HeadMaster Lunch Management

2022

Copyright © 2022, ACS Technologies. All Rights Reserved.

Table of Contents

Set Up Lunch Management

Initially, some set up is required in order for all users to have the necessary rights to use Lunch Management.

You don't have to select the Lunch Login check box when creating an administrator account. Administrators automatically have all rights to Lunch Management.

If someone isn't an administrator, but they work in the front office, you can select which Lunch Management security rights they need.

You can set up an Administrator, so they only have rights to view the Lunch Management Assistant when they log in to HeadMaster.

1. On the Home screen, click **User Administrator**.
2. Select a username and click **Edit**.
3. In the Lunch Security section, select the appropriate check boxes.
4. Click **Save**.
5. To add Lunch Management rights to other users, repeat steps 2-4.

If the teachers are taking lunch counts at the beginning of the school day, they need to have their Lunch Management rights set up, too.

1. On the Home screen, click **User Administration**.
2. Select the **Teacher** or **Teacher Login** user group.
3. Click **Edit**.
4. In the Lunch Security section, select the appropriate check boxes.
5. Click **Save**.

To edit the lunch settings

1. On the Home screen, click **Options**.
2. Click **Lunch Settings**.
3. Make your selections.

Useful Information:

- **Lunch Password** makes the Lunch Line screen password protected. You must enter the password to close the Lunch Line screen.
- **Low Balance Reminder** lets you set up a specific dollar amount to be the low balance. Once a student's balance falls below that dollar amount, then a warning appears on the Lunch Line screen. This also enables you to send out Low Balance emails to parents.

Copyright © 2014, ACS Technologies

Option #1: If you are not integrating with ACS General Ledger

1. On the Home screen, click **Define List**. The Define List dialog box displays.
2. In the Available Fields list, expand Billing and click **Accounts**.
3. Click **Add**. The accounts dialog box displays.
4. Enter the Account Number and Account Name.
5. Click **OK**.
6. In the Available Fields list, expand Billing and click **Revenue Centers**.
7. Click **Add**. The New/Edit Revenue Centers dialog box displays.
8. Enter the account information and click **OK**.
9. In the **Lunch** drop-down list, select **Lunch Revenue Center**.
10. Click **OK**

Useful Information: Lunch Management works with HeadMaster Billing. You need to create two billing accounts: a lunch account and a checking account. These accounts are added to a revenue center called Lunch. If you don't have accounts set up or don't need to have the account information in HeadMaster, you can create generic accounts, for example:

- Offset account: 123456789
- Checking account: 987654321

Copyright © 2014, ACS Technologies

Add or Edit the Lunch Menu

You can use Menu Items to add, edit, and remove items to create your school's lunch menu. Setting up the menu items is a one-time set up feature unless you need to make changes to the items.

To add a new menu item

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Select **Menu Items**. The Menu Items dialog box displays.
3. On the toolbar, click **New**. The Add Menu Item dialog box displays.
4. Enter the menu item information.
5. Click **OK**.

To edit a menu item

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Select **Menu Items**. The Menu Items dialog box displays.
3. Select a menu item, and on the toolbar click **Edit**. The Edit Lunch Item dialog box displays.
4. Edit the menu item information.
5. Click **OK**.

To delete a menu item

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Select **Menu Items**. The Menu Items dialog box displays.
3. Select a menu item, and on the toolbar click **Delete**.
4. Click **Yes**.

You can use a barcode scanner to scan the UPC of your menu items. The scanned barcode automatically appears in the UPC field.

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Menu Items**. The Menu Items dialog box displays.
3. On the toolbar, click **Print** > **Scannable Barcodes**. The Print dialog box displays.
4. Make your selections and click **OK**.

Tip: You can enter up to 20 characters in the UPC field. The UPC code for an item will auto-fill a selected field if you scan a barcode while in add/edit mode. You can also print a list of barcodes from the menu items grid.

Create and Assign Lunch Plan Types

You can assign a lunch plan type to individuals. By default, all students are full price while staff, parents, and others are adult price.

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Assign Plans**. The Assign Lunch Plans dialog box displays.
3. Click the **Show** drop-down list and select the group to which you want to assign lunch plans.
4. Highlight an individual (or a group of individuals), and in the Assign Lunch Plans pane, click the appropriate lunch plan.
5. Click **Close**.

> Useful Information: If you need to add/edit the plan of one specific individual, you can also make the changes on the Lunch tab located in their record.

Create a School Lunch Calendar

You can customize a weekly or monthly lunch calendar by adding items to days in the Lunch Calendar. You can also copy a previously created menu for a day or week in order to save time or to clear either an item or an entire day.

