



myschoolaccount.com

FSS Preorder Version - 5.10

WebLunch Calendar Reports

+ ADD NEW CALENDAR

Calendar Name	Calendar Type	Assigned Schools	Edit Assigned Schools
<input type="checkbox"/> Paula's New Calendar	Combined		- Select Schools -
<input type="checkbox"/> Safari calendar	Combined		- Select Schools -
<input type="checkbox"/> Chrome Calendar March	Combined		- Select Schools -
<input type="checkbox"/> food Serve 2	Combined		- Select Schools -
<input type="checkbox"/> Mandatory	Lunch		- Select Schools -
<input type="checkbox"/> erytery	Lunch		- Select Schools -
<input type="checkbox"/> Green Apple	Lunch	Alternative School	- Select Schools -
<input type="checkbox"/> FSS Calendar	Combined	Coffee High School	- Select Schools -
<input type="checkbox"/> NEW Calendar	Combined	Coffee High School	- Select Schools -
<input type="checkbox"/> ATEST	Combined	Coffee High School	- Select Schools -

Change page: [Navigation icons] Page 1 of 2, Items 1 to 10 of 13.

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PREORDER ADMINITRATIVE USER GUIDE

INTRODUCTION TO PREORDER

This section will review how to create and maintain the preorder calendars to easily configure and publish the information for the parents.

SETTING UP CALENDAR MENU

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ACCESS PREORDER CALENDAR

- Log onto preorder.myschoolaccount.com
- Your home page, similar to the illustration below, will appear.

Click to create a new calendar

HOME SCREEN

After calendar is created, Click to edit calendar.

Click to generate Distribution, Category and Production Reports.

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Click to delete a calendar.

Schools can be assigned after a calendar has been created.

CREATE PREORDER MENU CALENDAR

- To create a new calendar, click the **Add New Calendar** button on the Home Screen.
- In the **Calendar Name**, enter a name.
- Select a type from Calendar Type.

The screenshot shows the 'Add New Calendar' interface. At the top, there are input fields for 'Calendar Name' (containing 'FSS Calendar') and 'Calendar Type' (set to 'Combined'). Below these are four buttons: 'Allow Orders (entire month)', 'View Only (entire month)', 'Cutoff Settings', and 'Close'. A legend on the right indicates 'Hidden' (blue), 'Visible' (red), and 'Order' (green). The main area is a calendar for August 2012, showing dates from 29th to 31st. A 'Month' button is in the top right corner of the calendar area.

Type in name for New calendar and select type.

Set order status to "Allow Orders" or to "View Only" for the entire month.

Click to adjust cutoff dates for parents

To save, you must click the Close button

To add menu items, select the date on this calendar.

CALENDAR DISPLAY PAGE

ADDING ITEMS TO CALENDAR

- After a Calendar has been created, **Left Click** on the day you wish to edit in the Calendar Window and the **Menu Detail** window will appear (see image below).
- To add a food or drink item, drag and drop from the **“Available Items”** list to the **“Assigned Items”** box.
- To change the menu listing order, use the arrows at the right hand side of the window.
- Once your items are assigned, you may then choose your menu status to **“View Only”** or **“Allow Order”** by clicking the **blue buttons** above your group of assigned items.
- When you finish configuring your menu, click the **close button** at the bottom right hand corner.
- When you have completed this process, your menu will appear in the calendar date you had originally selected.

View Menu Details

Preorder Menu Configuration for 08/20/2012

All Categories

Available Items

- Adult Breakfast
- Adult Lunch
- Adult Lunch (To Go)
- AlaCarte Meal
- ANNUAL FEE
- BIG GRABS
- Bkfst Meat
- Boys H20 fee
- BREAD
- BREAD/ ROLL
- CEREAL (large)
- CEREAL (small)
- CHEESE CUP
- CHEESE CRISPS

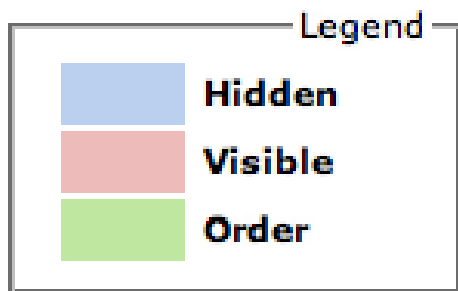
Assigned Items

Assigned Items	Price	
Adult Breakfast	\$1.00	X
AlaCarte Meal	\$4.00	X

Allow Orders View Only Item Scheduler Override Cutoff

Close

CALENDAR COLOR CODING



- When a menu item is first added to the calendar date, it will appear as a blue button.
Blue - Means the menu item(s) will be hidden to parents
- To allow parents to view the menu items being offered for a specific date, select the date in the menu details window, click **“view only”**.
Red - Means Parents can only view the menu item(s)
- To allow parents to view AND order the menu items for a specific date, select the date and in the menu details window, click **“allow orders”**.
Green - Means parents can view and place orders on the menu item(s).

