Choosi Bulk Order Setup Instructions – Internal

This guide is intended for inTEAM internal consultants and should not be distributed to customers and clients. The functions contained within can only be performed by users with inTEAM users and will not be visible to users with any other credentials in CNCentral. Last, this guide assumes some knowledge of CNCentral v5 and v6 as well as knowledge of how to create Choosi combos in v6.

Configure Sub-Sites and Teacher Accounts for Bulk Ordering

1. Click on "Sites" under the Setup Category from the left-hand side menu bar. Click on the three dots icon for the building you are configuring bulk ordering for and click "View".
   Note: All buildings will first need to be configured in v5. For information on creating buildings in districts in v5, click here.

All buildings in the district should appear listed here.
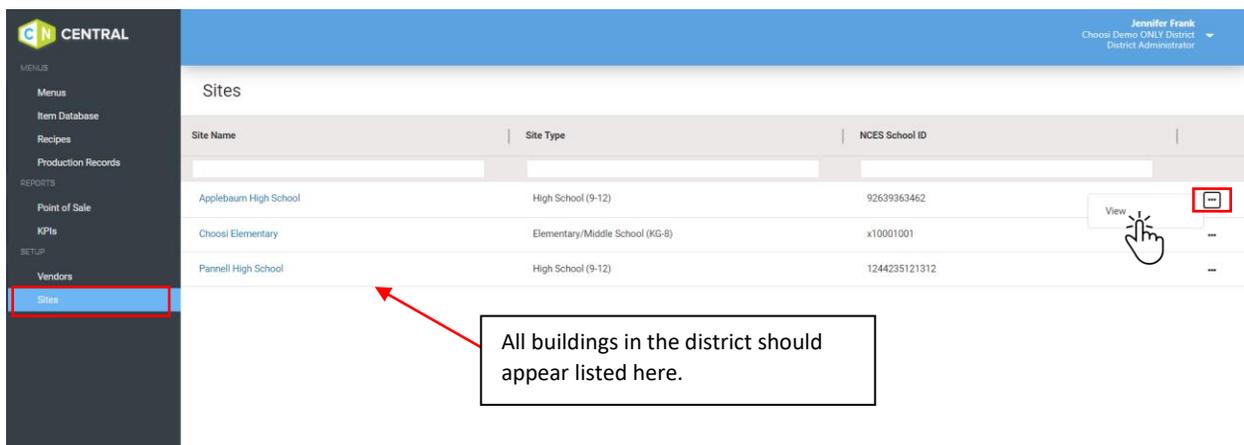
2. Click to the Choosi Configuration tab. Change the Order Cut-off Day, Cut-off Time, Order and Window Duration accordingly for each meal session available in the app.
   a. Cut-off Day – Determines what day orders can no longer be placed by teachers.
   b. Cut-off Time – Determines the time on the day configured above that orders can no longer be placed. When this time passes, no further orders can be placed.
   c. Order Window Duration – Determines how far into the future orders can be placed.
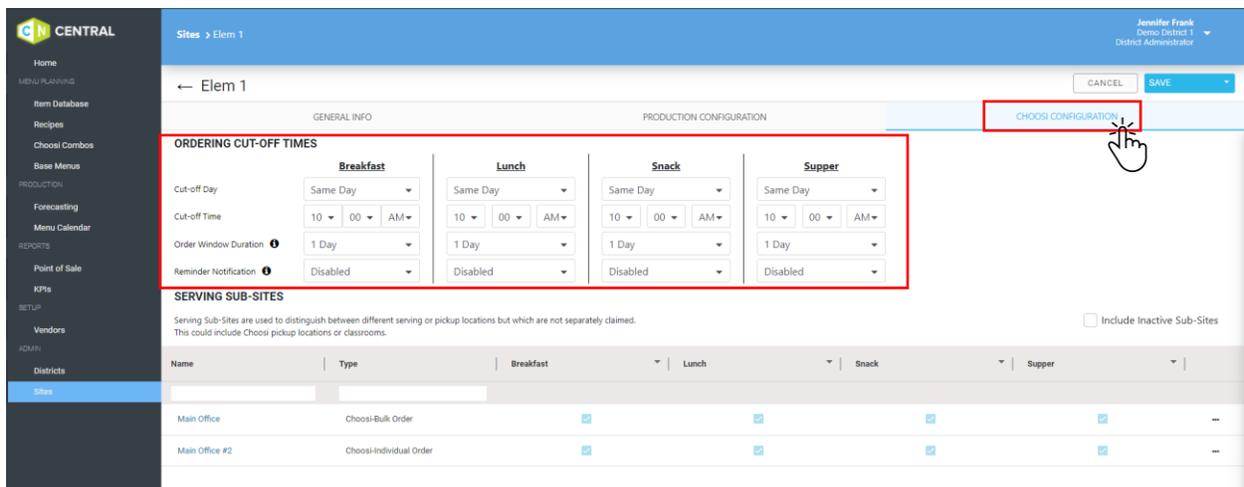
3. Click the blue plus sign button on the bottom right hand side of the screen to configure Sub-Sites (sub-sites are the teacher classrooms that will be logging in to place orders)

