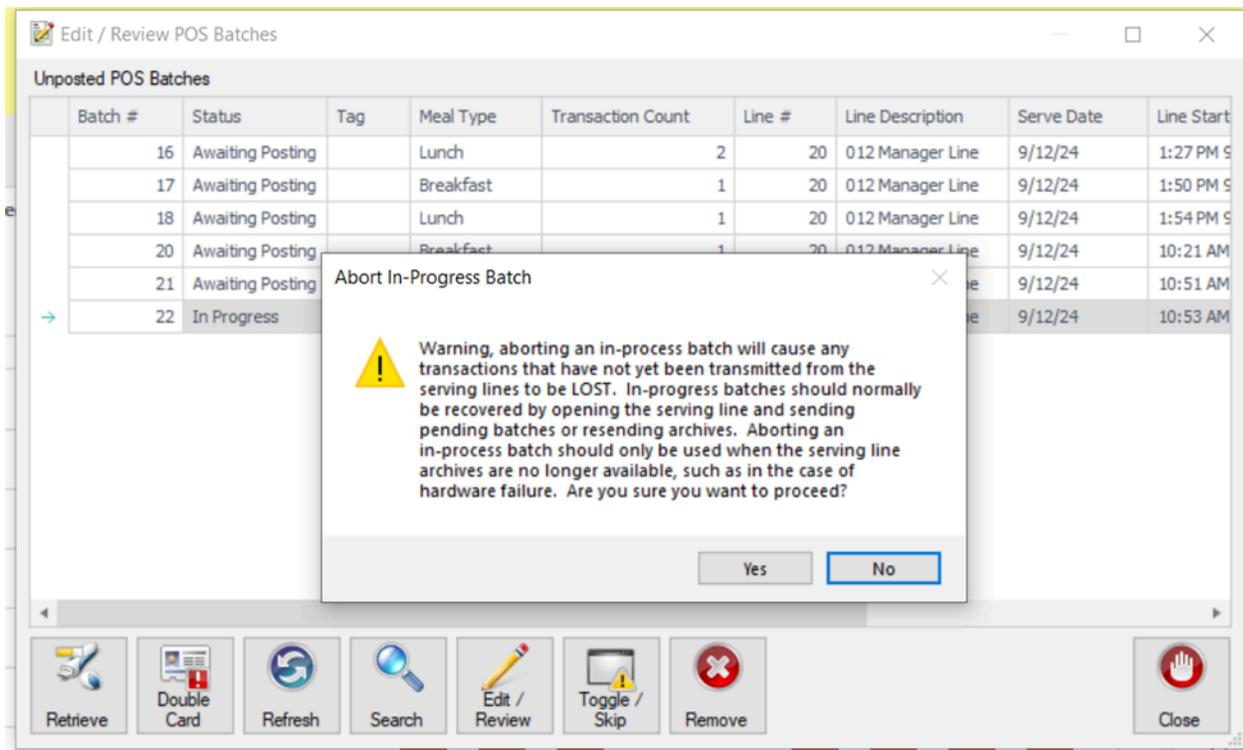
When you right click on it, you will get the following options:



You are going to choose **"Abort In-Process Batch"**

If you have permissions to Abort a batch, you will get the following message which is basically saying that if you do have the POS serving line Open, you might lose transactions.

Since we know that no meal is running we will click on **"Yes"**. However if you don't have permissions to Abort a batch, an Override screen might pop up. You will have to request an Override and call the central office to allow it.

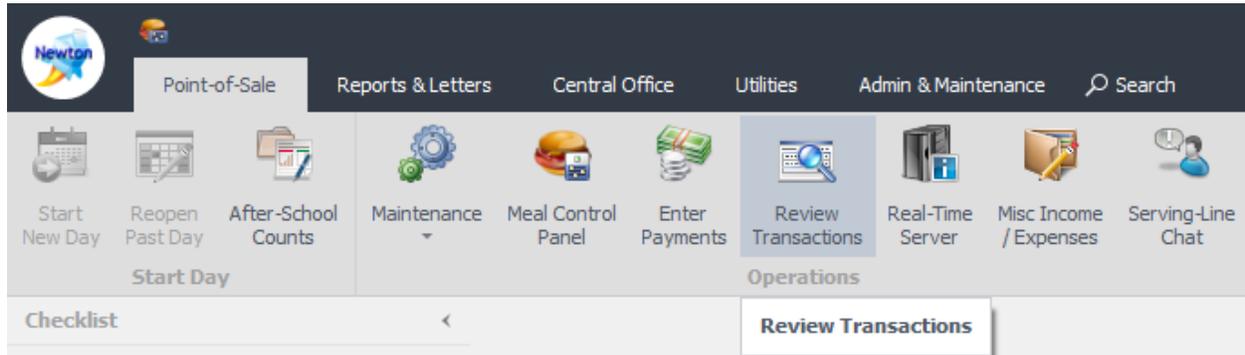


Now you will get an interrupted batch. Simply click on it once and click on toggle skip to change it to **"Awaiting Posting."** Now you can go and **"Post your Operating Day"**

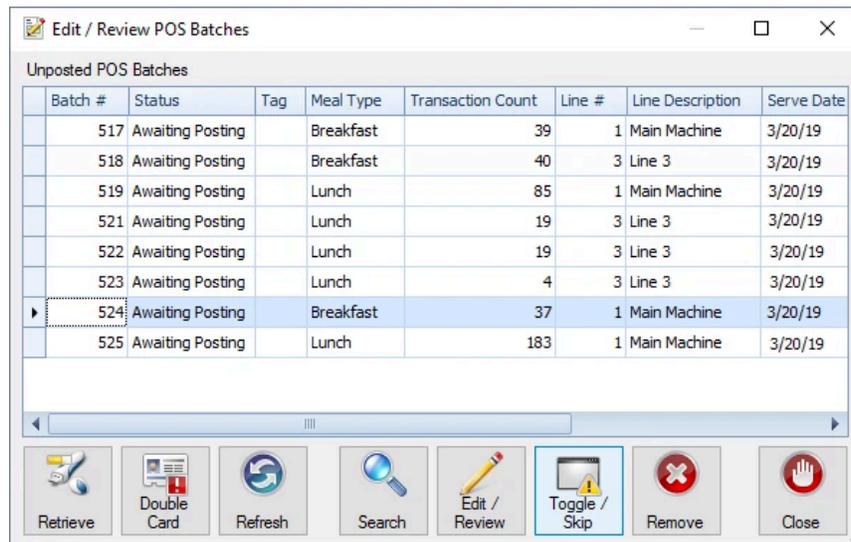
Toggle/Skipped Batches

This feature allows you to change the status of a batch in order to skip posting batches for a day/number of days. When you are ready to post past days, the transactions can be toggled to allow posting.

In the Point of Sale tab, click on **"Review Transactions"**



Select a batch by clicking on it. Then, click **"Toggle/Skip"**



Notice that the status changes from the current status to Skip. Repeat the process for additional batches that need to be skipped.

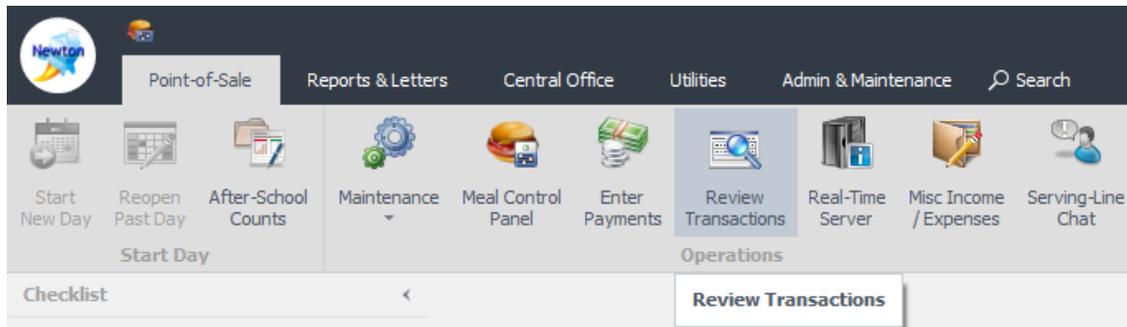
a. When you are ready to post batches for the skipped batches, select the batch and click the **"Toggle/Skip"** button again so the status changes to *Awaiting Posting*.

Remove Batches

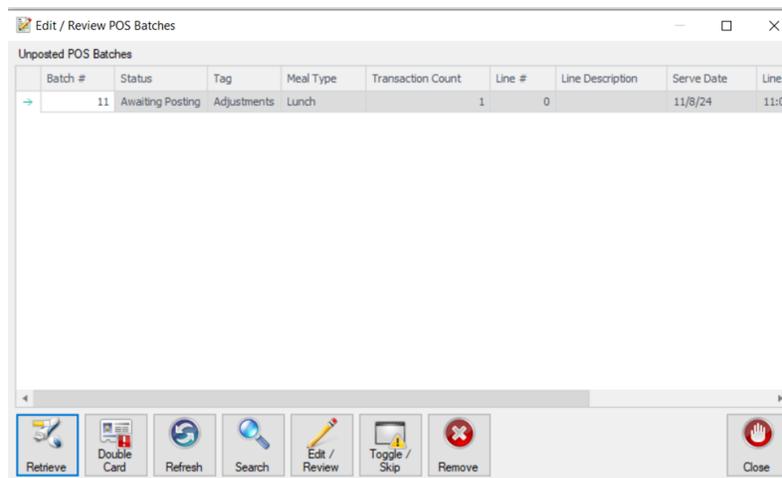
Removes a batch from the list such as batches containing zero transactions or where transactions have been entered a second time.

There is no UNDO when performing this operation. Make certain you wish to perform this function before proceeding.

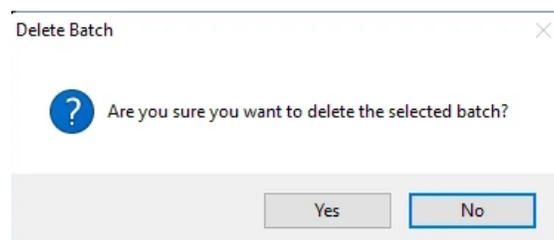
On your Point of Sale screen, you will click on **“Review Transactions”**



a. Select a batch by clicking on it. Then, click **“Remove”**



b. A confirmation window will appear asking if you are sure you want to delete the selected batch. Click **“Yes”** to continue with the process.



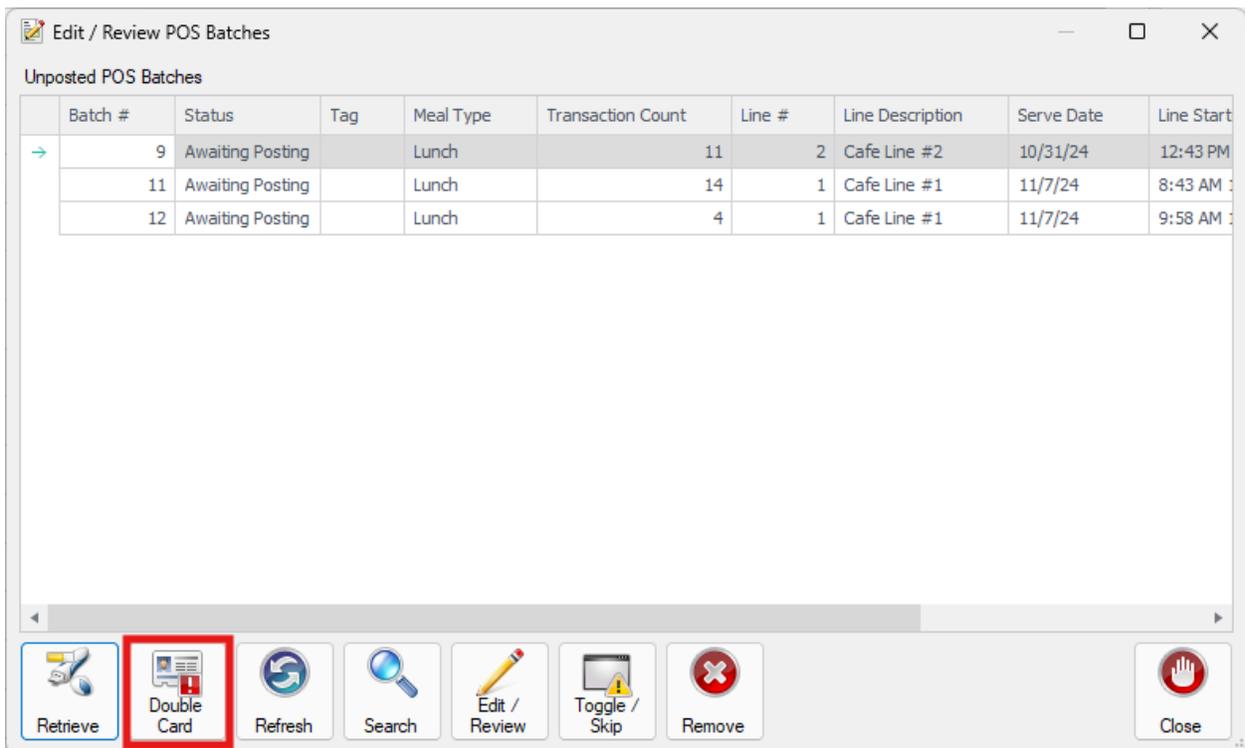
Double Card Usage

The Double Card option allows you to check for and correct any double card usage for meals. Double card usages occur typically when there is loss of network or no network connectivity. A double card usage will appear if there are two reimbursable meals sold to one student or if an at-cost meal is sold to a student where no reimbursable meal exists. To find these, follow these steps:

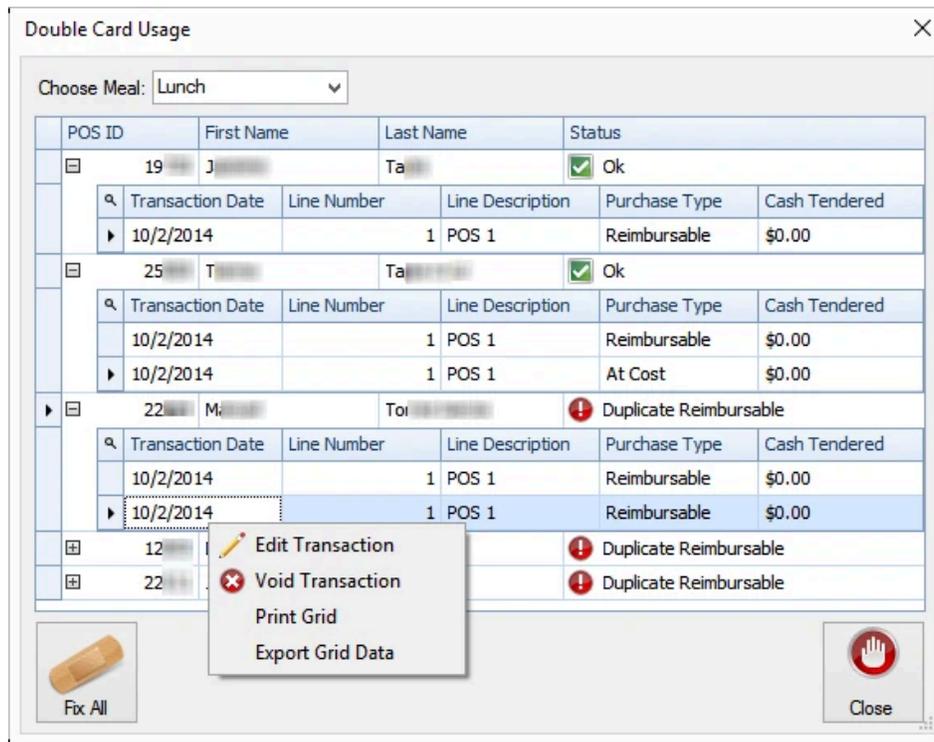
Click on **Point of Sale → Review Transactions**



i. Click the **“Double Card”** button.



ii. Use the drop-down menu to Choose Meal.



iii. Review the double-card usages by clicking on the plus sign of each student.

iv. Right-click on a row and select the appropriate action.

i. Edit Transaction - Allows the user to edit a transaction (e.g. the student ate two meals and one of the transactions was sold At-Cost). Refer to [Edit/Review](#) for details.

ii. Void Transaction - Allows the user to void/remove the transaction (e.g. The Line Operator selected the wrong student from the list). Enter a comment about why you are voiding the transaction. Then, click **"Ok"**

Click Close once you have corrected all double card usage issues.

Fix All Warning

The Fix All button will automatically convert second reimbursable meals to at-cost meals. **Only use the Fix All button if your Supervisor or Central Office contact has informed you it is okay.**

Permission to disable the Fix All button can be found in Administration and Maintenance → Permissions → Cafeteria Role Permissions → *Transactions* → "Double card usage utility; fix all"

Recount Money & Edit

1. You may notice that you miscounted your money while Posting. Click on the **"Bank Deposit Tab"**

2. Click **"Edit Counts"**

Post Operating Day - Wednesday, December 04, 2024

Bank Deposit | Daily Figures | Expenses & Revenue | Labor Hours | Misc Counts | POS Batches

Cash Receipts

Pennies (\$0.01)	0
Nickels (\$0.05)	0
Dimes (\$0.10)	0
Quarters (\$0.25)	0
Half-Dollars (\$0.50)	0
Dollar Coins (\$1)	0
Ones (\$1)	0
Twos (\$2)	0
Fives (\$5)	0
Tens (\$10)	0
Twenties (\$20)	0
Fifties (\$50)	0
Hundreds (\$100)	0
Miscellaneous Cash	0.00

Totals

Total Checks	0.00	...
Total Cash	0.00	
Grand Total	0.00	

Bank Deposit

Bank Deposit Today

Deposit Amount: 0.00

Deposit Slip #:

Deposit Comments:

Edit Counts

No cash was collected today

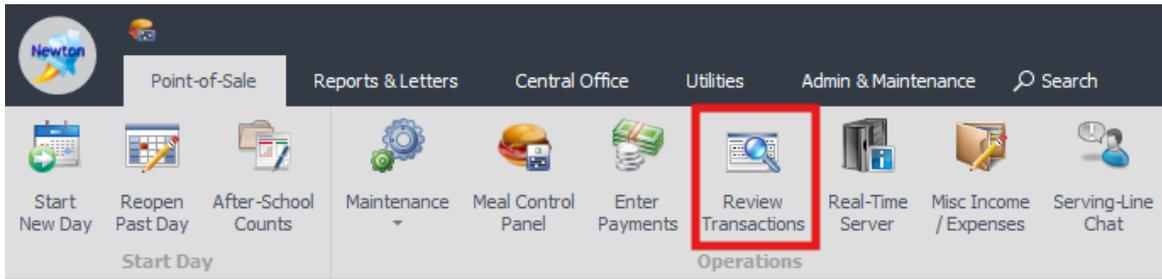
Save without Posting

Ok Cancel

3. Once done, click **"Ok"**

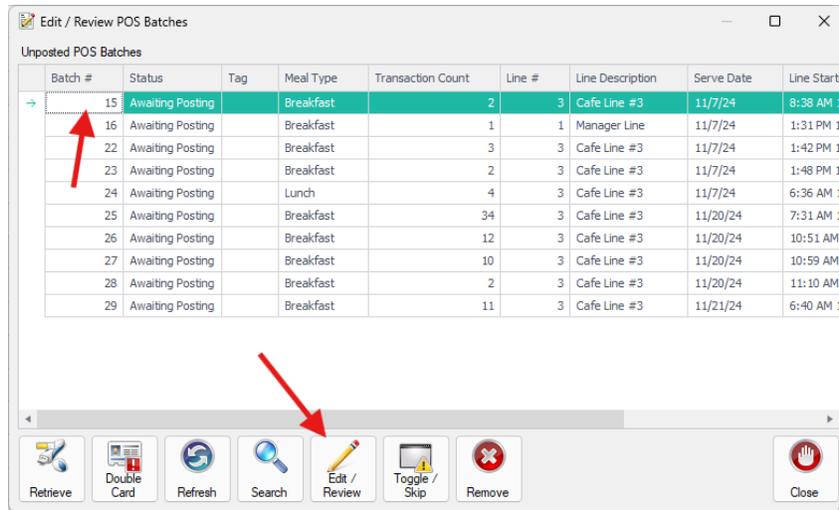
Review Transactions

1. Click on **“Review Transactions”** on the ribbon.

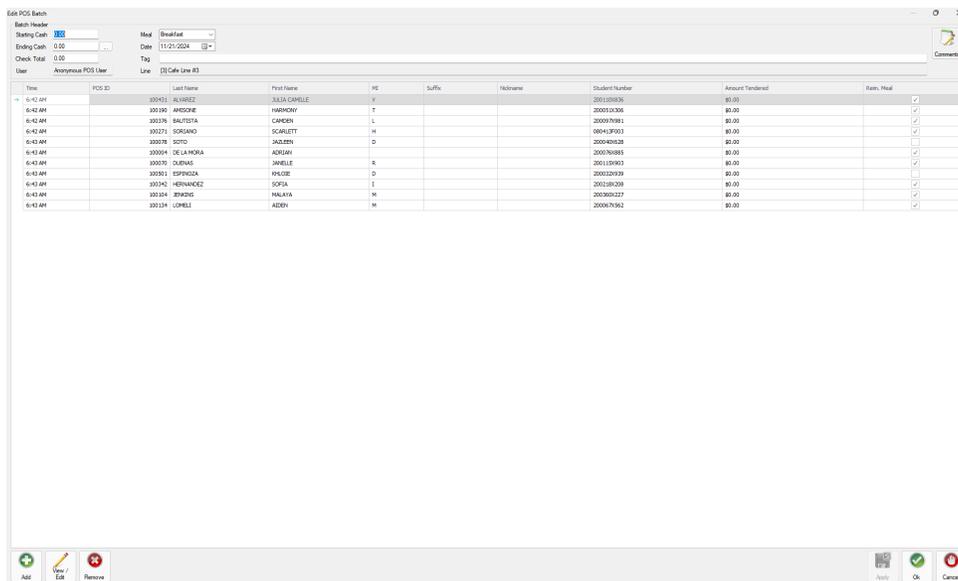


2. Select Batch # (click to highlight or double-click to open/edit).

3. Click **“Edit/Review”**

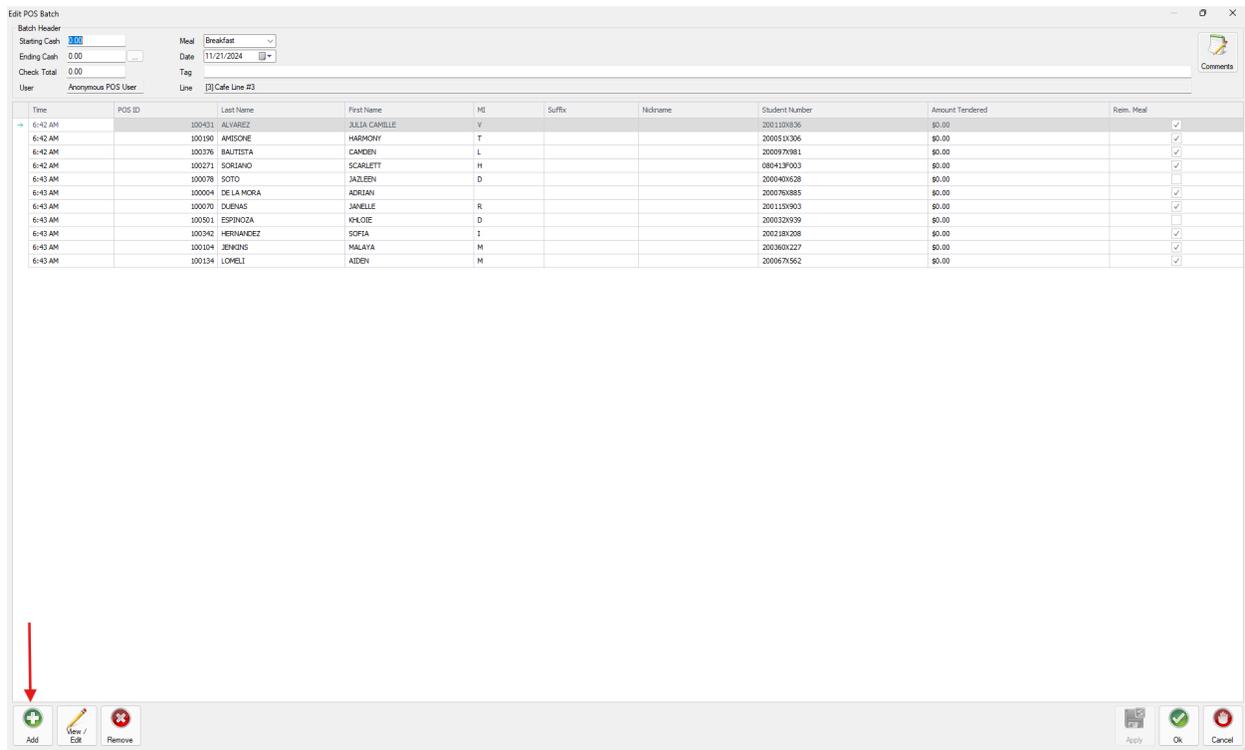


From here, you can **Add, View/Edit, or Remove** a transaction.



