

# LUNCHTIME PAYMENT SOURCE & AUTO REPLENISH INSTRUCTIONS

All cafeteria accounts are managed via the LUNCHTIME software system. Using the online portal, you can set personal alerts, make payments, view transactions, auto-replenish, and more.

Get started by going to <u>www.schoolpaymentportal.com</u>.

- 1) Create your parent account prior to adding your kids.
- 2) Log back into your account using your newly created account info.
- 3) Click on "Add Student" and input the school zipcode and select the school.
- 4) Use the <u>Name as it appears on cafeteria alerts</u> and the student ID to complete the process.
- 5) Add additional students as needed.
- 6) Add a payment source. Please follow the steps below.
- 7) Establish your Auto-Debit enrollment. Please follow the steps below.

### **PAYMENT SOURCE**

Before you can establish the auto-replenish feature, you must establish a payment source.

#### Using the website portal:

From your account, click on <u>My Account</u> in the top navigation. Click on <u>New Saved Payment Source</u>. Select your <u>Gateway</u>, which is the school whom you'll be paying. Select <u>Account Type</u> to select ACH or Credit Card. Enter your payment information and click <u>Continue</u> to save.

#### Using the mobile app:

From the main menu, select <u>Payment Sources</u>. Select <u>Add Payment Source</u>. Select <u>Account Type</u> to select ACH or Credit Card. Enter <u>Account Holder Information</u>. Enter <u>Payment Account Information</u>. Select <u>Complete</u>.

### **AUTO REPLENISH**

#### Using the website portal:

From your account, click on <u>My Account</u> in the top navigation. Click on <u>View/Set Reminders</u>. Click <u>Modify</u> for the student account you want to modify. Under <u>Reminder Type</u>, select <u>Auto Replenish</u> and continue. Establish the <u>Balance Level</u> used to trigger the auto replenish. Select <u>Payment Source</u>. Establish how much to <u>Deposit</u> into the student account any time the account balance falls below the Balance Level. Select <u>Continue</u>. Verify the settings and select <u>Save Reminder</u>.

#### Using the mobile app:

From the main menu, select <u>Student Accounts</u>. Select <u>Student Name</u>. Select <u>Auto Replenish</u>. Establish the <u>Balance Level</u> used to trigger the auto replenish. Select <u>Payment Source</u>. Establish how much to <u>Deposit</u> into the student account any time the account balance falls below the Balance Level. Select <u>Continue</u>. Verify the settings and select <u>Complete</u>.

### THE FOLLOWING PAGES PROVIDE A STEP-BY-STEP GUIDE FOR BOTH WEBSITE PORTAL AND MOBILE APP.



# WEBSITE PORTAL INSTRUCTIONS FOR PAYMENT SOURCE & AUTO REPLENISH

On the My Account Info page, click the **New Saved Payment Source** button.

View Cart	MY ACCOUNT	STUDENT ACCESS & CAF	ETERIA ACCOUNT I	.OG OUT	Logged in as Anne Robinson
My Accour	nt Info				
First Name:	Anne	1			
Last Name:	Robin	nson			
Email Address:	swilc	ox.lunchtimesoftware@gmail.c	com		
New Password:			Ð		
Confirm New Password:			P		
					Undete
Saved Payme	ent Sources				Opdate
					New Saved Payment Source
Any payment sou to update the sele	rce appearing in r cted saved paym	ed is invalid and can't be used ent source.	as a form of payment unt	I the errors with the payment so	purce are corrected. Click the modify link
Gatewa	y	Nickname	Туре	Account Number	
No records to dis	play.				
Online Payme	ent History				
	Receipt		Date		Total
No records to dis	olay.				
	Page size:	10 -			0 items in 1 narres

Choose the school Gateway that will receive the payments from the this payment source. Each saved payment source is assigned to a specific online gateway account. Gateway accounts determine where the money is transferred to when you complete a transaction.

