

# Menu Admin

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## Create Menus

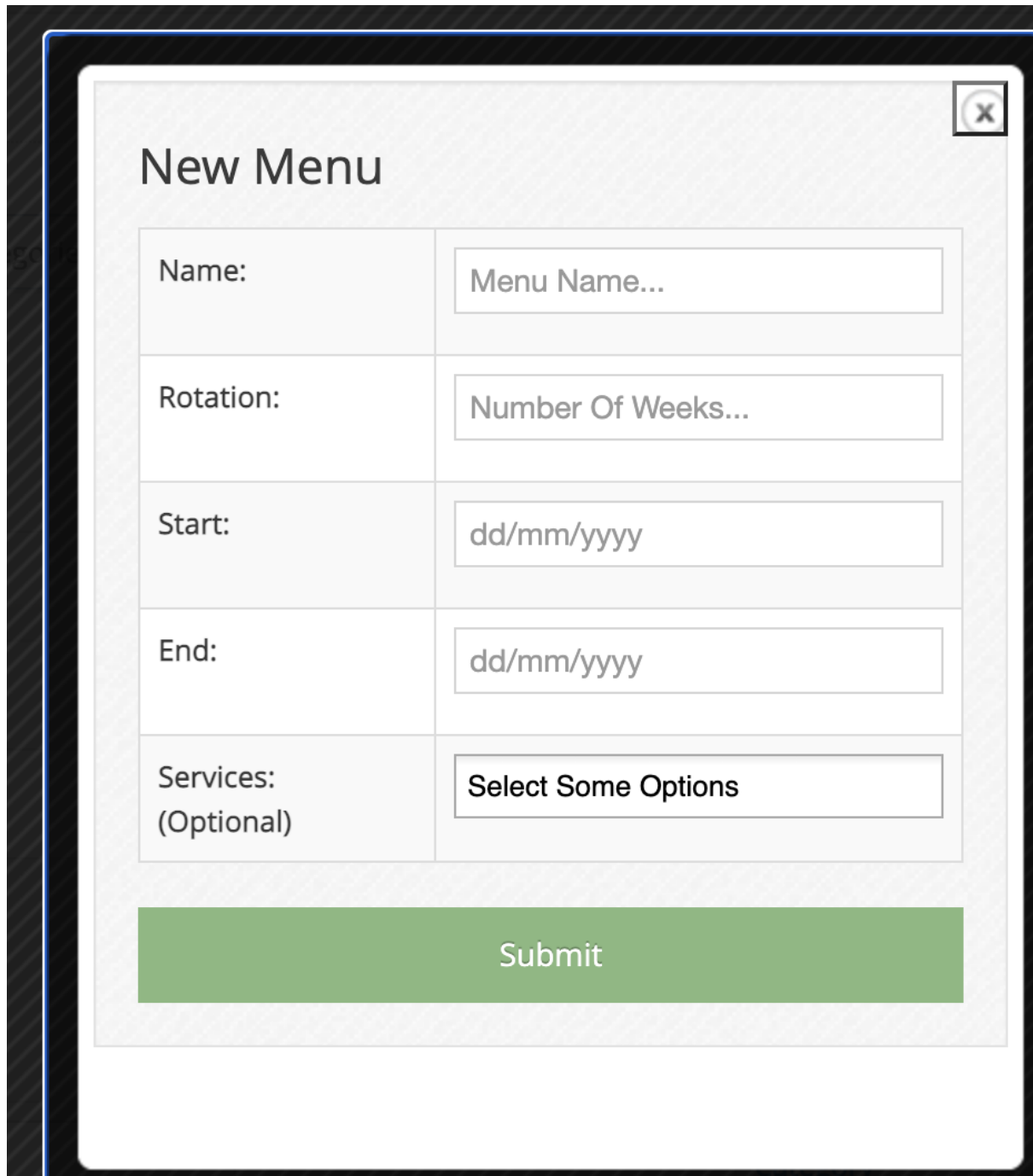
To **Create** a menu, navigate to the Meals and Services Page by selecting **Administration** from the menu and then selecting **Meals and Services**.

