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

 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 <u>here</u>.

				Jennifer Frank Choosi Demo ONLY District → District Administrator
MENUS Menus Itam Database	Sites			
Recipes Production Records	Site Name	Site Type	NCES School ID	L
REPORTS Point of Sale KPIs	Applebaum High School	High School (9-12)	92639363462	View
SETUP Vendors	Pannell High School	High School (9-12)	1244235121312	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Sites		All buildings in the district sho appear listed here.	buld	

- 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.

	Sites > Elem 1						Jennifer Frank Demo District 1 District Administrator
	← Elem 1						CANCEL SAVE *
Item Database Recipes		GENERAL INFO		PRODUCTION CONFIGU	RATION	CHOOSI CON	
Choosi Combos	ORDERING CUT-OFF TIM	MES		1	1]	واليسا
Base Menus		Breakfast	Lunch	Snack	Supper		\bigcirc
Freesenting	Cut-off Day	Same Day 👻	Same Day 👻	Same Day 👻	Same Day 👻		
Menu Calendar	Cut-off Time	10 • 00 • AM•	10 • 00 • AM•	10 • 00 • AM•	10 • 00 • AM•		
	Order Window Duration (1 Day 👻	1 Day 💌	1 Day 💌	1 Day 👻		
Point of Sale	Reminder Notification	Disabled -	Disabled 👻	Disabled -	Disabled 👻		
KPIs	SERVING SUB-SITES					1	
Vendors	Serving Sub-Sites are used to dis This could include Choosi pickup	tinguish between different serving or locations or classrooms.	pickup locations but which are not separa	ately claimed.			Include Inactive Sub-Sites
ADMIN Districts	Name	Туре	Breakfast	▼ Lunch	* Snack	▼ Supper	•
Sites							
	Main Office	Choosi-Bulk Order		2			—
	Main Office #2	Choosi-Individual Order		1			2

- 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.

	Sites > Pannell High School					c	Jennifer Frank hoosi Demo ONLY District District Administrator
Menus	← Pannell High Scł	nool				CA	NCEL SAVE -
Item Database		GENERAL INFO			SITE	CONFIGURATION	
Production Records	SERVING SUB-SITES Serving Sub-Sites are used to distingu	uish between different serving or pickup loca	/	Add Sub-Site	×		
Point of Sale KPIs	This could included Choosi pickup loc	ations or classrooms.			S	Sub-Site Name* Classroom C	
SETUP Vendors	Name	Туре В	reakfast 👻	Lunch 👻	Snack	Sub-Site Type	•
Sites							
	Classroom A	Choosi-Bulk Order					
	Classroom B	Choosi-Bulk Order		Z			
Q Help CNCentral 1.0.9.69						CANCEL	SAVE & EXT.

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.

	Sites > Pannell High School > Classroom C			Jennifer Frank Choosi Demo ONLY District 🔫 District Administrator
Menus	← Pannell High School		INACTIVATE	CANCEL SAVE -
item Database Recipes Production Records REPORTS Point of Sale KPIs SCTUP Vendors	SUB-SITE INFORMATION Sub-Site Name* ① Classroom C Sub-Site Type ① Choosi-Bulk Order Meal Sessions ① Stack Supper	All meal sessions will be select by default. De-select as necessary		
Sites	CHOOSI-BULK ORDER: STAFF ACCOUNT SETUP Staff or teacher accounts listed below can place bulk orders for students in Choosi. Only Choosi Co Max Order Limit 0 0	The Max Order Limit will be 0 by default. Change as necessary	C	View Inactive Accounts

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.

Updated as of 1/26/2021

	Sites > Pannell High School > C				Jennifer Frank Choosi Demo ONLY District - District Administrator
Menus	← Pannell High Schoo	ol.		INACT	VATE CANCEL SAVE -
Item Database	SUB-SITE INFORMATION				
Recipes	Sub-Site Name*				
Production Records	Classroom C				
Point of Sale	Sub-Site Type				
KPIs	Choosi-Bulk Order	•			
SETUP	Meal Sessions				
Vendors	🗹 Breakfast 🛛 Lunch 🗹	Snack 🕜 Supper			
Sites	CHOOSI-BULK ORDER: STAFF AN Staff or teacher accounts listed below	COUNT SETUP can place bulk orders for students in Choosi. Or	ly Choosi Combo Meals without Optional Items will be availab	ble for Bulk Order.	
	Max Order Limit				View Inactive Accounts
	First Name	Last Name	Email Address	Username	1
Сисентаl 1.0.9.69			No Rows To Show		+ Add Staff Account

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.