View Cart	MY ACCOUNT	STUDENT ACCESS & CAFETERIA ACCOUNT	LOG OUT	Logged in as Anne Robinson
Add A Ne	ew Saved Pa	ayment Source - Step 1		
Each saved pa transaction. Ba	yment source is assi sed on your account	gned to a specific online gateway account. Gateway information, the list below represents the gateway a	accounts determine ccounts available to	where the money is tranferred to when you complete a you for use.
Gateway:	Apple Grove			
Cancel				Continue
© 2001-2022 F	ocal Tech, Inc. Site F	Powered by LunchTime Software.		
-	_		_	

Saved Payment Source – ACH (Checking or Savings Account): Select ACH (Checking or Savings Account) from the dropdown list

#### Click Continue

View Cart MY	ACCOUNT	STUDENT ACCESS & CAFETERIA ACCOUNT	LOG OUT	Logged in as Anne Robinson
Add A New S	Saved Pa	ayment Source - Step 2		
Select the type of acc	count you wish	to add.		
Account Type:	ACH	(Checking or Savings Account)		
	ACH	I (Checking or Savings Account)		
Cancel				Continue

Enter your account information. The Nickname will be used to identify this card in your saved payment list.

View Cart MY ACCOUNT	STUDENT ACCESS & CAFETERIA ACCOUNT	LOG OUT
Modify Saved ACH		
Please enter your account inform	ation.	
Nickname:	Lunches	5
Billing Information		
First Name:	Anne	
Last Name:	Robinson	
Address Line 1:	301 Any Street	
Address Line 2:		
City:		
Guj.	Yourtown	
State:	PA	
Zip Code:	16803	
Country:	USA 🗸	
Phone:		
Account Information		
EXAMPLE EXAMPLE		
9 digit Account Number N Number (1-17 digits) (do n	ineck <sup>/</sup> umber st include)	
Name on Account:	Anne Robinson	
Routing Number:	021000021	
Account Number:	000000000	
Account Entity:	Personal	~
Account Type:	Checking	
	orrevelly	v
Cancel		

Click **Continue** to be returned to the My Account Info page

# Setting Email Reminders/Auto-Replenish

Users can establish thresholds for each student and receive either email reminders or automatic payments when the threshold has been reached. Under the LunchTime Cafeteria Account section, Click on **View/Set Reminders**.

udents available	to your account are	listed below. Click the "Add	Student" button to start t	le process of a		in to jour abou	unt.	
								Add Student
lame	:	School		Grade	ID #	PIN		
ckerman, Stan	(	Cherry Hill Middle School		8	3833	3833	Remov	е
mith, Tyler	(	Cherry Hill Middle School		6	6993	6993	Remov	е
InchTime the Reminder iew/Set Remin	e Cafeteria A s link to setup an ema ders Meals	CCOUNT	out money in your child's	account when y	rour their bala	nce falls below	v a specified lev Make Cafet	rel. eria Deposit
unchTime e the Reminder /iew/Set Remin re-Order pre-order meal	e Cafeteria A s link to setup an emo ders Meals s for students assigne	ccount ail alert or to automatically p ed to your account or to cha	out money in your child's nge existing pre-order se	account when y	your their bala he <b>Meal Pre</b> -0	nce falls below Drder button b	y a specified lev Make Cafet elow.	rel. eria Deposit
unchTime te the Reminder View/Set Remin re-Order pre-order meals Meal Pre-Order	e Cafeteria A s link to setup an ema ders Meals a for students assigne	CCOUNT ail alert or to automatically p ed to your account or to cha	out money in your child's nge existing pre-order se	account when y lections, click th	vour their bala he <b>Meal Pre</b> -0	nce falls below Drder button b	v a specified lev Make Cafet elow.	rel. eria Deposit
unchTime e the Reminder View/Set Remin re-Order pre-order meal Meal Pre-Order afeteria E	e Cafeteria A s link to setup an ema ders Meals s for students assigne	CCOUNT ail alert or to automatically p ed to your account or to cha saction Informa	out money in your child's nge existing pre-order se tion	account when y lections, click th	your their bala	nce falls below Drder button b	v a specified lev Make Cafet elow.	rel. eria Deposit
unchTime e the Reminder fiew/Set Remin re-Order pre-order meal Aeal Pre-Order afeteria E	e Cafeteria A s link to setup an ema ders Meals s for students assigne Balance/Tran	CCOUNT ail alert or to automatically p ed to your account or to cha saction Informa Name	out money in your child's nge existing pre-order se tion School	account when y lections, click th	our their bala he Meal Pre-C Grade	nce falls below Order button b	v a specified lev Make Cafet elow. Balance	rel. eria Deposit
unchTime e the Reminder /iew/Set Remin re-Order pre-order meal Aeal Pre-Order afeteria E	e Cafeteria A s link to setup an ema ders Meals s for students assigne Balance/Tran	CCOUNT ail alert or to automatically p ed to your account or to cha saction Informa <u>Name</u> Ackerman, Stan	but money in your child's nge existing pre-order se tiON School Cherry Hill Middle S	account when y lections, click th	nour their bala the Meal Pre-C Grade 8	nce falls below Order button b PIN 3833	A specified lev Make Cafeto elow. Balance \$103.60	rel. eria Deposit Pending \$0.0