4. From the pop-out window, enter a Sub-Site Name and select "Choosi-Bulk Order" from the drop-down menu under Sub-Site Type. Select to Save & Edit to continue configuring this Sub-Site or click Save & Close to save this site and close the window.
Note: The Sub-Site Name should describe the teacher name or classroom which will be displayed in the reports. It's important you speak to the district to determine the correct nomenclature for this field.
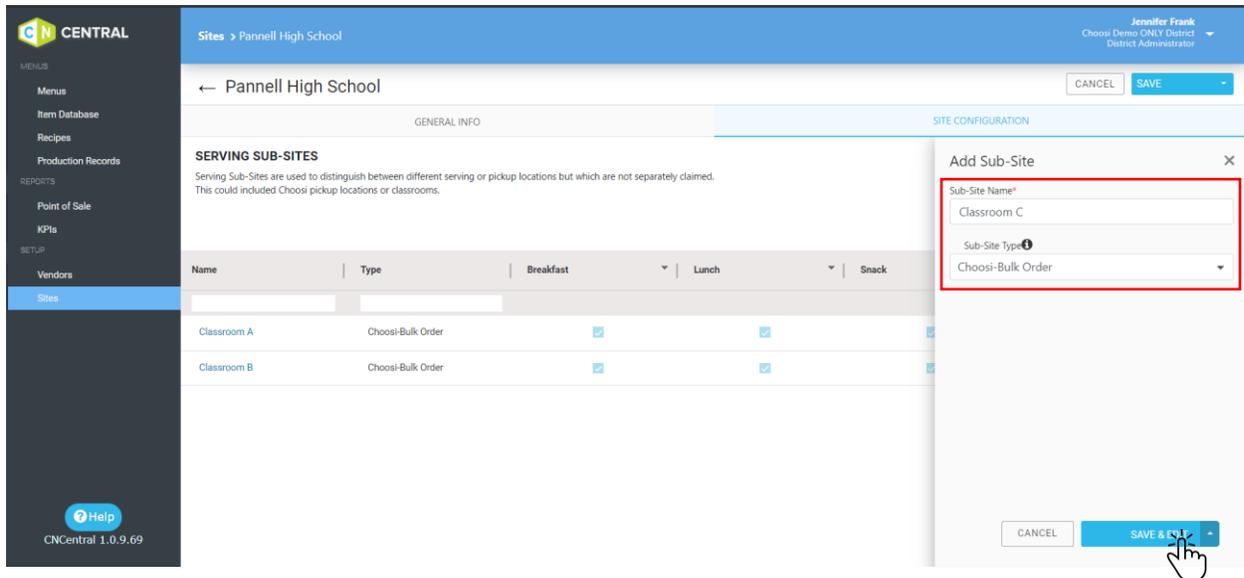
5. Select the appropriate meal sessions that will be displayed in the Choosi app for this Sub-Site. If there is a maximum order limit per Sub-Site, enter that into the Max Order Limit box. If "0" is entered, there will be no maximum number of orders that can be placed for this site.
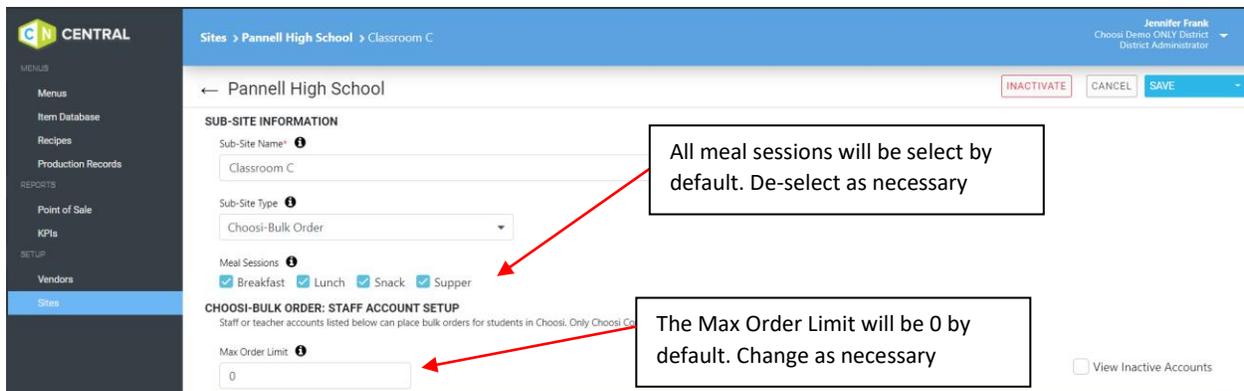
6. Create a teacher account to link to this Sub-Site by clicking the blue plus sign button on the bottom right side of your screen and selecting "Add Staff Account" button.
Note: Creating a staff account here, creates a user account in the Choosi app. The username and password you create for this user will need to be provided to the teacher who will be placing bulk orders for their classroom.

