MyMealOrder

Admin User Guide

MYMEALORDER ADMIN MANUAL WITH FEES & ACTIVITIES

Table of Contents
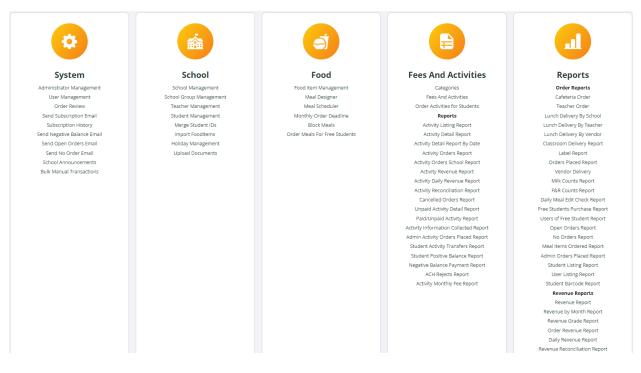
System	School	Food	Fees And Activities	Reports
Administrator Management	School Management	Food Item Management	Categories	**Order Reports**
User Management	School Group Management	Meal Designer	Fees And Activities	Cafeteria Order
Order Review	Teacher Management	Meal Scheduler	Order Activities for Students	Teacher Order
Send Subscription Email	Student Management	Monthly Order Deadline	**Reports**	Lunch Delivery By School
Subscription History	Merge Student IDs	Block Meals	Activity Listing Report	Lunch Delivery By Teacher
Send Negative Balance Email	Import FoodItems	Order Meals For Free Students	Activity Detail Report	Lunch Delivery By Vendor
Send Open Orders Email	Holiday Management		Activity Detail Report By Date	Classroom Delivery Report
Send No Order Email	Upload Documents		Activity Orders Report	Label Report
School Announcements			Activity Orders School Report	Orders Placed Report
Bulk Manual Transactions			Activity Revenue Report	Vendor Delivery
			Activity Daily Revenue Report	Milk Counts Report
			Activity Reconciliation Report	F&R Counts Report
			Cancelled Orders Report	Daily Meal Edit Check Report
			Unpaid Activity Detail Report	Free Students Purchase Report
			Paid/Unpaid Activity Report	Users of Free Student Report
			Activity Information Collected Report	Open Orders Report
			Admin Activity Orders Placed Report	No Orders Report
			Student Activity Transfers Report	Meal Items Ordered Report
			Student Positive Balance Report	Admin Orders Placed Report
			Negative Balance Payment Report	Student Listing Report
			ACH Rejects Report	User Listing Report
			Activity Monthly Fee Report	Student Barcode Report
				Revenue Reports
				Revenue Report
				Revenue by Month Report
				Revenue Grade Report
				Order Revenue Report
				Daily Revenue Report
				Revenue Reconciliation Report

SYSTEM:

Administrator Management – Administrator Management is a listing of the administrators created for your district. You can add new administrators for your district here.

User Management – User Management is a listing of all parent user accounts that parents have created for your district.

User Name	First Name	Last Name	User ID	Balance	Email	Actions
RobbinsTest	Robbins	Test	6911	($32.50)	robbinstest@test.com	✏️ ➕ 🕐

- If you Edit a user account, by clicking on the pencil icon, you can view their account information.

- You can also reset their password for them from this screen. Type in the new password in the Password and Confirm Password fields and Save.

- You can apply a manual credit to the user account by clicking the * icon from the listing of users. You can apply a manual Payment, Charge, Account Credit or Credit Card Refund. (A Credit Card Refund does not actually refund directly to the credit card, it only creates a credit in MyMealOrder). These manual transactions will create a credit or debit automatically in MMO and email the user with the details.
- From the User Listing, you can click the calendar icon to get a listing of transaction history for the user.

Order Review – Order Review allows the admin to see a listing of all orders for a particular school, user, student or grade for a selected date range.

- There is a tab for Meal Orders and a tab for Activity Orders.

- If you want to cancel an individual student's meal, select the student or user from the drop downs and enter the date range, select Purchased from the Status drop down and click Review Orders. This will show you a list of purchased meals for this user/student. To cancel an individual meal, click the Transaction button next to the meal you want to cancel. You will get another listing of meals, find the meal you want to cancel and click the Cancel button. You can enter a reason for the cancellation. This will remove the meal, apply a credit to the user account and email the parent.

- If you want to cancel all meals for a specific day or days, don't select a user or student, just select your date(s) and select Purchased from the Status drop down. This will show a listing of all meals purchased for this date range. Scroll to the bottom and click the Cancel button. You can enter a reason for the cancellation. This will cancel all meals, apply a credit to each user account and email each user.

- To cancel an activity, select the activity you want to cancel by clicking the check box next to that activity and click the Cancel button at the bottom.

Send Subscription Email – Use this feature to send an email to all registered users in MyMealOrder for your district. You can select an individual school, multiple schools or all schools. This feature has a full text editor and allows for you to include attachments in your email. Any user that has opted out of this email will not receive them.