## Auto Replenish

(You must have a saved payment source to use this Reminder Type)

Click Modify next to the Patron name.

View Cart	MY ACCOUNT	STUDENT ACCESS & CAFETERIA ACCOUNT	LOG OUT		Logged in as Anne Robinson
Cafeteria	a Low Balan	ce Reminders			
Any item appe	aring in red has an in	valid saved payment source. Please modify the s	aved payment source from the	My Account page in order for the payment	to resume processing.
Any item appe	aring in red has an in Patron	valid saved payment source. Please modify the s Auto Email	aved payment source from the Auto Replenish	My Account page in order for the payment Balance Amount	to resume processing. Deposit Amount
Any item appe Modify	aring in red has an in Patron Ackerman, Sta	valid saved payment source. Please modify the s Auto Email n	aved payment source from the Auto Replenish	Ay Account page in order for the payment Balance Amount	to resume processing. Deposit Amount
Any item appe Modify Modify	aring in red has an in Patron Ackerman, Star Smith, Tyler	valid saved payment source. Please modify the s Auto Email	aved payment source from the Auto Replenish	Vy Account page in order for the payment Balance Amount	to resume processing. Deposit Amount
Any item appe Modify Modify	aring in red has an in Patron Ackerman, Sta Smith, Tyler	valid saved payment source. Please modify the s Auto Email n	aved payment source from the Auto Replenish	Vy Account page in order for the payment Balance Amount	to resume processing. Deposit Amount
Any item appe Modify Modify	aring in red has an in Patron Ackerman, Sta Smith, Tyler	valid saved payment source. Please modify the s Auto Email n	aved payment source from the Auto Replenish	dy Account page in order for the payment Balance Amount	to resume processing. Deposit Amount
Any item appe Modify Modify Return	aring in red has an in Patron Ackerman, Sta Smith, Tyler	valid saved payment source. Please modify the s Auto Email n	aved payment source from the Auto Replenish	ly Account page in order for the payment Balance Amount	to resume processing. Deposit Amount

Choose Auto Replenish from the Reminder Type dropdown list to trigger an automatic deposit when the patron's balance falls below a specified level.

View Cart	MY ACCOUNT	STUDENT ACCESS & CAFETERIA ACCOUNT	LOG OUT	Logged in as Anne Robinson
Set Cafet	eria Low Bal	ance Reminder - Step 1		
Reminder Types Auto Email - rec Auto Replenish Note: not all ren	eive an email when th - run a transaction ag ninder types are availa	te patron's balance falls below a specified amount, ainst a saved payment source for a specified amou able for every school.	int when the patron's balance falls below a specified level.	
Patron Name:	Sn	nith, Tyler		
Reminder Type:		Auto Email Auto Email Auto Replenish		
Cancel	-	нию порелон	_	Continue

Click Continue

Enter the Balance Level that will trigger the Auto Replenish.

Choose the Saved Payment Source to be used for the payment.