SAVING PREORDER CALENDAR

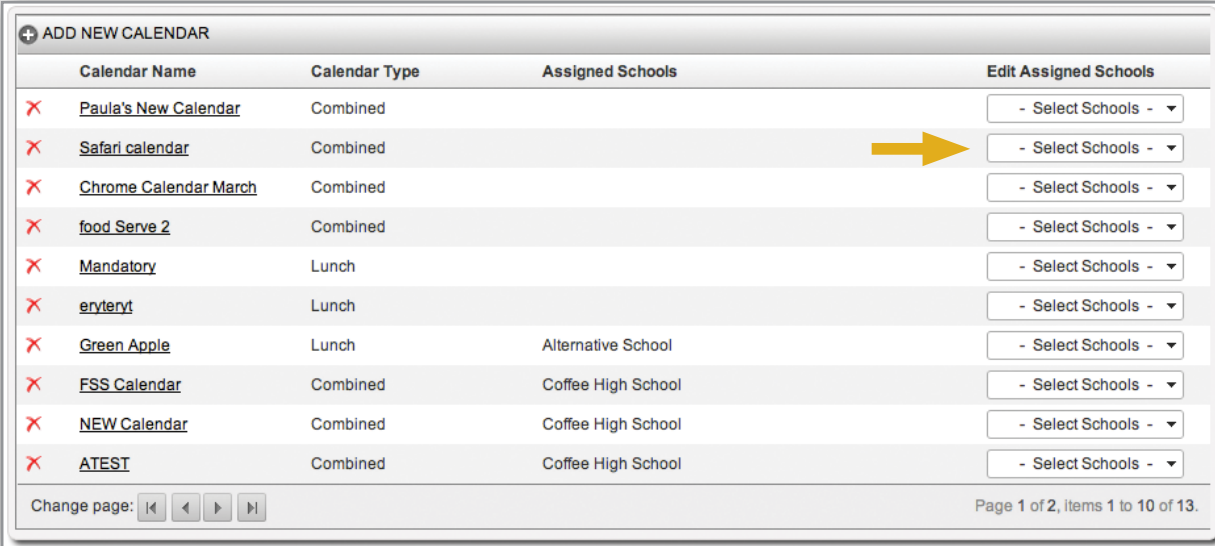
When the preorder calendar configuration has been finalized, make sure to click on the **Close** button that is located above the right side of the calendar. **Everything is saved to the system ONLY when this button has been pressed.**

While configuring the calendar, if the school administrator needs to walk away for any length of time, it would be wise to press the close button and then reopen the calendar when he/she is able to continue.

ASSIGN CALENDAR TO SCHOOL

The calendar cannot be made available for the parents until the school administrator tells the system which school(s) are assigned to the calendar.

- After you click **Close** on the Calendar, you'll return to the **Home Screen**.
- Next to the Calendar you wish to assign, click the **"Select Schools"** drop down menu.




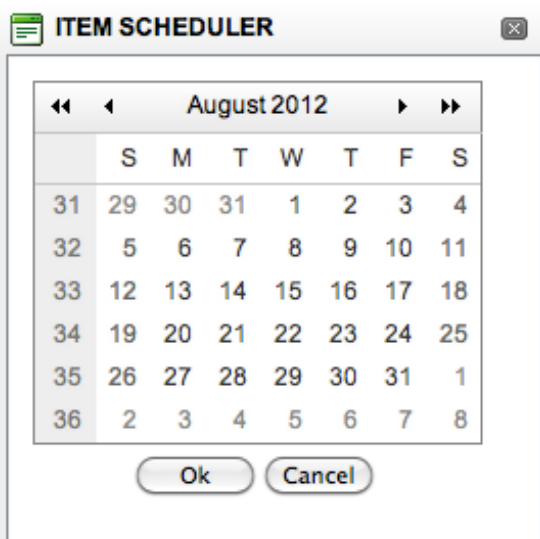
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- Under the list of **Available Schools**, place a check next to the school(s) you wish to add the calendar to.
- Click **Save**

DUPLICATING MENUS

- To configure more than one day with the same preorder items, you do not need to attach each and every item to all of these days individually.
- Once the items have been added to the offering date, **click the date** you wish to duplicate and the menu details window will appear.
- In the menu details window, click the **“Item Scheduler”** button. 

