



Canteen Management Setup Guide

- ✓ An introduction to Canteen Management
- ✓ Configuring your Menus
- ✓ Publishing your Menus
- ✓ Tracking your Orders



What is Compass Canteen?

Compass Canteen's range of functionalities and integration with your already familiar Compass portal allows you to:



Customise menus



Manage spending by students



Handle secure payments



Integrate with our Kiosks and Canteen POS Systems



Flag food allergies and medications

What can Compass Canteen do for my school?

Compass Canteen makes ordering and paying for school meals easy for parents and students, and helps your school reduce logistical effort and food wastage. Bring your school canteen online and deliver a better food ordering experience for everyone.

Permissions

CanteenAdmin

Allows the user to access the module to administer menus/orders, for themselves and on behalf of others.

CanteenPower

Allows the user to access the module to administer menus/orders.

Keywords

Order

When a buyer completes a menu, this is their order. This will hold the items they've ordered and any notes, and can be cancelled.

Availability

When a menu is available to order. For example, you can have a Lunch Menu, which is available every Mon-Thurs at 1pm.

Wallet

Parents are able to set automatic top ups, or do so manually, to allow students to order themselves - and only use what's been made available to them.

Menu

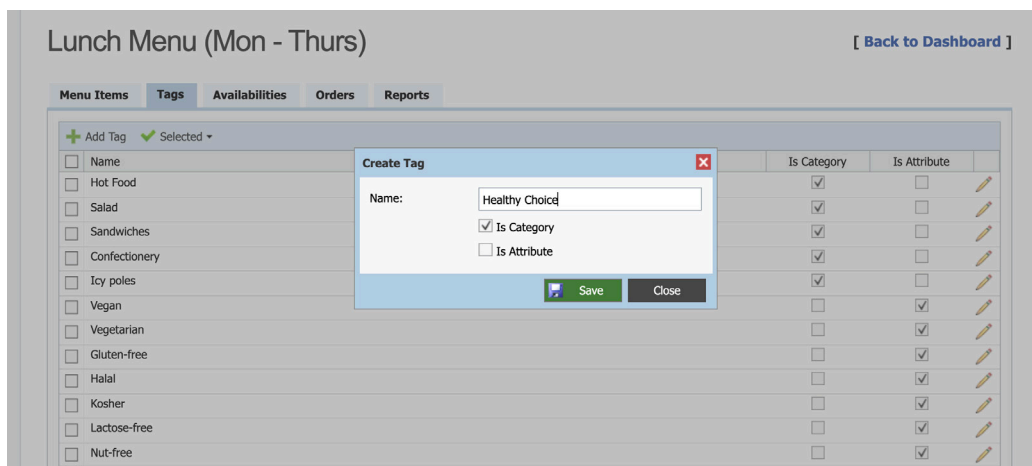
The specific items available in a certain sitting.

Step 1 - Create your Menu/s

From the Dashboard, either create a new menu, or use the page icon to duplicate an existing menu. Fill in the relevant details here.

Step 1a - Create your Tags

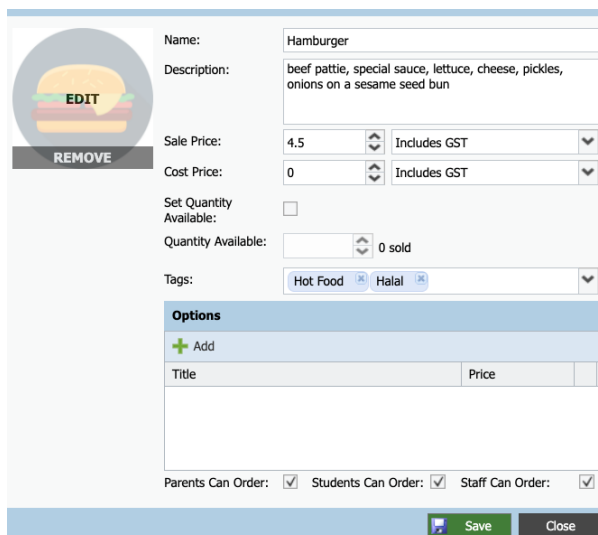
From the Tags tab, add helpful keywords that will help categorise your menu items. Some schools like to use this for allergens (eg. nut-free, vegetarian, contains gluten) - or you can put foods into sections such as hot food, sandwiches, etc.