Subscription History – Subscription History shows you the history of the subscription emails sent out.
- Click Message to see the message, which schools it was sent to and any attachments that were sent out.

- Click Detail to see a listing of all users that the email was sent to, which users it was delivered to and which users the message failed to reach.

Send Negative Balance Email – This is a great feature to use at the end of the school year to help collect payments for any negative balances that remain. You can select an individual school, multiple schools or all schools to send this email to. Any user account with a negative balance will receive the email letting them know they have a negative balance. Users can logon to MyMealOrder.com and pay for a negative balance at any time, even without ordering a meal.

Send Open Orders Email – This allows you to send emails to users that have items in their cart but have not completed the transaction for the date range selected.

Send No Orders Email – This allows you to send emails to users that have not placed a single order for the date range selected.

School Announcements – This allows you to setup school announcements, with a start and end date, that will pop up for users to see and acknowledge.

Bulk Manual Transactions – The Bulk Manual Transactions feature allows you to zero out the balance for all selected accounts in MyMealOrder. This is typically used for users that no longer have students at your school and have already been refunded their balance.

SCHOOLS:

School Management – School Management lists all of the schools in your district.

Name	District	City	
Adams Middle	School USA District	Athens	✏ ⚙
Franklin High	School USA District	Athens	✏ ⚙
Kennedy High	School USA District	Athens	✏ ⚙

Clicking the Edit icon (the pencil) will allow you to edit several settings for each school.

School | Order Timeframe

Contact Details ▲

Name: Kennedy High
District: School USA District
Campus Code:

Address 1:
Address 2:

State: Georgia
City: Athens
Zip Code: 30307

Email 1: mlobato@n-ltech.com
Email 2:

Phone 1:
Phone 2:

Logo: /UploadedContent/1/Images/kennedy0253430749.png

Choose File | No file chosen

School Groups

☐ All Elementary Schools
☑ All High Schools Schools
☐ All Middle Schools

Meal Period / Grade
9
10
11
12

Message ▼

Cancel | Save

- The top section has information related to the school, i.e. address, email address, phone number, etc.

- You can enter a Disclaimer for each school that will be displayed on the parent side at the bottom of the ordering screen.

- If you want an announcement displayed each time a parent logs in to MyMealOrder, enter your message in the Announcement section. If no text is entered, no message will be displayed to the parents. Click the "Enable Announcement" box to enable this feature.

- In MyMealOrder, you can block an individual user from ordering meals. If you want to display a message for a user that has been blocked, enter your message in the Block Meal Sale Message section.

- If your District is using the Manual Checkout Payment Option, you can enter the message in the Manual Checkout Payment Message section that will be displayed at the final checkout screens for parents that select this option.

School   **Order Timeframe**

Earliest Order Date ▾

Day(s)
300

The user can only order up to specified day(s) in advance.

In addition to the above order timeframe, the user should not be able to place any orders before and including

Select Date

(Leave this blank to disable the feature)

Monthly Discount Lead Days
-- Select -- ⌄

Meal Time Order Deadline ▾

🔘 Use Rolling Days Deadline   ⚪ Use Weekly Deadline

Set the number of days and time required as the lead time for ordering. For example, 3 days by 23:59 (11:59 pm) would require a user to order on Monday by 11:59 pm for a Thursday meal. An order for Friday would need to be ordered by Tuesday by 11:59 pm, etc.

Must order
2

day(s) before meal time by
9:00

Reports will be available at 9:15.

☐ Allow Deadline Override

Cancel   Save

- Enter the number of days that users can order in the future in the Earliest Order Date field.

- In the Order Deadline section, you have two options. You can set the number of days and time required for ordering lead time or you can set the deadline day and time.
  If you set the number of days required, the system will use this as the required lead time.
  For example, 3 days by 23:59 (11:59 pm) would require a user to order on Monday by 11:59 pm for a Thursday meal.
  If you set the deadline day and deadline time, that will be used for the ordering deadline. This setting overrides the number of days setting. The deadline day and time sets the deadline for ordering for the following week. For example, Wednesday at 23:59 (11:59 pm) would be the deadline for ordering for the following week.

- You can also lock out ordering before a chosen date. Select a date if you want to lock out ordering prior to and including the selected date. Leave this field blank if you don't want to use this feature. This is helpful if you don't want users to order at the beginning of the school year until a certain date.

- Check the box "Allow Favorites" if you want to allow favorites, which is a feature where users can select items as Favorites and then order those Favorites with one click.

- If you want to inactivate a school, uncheck the "Active" box.

- If you want the users to see the Menu Title, which is recommended, check the box "Show Menu Title". When enabled, parents will see the name of the menus you have setup instead of a listing of the individual food items in the menu on the calendar view.

- Select which School Groups this school belongs to. School Groups allow you to create and schedule the exact same menus for multiple schools at once, assuming they offer the same menus. This makes it quicker and easier to manage the menus.