Menus				
<input checked="" type="checkbox"/> Only Show Active Menus				
New Menu	Name	Rotation	Start	Finish
	Fresh Menu	2 weeks	Monday 7th of September 2015	Saturday 1st of March 2025
	Generic Menu	1 weeks	Wednesday 1st of March 2017	Monday 31st of March 2025

Under the Menu Heading, click the green **New Menu** button on the left side. This will display the New Menu popup, where you'll have to fill out some basic information about the menu. The menu will need a **Name**, a **Start Date** and an **End Date**. If your clients will be choosing from the same meals each week, set the **Rotation** to 1. If they'll be choosing from different meals on different weeks, set the **Rotation** to the number of weeks in your menu. That is: a **4 Week Menu** should have a **Rotation** of 4.

**Note:** If you're creating a Rotating Menu (ie: a menu with a rotation greater than 1), the **Start Date** should be a Sunday. This will avoid unexpected behaviours.

Once you've entered the information, click the **Submit** button to create the menu.



A screenshot of a web form titled "New Menu". The form is enclosed in a light gray box with a close button (an 'x' in a circle) in the top right corner. It contains five input fields arranged in a table-like structure. The first field is "Name:" with a placeholder "Menu Name...". The second is "Rotation:" with a placeholder "Number Of Weeks...". The third is "Start:" with a placeholder "dd/mm/yyyy". The fourth is "End:" with a placeholder "dd/mm/yyyy". The fifth is "Services: (Optional)" with a placeholder "Select Some Options". Below these fields is a large green button labeled "Submit".

New Menu	
Name:	<input type="text" value="Menu Name..."/>
Rotation:	<input type="text" value="Number Of Weeks..."/>
Start:	<input type="text" value="dd/mm/yyyy"/>
End:	<input type="text" value="dd/mm/yyyy"/>
Services: (Optional)	<input type="text" value="Select Some Options"/>
<input type="submit" value="Submit"/>	

## View and update Menus

On the Meals and Services Page, you can see the basic information for each menu: its **Name**, **Rotation**, **Start Date** and **End Date**, etc. To **View** the meals in a menu,

and to **Update** the meals or information in a menu, click the blue **Information** button next to the menu's name. You'll be taken to the Menu Details Page.

	Fresh Menu	2 weeks
	Generic Menu	1 weeks

On the Menu Details Page, you can see all the basic information for a menu, as well as its meals. You can **Add** or **Remove** meals, **Update** the menu's basic information, **Delete** the menu.

Fresh Menu

Actions ▾

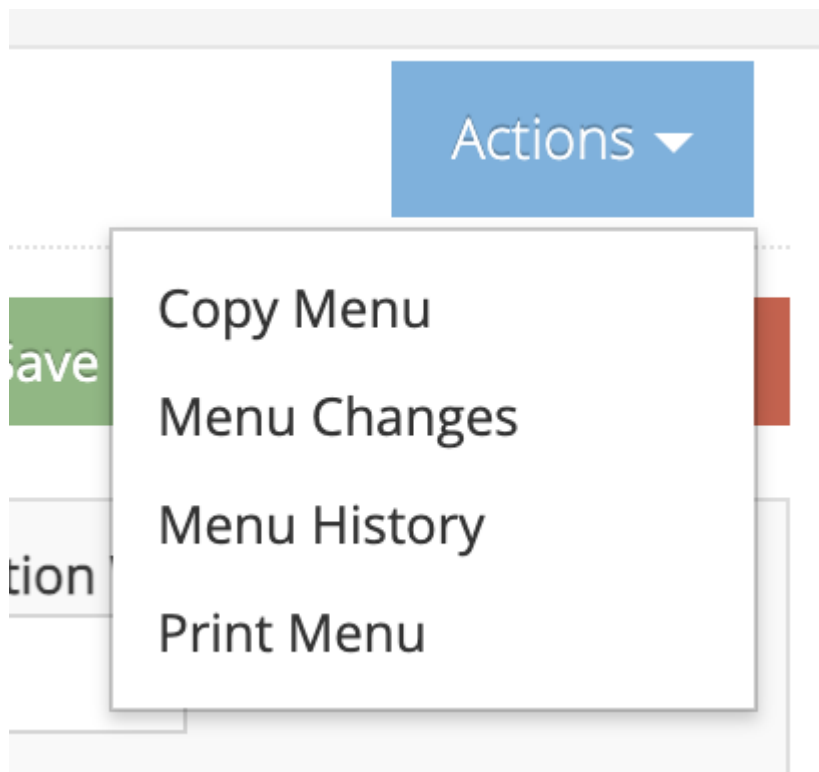
Menu Details:

Save Changes Delete Menu

Menu Name: Fresh Menu	Services: Select Some Options	Rotation Weeks: 2
Menu Start: 07/09/2015	Menu Finish: 01/03/2025	
Display on Online Ordering: No ▾		

\* The meal has been affected by a Menu Change

You can also use the **Actions** button to **View** the history or changes, **Print** the menu, or **Copy** the menu.