	Sites > Pannell High School > Classroom				Jennifer Choosi Demo ONLY District Admin	r Frank District 🗢 istrator
Menus Menus	\leftarrow Pannell High School				Add Staff Account	×
Item Database Recipes Production Records REPORTS Point of Sale KPIs SETUR Vendors Sites	SUB-SITE INFORMATION Sub-Site Name* ① Classroom C Sub-Site Type ① Choosi-Bulk Order Meal Sessions ② @ Breakfast @ Lunch @ Snack ③ CHOOSI-BULK ORDER: STAFF ACCOUNT Staff or teacher accounts listed below can place Max Order Limit ③ 0	Supper SETUP Dulk orders for students in Choosi. Only 6	hoosi Combo Meals without Optional Items will be ave	silable for Bulk Order.	First Name* Teacher Last Name* DEF Email Address* teacher@schoolemail.com Username* ☑ Use Email Address ④ teacher@schoolemail.com Temporary Password* ④ Password124	
O Help CNCentral 1.0.9.69	First Name	Last Name	Email Address	Use	CANCEL CANCEL	LOSE

- 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.

Updated as of 1/26/2021

	Sites > Pannell High School > Classroon	n C			Jennifer Frank Choosi Demo ONLY District 🚽 District Administrator
Menus	← Pannell High School			INACTIVATE	CANCEL SAVE & CLOSE -
Item Database	SUB-SITE INFORMATION				دېلېک
Recipes	Sub-Site Name* 🟮				\bigcirc
Production Records REPORTS	Classroom C				
Point of Sale	Sub-Site Type 🚯				
KPIs	Choosi-Bulk Order	-			
SETUP	Meal Sessions				
Vendors	🗹 Breakfast 🗹 Lunch 🗹 Snack	🗹 Supper			
Sites	CHOOSI-BULK ORDER: STAFF ACCOUNT Staff or teacher accounts listed below can place	SETUP bulk orders for students in Choos	i. Only Choosi Combo Meals without Optional Items will be availat	ble for Bulk Order.	
	Max Order Limit 0				View Inactive Accounts
	First Name	Last Name	Email Address	Username	I
	Teacher	DEF	teacher@schoolemail.com	teacher@schoolemail.com	
CNCentral 1.0.9.69					•

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.

n the Item Ch	oices tab, make sure th	e milk flag is n	ot enabled	(this fla	ag is uns	elected k	by defau	ult)
								Jennifer Frank si Demo ONLY District District Administrator
MENUS Menus Item Database	← Cheese Burger Meal						CANC	EL SAVE
Recipes	COMBO INFO	ITEM CHOICES	NUTRIENTS & MEAL O	OMPONENTS		STAFF DIRECTIONS		USAGE
Forecasting	French Fries with Ket	1 Each	Condiments	150	1.5	370	23	
Production Records REPORTS	From the Cho	osi Combos M	odule and	70	0	0		
Point of Sale KPIs	in the Item Ch	oices tab of th	e specific	60	0	15	14	
SETUP Vendors	Choosi Combo	o you're creatii	ng					Þ
Sites	~ Optional Items			1				
	All items listed here will be optional for the customer to se I tem Name Usage Factor (%)	elect as add-ons to the Combo within the Manufacturer Brand	e Choosi ordering app. 1 Serving Size No Rows To Sho	Meal Compor	nent Calories (k	ical) Sat. Fat (g	g) Sodium	(mg) Carbs (g)
ChCentral 1.0.9.69	Milk Consonal mile choices available to the customer should be of their order (This can be useful to get quantity estimate Display as options within App	This flag sh	ould remain here	n UNCH	IECKED	ar in the Choosi	ordering app for the o	customer to select as part

• 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.



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.



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:

						7	
Choosi Order Pickup Sheet - Bulk Page 1 of 1 Page 1 Page 1 of 1 Page 1 Pag					Differentiates this as a "Bulk" report		
Lunch - Monday, August 10, 2020				C	assroom A		Sub-Site name
Menu Items (for Monday 8/10)	Serving Size	Portions Received	Portions Served	Leftover	Waste		Meal session and date. If multiple meal sessions. EDS will need to run
Entrees							roport for each sossion
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:							
						\vdash	Items added as "Included Items" in the Choosi Combo