- Enter the Grades for the school in the Meal Period / Grade box. These grades are used for students in Student Management and when sorting and selecting specific grades on reports.

Name	District	City		
Adams Middle	School USA District	Athens	✎	⚙
Franklin High	School USA District	Athens	✎	⚙
Kennedy High	School USA District	Athens	✎	⚙

Clicking the Meal Options icon (the asterisk *) will allow you to edit several settings for each school.

Meal Type Rules

	School Options		Per Meal Options	
	Override Default	Max Scheduled Meals	Max Student Orders	Meals Required for Item Menu
Default Rule		10	10	0
Breakfast	☐	10	10	0
Lunch	☑	10	10	0
Snack	☐	10	10	0
Dinner	☐	10	10	0

Cancel   Save

- From this screen, you can override the default settings. You can change the number of allow meals allowed to be scheduled, the maximum number of student orders per day and the meals required to order before ordering from the ala carte menu.

School Group Management – School Groups allow you to create and schedule the exact same menus for multiple schools at once, assuming they offer the same menus. This makes it quicker and easier to manage the menus. You can create a group or groups and assign the schools to each group from School Management.

Group Name	District Name	School Count	
All Elementary Schools	School USA District	2	✏️
All High Schools Schools	School USA District	3	✏️
All Middle Schools	School USA District	2	✏️

Teacher Management – Teacher Management lists all of the teachers that are setup in MyMealOrder. This list is used to assign to students in Student Management and for reports. This is not where you setup teachers that want to use the system for ordering. Teachers that want to order, should be setup in Student Management, just like a student. They need a unique student ID, they need to create a user account and add themselves to their account in mymealorder.com.

🔍 Search Teacher	⇄ Adams Middle ▾	⚪ Include Inactive	Search	➕

Name	School	Email	
Karen Smith	Adams Middle	karen.smith@schoolusa.com	✏️
Mary Watkins	Adams Middle	mary.watkins@schoolusa.com	✏️
Bonnie Henderson	Adams Middle	bonnie.henderson@schoolusa.com	✏️
John Banks	Adams Middle	john.banks@schoolusa.com	✏️

Student Management – Student Management is a listing of all students in MyMealOrder for your district.

🔍 Search Student	⇄ Franklin High ▾	≡	Search	➕

☑️ Include Students with no Account
☐ Include Inactive Students

Name	Student ID	Student Balance	School	Teacher	Grade	
Katie Jackson	112	$0.00	Franklin High		9	✏️ 🕐
Lisa Jones	123	$0.00	Franklin High		10	✏️ 🕐
Gina Smith	127	$0.00	Franklin High		9	✏️ 🕐
NDSion Student	134	$0.00	Franklin High		9	✏️ 🕐
Donna Wilson	124	$0.00	Franklin High		11	✏️ 🕐

To manually add a new student, click the Add New button, enter the required information and the student will be added to the system. Once added, the student is now available to be attached to a parent user account.

Clicking the Edit (pencil) icon will open the details of an individual student. The student ID, name, birthdate, teacher, grade and pricing level are set here. You can also select which allergens a student has, which will show on the Label Report. The user account that the student is attached to is also listed.

Add/Edit Student

Contact Details ▲

Student ID 101	First Name Heather	Middle Name
Last Name Robbins	DOB	School Adams Middle ⌄
Teacher Karen Smith ⌄	Grade 6 ⌄	Eligibility Full Pay Price ⌄
PIN 1512		

🟠 Active

Associated User Accounts

Accounts

robbins	(Robbins Family)	🗑

Student Alert ▲

Student Alert Message

Extreme Peanut Allergy

Allergens ▲

Select

⚪ Beef	⚪ Carrots	⚪ Corn
⚪ Dairy	🟠 Egg	🟠 Fish
⚪ Gluten Sensitive	⚪ Milk	
⚪ Other	🟠 Peanuts	⚪ Pescatarian
⚪ Pork	⚪ Sesame	⚪ Shellfish

Additional Allergens

Holiday Management – Holiday Management lists all of the holidays that have been entered. Holidays are displayed on the parent site as well as on the meal scheduler. This let's parents know when there is a holiday and why a meal is not scheduled and also lets the admin know to not schedule a menu for that day, as it is a holiday. Holidays should be entered at the beginning of each school year, prior to scheduling menus.

Holiday Name	School	Start Date	End Date	Action
Thanksgiving Break	Adams Middle	11-21-2022	11-25-2022	✏️ 🗑️
Thanksgiving Break	Washington Elementary	11-21-2022	11-25-2022	✏️ 🗑️
Winter Break	Washington Elementary	12-23-2022	01-03-2023	✏️ 🗑️

To enter a new Holiday, click Add New. Enter the Holiday Name, select all schools or an individual school, select a start and end date and save.

