

How To Guide - Creating a Schedule

A schedule is a set of menus and may contain only one or many menus. Each menu is a set of items that are related by date or by some other categorization. For hot lunch schedules the menu items are grouped by dates, for fund raising or school fee schedules the items can be grouped any logical fashion.

Each schedule has a title and a set of dates that define the date range orders will be accepted and the dates of the menus (hot lunch schedules). There are a number of other optional fields to manage late fees, discounts and other schedule parameters.

1. Go to the "**ORDERS**" tab => "**Add a New Schedule**".
2. Enter the schedule title.
3. Ordering Start and End dates define the range of dates in which parents and staff can place orders. Administrative users can always place or edit orders even outside of this date range.
4. The Schedule Start and End Dates (hot lunches only) define the range of the menu dates for the schedule and the system will define the menu dates for you when you create a schedule based on these dates and the selected "**Menu Days**".
Example; If you are offering lunch service on Wednesday's and Friday's then select those "**Menu Days**" and a menu date will be generated for each Wednesday and Friday between the Schedule Start and End Dates.
5. A schedule that is not of status "**Active**" will not be accessible by parents so the status needs to be set to **Active** for parents to place, edit or view orders
6. The "**Form Display Mode**" defines the layout of the order form as either a linear form or a calendar layout
7. The " Number of Days Prior to Menu Date" is used to control ordering when the end order date is after the start date of the schedule (hot lunches only). This prevents parents from ordering for a menu that is within the number of days prior so that the orders can be sent to the suppliers in a timely manner
8. The remaining fields can be left with the default values
9. Click "Insert" to create the schedule

The next step is to create the menus for the schedule.