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Lunch Calendar**.
3. Select a date.
4. In the Menu Items pane, click the **Add** tab, and highlight an item.
5. Select either **Add Item to Selected Day** or **Add Item to Entire Month**.
6. Repeat steps 2-5 until your calendar is complete.
7. Click **Close**.

To copy/paste a lunch calendar

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Lunch Calendar**.
3. Select a date.
4. In the Menu Items pane, click the **Copy/Paste** tab.
5. Click the **Copy Day** or **Copy Week** button. If you select **Copy Week**, any day you select during a week will affect the entire week.
6. Select a day or week to paste the copied week to.
7. Click **Paste** > **Close**.

To delete a menu item or day

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Lunch Calendar**.
3. Select a menu item or day to delete.
4. In the Menu Items pane, click the **Delete** tab, and highlight an item.
5. Click the **Delete Item** or **Clear Day** button.
6. Confirm the item/day you want to delete.
7. Click **OK** > **Close**.

Display the lunch calendar on HeadMaster Online

Need to share your school lunch calendar with parents and students using HeadMaster Online?

1. On the Home screen, click **Options**.
2. On the Options sidebar, select **HMOnline**.
3. Select the **Upload Lunch Calendar** check box.
4. Click **Close**.

Copyright © 2014, ACS Technologies

Enable lunch preorders in HeadMaster Online

By allowing lunch pre-orders in HeadMaster Online, you take the guesswork out of lunch orders. Parents can preorder their child's lunch the night or week before, freeing up classroom time for teaching.

1. On the Home screen, click **Options**.
2. On the Options sidebar, select **HMOnline**.
3. Select the **Allow Lunch Preorders a Minimum of days in advance** check box and enter the minimum number of days in advance that lunch preorders can be submitted.
4. Click **Close**.

Copyright © 2014, ACS Technologies

Preorder Menu Items

You can enter preorders sent from home, or view preorders placed using HeadMaster Online when linked to your school's lunch calendar.

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Preorders**. The Lunch Preorders window displays.
3. Select the Type or Homeroom Teacher.
4. In the grid, you can select a student and set the quantity for each menu item that is pre-ordered.
5. Click **OK**.

Copyright © 2014, ACS Technologies

Add Menu Items to Individual Accounts

No need to send students back to class hungry. You can add an extra item to their lunch using Lunch Line. Lunch Line works with a touch screen monitor, a barcode scanner, or a basic computer kiosk with a mouse.

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Lunch Line**.
3. At the bottom of the right pane, select . An alphanumeric keyboard window displays.
4. Select an **Item Description**.
5. Click .
6. Click **Buy** or **Delete**.

To buy a menu item

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Lunch Line**.
3. In the top right corner, click the keyboard. An alphanumeric keyboard window displays.
4. Select an individual, and click .
5. At the top of the window, select a menu item type, or select **All**.
6. Click the menu items you want to add.
7. Click **Buy**.

To delete a purchased item

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Lunch Line**.
3. In the Purchased Items pane, highlight the item you want to delete.
4. Click **Delete**.

Copyright © 2014, ACS Technologies

Manage Lunch Money

You can add money to an account or refund an incorrect lunch charge using Lunch Money.

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Lunch Money**. The Lunch Money dialog box displays.
3. Make your selections and click **Next** to move to the next window.
4. In the last window, click **Post**. Select **Edit** or **Delete** to make changes to a refund prior to posting.

> Note: You can print a list of credits or refunds at the end of each posting. However, if you skip this option, you won't be able to return to report postings.

To refund an incorrect lunch charge

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Lunch Money**. The Lunch Money dialog box displays.
3. In the **Receive Refund from Lunch Account** section, select an option.
4. Click **Next**.
5. Make your selections and click **Next**.
6. Click **Post**. Select **Edit** or **Delete** to make changes to a refund prior to posting.

Copyright © 2014, ACS Technologies

Viewing Sale Details

You can use Sale Details to view lunch purchases, to add an item to an account outside of the Lunch Line or delete an item in the case of a dispute.

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Sale Details**. The Sale Details dialog box displays.
3. Select the type and date range.
4. On the toolbar, click **Preview**.

To edit a sale item

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Sale Details**. The Sale Details dialog box displays.
3. Select the type and date range.
4. Select an item in the grid.
5. On the toolbar, click **Edit**. The Edit Sales Item dialog box displays.
6. Edit the information and click **Close**.

To add a sale item

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Sale Details**. The Sale Details dialog box displays.
3. On the toolbar, click **New**. The Add Sales Item dialog box displays.
4. Enter the sales item information and click **OK**.

To delete a sale item

1. On the Home screen, click **Lunch**. The Lunch Management Assistant displays.
2. Click **Sale Details**. The Sale Details dialog box displays.
3. Highlight the item you want to delete.
4. On the toolbar, click **Delete**.
5. Click **Yes**.

Copyright © 2014, ACS Technologies