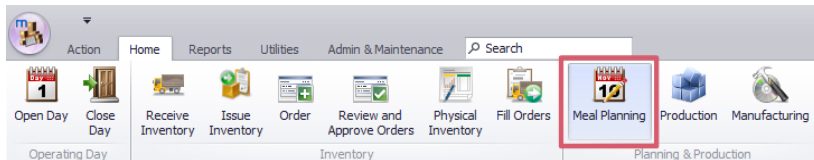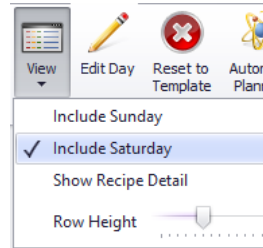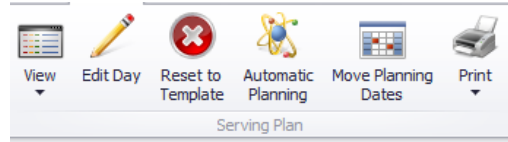# Meal Planning Quick Guide
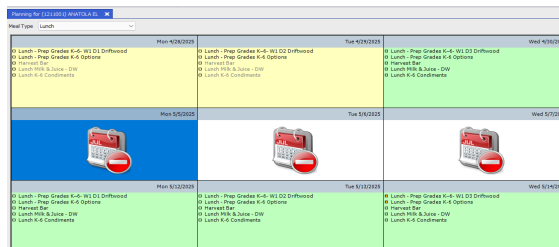
From the **Home** tab or **Checklist**, click on **Meal Planning**

- **Meal Planning** ribbon options -
  View – changes how the calendar looks – click an option once to select it, click it again to deselect it.
    - Include Saturday
    - Show Recipe Details
    - Row Height
- **Edit Day** – opens the selected (blue) day. Can also double-click a day to open it.
- **Reset to Template** – Resets the entire selection to the CO template, and resets meal counts to zero.
- **Automatic Planning** – this is used to copy planned or served numbers to the same menu in the future. Adjustments will still need to be made to future days.
- **Move Planning Dates** – not using this feature currently

- Color legend:
    - White – planning has not been started
    - Green – at least one menu line has been planned
    - Blue – The current selected day
    - Yellow – planning is partially complete (if there is more than one menu, only one of the green menu lines has numbers in it)

Double click a day to open the **Serving Plan.**

Select a **Meal Type** from the drop down at the top left of the screen. (Breakfast, Lunch, Supper, etc.)
  - **NOTE**: System will always default to displaying Lunch when opened.

Serve Type
- **Normal** – default option, for everyday use
    - Only Use other **Serve Type** when directed by the Central Office
- **Meals Planned** - The projected feeding figures for each menu count type on the **Meals Planned** line item is calculated using the numbers entered into the "entrée" recipes.

- **Servings Planned** - Enter the estimated planned servings for students, adults, and a la carte for each recipe in the **Servings Planned** fields. These counts will be used towards determining which items need to be ordered. **Entrée** recipes are displayed in bold for ease of identification.

- **Adding a recipe to the Serving Plan**
    - Click the **Add** button.
    - Click **OK** to add a recipe to the current menu
    - Use the **Search** box to locate and select one or more recipes – search by word or recipe number
    - Place check marks next to the recipes to be added
    - Click **OK**

- **Removing a recipe from the Serving Plan**
    - Highlight the recipe to be removed by clicking on it.
    - Click the Remove button.