Step 1b - Configure your Menu & Items

Click the 'Add Menu Item' button, and a pop-up will show for you to fill in details about the item. From here, upload an image, set the price, add tags, and allow certain groups to order.

You're also able to edit and archive existing items.



Quick Tip!

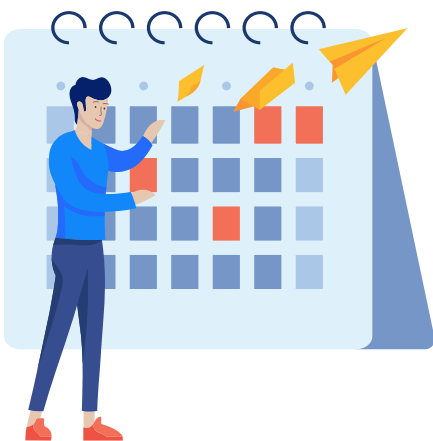
Categories can be used to allow for quick searching or filtering of menu items when looking at the menu on our POS device.

Step 2 - Create your Availabilities

This tab is where you'll add the date/s the menu is available to order for. Add an availability and fill out when the 'sitting' is. This might be Monday lunchtime from 1pm-2pm.

Step 2a - Cut off Times

Set your cut-off/cancellation times. The cut off time will stop users ordering after this time, and the cancellation time stops people cancelling. For example, for a Monday lunch menu, the cut off could be Sunday night, and the cancellations can happen until Monday morning.



Edit Availability: Monday, 01 June 2020

Availability

Start: 01:11 PM Select a period...

Finish: 01:32 PM Select a period...

Ordering Closes: 10:00 AM 01/06/2020

Cancelling Closes: 10:00 AM 01/06/2020

Parents/Students can order: Staff can order:

Search for an item... Selected

<input type="checkbox"/> Item	<input checked="" type="checkbox"/> Change Order Status
<input checked="" type="checkbox"/> Hamburger	Order Online And In Canteen
<input checked="" type="checkbox"/> Hotdog	Order Online And In Canteen
<input checked="" type="checkbox"/> Pizza	Order Online And In Canteen
<input type="checkbox"/> Cup of Noodles	Order Online And In Canteen
<input type="checkbox"/> Salmon and Avocado Sushi	Order Online And In Canteen
<input type="checkbox"/> Salad Sandwich	Order Online And In Canteen
<input type="checkbox"/> Chocolate Cake	Order Online And In Canteen

Save Close

Step 2b - Repeat Feature

Use the repeat feature to have the same cut off times/dates and set up your whole semester/year in one go. Most schools use this for every weekday, but if you have a special Friday menu - just tick Friday!

Quick Tip!

You can use scheduling to create unique one off or regular event menus, like "Pizza Fridays!"

Create Menu Availability

Available Dates

September 2021

S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Today

Start: 01:00 PM Select a period...

Finish: 02:00 PM Select a period...

Ordering Closes: 10:00 AM On The Day

Cancelling Closes: 10:00 AM On The Day

Parents/Students can order: Staff can order:

Repeat

Repeat:

Repeat pattern: Repeat every 1 week(s) until 30/09/2021

Repeat on days: Mon Tue Wed Thu Fri Sat Sun

Teaching Days Only:

Save Close

Step 3 - Track your Orders

The Orders tab of a Menu allows you to view and manage the orders that your users have made. You can select an availability to see who's ordered what, and mark these as processed.