To **Add** a meal, you'll have to select the **Meal Name** as well as the **Week** and **Day** of the menu it will appear on. You can select **Multiple Weeks** and/or **Multiple Days**. Once you've filled out that information, click the **Add Meal** button to add it to the menu.

Menu Items:

Meal	Week	Day	
Beef & Bean Burrito Large (Frozen Meals)	1	Monday	<input type="button" value="Add Meal"/>






To **Remove** a meal, simply click the **Garbage Bin** icon next to the meal. You can only remove an Unused Meal. If it's part of a client's Meal Plan, Polixen won't let you remove it from the menu.

	Mini Beef Lasagna	Frozen Mini Meals	2	Friday	
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You can use the green leaf **Meal History** button to check if a meal has been used.

### Meal History:

Start : 17/06/2022    END : 15/09/2022    [Update](#)

	Client	Type	Start Date	End Date
	Bob Jones	Recurring	24/01/2018	No end date
	Gregory Hicks	Recurring	01/03/2017	No end date
	Jennifer Goldings	Recurring	01/03/2017	No end date
	Mathew Johnson	Recurring	01/10/2015	No end date
	Paul Strabs	Recurring	14/09/2017	No end date

To **Update** a menu once you've changed its information, click the **Save Changes** button on the top right-hand side.

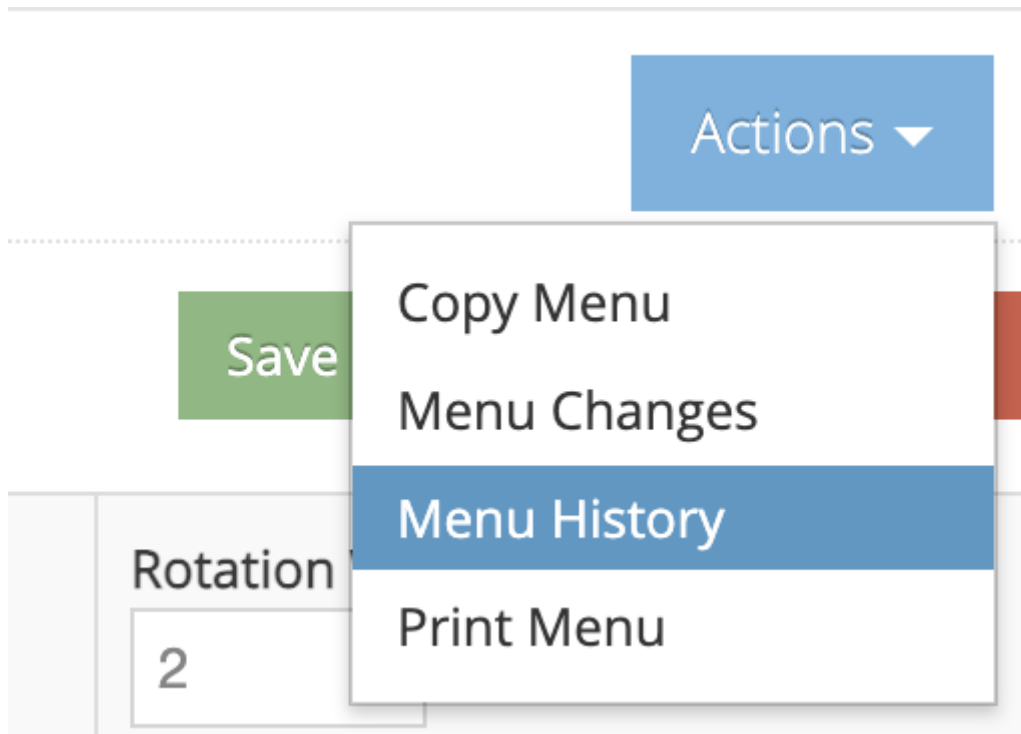
Actions ▼

Save Changes

Delete Menu

## View Menu Histories

From the Menu Details Page, you can view the **History** of the menu. To do so, click the **Actions** button and select **Menu History**.



This will take you to the Menu History Page for that menu. If a client has a recurring meal plan using that menu, or a once-off meal from that menu, during the date range, it will be listed here.