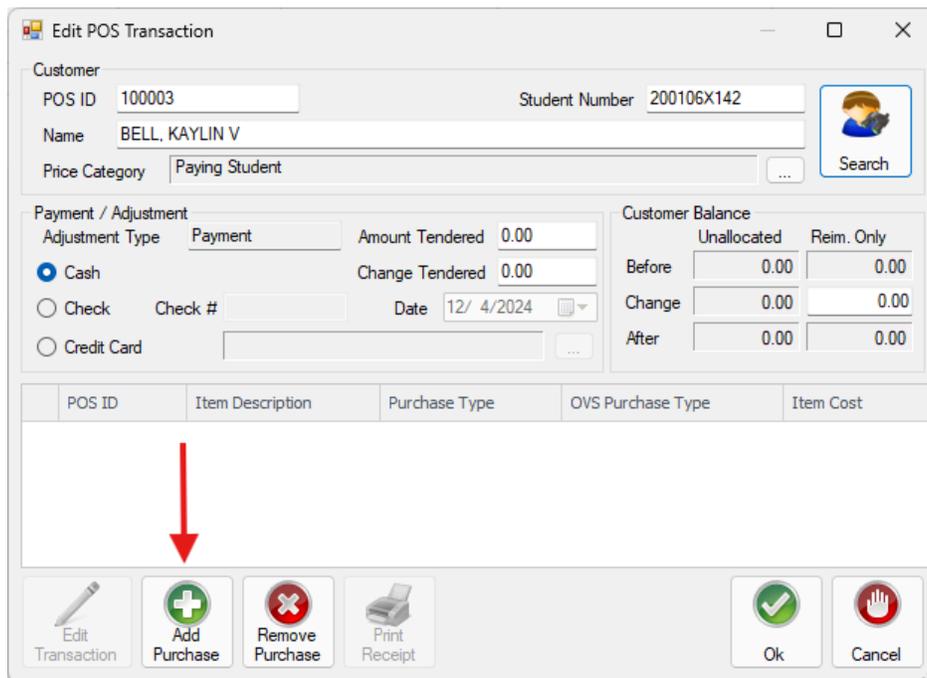
Add Transaction

1. Click "Add"

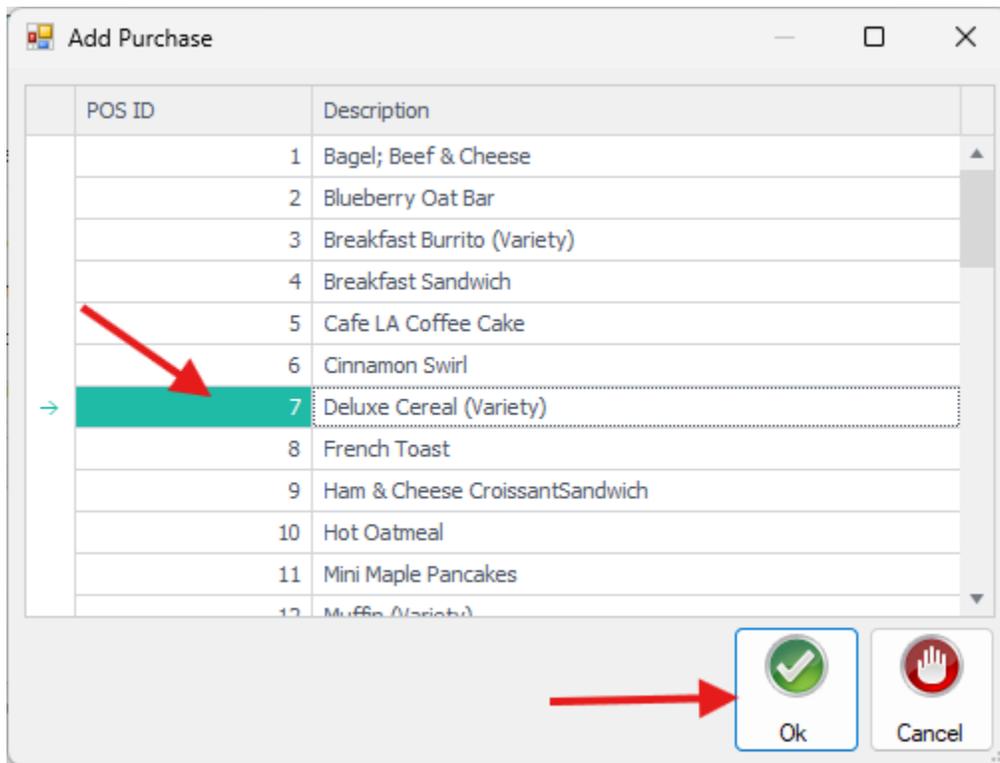


2. An **Edit POS Transaction** window opens. Search by customer's name and/or ID#.

3. Click "**Add Purchase**"

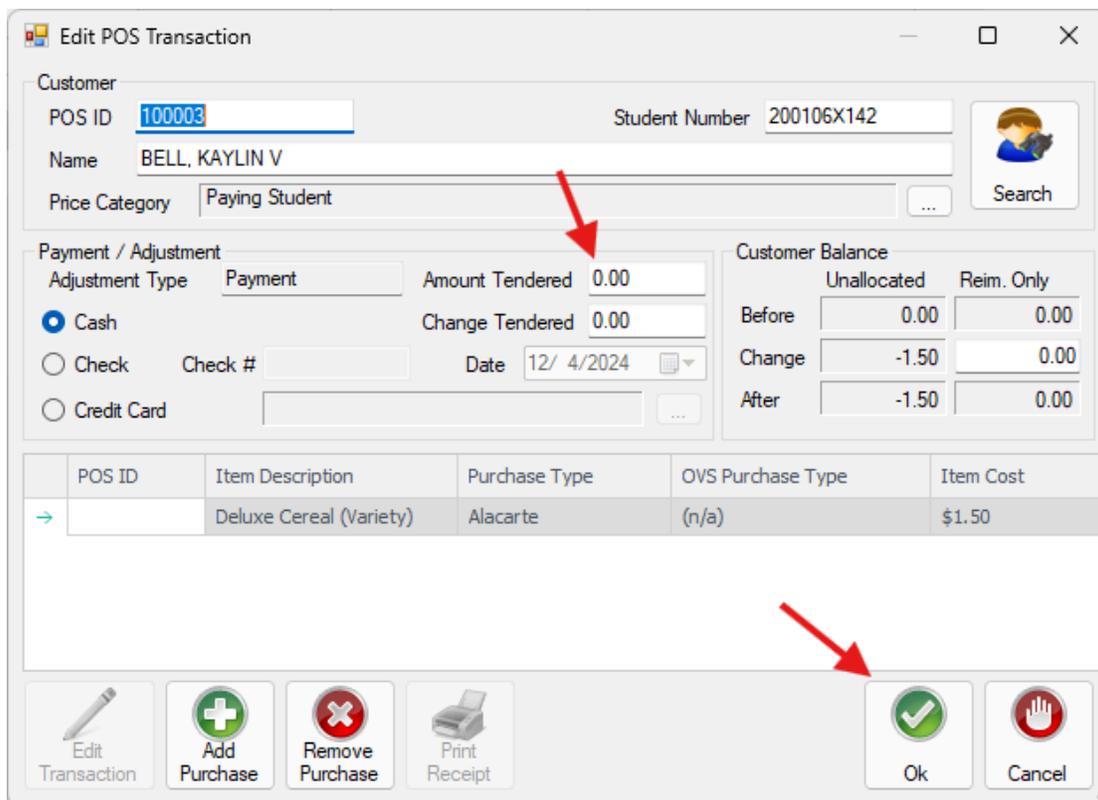


4. Select item to add. Click "Ok"



5. Enter Cash Tendered, if applicable.

6. Click "Ok"



7. The new added transaction is now in Blue. Click "Ok"

Batch Header

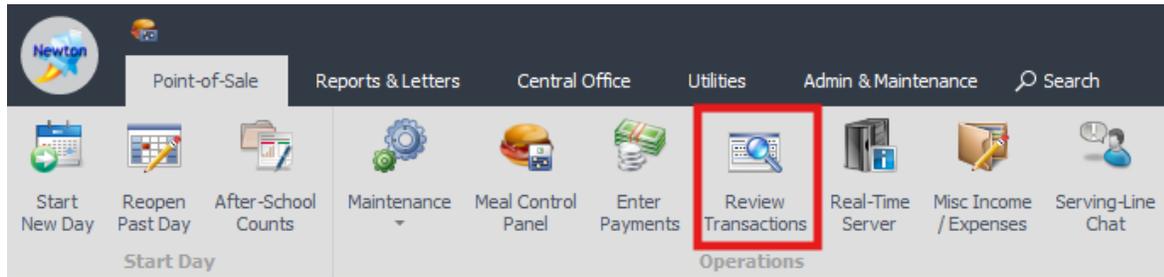
Starting Cash: 0.00 Meal: Breakfast
Ending Cash: 0.00 Date: 11/21/2024
Check Total: 0.00 Tag:
User: Anonymous POS User Line: [C] Cafe Line #3

Time	POS ID	Last Name	First Name	MI	Suffix	Nickname	Student Number	Amount Tendered	Reim. Meal
6:42 AM		100451 ALVAREZ	JULIA CAMILLE	V			2001101836	\$0.00	<input checked="" type="checkbox"/>
6:42 AM		100190 ARISOBE	HARRODNY	T			2000518306	\$0.00	<input checked="" type="checkbox"/>
6:42 AM		100176 BALTIMISTA	CAMDEN	L			2000979081	\$0.00	<input checked="" type="checkbox"/>
6:42 AM		100271 SORIANO	SCARLETT	H			0804131003	\$0.00	<input checked="" type="checkbox"/>
6:43 AM		100078 SOTO	JAZLEEN	D			2000403628	\$0.00	<input type="checkbox"/>
6:43 AM		100004 DE LA MORA	ADRIAN				2000760885	\$0.00	<input checked="" type="checkbox"/>
6:43 AM		100070 DUENAS	JANELLE	R			2001101903	\$0.00	<input checked="" type="checkbox"/>
6:43 AM		100501 ESPINOZA	KHLOE	D			2000320939	\$0.00	<input checked="" type="checkbox"/>
6:43 AM		100142 HERRANDEZ	SOFIA	I			2002180208	\$0.00	<input checked="" type="checkbox"/>
6:43 AM		100104 JENKINS	MALAYA	M			2003063227	\$0.00	<input checked="" type="checkbox"/>
6:43 AM		100138 LOVELL	RIDEH	H			2000579552	\$0.00	<input checked="" type="checkbox"/>
10:22 AM		100003 BELL	KAYLIN	V			2001061142	\$0.00	<input type="checkbox"/>

Buttons: Add, View / Edit, Remove, Apply, Ok, Cancel

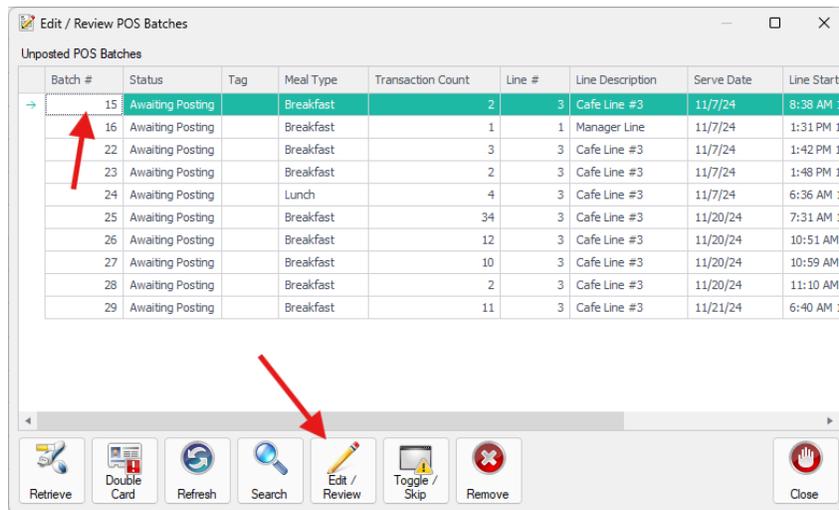
View/Edit Transaction

1. Click on **Review Transactions** on the ribbon.



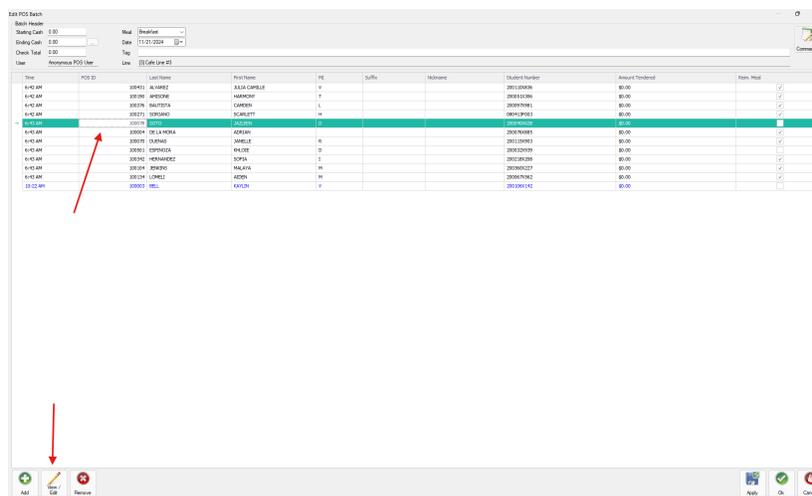
2. Select Batch #

3. Click **"Edit/Review"**



4. Click on the transaction that you wish to edit.

5. Click **"View/Edit"**



6. Click **"Edit Transaction"**

Customer

POS ID 100078 Student Number 200040X628

Name SOTO, JAZLEEN D

Price Category Free Student

Payment / Adjustment

Adjustment Type Payment Amount Tendered 0.00

Cash Change Tendered 0.00

Check Check # Date 12/ 4/2024

Credit Card

Customer Balance

	Unallocated	Reim. Only
Before	0.00	0.00
Change	0.00	0.00
After	0.00	0.00

POS ID	Item Description	Purchase Type	OVS Purchase Type	Item Cost
	Incomplete Meal	Alacarte	(n/a)	\$0.00

