

How To Guide - Setting Default Order Status

The system allows you to specify the default order status when an order is entered into the system. You can specify the default status by editing the "**Application Profile**".

1. Go to the "**ADMINISTRATION**" tab => "**Edit Application Profile**".
2. Scroll down to the bottom of the form to find the "**Default Order Status**" field.
3. Select the option you wish to use for your school. The options are "**Unpaid**" or "**Inactive**".

Unpaid Orders:

All "**Unpaid**" orders are included in the "**Supplier Orders**", "**Delivery Sheets**", etc. This means that an order flagged as "**Unpaid**" is processed and meals (or products) are delivered as if the order has been paid. The assumption made here is that the order will be paid for and the family is just late paying for the order.

Inactive Orders:

"**Inactive**" orders are not included in the "**Supplier Orders**", "**Delivery Sheets**", etc. This means that an "**Inactive**" order is not processed until payment is made. This is a more business-like approach to the lunch service but there are issues to consider and regardless of the choices you must notify the families when orders are deleted.

When to delete "**Inactive**" orders?

- If the end order date is prior to the first menu date then you should delete all "**Inactive**" orders once the end order date has passed.
- If the end order date is after the first menu date then you can choose to delete the orders when you generate your first supplier orders. This is the cleanest and will ensure you do not have problems later.

Why delete "**Inactive**" orders?

If a payment is received after the cutoff date it is usually not possible to adjust "**Supplier Orders**" and get the required products delivered. It becomes unmanageable to allow late payments for "**Inactive**" orders and if you wish to allow late payments and do not wish to delete the orders then your default order status should be "**Unpaid**".

How to Delete "**Inactive**" Orders

Go to the schedule summary and click "**View Orders**" and then click "**Inactive**". Scroll to the bottom of the page and click the "**Delete Inactive Orders**" button to delete these orders.



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Alternative to Deleting "Inactive" Orders

If you do not wish to completely delete the "**Inactive**" orders you **must** delete the items ordered each week on the "**Inactive**" orders. Then if the parent pays on-line their payment does not include the current week's meal which is not going to be delivered to their children. See the How To Guide "**Deleting Ordered Items for a Date**" and select only "**Inactive**" orders.