Menu History:

Start : 16/08/2022 END : 15/09/2022 [Update](#)

	Client	Type	Start Date	End Date
<a href="#">i</a>	Belinda Shaw	Recurring	01/10/2015	No end date
<a href="#">i</a>	Bob Jones	Recurring	24/01/2018	No end date
<a href="#">i</a>	Gregory Hicks	Recurring	01/03/2017	No end date
<a href="#">i</a>	Jennifer Goldings	Recurring	01/03/2017	No end date
<a href="#">i</a>	Mathew Johnson	Recurring	01/10/2015	No end date
<a href="#">i</a>	Paul Strabs	Recurring	14/09/2017	No end date

You can click the blue **Information** button next to the client to be taken to the relevant meal plan.

## Meal Plan

Start Date

01/10/2015

End Date *\*\* optional*

dd/mm/yyyy

Fortnightly *\*\* optional*

No

Menu:

Fresh Menu

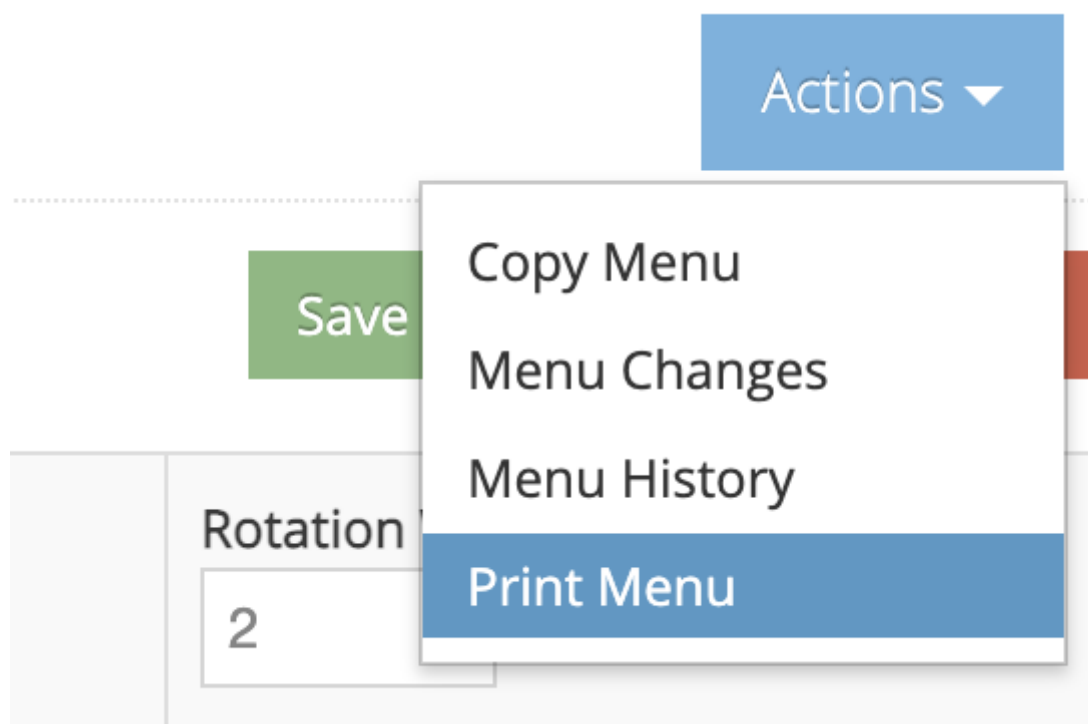
Diet Requirements:

Meal Restrictions:


You can also change the dates in the date filter to update the meals listed (click the **Update** button once the dates have been changed).

## Print a Menu

To see which meals are available on certain dates, or to create a menu you can send to clients, you can **Print** the menu from the Menu Details Page. To do so, click the **Actions** button and select the **Print Menu** option.



By default, the **Start Date** and **End Date** are both set to today's date, but you can change them.