Edit Transaction Add Purchase Remove Purchase Print Receipt Ok Cancel

7. Enter comment as to why you are editing the transaction.

Edit Transaction

Please enter your comments about editing this transaction

Ok Cancel

8. Click **"Ok"**

- 9. Edit transaction:
 - a. Add or subtract amount tendered
 - b. Add check & check number
 - c. Add or remove purchase
- 10. Click **"Ok"**

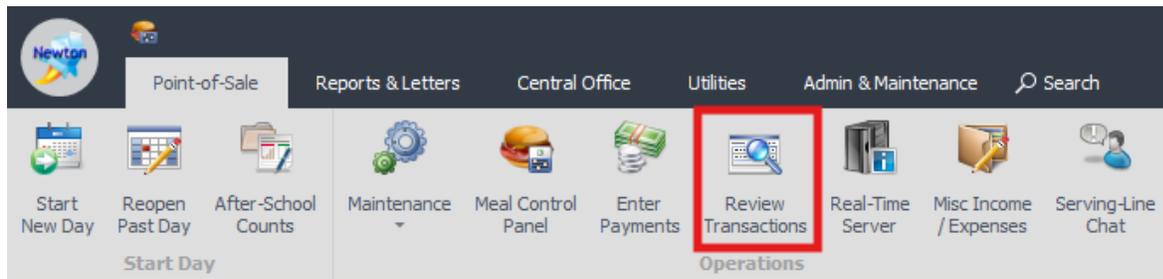
The screenshot shows the 'Edit POS Transaction' window. At the top, the Customer information is displayed: POS ID 100078, Student Number 200040X628, Name SOTO, JAZLEEN D, and Price Category Free Student. Below this, the Payment / Adjustment section shows 'Adjustment Type' set to 'Payment' with 'Amount Tendered' and 'Change Tendered' both at 0.00. The 'Cash' radio button is selected. To the right, the Customer Balance table shows 'Unallocated' and 'Reim. Only' columns with values for 'Before', 'Change', and 'After' rows. A table below lists a single item: 'Incomplete Meal' with a cost of \$0.00. At the bottom, there are buttons for 'Edit Transaction', 'Add Purchase', 'Remove Purchase', 'Print Receipt', 'Ok', and 'Cancel'. Red arrows point to the 'Amount Tendered' field, the 'Cash' radio button, the 'Add Purchase' button, the 'Remove Purchase' button, and the 'Ok' button.

POS ID	Item Description	Purchase Type	OVS Purchase Type	Item Cost
→	Incomplete Meal	Alacarte	(n/a)	\$0.00

	Unallocated	Reim. Only
Before	0.00	0.00
Change	0.00	0.00
After	0.00	0.00

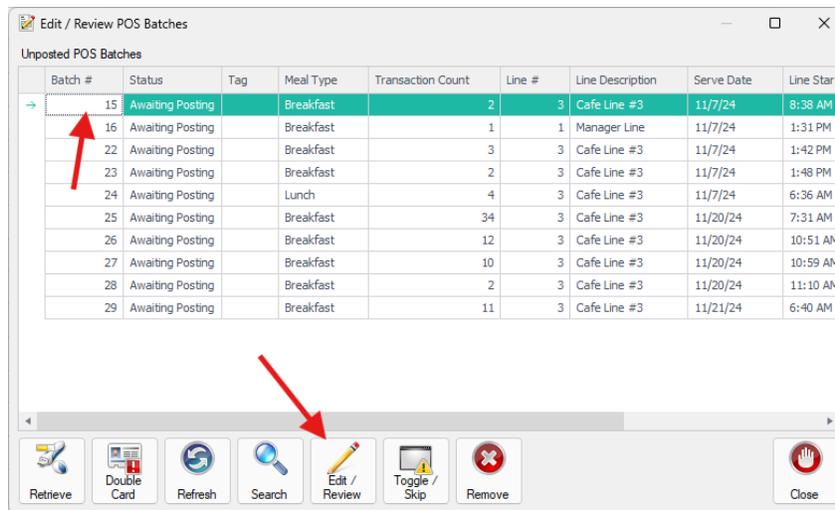
Remove Transaction

1. Click on **Point-of-Sale** → **Review Transactions** from the ribbon.



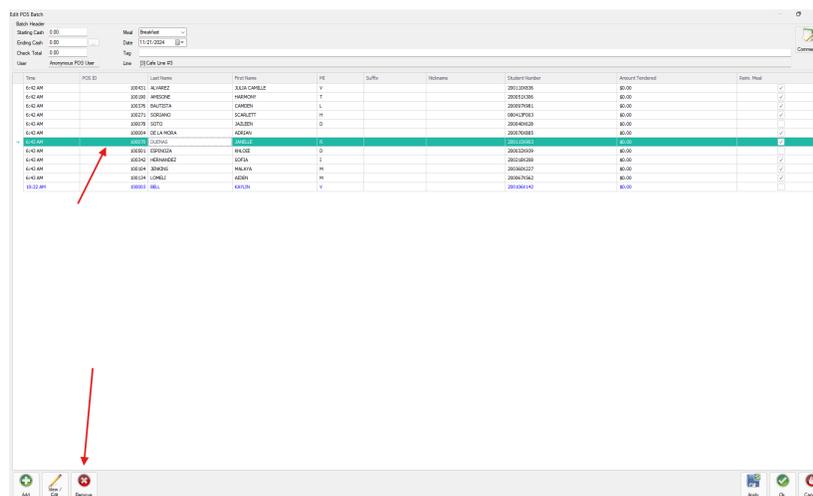
2. Click on the Batch that you want to remove the purchase from.

3. Click **"Edit/Review"**

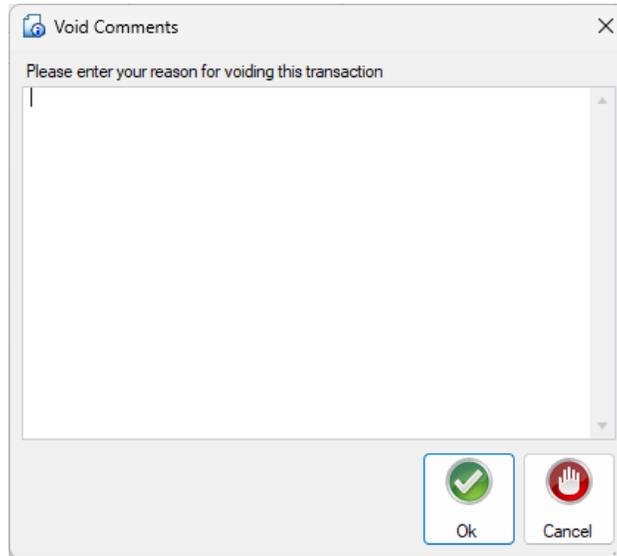


4. Click and highlight the transaction that you wish to remove.

5. Click **"Remove"**

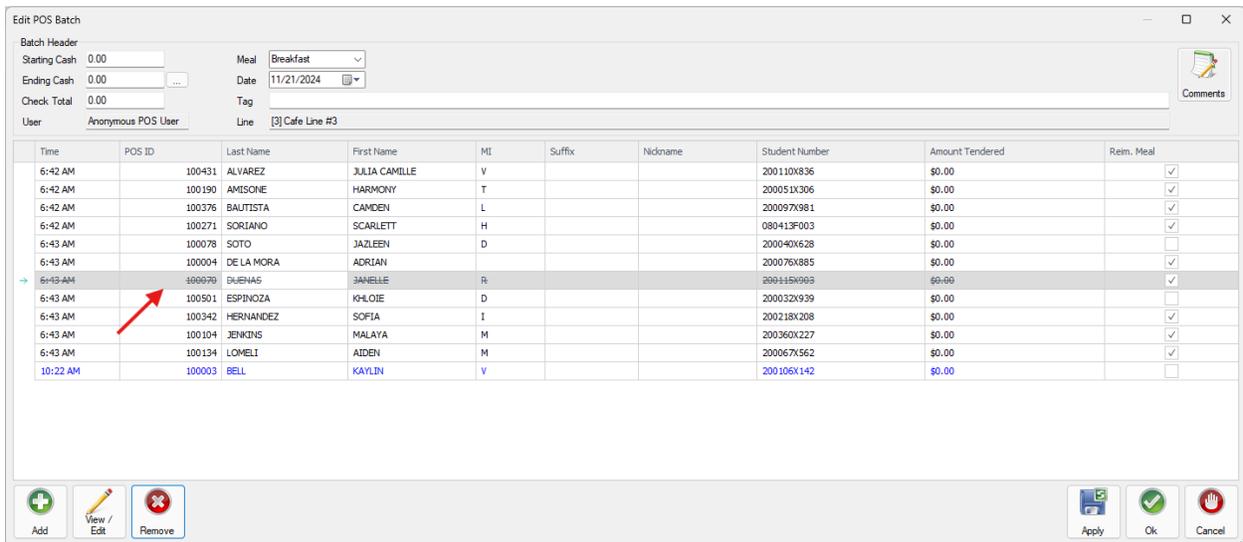


6. Enter a comment as to why you are voiding/removing the transaction.



7. Click **"Ok"**

9. The removed (voided) transaction will be marked out. From here, you can Add, Edit, or Remove other transactions, if necessary. Repeat actions as necessary.



11. Click **"Ok"**

12. Once you are done Editing Transactions, click **"Close"**

Edit Starting and Ending Cash

If cashiers are unable to count money and add it on the POS, they must do it in the manager's office.

1. Click on **Review Transactions** in the ribbon.



2. Select the appropriate batch.

3. Click **"Edit/Review"** An Edit POS Batch window will appear:

Time	POS ID	Last Name	First Name	MI	Suffix	Nickname	Student Number	Amount Tendered	Reim. Meal
8:39 AM	100564	ABUANA	ANDREW	R			200115X500	\$0.00	<input checked="" type="checkbox"/>
8:39 AM	100327	ARMENTA JR	LUIS	E			200159X735	\$0.00	<input checked="" type="checkbox"/>

Edit Starting Cash - Adjust starting cash if incorrect. Click **"Ok"**

Edit Ending Cash - Click the ellipses icon to enter figures for cash received while on the serving line.

a. An Edit Ending Cash Balance window will open.

b. Click **"Ok"** when edits are complete.

Add Check- add total check value.

Click **"Ok"** when done.

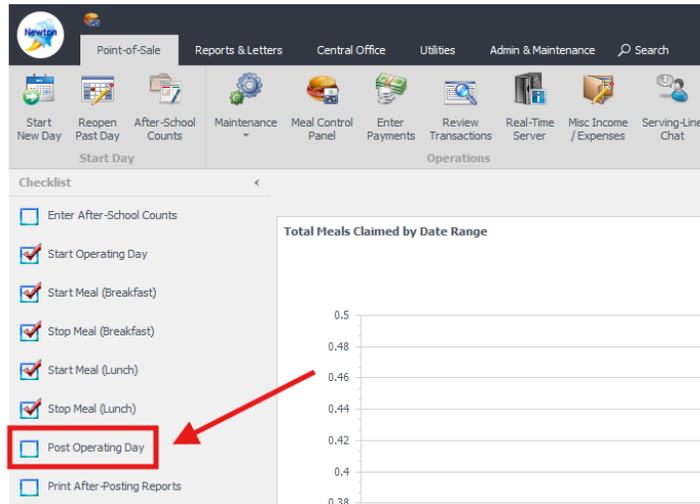
Dollar Counts	
Ones	0
Fives	0
Tens	0
Twenties	0
Fifties	0
Hundreds	0

Coin Counts	
Pennies	0
Nickels	0
Dimes	0
Quarters	0

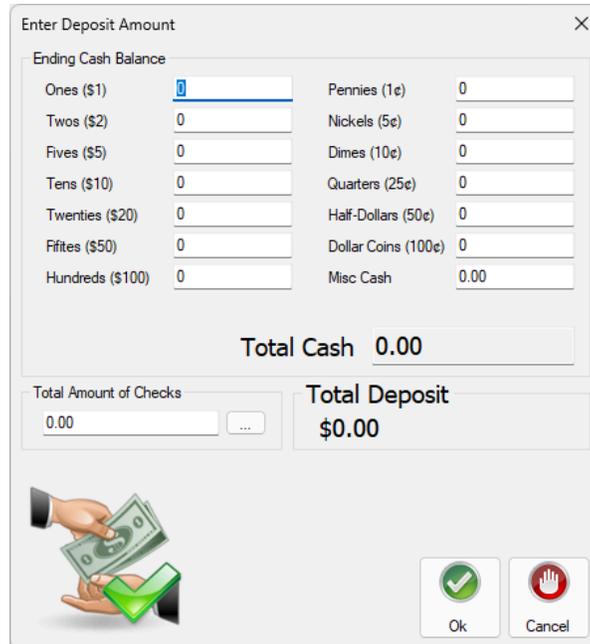
Misc Cash	
Misc Cash	\$0.00
Total	
Ending Cash Balance	\$0.00

Post Operating Day

1. Click on **Post Operating Day** from the checklist.



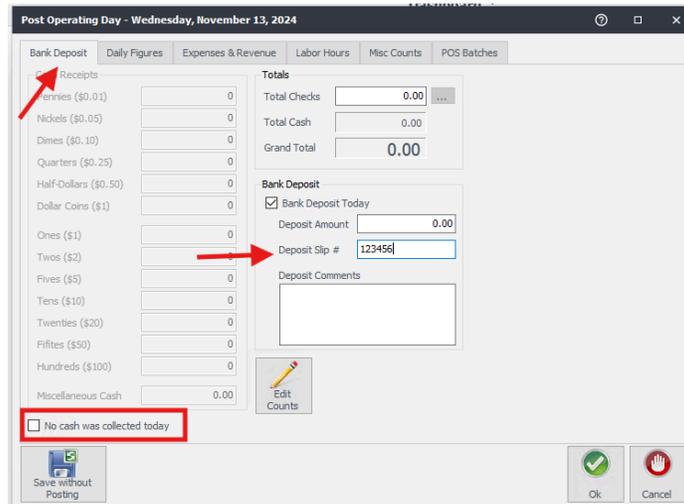
2. Enter ending cash balances from cashiers in the Enter Deposit Amount window. You will get it from their Blank Bank Deposit and/or verifying their counts.