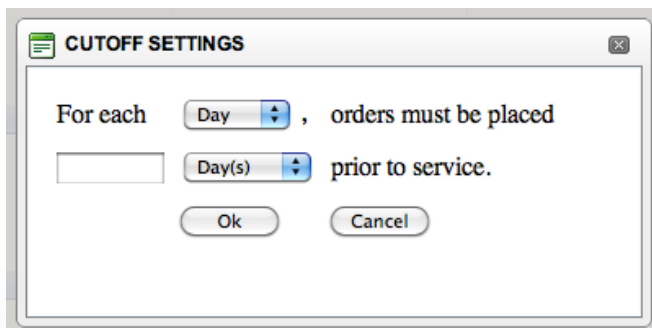


- Select the dates in the popup calendar that you want your menu duplicated to.
- Click **“Ok”** to complete the process. Your menu should then be duplicated to the dates you selected.

CUTOFF DATE SETTINGS

Schools can now select how many days, weeks, or months they require preorders to be made in advance.

- From the **Calendar Display page**, select the **Cutoff Settings** button.

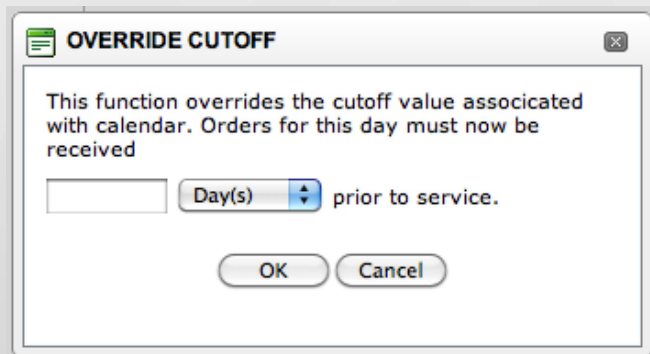
A dialog box titled "CUTOFF SETTINGS" with a close button in the top right. It contains the text "For each" followed by a dropdown menu set to "Day", a comma, and "orders must be placed". Below this is an empty text input field, another dropdown menu set to "Day(s)", and the text "prior to service.". At the bottom are "Ok" and "Cancel" buttons.

- Here you can designate how far in advance preorders must be made.
- Schools can also designate that orders are to be made for single days, an entire week or an entire month.

OVERRIDING CUTOFF DATES

Preorders can now be allowed even after passing the cutoff date for any specific date.

- From the **Menu Details page**, select the **Override Cutoff** button.

A dialog box titled "OVERRIDE CUTOFF" with a close button in the top right. It contains the text "This function overrides the cutoff value associated with calendar. Orders for this day must now be received". Below this is an empty text input field, a dropdown menu set to "Day(s)", and the text "prior to service.". At the bottom are "OK" and "Cancel" buttons.

- From this window you can set a new cutoff date for any single menu date.
- Click **"Ok"** and the selected date will have a new cutoff date.

RUN A PRODUCTION REPORT

- Click the **Reports** button on the top right side of the **Home Screen**.



- With the **Production Summary** report tab selected, choose your start and end date with the calendar popup.



- Click **Start**

If you have any voids of preordered meals, they will only appear on the reports run from the admin software.

RUN A PREORDER DISTRIBUTION REPORT

- Click the **Reports** button on the top right side of the **Home Screen**.



- With the **Preorder Distribution** report tab selected, choose your start date with the calendar popup.
- Select your sort option: **Name, UserID, Grade, or Homeroom**



- Click **Start**

If you have any voids of preordered meals, they will only appear on the reports run from the admin software.

VIEW PREORDER HISTORY

- Click the **Reports** button on the top right side of the **Home Screen**.



- With the **Preorder History** report tab selected, choose your start and end date with the calendar popup.



- Click **Start**

If you have any voids of preordered meals, they will only appear on the reports run from the admin software.

VIEW PREORDER PURCHASE ACTIVITY

- Click the **Reports** button on the top right side of the **Home Screen**.



- With the **Purchase Activity** report tab selected, choose your start and end date with the calendar popup.



- Click **Start**

If you have any voids of preordered meals, they will only appear on the reports run from the admin software.