Upload Documents – This feature allows you to upload any type of document and it will show on the parent site, where the user will have the ability to download.

Title	Description	File Size (KB)	
MMO Help Guide	MMO Help Guide	587	✏️ 🗑️

To upload a new document, click the Add New button. Enter a document Title, enter a description, then click Attach to search for a document on your computer. Select which school(s) you want the document to be attached to and Save.

Add/Edit Document

Title
MMO Help Guide

File Name
MMO_Help_2017.pdf

Description
MMO Help Guide

Choose File   No file chosen

Select Schools
☑️ School USA District

Cancel   Save

FOOD:

Food Item Management – Food Item Management lists all of the individual food items for your district. The individual food items are used to build menus in Meal Designer.

Click the Add New button to enter a new food item.

- Required fields are Item Name, Price and Item Type, every other field is optional.

- The Brand allows you to assign a vendor admin to this brand so that the vendor can login and run reports on what to produce.

- The price is only used if the item is sold in an ala carte item, not in a non ala carte meal. You can set the ala carte price for a regular priced student, a reduced priced student and staff. If you want the ala carte pricing to apply to free, reduced and full pay students, check the box "Enable Free/Reduced Pricing.

- You can assign a graphic to each food item, this is optional.

- Nutrition information and allergens can be entered for each item, but is optional. If there is data and the option is enabled, the nutritional information will show to the end user when they click the details of an item in the menu.

Meal Designer – Meal Designer is where the menus are built using the food items from Food Item Management.

Meal Name	Regular Price	Reduced Price	Staff Price	
Bagel, Cinnamon/Raisin	2.50	0.30	0.00	✏️
Breakfast Quesadilla w/Fruit Juice	4.25	0.30	0.00	✏️
Burger	4.25	0.40	0.00	✏️
Chick-Fil-A	0.00	0.00	0.00	✏️
Chicken and Waffles	3.50	0.30	0.00	✏️
Chicken Biscuit	3.50	0.30	0.00	✏️
Chicken Nuggets	4.25	0.40	0.00	✏️

- You can add a new meal, edit a current meal (pencil icon) or copy a current meal (paper icon) and modify it. Once a meal is ordered, the items in that meal are locked and the menu can't be changed. Use the copy feature to copy a meal that is locked and edit the copy with the updated items.

Meal Details ▲

Meal Name

Price	Reduced Price	Staff Price
0.00	0.00	0.00

Suggested Meal Type	School/Group	Monthly Discount Price
Any ⌄	All Middle Schools ⌄	

◯ Is Monthly Discount Meal

Description and Options ▲

Font ⌄ | Size ⌄ | B *I* U | ↶ ↷ | ✂ ⧉ 📋 🔍 🔤 | ≔ ☰ | ≣ ≣ ≣ ≣ | A⁻ A⁺

◯ Enable À la carte   ◯ Auto Drink Menu   ◯ Daily Ala Carte Drink Menu
◯ Yearly Drink Menu   ◯ Is Second Meal   ◯ Enable Addons
◯ Enable Grade Pricing Per Meal
◯ Specific Grade
◯ Is Side Meal

◯ Specific PIN   Custom Value ⌄

🟠 Active

Image URI (Recommended size is 200px X 128px)

Choose File	No file chosen

Browse Image Library

Meal Items ▲

🔍 Search Items...   ◯ Include Inactive

				Current Items
⊕ BBQ Sandwich	Shanes	2.25		⊖ BBQ Chicken Tenders, Mashed Potatoes
⊕ BBQ Sauce		0.00		
⊕ Black Beans		1.50		
⊕ Bottled Spring Water		0.00		
⊕ Breakfast Quesadilla		1.00		
⊕ Candy Bar	Quiz Bowl	1.00		
⊕ Carrots and Celery		0.00		
⊕ Celery Sticks		0.25		
⊕ Cheeseburger		2.50		

Cancel   Save

- To add a new meal in Menu Designer, enter the Meal Name. This is what the parent will see on the menu when ordering.

- The price of the meal can be set for a Regular Priced meal (Price), a Reduced Price meal and Staff Price. This price is used when a parent purchases the meal, as long as "Enable A la Carte" is not checked. If Enable A la Carte is checked, the price set in Food Item Management will be used for each item.

- The Meal Description is seen by the parent on the menu when ordering. This is a good place to enter more details about the meal and the items in the meal.

- Enable A la Carte should be checked if the items in the meal can be ordered individually, using the price in Food Item Management, as ala carte items.

- The Auto Drink Menu should be checked if you want to build this meal with drink items that a parent can select and will be added, at no charge, to each meal that the parent orders.

- The Daily Ala Carte Drink Menu should be checked if you want to build this meal with drink items that will allow parents to order the selected drink on the selected days to their cart for the week or for the month, depending on which view they are using.

- The Yearly Drink Menu should be checked if you want to build this meal with drink items that will allow parents to order the selected drink for the remaining school days of the year.