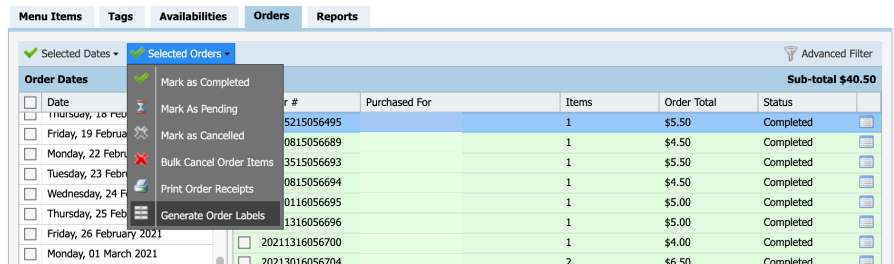
Step 3a - Reports

The Reports tab shows a breakdown of the items ordered within a date range, and also allows you to view/export data. Select from either a CSV or PDF of the orders you've selected.



Step 3b - Receipts/Labels

You can connect a Compass Thermal Printer to your network to be able to print order receipts! These can also be downloaded as a PDF and printed through a normal printer.



Order Dates	Order #	Purchased For	Items	Order Total	Status
Thursday, 18 Feb 2021	5215056495		1	\$5.50	Completed
Friday, 19 February 2021	0815056689		1	\$4.50	Completed
Monday, 22 February 2021	3515056693		1	\$5.50	Completed
Tuesday, 23 February 2021	0815056694		1	\$4.50	Completed
Wednesday, 24 February 2021	0116056695		1	\$5.00	Completed
Thursday, 25 February 2021	1316056696		1	\$5.00	Completed
Friday, 26 February 2021	20211316056700		1	\$4.00	Completed
Monday, 01 March 2021	20213016056704		2	\$6.50	Completed

Step 4 - Track your Payments

Within your CompassPay portal, the Transactions tab will show you each individual payment, and the Transfers tab will show a PDF with the day's report/takings. You can also refund from here.

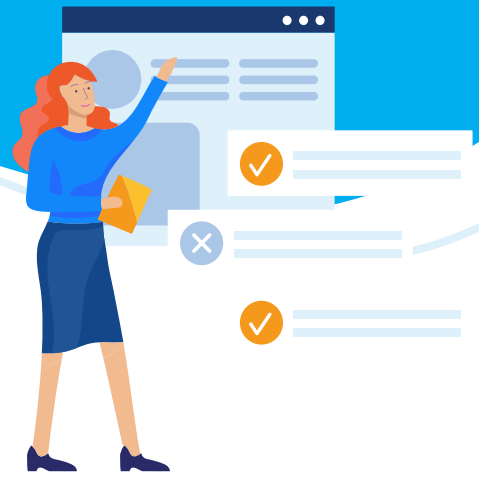
Step 4a - Cancelling/Refunding Orders

From the Orders tab, click into an availability and then each order to update/cancel/check it. When an order's cancelled, the buyer will receive a refund or credit.

You can also choose item/s you need to bulk cancel and add the reason - useful if you run out of something!



Tips & Tricks



Tags

Tags are super helpful to both categorise and add attributes to your menu items.

These are completely customisable (eg. nut-free, vegetarian, contains gluten) - or you can put foods into sections such as hot food, sandwiches, etc.



Medical Info

Integrated with the rest of Compass, you'll always be aware of students' medical alerts - especially allergies. The notes feature also allows parents/orderers to input details about their order (eg. no cheese, dairy allergy).



Reports

Customise your Reports tab to simply spot trends and the most/least popular items. Perfect to know which items you need to order more of!



Printing order labels

Integrated with our Thermal Printers, you can print order labels to attach to each lunch order. Makes it even easier to cross check and hand out every order to the right person!

If you have any questions,
please call 03 9005 5217 or email us
support@compass.education