Make sure all edits, voids, and money entries are performed before you click Ok.

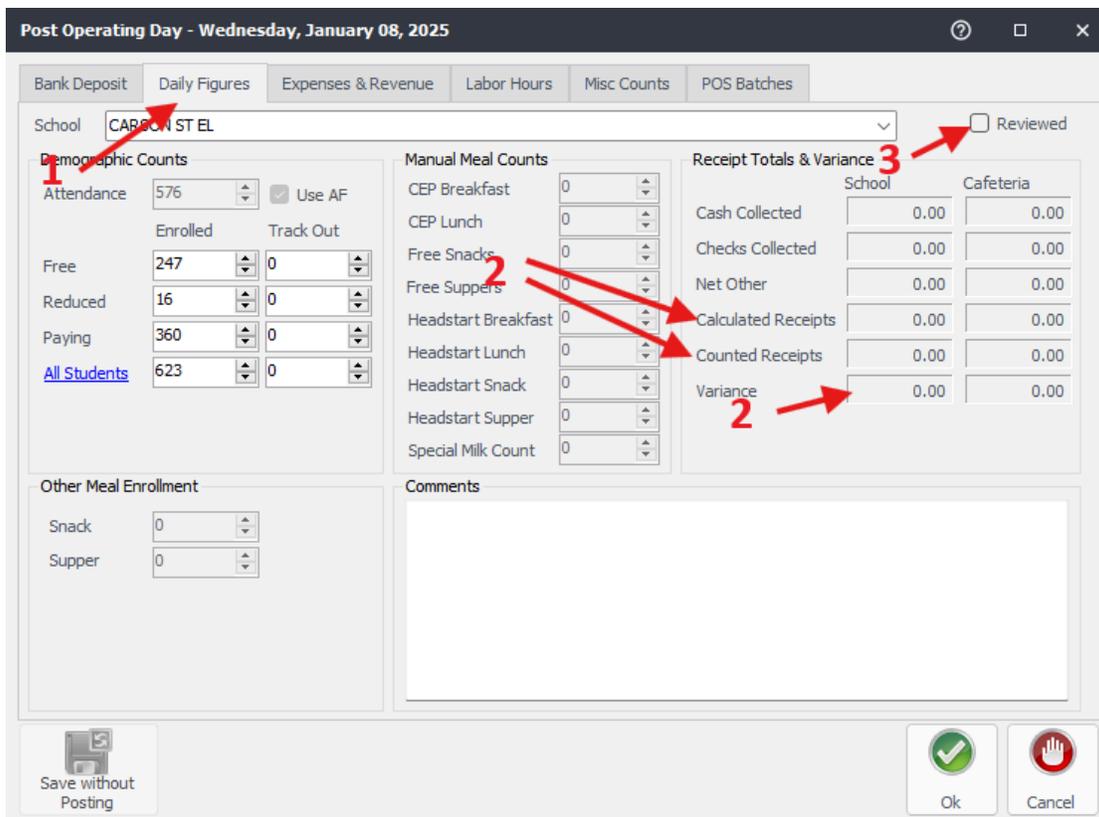
3. A Post Operating Day window appears with different tabs. Fill in the deposit screen if any cash was taken. If not, then the **"No cash was collected today"** checkbox should be marked.

If any checks were collected then the ellipsis button next to **"Total Checks"** should be clicked on and you should verify all your checks are accounted for.



a. Enter **"Deposit Slip #"** in field and enter **"Bank Bag #"** in the Deposit Comments box.

Click on the **"Daily Figures"** tab (#1):



- a. Look to see that your **Calculated Receipts** equals the **Counted Receipts** (a \$0.00 variance). This means that there was no variance in your cash drawer (#2).
- b. If there is no Variance, click on the **"Reviewed"** checkbox (#3). This must be done in order to Post. If you have a variance greater than 1% of your deposit, you will need to do some research.

Daily Figures Tab (CSPP/EEC Sites) - Attendance

If you are at a site that has CSPP/EEC, attendance will not be pulled in automatically for those specific programs, so you must enter them manually.

The following screenshot is an example of when the Attendance Factor is automatically checked at a site without CSPP/EEC:

Demographic Counts		
	Enrolled	Track Out
Attendance	576	
Free	247	0
Reduced	16	0
Paying	360	0
All Students	623	0

The difference you will see in the Daily Figures Tab for CSPP/EEC sites is this box for **"Use AF"** (Attendance Factor) being unchecked.

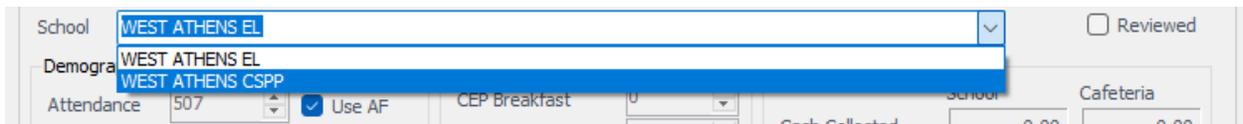
Follow these steps to properly count attendance when posting:

1. For your regular cafeteria attendance, you will have to check the **"Use AF"** box manually. It will then fill in your attendance for you

Demographic Counts		
	Enrolled	Track Out
Attendance	0	
Free	377	0
Reduced	19	0
Paying	152	0
All Students	548	0

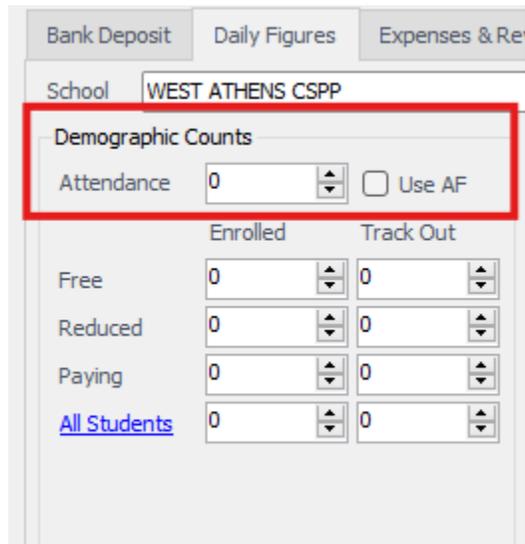
Demographic Counts		
	Enrolled	Track Out
Attendance	507	
Free	377	0
Reduced	19	0
Paying	152	0
All Students	548	0

2. In the **"School"** dropdown menu, select your CSPP/EEC site



A screenshot of a web application interface. At the top, there is a dropdown menu labeled 'School' with 'WEST ATHENS EL' selected. Below it, a blue dropdown menu is open, showing 'WEST ATHENS EL' and 'WEST ATHENS CSPP' as options. To the right of the dropdowns, there is a 'Reviewed' checkbox which is currently unchecked. Below the dropdowns, there are several input fields: 'Attendance' with the value '507', a checked 'Use AF' checkbox, 'CEP Breakfast' with the value '0', and 'Cafeteria' with the value '0.00'.

3. Enter your Attendance count ONLY for the site in the designated field WITHOUT checking the "Use AF" box or entering numbers in the "Enrolled" sections.

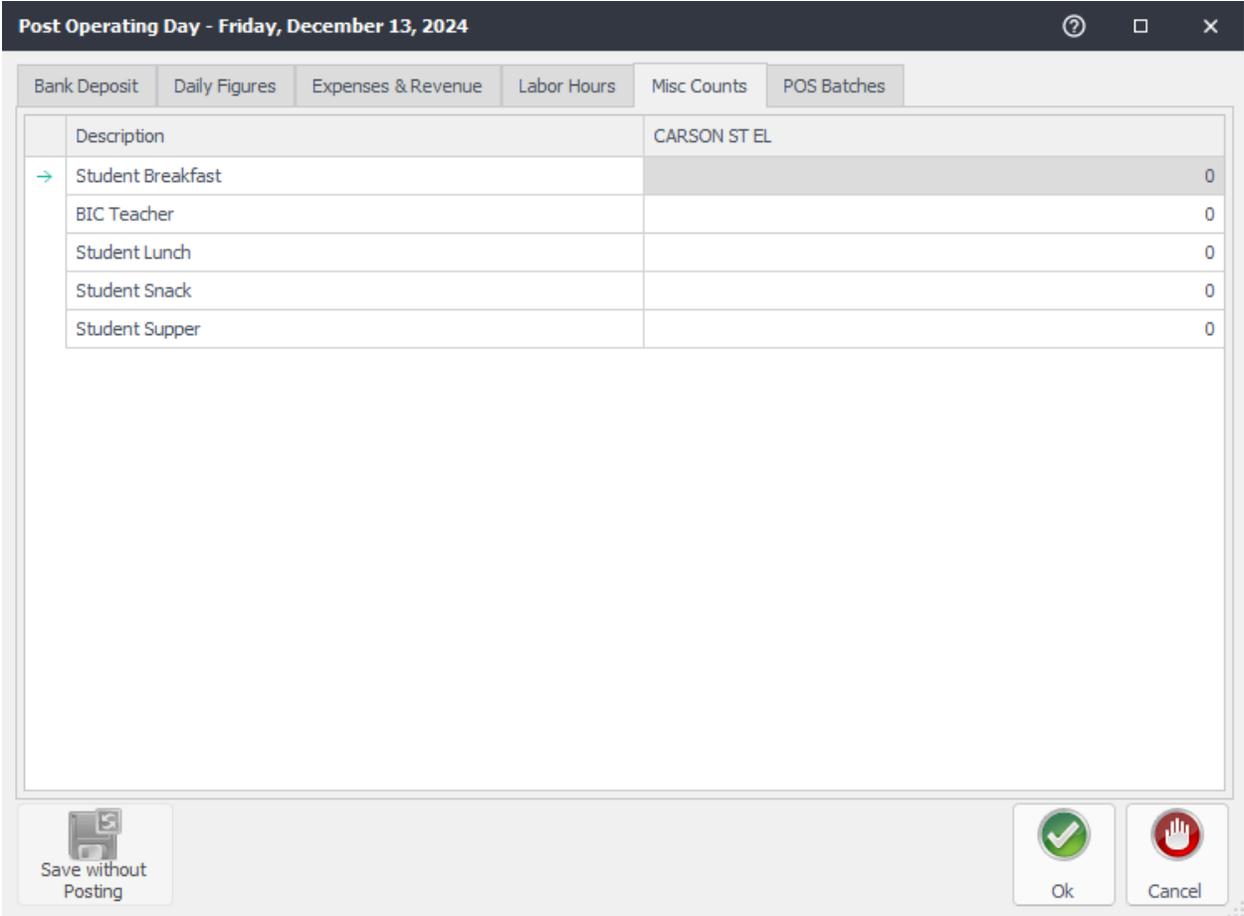


A screenshot of a web application interface showing the 'Demographic Counts' section. The 'School' dropdown is set to 'WEST ATHENS CSPP'. The 'Demographic Counts' section is highlighted with a red box. It contains an 'Attendance' field with the value '0' and an unchecked 'Use AF' checkbox. Below this, there are two columns: 'Enrolled' and 'Track Out'. Each column has four rows: 'Free', 'Reduced', 'Paying', and 'All Students'. Each row has a spinner control with the value '0'.