- If you want to build a menu for a specific grade only, select the checkbox "Specific Grade", then check the box(es) next to the grade(s) that you want the meal to apply to. Parents will only be allowed to order this meal for students attached to their account that are set in the grade(s) selected.

- Enable Add-Ons allows you to setup items that require a selection from the parent. You can setup sides, fruits, vegetables, bread, meat, cheese, condiments, dressings, sauces and drinks. On the Item Type tab, you set the minimums and maximums for each category and the system will force the parent to pick the minimums for each category that is added.

- To add items to your menu, click the green + button in the listing of food items (from Food Item Management). To remove items from your menu, click the red – in the listing of items on the right that are already in the menu. *Note: Once a meal is ordered, the items in that meal are locked and the menu can't be changed. You will not see the green + or red – options.

Meal Scheduler – Meal Scheduler is used to schedule the menus that you have built in Meal Designer so that parents can order these meals.

- Click on any day on the calendar and the available menus will show on the right. Click the Add button next to the menu you want to add on that calendar day. Multiple meals can be scheduled per day. Clicking the + icon out to the right of the meal will allow you to schedule that meal for a selected date range.

- Uncheck the "Show All" box to hide the Ala Carte meals at the bottom of the list of meals.

- If you have multiple schools that are in a meal group and have the same menus, you can schedule and/or publish meals for all of them at once. If you only want to schedule and/or publish for an individual school, select that school from the drop down.

- To remove a meal from the calendar, click the X next to the meal. If you are looking at a meal group, the meal will be removed from all schools in that meal group.

- When meals are added to the calendar, they will appear in Green. Meals in Green have not been published so parents can't see them and can't order them yet. When you are ready to make the menus available for order, click the Publish button. This will turn the menus Blue. Blue menus have been published. You can publish for the selected month or publish for a selected date range.

- Click the UnPublish button if you need to make the meals unavailable to parents. The meals will stay on the calendar menu but parents will not see them and will not be able to order them.

- To order for a student, click the icon next to the meal that you want to order. You can order by Parent or by Student. This icon is only displayed when looking at an individual school, it's not shown when looking at a meal group. By default, the Parent is selected. Click the parent username you want to order for. Students associated with that parent will display out on the right. Click the student you want to order for and then click the Order button at the bottom. If you want to order by student, click the radio button on Students and click on the student you want to order for. The associated parent account(s) will show on the right. Click the parent account you want the charge to apply to, then click the Order button at the bottom.

Month Range – Month Range is used to set an ordering deadline for individual months. You can set a date range in one month to allow orders to be placed for the upcoming month. For example, you can allow orders for September during a 10 day period in August. If there is a month range set, it will override any other ordering deadlines.

Block Meals – The Block Meal feature allows you to block a parent from ordering for a day when a specific grade or teacher's class will not be served a meal. This feature is used for field trips, for example. If the 5th grade is going on a field trip, you enter the dates and the grade and the reason for the block meal entry. Parents that have a 5th grade student will not be able to order for that date range and will see the reason on the menu. If the parent has students in other grades, they will be able to order for those students.

Order Meals for Free Students – This feature will allow you to order the first meal scheduled for the date range for the selected Free Students. Enter your date range and select the students you want to order for. Only free students will be listed. If there are multiple meals scheduled, the first meal scheduled on each day will be ordered for each student.

Point of Sale – This feature will allow you to place an order for students as they come through the line or place an order for students that didn't order prior to the deadline. Students can be selected from the drop down, their name or student number can be typed into the search bar or a Pin Pad can be used for students to enter their student number. When a pin pad is used, once a student number is entered, the Get Student button will turn green, click that button to pull up that student. The system will buffer and store multiple student numbers as they are entered.

FEES AND ACTIVITIES:

Categories – You can enter as many different categories for the various fees and activities your school offers. Just click Add New and enter the category.

Fees and Activities – This link will show you a list of all of the fees and activities that are active. As an admin, you can add and edit your activities here. Click Add New to add an activity or click the edit (pencil icon) to edit a current activity.

Activity | Collect Information | Student Add-Ons/Exclusions

Activity Details ▲

| Activity Name | | Price | Reduced Price | Free Price |

◯ Enable Quantity ❶   ◯ Required ❶   ◯ Recurring ❶   ◯ Enable Free And Reduced ❶

| Start Date for Fee to be Purchased ❶ | End Date for Fee to be Purchased ❶ | Category
adams sch admin 1 ⌄ |

| Start Date Activity Occurs ❶ | End Date Activity Occurs ❶ | Signup Deadline date |