View Cart	MY ACCOUNT	STUDENT ACCESS & CAFETERIA ACCOUNT	LOG OUT	Logged in as Anne Robinson
Set Cafe	teria Low Ba	alance Reminder - Automatic R	eplenishment	
Deposit funds i an auto repleni	nto the patron's acco sh reminder. You car	ount when their balance falls below a specified level. In view your saved payment sources on the "My Account	You must have a saved payment source unt" page.	e asssociated with the gateway account used by the school in order to save
Patron Name:		Smith, Tyler		
Balance Level:		10.00		
Saved Paymen	t Source:	Lunches		
Amount To Dep	oosit:	Lunches Lunches Credit Card		
Canad				<b>0</b> 1
Cancel				Continue

#### Enter the Amount to be deposited.

View Cart	MY ACCOUNT	STUDENT ACCESS & CAFETERIA	ACCOUNT	LOG OUT	Logged in as Anne Robinson
Set Cafe	teria Low Ba	alance Reminder - Auto	omatic F	Replenishment	
Deposit funds in an auto replenis	nto the patron's acco sh reminder. You car	ount when their balance falls below a sp n view your saved payment sources on	pecified level. the "My Acco	. You must have a saved ount" page.	payment source asssociated with the gateway account used by the school in order to save
Patron Name:	5	Smith, Tyler			
Balance Level:	(	10.00			
Saved Paymen	t Source:	Lunches Credit Card	~		
Amount To Dep	oosit:	50.00			
Cancel					Continue
-	_		-	_	

### Click Continue

Verify the replenishment information

Review the payment information for accuracy, check the box confirming that you accept the fees for this transaction

Set Galetella L	ow Balance Reminder - Confirm Cho	DICES	
Please verify the item infor	mation and click Save Reminder to add this item to your shop	pping cart.	
Patron Name:	Smith, Tyler		
Low Balance Level:	\$10.00		
Saved Payment:	Lunches Credit Card		
Amount To Deposit:	\$50.00		
Service Fee:	\$2.15		
Transaction Total:	\$52.15		
By checking this b reaches or falls below understand that this t	ox I confirm that I wish to have a total of \$52.15 automatic \$10.00. \$50.00 will be added into this patron's cafeteria : ranaction will continue to run based on the information al	cally charged to my credit card to put into the cafeteria accoun account and \$2.15 will be applied to the service fee each time t bove until I cancel it via this website.	t of Smith, Tyler each time their account his recurring transaction is executed. I

Click **Save Reminder.** You'll be directed to the Cafeteria Low Balance Reminders page. Here you'll see the patron name(s) and which reminder option has been applied to each of them.

item appearing in red has an invalid saved payment source. Please modify the saved payment source from the My Account page in order for the payment to resume processi Patron Auto Email Auto Replenish Balance Amount Deposit Amount	ng.
item appearing in red has an invalid saved payment source. Please modify the saved payment source from the My Account page in order for the payment to resume processi Patron Auto Email Auto Replenish Balance Amount Deposit Amount	ng.
item appearing in red has an invalid saved payment source. Please modify the saved payment source from the My Account page in order for the payment to resume process Patron Auto Email Auto Replenish Balance Amount Deposit Amount	ng.
Patron Auto Email Auto Replenish Balance Amount Deposit Amount	
Patron Auto Email Auto Replenish Balance Amount Deposit Amount	
odify Ackerman, Stan True False \$10.00 \$0.00	Remove
odify Smith, Tyler False True \$10.00 \$50.00	Remove

Clicking on the Return button will return you to the Student Access page.



# MOBILE APP INSTRUCTIONS FOR PAYMENT SOURCE & AUTO REPLENISH

### **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.

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

≡ <sup>MENU</sup> Payment Sour	rces 🎢	<b>≡</b> MENU Paym	ent Sources
+ ADD PAYMENT S	SOURCE	+ ADD PA	YMENT SOUR
Select the payment source to ei account information or remove	ither modify the it completely.	Select the payment s account information	ource to either m or remove it com
Test Credit Card	4xxxxx1111	Test Credit Card	

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

**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.

← Payme	nt Sources		<b>く</b> Bac	k Payment	t Sources
Payment Sour Select the type of Account Type	r <b>ce - Step 2</b> account you w	vish to add.	Paym Select Accou	nent Source - S the type of account the Type	Step 2 Int you wish to add.
<ul><li>ACH (C</li><li>Credit (</li></ul>	hecking or Sav Card	rings)		ACH (Checking Credit Card	or Savings)
CANCEL	CC	ONTINUE		CANCEL	CONTINUE
	0	<	Sent from my iPho	re	