4. Click the **"Reviewed"** checkbox after you are finished as you normally would when posting.

Bulk Entry (Misc. Meal Counts)

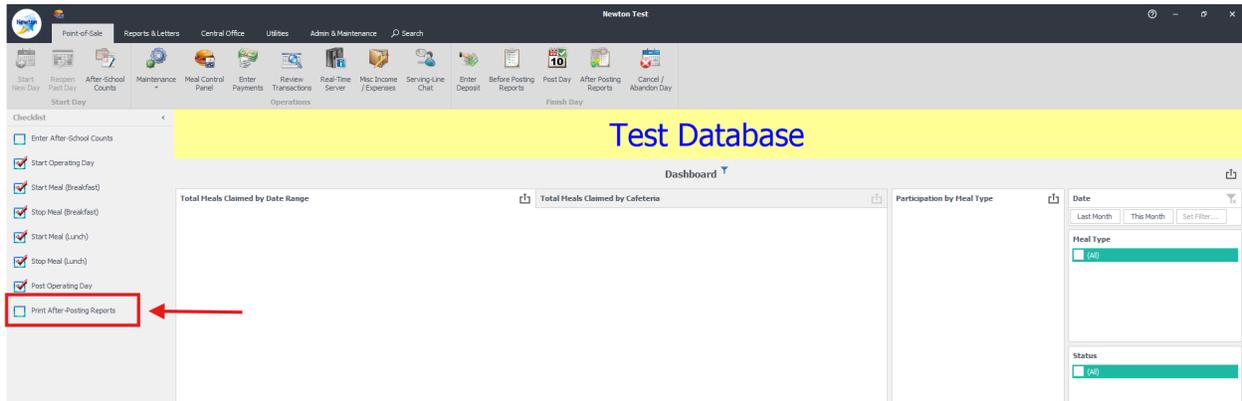
LAUSD will use the Misc Meal Counts tab for all Bulk Entry



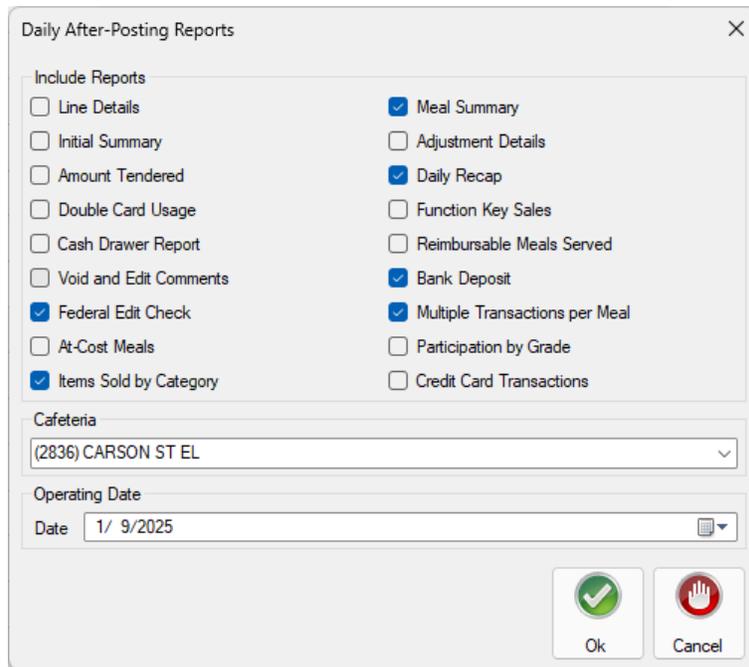
When you are ready to Post, Click "Ok". This Posts your transactions for the day.

Print After-Posting Reports

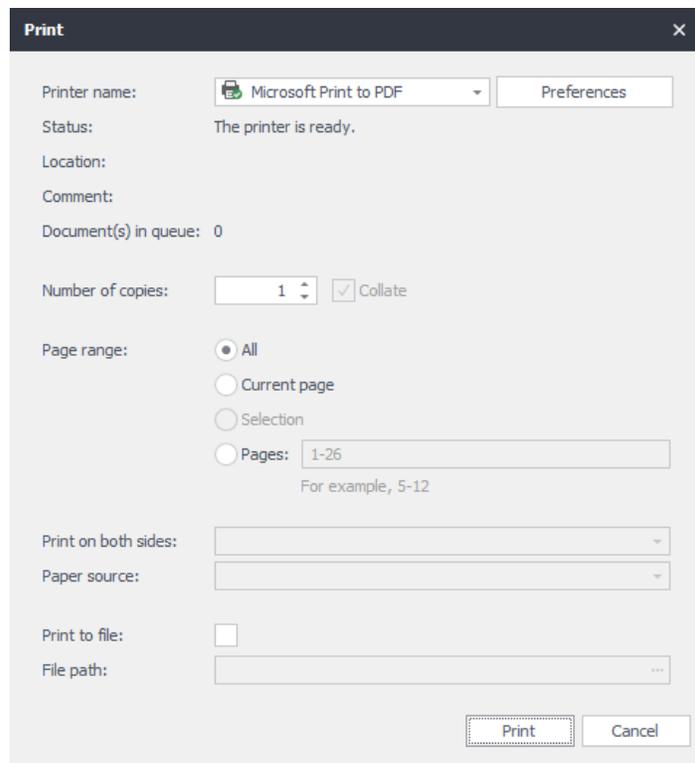
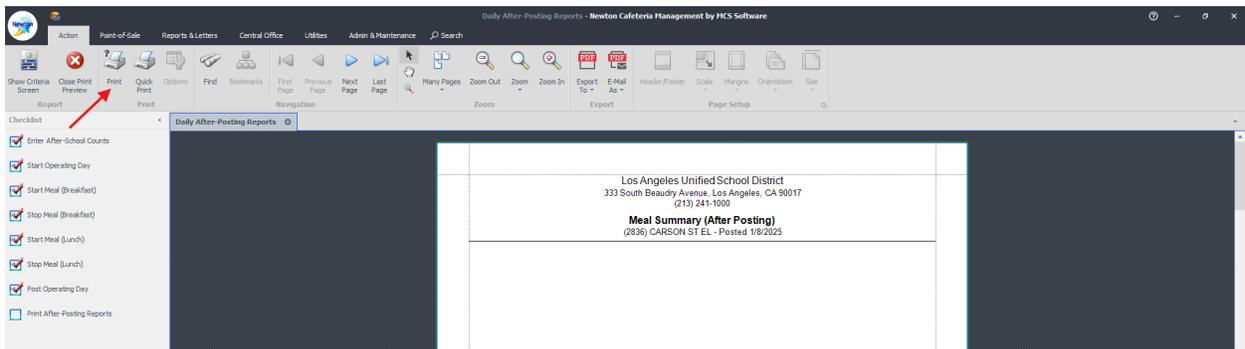
1. Click on **Print After-Posting Reports** in the checklist:



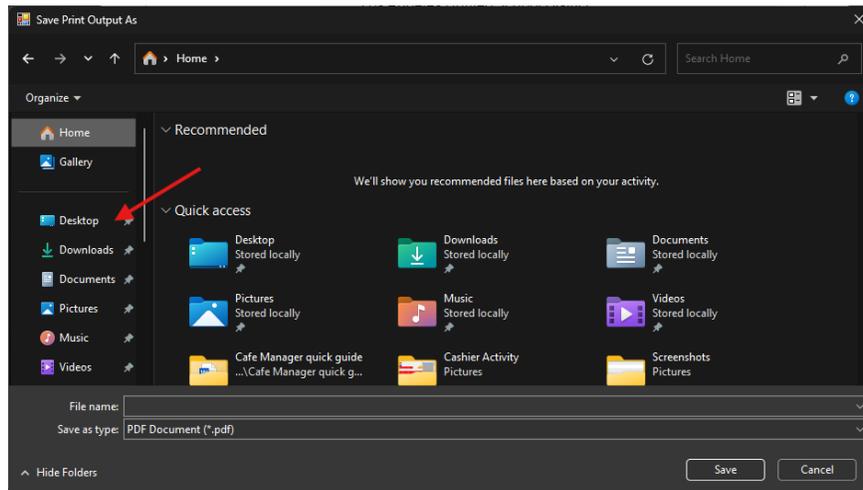
2. The pre-selected reports will be checked off. Check any other reports you need and click **"Ok"**:



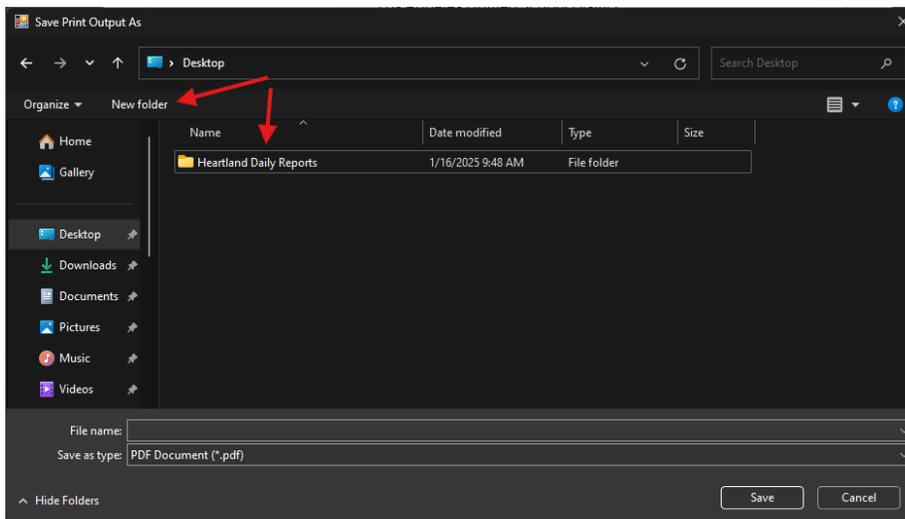
3. The reports will be generated. Click **"Print"** to bring up the Print window. You can save your reports as a PDF (as shown in below screenshot).



After clicking **"Print"** a window will pop up asking where you'd like to save your file. Click **"Desktop"** on the left side.



Then, click **"New Folder"** and title it **"Heartland Daily Reports"** Double click on the new folder to open it.



Once you are in the folder, click the File Name field and use this naming convention: **Daily Reports XX-XX-XX** (date with dashes in between) then click **"Save"**



Once this folder is set up, you will have to navigate to it to save your Daily Reports each day moving forward.

Other options for viewing reports include:



Show Criteria Screen - Goes back to checklist to add or remove reports from the preview.

Quick Print - Automatically prints the report to the default printer.

Find - Allows you to search the report(s) for specific text.

Page Navigation Arrows - Allows you to quickly navigate pages or to the beginning or end of the report.

Export To - Allows you to select a format type in which to export the report. Clicking the "PDF" icon on the top will bring up an export window:

A screenshot of the PDF Export Options dialog box. The dialog box has a title bar that says "PDF Export Options" and a close button (X). The dialog box contains several fields and checkboxes: "Page range:" with a text input field; "Don't embed these fonts:" with a text input field; a checkbox for "Export editing fields to AcroForms"; "PDF/A compatibility:" with a dropdown menu set to "None"; "PDF/UA compatibility:" with a dropdown menu set to "None"; a checkbox for "Rasterize Images"; "Rasterization Resolution:" with a text input field set to "96"; a checked checkbox for "Convert images to JPEG"; "Image quality:" with a dropdown menu set to "Highest"; "Password security:" with a dropdown menu set to "(none)"; "Digital signature:" with a dropdown menu set to "(none)"; "Application:" with a text input field; "Author:" with a text input field; "Keywords:" with a text input field; "Subject:" with a text input field; "Title:" with a text input field; and "OK" and "Cancel" buttons at the bottom.

Hit "Ok" on the bottom to save to the designated location on your computer. Follow the same instructions as above for saving your Daily Reports.

End of Day Reports

Meal Summary (After Posting)

The Meal Summary report breaks down the final meal counts by item (item description, count, item cost, cash tendered, prepaids used), item category (category description, count, item cost, cash tendered, prepaids used), adjustment summary (adjustment description, count, amount) and provides a summary of all meals.

School System Child Nutrition Programs				
Meal Summary (After Posting)				
(070) Elementary - Posted 9/17/2013				
(070) Elementary				
Breakfast				
<i>Summary by Item</i>				
<i>Item Description</i>	<i>Count</i>	<i>Item Cost</i>	<i>Cash Tendered</i>	<i>Prepaids Used</i>
REIMB. BREAKFAST	78	\$0.00	\$0.00	\$0.00
<i>Summary by Item Category</i>				
<i>Category Description</i>	<i>Count</i>	<i>Item Cost</i>	<i>Cash Tendered</i>	<i>Prepaids Used</i>
Reimbursable Meal	78	\$0.00	\$0.00	\$0.00
<i>Adjustment Summary</i>				
<i>Adjustment Description</i>	<i>Count</i>	<i>Amount</i>		
Payment	1	\$1.00		
Lunch				
<i>Summary by Item</i>				
<i>Item Description</i>	<i>Count</i>	<i>Item Cost</i>	<i>Cash Tendered</i>	<i>Prepaids Used</i>
ENTREE, HOT LINE	1	\$1.75	\$1.75	\$0.00
HOT LINE LUNCH	84	\$17.35	\$16.55	\$0.80
<i>Summary by Item Category</i>				
<i>Category Description</i>	<i>Count</i>	<i>Item Cost</i>	<i>Cash Tendered</i>	<i>Prepaids Used</i>
Extra Sales	1	\$1.75	\$1.75	\$0.00
Reimbursable Meal	84	\$17.35	\$16.55	\$0.80
<i>Adjustment Summary</i>				
<i>Adjustment Description</i>	<i>Count</i>	<i>Amount</i>		
Correction	1	\$2.50		
Payment	5	\$14.00		
Refund	1	-\$0.40		
Transfer	2	\$0.00		

All Meals

Summary by Item

Item Description	Count	Item Cost	Cash Tendered	Prepays Used
ENTREE, HOT LINE	1	\$1.75	\$1.75	\$0.00
HOT LINE LUNCH	84	\$17.35	\$16.55	\$0.80
REIMB. BREAKFAST	78	\$0.00	\$0.00	\$0.00

Summary by Item Category

Category Description	Count	Item Cost	Cash Tendered	Prepays Used
Extra Sales	1	\$1.75	\$1.75	\$0.00
Reimbursable Meal	162	\$17.35	\$16.55	\$0.80

Adjustment Summary

Adjustment Description	Count	Amount
Correction	1	\$2.50
Payment	6	\$15.00
Refund	1	-\$0.40
Transfer	2	\$0.00

Initial Summary (After Posting)

The Initial Summary (After Posting) report provides final details of meals and breaks the compiled information down to show the line number/description, the number of each meal status types, at cost counts, a la carte counts, total meals served, total cash collected, and variance amount.