Instructions

Target Audience for the Fee ▲

| School Group(s) ⌄ | School(s) ⌄ | Teacher
-- Select Teacher -- ⌄ |

| Grade(s) ⌄ |

Student(s)

| |

Specify Price

Import Students ❶

| Choose File | No file chosen |

Description, Resources and Images, Color and Size ▲

Styles ▾ | Format ▾ | Font ▾ | Size ▾

B *I* U ← → ✕ ⎘ 📋 🔍 🔁 ⊣⊢ ⊢⊣ 🖨

≔ ≔ ≣ ≡ ≣ ≣ 🖼 ▦ 🔗 ⊘ ☺ A▾ A▾ Source

| |

Contact Information

| |

| Resource URI |

| Choose File | No file chosen |

Resource Description

| |

| Image URI |

| Choose File | No file chosen |

Browse Image Library

Color ❶

Size ❶

Discounts ▲

Discount Start Date

Discount End Date

Discount Date %age

Discount Code

Discount Code %age

Notice ▲

Max Enrollment

☐ Notify via Email

Email

☑ Active

Cancel   Save

- Enter a name for the activity. This is the name parents will see in OnlineSchoolFees.

- Price is the full pay price that users will pay for this activity.

- If you want to enable free and reduced pricing for this particular activity, check the box "Enable Free and Reduced". This will allow a student marked as a free or reduced student to purchase the activity at the reduced price or the free price set. Enter the reduced and free price in the associated fields.

- Check the Enable Quantity box if you would like for the parent to be able to purchase this activity and enter a quantity for the number they would like to purchase.

- Check the Required box if this activity is a required activity to purchase.

- Check the Recurring box if this activity is allowed to be purchased again as needed. For example, weekly after school care would be marked as recurring so parents can purchase it each week. If it's not marked recurring, once an activity is purchased, it can't be purchased again.

- The Active Start and End Dates are the dates that the activity will be available for a parent to purchase. After the Active End Date, the activity will not show in the parent's list of activities.

- Select the category that you want this activity to be listed under.

- Select the school(s) that you want this activity to show for. Only parents with students in the assigned schools will be able to see this activity.

- If you want to offer this activity only for specific grades and/or specific students, select the grade(s) and/or the student(s). If these options are left blank, it will be available to all students in the selected school(s). Select "S" if you want to assign the fee/activity to staff.

- Fees and Activities can also be assigned by courses at selected school(s). Select a course or courses that you want to assign the fee or activity. Next, select the Section or Sections based on the course(s) selected. Only students enrolled in the selected course(s) will be able to pay for this fee or activity.

- The Description will be displayed to parents in the details of the activity when that activity is clicked on.

- The Activity start and end date is the date range that the activity will take place.

- The Signup Deadline Date is the deadline to purchase this activity. After this date, parents will not be able to purchase this activity nor will they see this activity in their list.

- The Contact Information will be displayed to parents in the details of the activity when clicked on. This gives the parent information on who to contact with questions about this particular activity.

- The Resource URI allows you to link to a document or a website. When an activity is clicked on, the Resource URI will be displayed to parents.

- The Resource Description allows you to enter more information about the document or website link setup in the Resource URI. When an activity is clicked on, the Resource Description will be displayed to parents.

- The Image URI is the image that is displayed to parents for the activity. You can click Choose File and upload a file from your computer or you can click Browse Library to select an image from our pre-loaded image library. The library of images is always being added to.

- You can offer a discount for this activity. Enter the date range that the discount will be offered. You can enter a percentage that will be discounted during this date range. If you want to provide a discount code, enter the code and the percentage that will be discounted. If the code is entered by the parent, that discount amount will be applied when added to the cart.

- If the fee or activity has color and size options, enter the color choices in the color box. Type in the first color, hit enter, type in the next color, etc. Do the same thing for sizes in the Size box.

This will show in a drop down to parents.

- The Active button determines if the activity is active for parents to order and admins to see. If you inactivate an activity, by default it will not be shown in your list of activities. You can always pull it back up by selecting "Include Inactive" on the Manage Activities page.

Collecting Additional Information for a Fee/Activity – Use the Collect Information to build questions to collect additional information for a fee/activity. You can add as many questions as needed to collect information. Click the "Add New" button to add a question. Enter the question in the Question box at the top. Select the Input Type you would like for this question. Your options are Textbox, Checkbox, Drop Down, Memo and Radio Button.

- Text would be used when you want the user to manually enter text, like an electronic signature.
- Checkbox is used when you want to allow the user to select multiple answers.
- Drop Down is used when you want a drop down list of options and the user is allowed to select one answer.
- Memo is used when you want to simply display information to the user, like a disclaimer.
- Radio Button is used when you want to display multiple options for the user but only one answer can be selected.
- Enter your answer choices in the Answers section by entering the first answer, hit the enter key, enter the next answer, etc.
- If you require that this particular question be answered by the user, click the "required" checkbox.
- Click Add New to add the next question. Do this for each question you want to ask for this fee/activity. Once complete, click the Save button.

![MyMealOrder logo]

Input Type
Checkbox ⌄

Question/Details
What type of snack would you like

Answers
Pretzels
Chips
Popcorn

○ Required

[Remove] [Move Up] [Move Down]

Input Type
Dropdown ⌄

Question/Details
What time will you pick up your student?