7. Enter a teacher first name, last name, email address and assign this user a username and password. It is recommended to use the teacher's email as the username. Click the Save & Close button when complete.
   Note: The teacher will be required to change the password upon logging into the app for the first time.

8. Repeat step 6 as necessary for each person who will be ordering meals at this Sub-Site.
9. When all Sub-Site teacher accounts have been created, click the Save & Close button at the top right side of your screen.
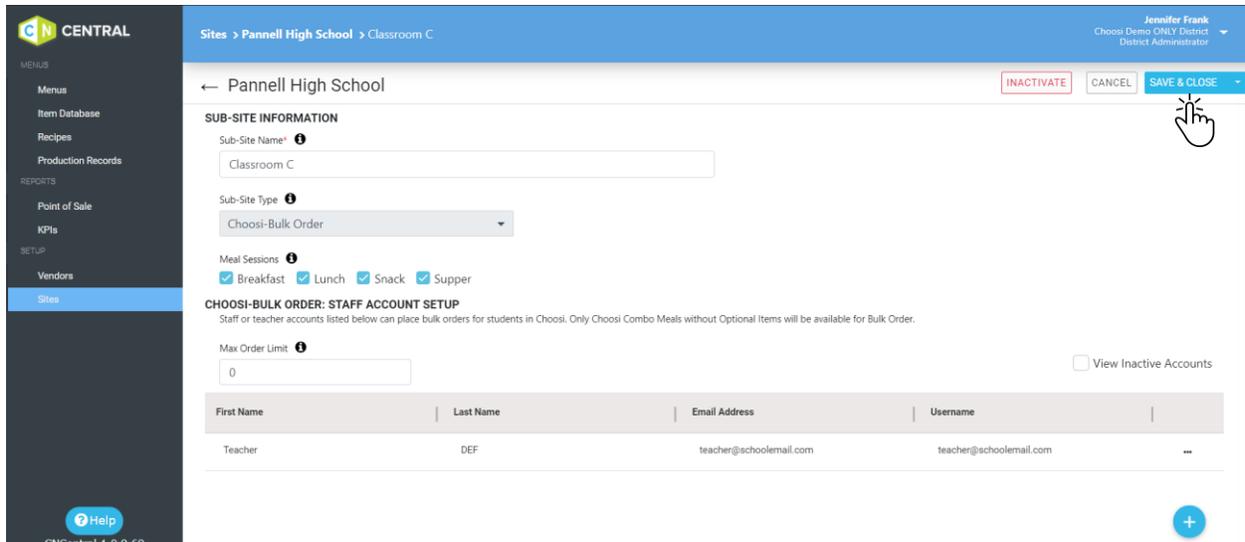
10. Repeat steps 2-8 for each Sub-Site and teacher account you'd like to create.

Considerations for Configuring Combo Meals for Bulk Ordering

Choosi bulk ordering does not support any meal customization. Rather, the order placed is for everything described in the description and added as a required item in the combo. Due to this, menu planners need to correctly configure combo meals in the Choosi Combos module and on the weekly menus to accommodate for the requirement that a variety of milks be offered, for the compliance to be analyzed correctly, and for the production records to accurately reflect the number of milks served.

