## **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

	<b>∓</b> Action	Home R	leports	Utilities	Admin & Maintena	ance 🔎	Search			
1	-		2	+		7	Ē	12		8
Open Day	y Close Day	Receive Inventory	Issue Inventory	Order /	Review and Approve Orders	Physical Inventory	Fill Orders	Meal Planning	Production	Manufacturing
Operating Day		Inventory				Planning & Production				

- 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.** 

Ferreng for (121000) AWITCLARE M MeelType Landh 🗸								
Men 4/28/2025	Tue 4/25/2825	Wed 4/35/2825						
O Lunch - Prep Grades K-6 Options O Harvest Dar O Lunch Milk & Juice - DW	0 Lanch - Prep Grades K-6 Options 0 Harvest Der 0 Lanch Milk & Juice - DW	0 Lunch - Prop Grades K-4 VU 03 Diffhold 0 Lunch - Prop Grades K-4 Options 0 Farward Bar 0 Lunch Mik A, San - OW 0 Lunch K-4 Goodmeets						
Mon 5/5/2025	Tue 5/6/2025	Wed 5/7/2025						
Mon 5/12/2025	Tue 5/13/2825	Wed 5/14/2025						
O Lunch - Prep Grades K-6 Options O Harvest Bar O Lunch Mik & Juice - DW	0 Lanch - Prep Grades K-6 Options 0 Harvest Bar 0 Lanch Milk & Juice - DW	e Lunch - Prop Grade K-4- VUI.03 Differend E Lunch - Prop Grade K-4 Options 0 Farvest Bar 0 Lunch Mild Ages - OW 0 Lunch K-6 Goodments						

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
  - o 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.



Remove

- 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
- $\circ$   $\quad$  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.

	Me	Menu / Recipe #		Menu / Recipe Description	Count Type	Menu Category / Item Type
Þ	-	LN	I 6-8 Prep-W 1D3	Lunch - 6-8 Prep- W1 D3	Meals Planned	Reimbursable Meal
		►	R0920	Chicken Corn Dog, Bulk	Servings Planned	Entree
		F	R5699	Zesty Beef Chalupa (Bulk)/Chip	Servings Planned	Entree
		►	R4613	Fresh Salsa (#24 disher)	Servings Planned	Side Dish