Answers
2:00
2:30
3:00
3:30

○ Required

[Remove] [Move Up] [Move Down]

Input Type
Radio Button ⌄

Question/Details
Where will you pick up your student?

Answers
Bus Lane
Car Rider Lane
Walker Lane

○ Required

[Remove] [Move Up] [Move Down]

Input Type
Textbox ⌄

Question/Details
Electronic Signature

Answers

🔘 Required

[Remove] [Move Up] [Move Down]

This is what the questions looks like to a user after they add a fee/activity to their cart:

Information

1. What type of snack would you like

🟢 Pretzels

⚪ Chips

⚪ Popcorn

2. What time will you pick up your student?

-- Select -- ⌄

3. Where will you pick up your student?

○ Bus Lane   ○ Car Rider Lane   ○ Walker Lane

4. Electronic Signature

[   ]

[Add To Cart]   [Cancel]

Be aware that if you edit an existing Activity to change what audience it is available to (i.e. to reach people that are still unpaid once a required field trip or payment deadline has come and gone), it is advised that you run reports first to capture the payment/sign-up information for that Activity before making any edits to it. This is because once you make these edits, although they may be relevant to who needs to pay the fee at that time, it will override the original reporting (payment/sign-up) that you had for that Activity. To preserve that information, run reports & save them first.

Ordering Fees and Activities for a student – This link will allow you to purchase a fee/activity for any student. Click the link and select a student from the drop down list. All available activities will be displayed, you will see what a parent would see from their view. Any activity that a parent already paid for will show "Purchased" under the activity. If a parent has an activity in their cart, it will show "Added

to Cart – Parents Username" under the activity. If the activity is put in the cart by the parent, the admin will have the ability to remove that item from the cart or order that item that is in the cart.

Click the fee/activity that you want to purchase and click the green Add to Cart button. Once you've added all fees and activities to the cart, click the Order Activities in Cart button. Click the pencil to change the price of a fee/activity. Click the red – button to remove an item from the cart. Select the method of payment, either Cash or Check. Cash or Paper Check will show on the Activity Revenue report in a separate section.

FEES AND ACTIVITIES REPORTS

Activity Listing Report – This report shows a listing of all activities for the date range selected.

Activity Detail Report – This report lists the Student Name, Teacher, Grade, Quantity and Amount Paid.The report is per activity and lists each individual student that paid for each activity.

Activity Detail Report by Date – This report lists the Student Name, Teacher, Grade, Quantity and Amount Paid.The report is per activity and lists each individual student that paid for each activity.

Activity Orders Report – This report lists each activity, the quantity of each activity purchased and the total revenue for each activity.

Activity Revenue Report – This report lists the Student Name, Teacher, Grade, Activity and AmountPaid.

Activity Daily Revenue Report – This report lists daily totals of all fees and activities purchased based on transaction date.

Activity Reconciliation Report – This report shows all transactions for purchased fees and activities for the date range selected. It's only displaying CC and ACH payments.

Cancelled Orders Report – This report shows a listing of all cancelled purchases for the date range selected.

UnPaid Activity Detail Report – This report lists the Student Name, Teacher, and Grade. All activitieswill be displayed in the drop down.

Paid/UnPaid Activity Report – This report lists all students for the selected activity and shows if they have a status of paid for the activity or unpaid for the activity. All activities will be displayed in the dropdown.

The email address field will be blank if there is no user/parent account associated with that student.

The following fields will be blank on the report for unpaid payments but will fill in with information for paid payments.

> o Amount Paid, Fee Amount (which represents the 3.5% processing for Debit/Credit card payments or 0% for ACH/electronic check payments), Payment Type
>
> o Budget Code, Account Code, Project Code, Project Account

The Teacher name field represents the elementary student's homeroom teacher as reflected in eschool. The teacher's first name and last name will appear in separate columns enabling the elementary campus to sort and give out information to classroom teachers as needed.

Activity Teacher Name – this is for secondary campuses only and is tied to the course and section selected during the set-up of the Activity. Secondary campuses will not see information in the regular Teacher Name field since homeroom teachers are not actively assigned to secondary students in eschool.

Activity Collected Information Report – Lists the activity, student and answers to requested information for the activity.

Admin Activity Orders Placed Report – Lists the orders placed by admins for students for fees and activities.

Student Activity Transfers Report – Lists the Students that have purchased activities for the selected date range.
It shows the students previous school, the student's new school, the student name, Activity, Date Purchased and Amount Paid. Report is grouped by the school the student has transferred to.

Student Listing Report – Lists all students for the selected school.

User Listing Report – Gives a listing of all user accounts at the selected school.

Student Positive Balance Report – Gives a listing of students and their positive balances that are not $0.00.

Negative Balance Payment Report – This report shows a listing of negative balances paid off for the date range selected.

ACH Rejects Report – This report shows all ACH payments that were rejected for the date range selected.