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

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

← Payment Sources
Payment Source - Step 3
Enter the account holder information for this account.
First Name*
Last Name*
Address*
Address 2
City*
Pennsylvania -
Zip Code*
United States
Phone
*required
CANCEL CONTINUE

Kernel Back Payment Sources				
Payment Source - Step 3				
Enter the account holder information for this account.				
First Name*				
Last Name*				
Address*				
Address 2				
City*				
Pennsylvania ~				
Zip Code*				
United States ~				
Phone				
*required				
CANCEL CONTINUE				
Set from my Flores				

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

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

← Payment Sources	Cack Payment Sources
Payment Source - Step 4 Enter your account information.	Payment Source - Step 4 Enter your account information.
The Nickname will be used to easily identify this card in your saved payment list.	The Nickname will be used to easily identify th card in your saved payment list.
Nickname	Nickname Nickname
Card Number Card Number	Card Number Card Number
Expiration Date 03 - March 2022	Expiration Date 03 - March 👻 2022
CANCEL COMPLETE	CANCEL COMPLETE
III O <	

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

## Setting Reminders

AUTO REPLENISH – YOU MUST FIRST SETUP A SAVED PAYMENT SOURCE TO USE AUTO REPLENISH. (See Payment Sources Section) From the Student Accounts page, tap the Student name, then tap AUTO REPLENISH



**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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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.

Student Accounts		<b>K</b> Back Stu	dent Accounts
natic Replenish - Ste funds into the account o an when their balance fa specified below. st have a saved payment ted with the gateway acc ool in order to setup an a sh.	<b>p 1</b> f Stan Is below the source ount used by utomatic	Automatic Rep Deposit funds into Ackerman when th amount specified b You must have a sa associated with the the school in order replenish.	Henish - Step 1 the account of Stan eir balance falls below the below. aved payment source e gateway account used by to setup an automatic
ance Level		Balance Level 10.00	
ayment Source*		Payment Source Payment Source*	÷
eposit Amount		Deposit Amount	
CANC CANC Deposit funds in Ackerman when amount specifier You must have a associated with the school in ord replenish.	eplenish - Step 1 to the account of Stan their balance falls below the d below. saved payment source the gateway account used by er to setup an automatic	Seet from my Phone	Automatic Replenish - Deposit funds into the accou Ackerman when their balance amount specified below. You must have a saved paym associated with the gateway the school in order to setup a replenish. School Lunch Cancel Payment Source*
Deposit Amount 50.00 *required CANCE	CONTINUE		Deposit Amount 50.00 *required CANCEL

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

Automatic Repl	enish - Ste	p 2
Please verify the int COMPLETE to add your account.	formation belo this automatic	w and click replenish to
Patron Name:	Stan Ack	kerman
Balance Level:	\$10.00	
Payment Source:	School L	unch
Deposit Amount:	\$50.00	
Service Fee:	\$2.15	
Total:	\$52.15	
CANCEL	I wish to have a tot charged to my cree tria account of Star ount reaches or fal added into the caf n and a \$2.15 serv ime this recurring t derstand that this t n until I cancel it vi COMPI	al of \$52.15 dit card and put in Ackerman each ls below \$10.00. eteria account of ice fee will be rransaction is rransaction will a the website/app.

Automat	ic Reple	enish - Step 2
Please verif COMPLETE your accou	y the info to add th nt.	rmation below and click is automatic replenish to
Patron Nar	me:	Stan Ackerman
Balance Level:		\$10.00
Payment Source:		School Lunch
Deposit Ar	mount:	\$50.00
Service Fe	e:	\$2.15
Total:		\$52.15
aut into tim \$50 Sta app exe	onfirm that I to comatically clo to the cafeteri e their accou 0.00 will be a n Ackerman blied each tin ecuted. I und attinue to run Ste/app.	wish to have a total of \$52.15 harged to my credit card and put ia account of Stan Ackerman each unt reaches or falls below \$10.00. idded into the cafeteria account of and a \$2.15 service fee will be ne this recurring transaction is erstand that this transaction will until I cancel it via the

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