Below are the considerations for Bulk Ordering you need to be aware of. You will need to communicate this information to the menu planner if they will be entering their Choosi Combos. If you need to provide these instructions to your contact, you can find them here.

- In the Item Choices tab, make sure the milk flag is not enabled (this flag is unselected by default)
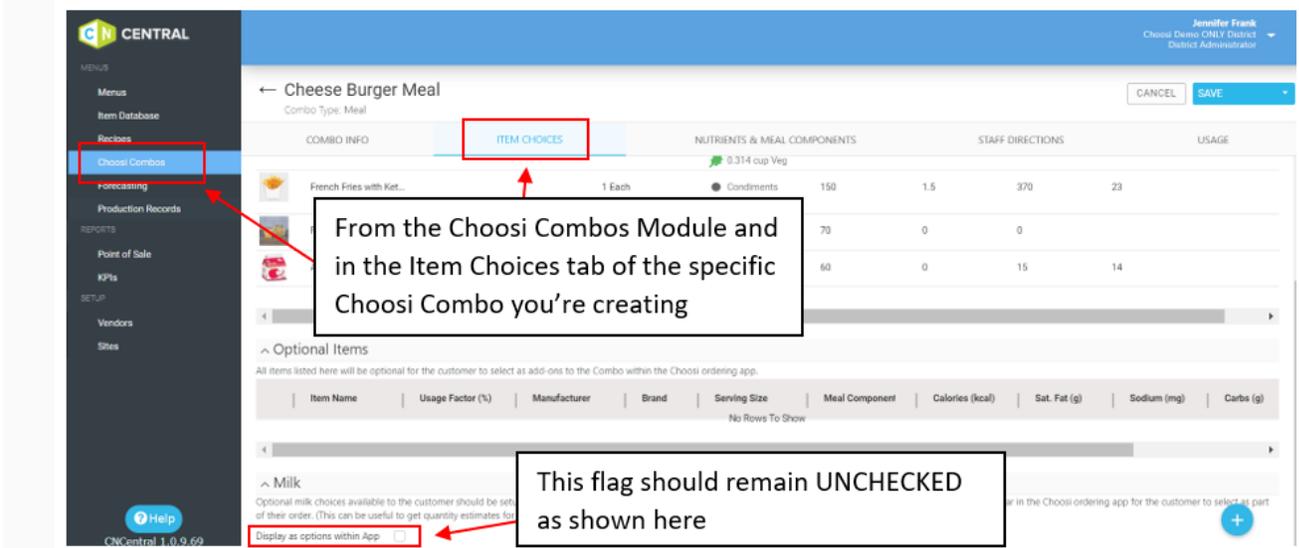
- On the Combo Info tab, make sure to include in the description of the Choosi combo that it comes with a variety of milk or choice of milk.

From the Choosi Combos Module and in the Combo Info tab of the specific Choosi Combo you're creating

Enter a description which included verbiage about choice/variety of milk

Considerations for Adding Combo Meals for Bulk Ordering to Weekly Menus

Milks will have to be added directly to a weekly menu and are not configured into the Choosi Combo for Bulk Ordering. See below for an example of a daily menu properly configured for Choosi Bulk Ordering.

- Use the blue plus sign button to add the milks you plan to offer directly to your daily menus for each day of the week. Add all options you plan to offer. Repeat for each day of the week.

From the Menus module and in a weekly menu that you're adding Choosi combo to

Add each milk you plan to offer directly to the menu with the appropriate planned numbers

Choosi Bulk Order Reports

The only report that is used for Choosi Bulk Ordering is the Order Pickup Sheet report. An example of that report as well as a description of where the data comes from is below:

Choosi Order Pickup Sheet - Bulk		Pannell High School			Page 1 of 1

Differentiates this as a "Bulk" report

Lunch - Monday, August 10, 2020 — **Classroom A**

Sub-Site name

Meal session and date. If multiple meal sessions, FDS will need to run report for each session

Menu Items (for Monday 8/10)	Serving Size	Portions Received	Portions Served	Leftover	Waste
Entrees					
Cheese Burger Meal *Cheese Burger; French Fries with Ketchup; Pineapple Cup; Apple Juice*	1 each	20			
Chicken Caesar Wrap Meal *Chicken Caesar Wrap; Oranges, Raw; Grape Juice; Carroteenies*	1 each	8			

Number of meals ordered for this sub-site only. Listed by entree

Substitutions:	Notes:

Completed By: _____

Items added as "Included Items" in the Choosi Combo