Activity Monthly Fee Report – This report will show total payments made for selected fee(s) by month.

REPORTS:

Cafeteria Order - Lists out each individual item that was ordered for the date range and gives a quantity for each individual item ordered as well as totals.

Teacher Order - Lists out each student and puts an X for each date the student has an order. This is for an individual teacher at an individual school.

Lunch Delivery By School - Lists each student and the items ordered. Teacher, grade and quantity are also displayed. The last page shows the daily item counts. For each day, each item and the total quantity ordered is listed. This page is a good "pull ticket" report.

Lunch Delivery By Teacher - This report is for all teachers or an individual teacher. It lists each student and the items ordered. Teacher and quantity are also displayed. The last page shows the daily item counts. For each day, each item and the total quantity ordered is listed. This page is a good "pull ticket" report.

Lunch Delivery By Vendor - This report shows the total quantity for each item needed to produce all orders for the date range, each page is broken out per vendor. If a vendor has an admin account setup with a role of vendor, they can run this report themselves and only see the data for their brand.

Classroom Delivery Report - This report is for all teachers or an individual teacher. It lists each student and the items ordered. Teacher and quantity are also displayed. Has the ability to summarize the quantities per class. The last page shows the daily item counts. For each day, each item and the total quantity ordered is listed. This page is a good "pull ticket" report.

Label Report - Lists out the student name, teacher and grade as well as the item(s) ordered. This report fits Avery 5160 labels.

Orders Placed Report - This report lists orders for students based on the date range selected. Includes date scheduled and date ordered, meal name and items ordered.

Vendor Delivery - If a Brand is listed in Food Item Management, this report will list out the items and quantity ordered and it is broken out per vendor (brand). Each vendor will have their own page with the items and quantity ordered.

Milk Counts Report - Lists out milk counts purchased in various categories.

F&R Counts Report - Lists the number of Free, Reduced and Full Pay meals purchased for each day for breakfast and lunch.

Free Students Purchase Report - Lists each free student and the number of lunches purchased for the date range per student.

Users of Free Student Report - This report shows a listing of users that have a free student(s) associated with the user account.

Open Orders Report - This report will list all users that have items in their cart for the date range selected.

No Orders Report - This report will list all students that do not have a meal/item ordered for the date range selected.

Meal Items Ordered Report - This report allows you to get a list of students that have ordered a specific meal or a specific food item for a specified date range.

Admin Orders Placed Report - Lists out orders placed by Admin.

Student Listing Report - Lists the Students in selected district or individual school.

User Listing Report - This report gives you a listing of the active users in the district showing username, email address and other user information.

Revenue Report - Lists each student individually and the total dollar amount for their order. Default report is based on Meal Scheduled Date. This option does not include the credits used. If "Use Transaction Date instead of Meal Scheduled Date" is checked, the report lists out each individual student and the dollar amount for their order(s). This option shows orders purchased on these dates for that day and future dates. If you choose Transaction Date, it does include the convenience fee. If you choose Meal Date, it does not include the convenience fee.

Revenue By Month Report - Lists a summary of the total dollar amount for each month. Default report is based on Meal Scheduled Date. This option does not include the credits used. If "Use Transaction Date instead of Meal Scheduled Date" is checked, the report lists out a summary of the dollar amount for all orders for the month. This option shows orders purchased on these dates for that day and future dates. If you choose Transaction Date, it does include the convenience fee. If you choose Meal Date, it does not include the convenience fee.

Revenue Grade Report - Lists each grade and the total dollar amount for the orders for that grade. This report is based on Meal Scheduled Date. It does not include the convenience fee.

Order Revenue Report - Lists each student individually and the total dollar amount for their order. Default report is based on Meal Scheduled Date. This option does not include the credits used. If "Use

Transaction Date instead of Meal Scheduled Date" is checked, the report lists out each individual student and the dollar amount for their order(s). This option shows orders purchased on these dates for that day and future dates. Revenue report does not include the convenience fee.

Daily Revenue Report - Lists daily totals of all meal sales based on transaction date, not meal date. Daily Revenue Report includes the convenience fee.

Daily Sales Report - Lists daily totals of all meal sales based on meal date, not transaction date. Credits used are also displayed and totaled.

Sales by School Report - This report lists the meal sales based on meal date for each school selected, for the date range selected.

Sales Item Report - List items ordered on date.

Meal Sales Report - Lists meals and ala carte items sold on date range with prices and price totals.

Customer Balance Report - The Customer Balance report shows the Users positive or negative balance as of today as well as the value of Purchased Meals for the date range selected.

Refund Report - This report shows a listing of all cancelled meals for the date range selected.

Student Positive Balance Report - Gives a listing of students and their positive balances that are not $0.00.

Student Negative Balance Report - Lists out all students with a negative balance and their current balance.

Manual Transaction Report - This report shows a listing of manual transactions for the date range selected.

ACH Reject Report - This report shows all ACH payments that were rejected for the date range selected.