## Menu Printout

Menu:

Fresh Menu

Start:

21/09/2022

End:

21/09/2022

Save as CSV: ☐

Run Report

Once you're happy with the dates, click the **Run Report** button to create the PDF menu. It will look like this:



## Fresh Menu

Meals from Wednesday 21st Sep 2022 to Wednesday 21st Sep 2022

Week 2

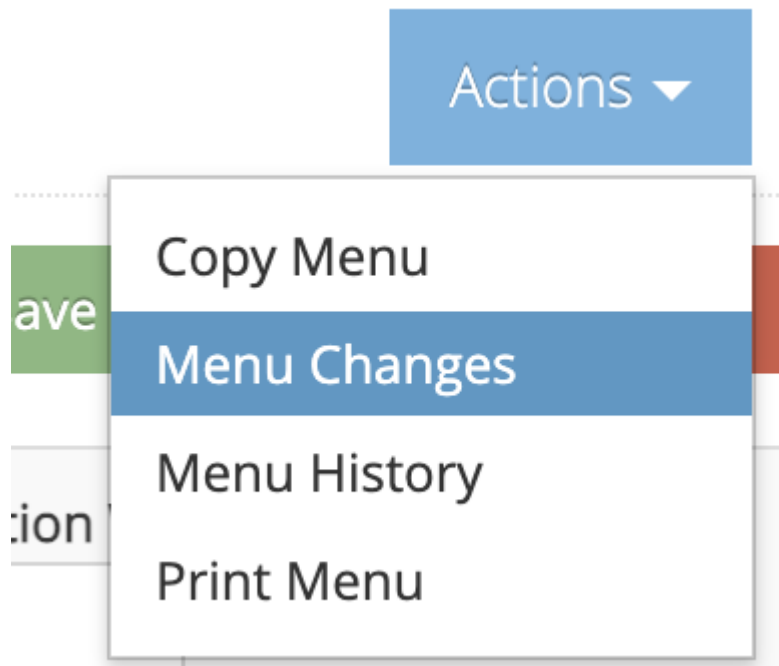
	Wednesday
	Curried Chicken (Hot Meals)

## Menu Changes

A **Menu Change** refers to a particular meal being changed on a menu. There are two kinds of Menu Change:




- **Temporary:** This refers to a menu change that takes place only **once** on a particular date. For example: the Tomato Soup on April 1st could be changed to a Pumpkin Soup. This only affects April 1st. The next time Tomato Soup comes around, it will be a Tomato Soup again.
- **Permanent:** This refers to a menu change that **starts** on a particular date, and **ends** on another date. For instance, the Apple Pie on Week 1 Mondays could be changed to Chocolate Cake between April 1st and April 30th. For that whole month, whenever a Week 1 Monday appears, the Apple Pie meal will be changed to a Chocolate Cake. Before April 1st, and after April 30th, it will be Apple Pie again.

To view all changes for a menu, click the **Actions** button and select **Menu Changes**. The Menu Changes Page will list all changes for that particular menu.



## Fresh Menu

Menu Changes:

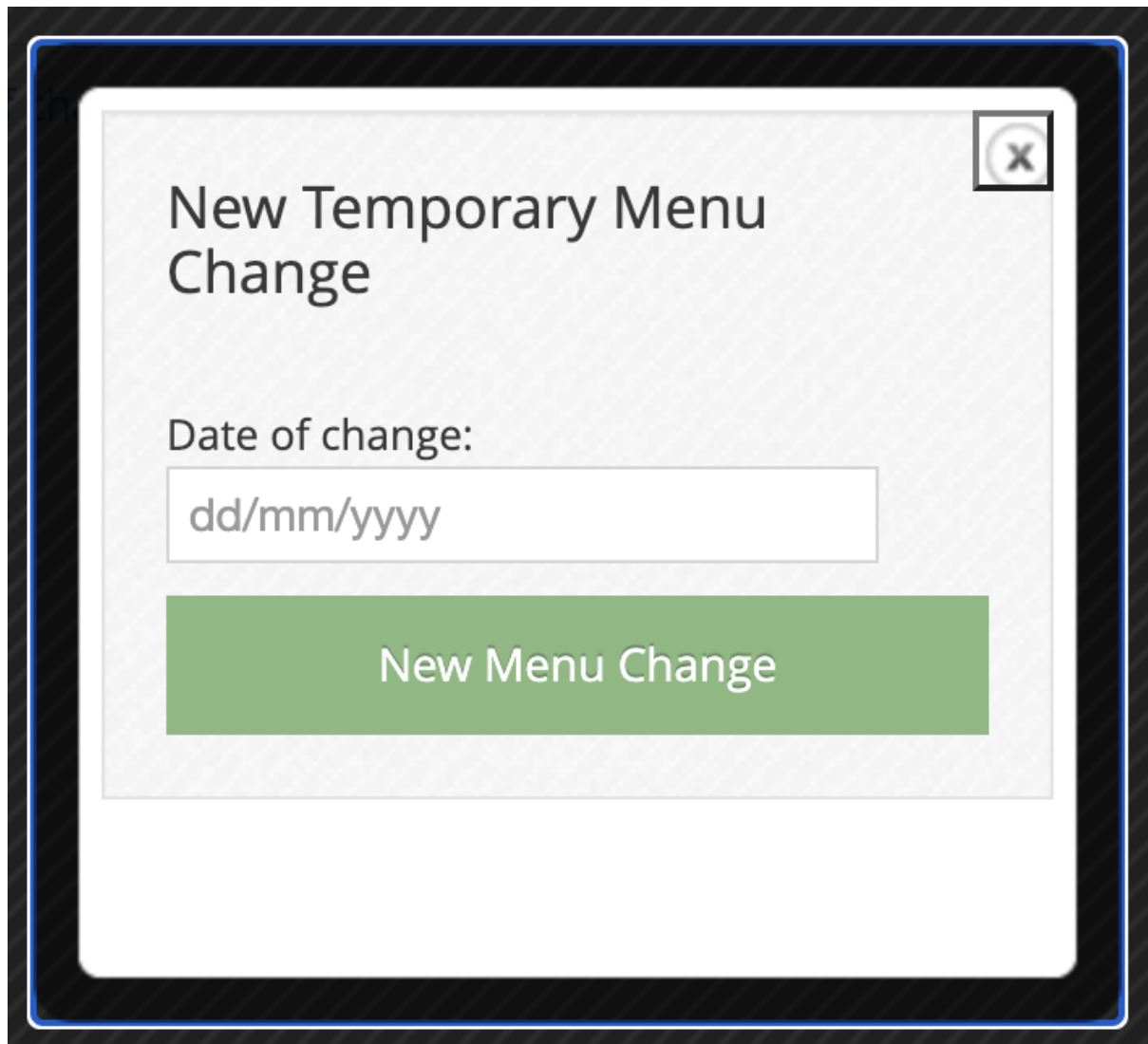
					New Temporary Menu Change	New Permanent Menu Change
	Type of change	Start Date of change	Day of change	End Date of change	Meals Changed	
	Temporary	12/10/2015		12/10/2015	1	
	Permanent	01/06/2017	Monday, week 1	No end date selected	1	
	Permanent	14/09/2022	Monday, week 1	No end date selected	1	

## Temporary Menu Change

To create a new temporary change, click the **New Temporary Menu Change** button. When creating a Temporary menu change, you'll be prompted to select the **Date**.

New Temporary Menu Change

Once you've filled in the information, click the **New Menu Change** button to be taken to the Menu Change Page.



A screenshot of a software dialog box titled "New Temporary Menu Change". The dialog box has a light gray background and a white border. In the top right corner, there is a small square button with a black 'X' icon. Below the title, the text "Date of change:" is followed by a white text input field containing the placeholder text "dd/mm/yyyy". At the bottom of the dialog box, there is a large green rectangular button with the text "New Menu Change" in white.

### **Permanent Change**

To create a permanent change, select the **New Permanent Menu Change** button.



A large, rectangular button with a gradient from light orange to a darker orange. The text "New Permanent Menu Change" is centered on the button in a white, sans-serif font.

When creating a Permanent menu change, you'll be prompted to select the **Start Date** and **End Date**, as well as the **Week** and **Day** of the menu the change will affect. Once you've filled in the information, click the **New Menu Change** button to be taken to the Menu Change Page.

## New Permanent Menu Change

Start Date:

End Date (Optional):

Day of Change:

Week of Change:

New Menu Change

### Menu Change Page

Once you're at the Menu Change Page, you'll see all meals that are on that date. You can then select a **New Meal** for one or more of these menus.

Fresh Menu

Delete Change

Menu Change Details

Save Menu Change

Start Date:

14/09/2022

End Date:

dd/mm/yyyy

Meals Changed: 1

☐ Only show changed meals

Meals for Monday, Week 1

Original Meal	New Meal
Beef & Bean Burrito Large (Frozen Meals)	Beef Stroganoff (Frozen Meals) ▾
Butter Chicken (Frozen Meals)	Blend - Chicken and vegetabl ▾

Once you've selected your new meals, click the **Save Menu Change** button to create the change.

You'll then be able to see the new change on the Menu Changes page, as well as on reports for that date.

## Meals

To learn more about meals, visit our [meal admin page](#).