School System
Child Nutrition Programs

Initial Summary (After Posting)
(070) Elementary - Posted on 09/17/2013

Breakfast

Line Number / Description	Reduced Student	Free Student	Paying Student	Student Meals	Adult Helper	Other Adult At Cost	A la carte	Total Meals	Total Cash	Variance
1 - Main Machine	3	34	2	39	0	0	0	39	\$0.00	\$0.00
3 - Line 3	2	33	4	39	0	0	0	39	\$1.00	-\$1.00
Breakfast	5	67	6	78	0	0	0	78	\$1.00	-\$1.00

Lunch

Line Number / Description	Reduced Student	Free Student	Paying Student	Student Meals	Adult Helper	Other Adult At Cost	A la carte	Total Meals	Total Cash	Variance
1 - Main Machine	0	0	0	0	0	0	0	0	\$4.60	-\$4.60
3 - Line 3	4	53	6	63	0	0	1	63	\$21.05	-\$41.05
3 - Line 3	0	20	1	21	0	0	0	21	\$6.25	-\$6.25
Lunch	4	73	7	84	0	0	1	84	\$31.90	-\$51.90

Adjustment Details (After Posting)

The Adjustment Details report shows final transaction details affecting deposits (payments and refunds) and non-deposits (corrections and transfers). The transaction date and time, user completing the transaction, customer POS ID, customer name, amount, check number/check date (if applicable), and transaction totals are included in the report.

School System Child Nutrition Programs						
Adjustment Details (After Posting)						
(070) Elementary - Posted on 09/17/2013						
Deposit-Affecting Adjustments						
Payments						
Transaction Date	User	Customer POS ID	Customer Name	Amount	Check Number	Check Date
09/17/13 1:13 AM	asdasd	1	Ha ., B . N	\$1.00		
09/17/13 1:20 AM	System Manager	1	Ke . L . P	\$3.00		
09/17/13 1:20 AM	System Manager	1	Bu ., D . L, II	\$2.00		
09/17/13 1:30 AM	asdasd	1	Na . D . A	\$2.00		
09/17/13 1:30 AM	asdasd	1	Gi ., K . D	\$2.00		
09/25/13 1:55 PM	System Manager	2	Sm ., E . H	\$5.00	1001	09/17/13
		Total Cash	\$10.00	Total Payments	\$15.00	
		Total Checks	\$5.00			
Refunds						
Transaction Date	User	Customer POS ID	Customer Name	Amount	Check Number	Check Date
09/25/13 1:56 PM	System Manager	1	Wi ., J . J	(\$0.40)		
		Total Cash	(\$0.40)	Total Refunds	(\$0.40)	
		Total Checks	\$0.00			
				Total Deposit-Affecting Adjustments	\$14.60	
Non-Deposit-Affecting Adjustments						
Corrections						
Transaction Date	User	Customer POS ID	Customer Name	Amount	Check Number	Check Date
09/25/13 2:01 PM	System Manager	1	Ga ., R . J	\$2.50		
				Total Corrections	\$2.50	
Transfers						
Transaction Date	User	Customer POS ID	Customer Name	Amount	Check Number	Check Date
09/25/13 2:04 PM	System Manager	1	Jo ., A . M	(\$1.85)		
09/25/13 2:04 PM	System Manager	1	Jo ., J . J	\$1.85		
				Total Transfers	\$0.00	
				Total Non-Deposit-Affecting Adjustments	\$2.50	
September 30, 2013 10:15 AM						
Point-of-Sale After Posting Reports						
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Daily Recap (After Posting)

The Daily Recap report breaks down meal totals by status to include paid, charged, prepaid, meals earned and state reimbursed totals to include the types of meals, cash collected, total meals served, vending, catering, miscellaneous sales, and sales of the day. Additionally, food cash and other cash incomes, deposits posted, deposits entered, variance amounts, net charges, deposits affecting receipts, customers on file, and miscellaneous figures.

Daily Recap								
(0101) Sunlake High School								
Daily Recap for Serve Date: 05/19/2017								
Enrollment: 1923								
Attendance: 1804								
	LUNCH		BREAKFAST		SNACK		SUPPER	
	MEALS	CASH	MEALS	CASH	MEALS	CASH	MEALS	CASH
REDUCED MEALS								
Reduced Meals Paid	5	\$2.25	2	\$0.60	0	\$0.00	0	\$0.00
Reduced Meals Charged	10		3		0		0	
Reduced Prepaid Meals	28		4		0		0	
Reduced Meals Earned	0		0		0		0	
Reduced (State Reimb.)	0		0		0		0	
Total Student Reduced	43	\$2.25	9	\$0.60	0	\$0.00	0	\$0.00
FREE MEALS								
Free Meals	196		62		0		0	
Free Meals Earned	0		0		0		0	
Total Student Free	196		62		0		0	
FULL PAY MEALS								
Full Pay Meals Paid	24	\$77.10	0	\$0.00	0	\$0.00	0	\$0.00
Full Pay Meals Charged	25		1		0		0	
Full Pay Prepaid Meals	85		5		0		0	
Full Pay Meals Earned	0		0		0		0	
Total Full Pay Meals	134	\$77.10	6	\$0.00	0	\$0.00	0	\$0.00
AREA ELIGIBLE MEALS								
Area Eligible Meals	0		0		0		0	
Total Student Meals	373	\$79.35	77	\$0.60	0	\$0.00	0	\$0.00
ADULT MEALS								
Adult Meals Paid	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
Adult Meals Charged	0		0		0		0	
Adult Meals Prepaid	0		0		0		0	
Adult Meals Earned (Emp.)	12		7		0		0	
Total Adult Meals	12	\$0.00	7	\$0.00	0	\$0.00	0	\$0.00
OTHER MEALS								
At Cost Student Meals	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
At Cost Adult Meals	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
Total Other Meals	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
TOTAL MEALS SERVED	385	\$79.35	84	\$0.60	0	\$0.00	0	\$0.00
MISCELLANEOUS SALES								
Alacarte	917	\$259.65	33	\$19.00	0	\$0.00	0	\$0.00
Milk	260	\$0.80	45	\$0.00	0	\$0.00	0	\$0.00
Entree	371	\$15.00	91	\$1.00	0	\$0.00	0	\$0.00
Fruit	411	\$0.00	87	\$0.00	0	\$0.00	0	\$0.00
Veg	86	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00
TOTAL SALES TODAY <small>(Including Meals)</small>	\$354.80		\$20.60		\$0.00		\$0.00	

DAILY RECAP CONT'D

(0101) Sunlake High School
 Daily Recap for Serve Date: 05/19/2017

FOOD CASH INCOME		OTHER CASH INCOME	
Student Meals	\$79.95	Prepayments for Students	\$633.05
Adult Meals	\$0.00	Prepayments for Adults	\$0.00
At Cost Student Meals	\$0.00	Charges Collected for Students	\$82.55
At Cost Adult Meals	\$0.00	Charges Collected for Adults	\$0.00
Miscellaneous Sales	\$295.45	Refunds	\$0.00
Total Food Cash Income	\$375.40	Total Other Cash Income	\$715.60
TOTAL DEPOSIT POSTED	\$1428.60		
TOTAL DEPOSIT ENTERED	\$1428.40		
VARIANCE	\$(0.20)		

NET CHARGES

Net Charges Accrued	\$53.80
Net Charges Reconciled	\$82.55

CUSTOMERS ON FILE

Free Students	483
Reduced Students	109
Paying Students	1331
Out-of-session Students	0
Inactive Students	17
Adults	75

LABOR HOURS

Breakfast	0.0
Lunch	88.5
Snack	0.0
Supper	0.0

DEPOSIT-AFFECTING RECEIPTS

Vending-Cafe	\$53.25
Vending-Enterprise	\$284.35
Catering	\$75.00

MISCELLANEOUS FIGURES

Corrections	\$0.00
Total Meal Cost	\$1590.15
Net Taxable Sales	\$0.00

Bank Deposit

The Bank Deposit report reflects the amount of funds received for the operating day and assists in ensuring all totals are correct. The operating date, deposit slip # (bank bag#), manager's name, cafeteria, total cash, total checks, and total deposits are listed. Signature lines are included for best practice of confirming amounts.

School System Child Nutrition Programs Bank Deposit (070) Elementary - Posted on 09/17/2013				
Operating Date		09/17/2013	Deposit Slip #	A9900999
Manager's Name		L. Ha		
Cafeteria		(070) Elementary		

Bills		Qty	Value
\$100	x		\$0.00
\$50	x		\$0.00
\$20	x	5	\$100.00
\$10	x	14	\$140.00
\$5	x	8	\$40.00
\$2	x		\$0.00
\$1	x	154	\$154.00
Total Bills			\$434.00

Coins		Qty	Value
100¢	x		\$0.00
50¢	x		\$0.00
25¢	x	8	\$2.00
10¢	x	14	\$1.40
5¢	x	51	\$2.55
1¢	x	15	\$0.15
Total Coins			\$6.10
Misc Cash			\$0.00

Total Cash:	\$440.10	Signature #1	
Total Checks:	\$5.00	Signature #2	
Total Deposit:	\$445.10		

Check Listing Details

Check #	Amount	Check #	Amount	Check #	Amount
1001	\$5.00				

Total Checks: \$5.00

Federal Edit Check

The Federal Edit Check report shows daily counts from the beginning of the current month to the current date and includes meals served, enrollment, and attendance numbers.

A row will be flagged with one of the following codes if any of the following issues occurs:

- A: Exceeds applications on file
- B: Exceeds eligible times attendance factor
- D: Exceeds average daily attendance
- If more than one issue occurs, the day will be flagged with an asterisk * and a message will appear above the Comments section.
- A manager signature line is included for best practice of confirming amounts.

School System																			
Child Nutrition Programs																			
Federal Edit Check																			
Beginning Date: 09/01/2013					Ending Date: 09/17/2013														
(070) Elementary					Attendance Factor: 95.69%														
Provision II Percentages - September, Breakfast					Free: 86.19%					Reduced: 4.75%					Paying: 9.06%				
Eligible Students					Number of Student Lunches					Number of Student Breakfasts									
Date	Reduced	Free	Paying	Attendance	Reduced	Free	Paid	Total	Other	Reduced	Free	Paid	Total	Other					
09/17/2013	48	535	46	0	4	73	7	84	0	4	67	7	78	0					
Totals				0	4	73	7	84	0	4	67	7	78	0					

Legend		Total number of days lunch was served	1
A - Exceeds applications on file		Total number of days breakfast was served	1
B - Exceeds eligible times attendance factor		Total number of days snack was served	0
D - Exceeds average daily attendance		Average daily attendance	0
* - One or more problems for the day		Average daily participation - lunch	84
		Average daily participation - breakfast	78
		Maximum number of reduced applications on file on any day	48
		Maximum number of free applications on file on any day	535
		Maximum number of paid students on file on any day	46
		Enrollment on last day	623

09/17/2013	84 Lunch meals served exceeds ADA of 0
09/17/2013	78 Breakfast meal served exceeds ADA of 0

Comments

Manager's Signature _____

September 30, 2013 10:15 AM

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Point-of-Sale | After Posting Reports

Other Reports

Misc Posting Cash (Custom Reports)

The Misc Posting Cash report shows the daily totals for miscellaneous revenue (catering and vending revenue). This report should be used when preparing the monthly vending reports.

Line Details (After posting)

The Line Details (After Posting) report shows the final meal type, batch number, serving line name, time the meal was served, customer the meal was sold to, customer's meal status, item/adjustment description, purchase type, meal/item cost, amount tendered by customer, total meals sold in a batch, batch meal cost total, batch amount tendered total, meal cost total, and meal amount tendered total.

Items Sold by Category

The Items Sold by Category report shows totals of items and items categories of meals sold in meal status categories for the established date/date range.

Participation by Grade

The Participation by Grade report shows the number of meals sold to each grade, the cost of meals served, and the total cost of all meals served for the established date/date range.

At-Cost Meals (After Posting)

The At-Cost Meals report displays any meals which were sold at-cost. The serving line, transactions date, customer, item description and item cost are displayed and the total at-cost transactions. If no at-cost occurred or issues have been cleared prior to posting the operating day, no information will be displayed in the report.

Multiple Transactions per Meal (After Posting)

The Multiple Transactions per Meal report reflects any customers which have had multiple transactions during a meal after the operating day has been posted. The report displays the POS ID, customer name, meal, time the transaction occurred, the line number, cashier name, purchase/adjustment description, price of item/meal, and amount tendered. If multiple transactions have not occurred or issues have been cleared prior to posting the operating day, no information will be displayed in the report.

Void and Edit Comments (After Posting)

The Void and Edit Comments report displays the batch number, serving line, user, student number, student name, type of change, and comments as to why a change has occurred when voids and edits have been made.

Reimbursable Meals Served (After Posting)

The Reimbursable Meals Served report breaks down any reimbursable meals served by the customer and includes the student number, customer name, price category, and meal the customer received. Meals are totaled by price category and total amounts of reimbursable meals sold.

Amount Tendered (After Posting)

The Amount Tendered report displays final amounts paid for each meal. The POS ID, meal benefit category, customer name, check number/date (if applicable), and amount is displayed for each monetary transaction. Additionally, line totals, meal totals, and total amount collected are displayed.

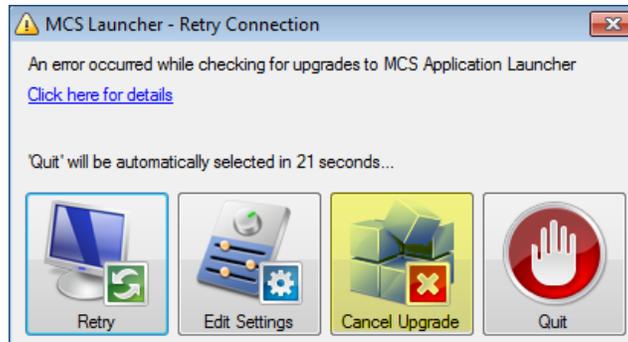
Cash Drawer Report (After Posting)

The Cash Drawer Report shows a final summary of each starting cash, tender counts of cash and checks, miscellaneous cash, total amount tendered, and overages and shortages for each batch. Totals for all batches are displayed as well. If your Calculated Receipts do NOT equal the Counted Receipts and there is a variance larger than 1% of the total deposit, you will need to do some research.

Working Offline from the Manager's Main Machine

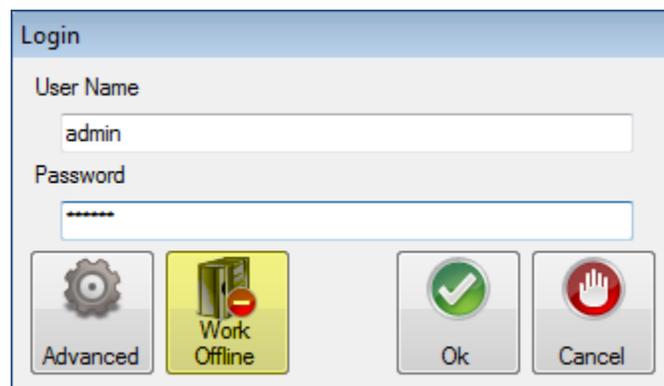
This section will explain how to use Newton in the event there is no internet connection at your site.

1. Login to Newton.
2. When there is not a network available, the MCS Launcher-Retry Connection window will display. Select Cancel Upgrade twice and then the Login window will open as usual.



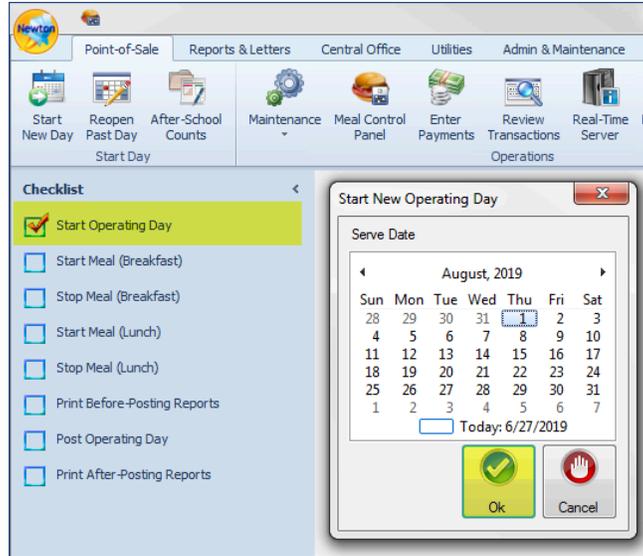
3. Enter your username and password. Then, select Work Offline.

Note: The workstation must be a computer that is permanently attached to a cafeteria to work offline.

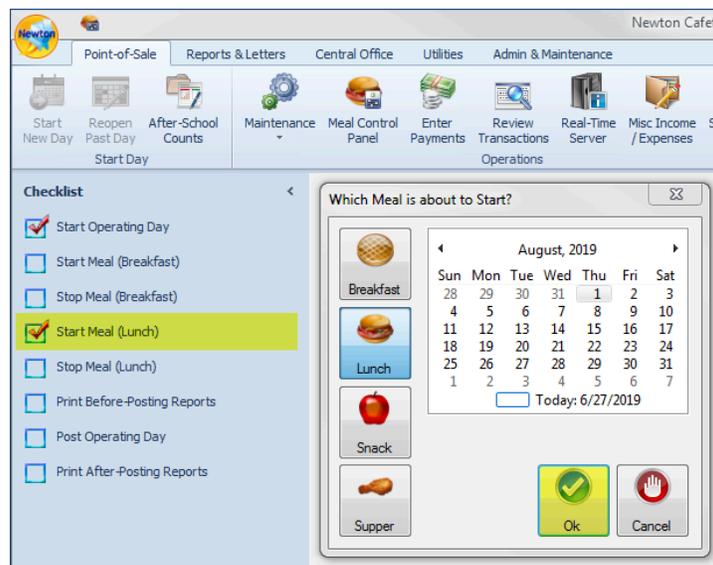


4. Under the Point-of-Sale ribbon click Start New Day or click Start Operating Day under the Checklist.

- Select an operating day from the calendar and click Ok.



5. Click Start Meal (Breakfast or Lunch) in the *Checklist*, confirm that the correct meal and date is selection on the calendar, and click Ok.



6. You may now open the line on the Main Machine as usual and serve.

- Select the Main Machine button.
- Select a serving line and click Ok.
- Login and serve the meal.
- Complete the meal transactions. When you are done, click Quit Serving-Line.
- In the End Batch window, enter cash and check amounts. When you are done, click Ok.
- If you are finished entering amounts, click Yes.

7. If the network issues are not resolved, you may select Exit Point-Of-Sale.



8. In the Meal Control Panel, click Stop Meal.

- In the End Lunch window, if you are done serving the meal and wish to stop, click Yes.
- Click Close to exit the *Meal Control Panel*.

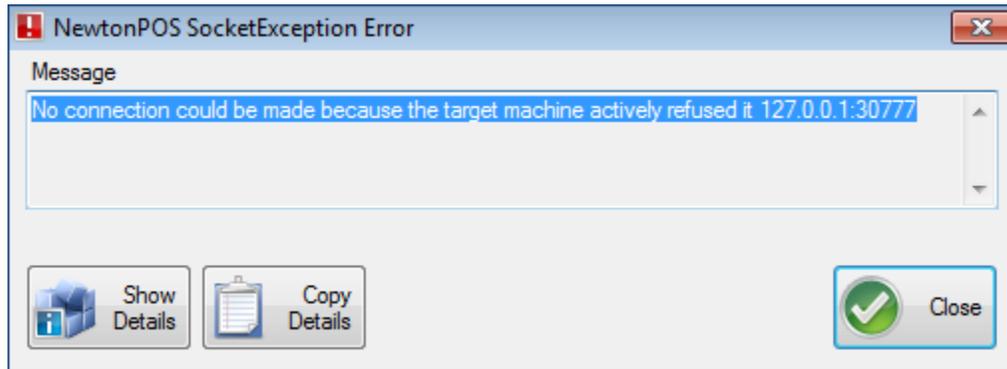
9. Finish the Day

- When the network has been restored, Newton will need to be restarted and you can post as usual.

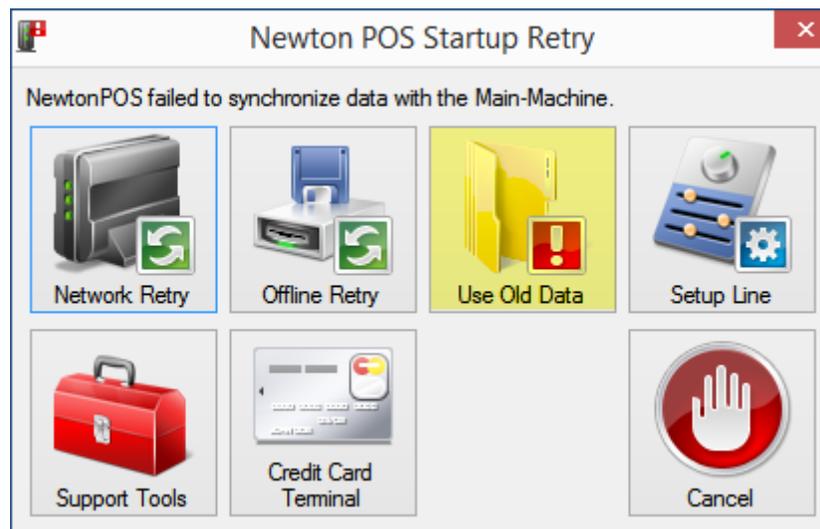
Working Offline from the POS Line Machine

Note: In order to begin working offline in Newton POS, the meal must first be started on the Manager's Machine.

1. Login to Newton POS.
2. Close the Socket Exception Error.

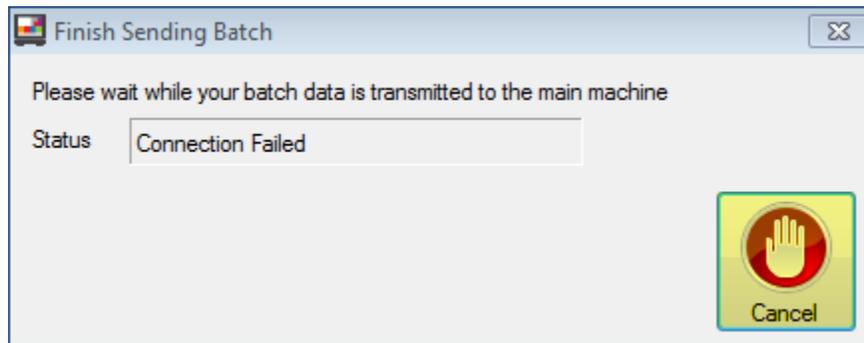


3. Select Use Old Data. The POS will run off the last set of synced data.

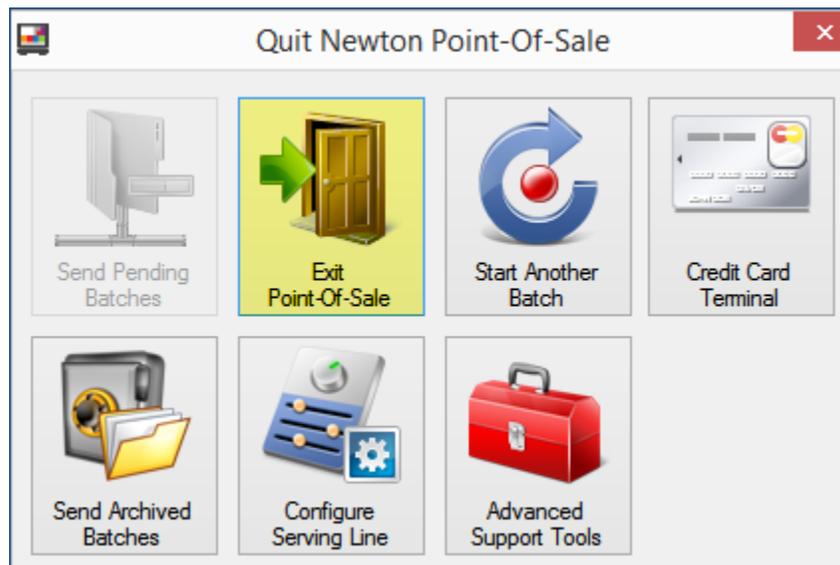


4. Login and serve the meal as usual.
 - When working offline, the meal and menu will have to be manually selected.
 - Complete the meal transactions. When you are done, click Quit Serving-Line.
 - In the Quit NewtonPOS window, click Yes.
 - In the End Batch window, enter cash and check amounts. When you are done, click Ok.
 - If you are finished entering amounts, click Yes.

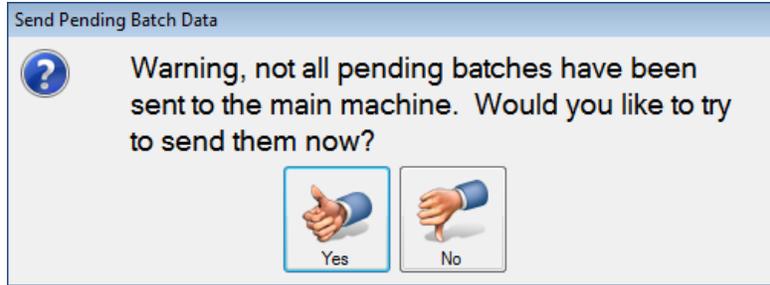
- If the network is still not available, a Connection Failed status message will display. Select Cancel to close the screen.



5. If the network issues are not resolved, you may select Exit Point-Of-Sale.



- You will receive a warning that not all batches have been sent to the main machine.
 - Select Yes if network is functional, or No if it is not available.
- Note: If the network comes online and the batches are not being recognized when submitted, close out of Newton POS and reopen it.



If you had to select No in Step 5, then once the network has been restored, open Newton POS and it will prompt to send pending batches the next time you exit.