sQuid Dinner Money Hosted Portal Manual

Version 1.3, June 2019

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1. How to access the system

1.1 Accessing Hosted Portal

You will access the sQuid Dinner Money Hosted Portal via the below Web Link https://dinnermoney.squidcard.com.
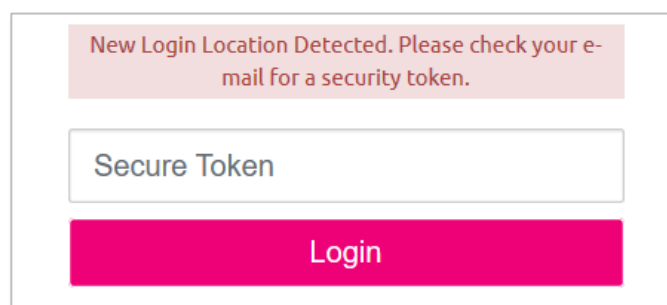
Please be aware that older versions of Internet Explorer do not work with this software, so we recommend using Google Chrome to access this. If Google Chrome is not available, we recommend contacting your IT to ask them to install.

Enter your username and password. These will have been emailed to you originally. Your username is normally your email address
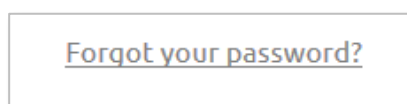
We have set the system up to recognise the school's Public IP address. If you are logging in to the portal from a different IP to normal, you will see a box asking for a token key to be entered. This will be automatically emailed across to you when you try to log in. Please enter the token key once received to access the system as normal. Emails will be sent from BioStore (donotreply@biostore.co.uk)

If you have forgotten your password, please click **Forgot your Password?,** A new password will be emailed across to you.

1.2 Hosted Portal Access Rights

Each staff member will be given their own unique login (their school email address). Each login can be tailored to have different permissions within the system. These will initially be set up from the data you have entered in the Hosted Portal Logins template spreadsheet. All staff members will have received an email with their username, password and the link for the new portal. If anyone has not received this or you wish to change the access rights of a staff member, please contact our Client Services team at support@squidcard.freshdesk.com with the staff members email address, and we can re-send the password details or amend the access rights. The different permissions are;-

- **Preorder –** all users should see this permission
- **Collection** – you will only see if your school uses collection at lunchtime
- **Registration** – you will only see if your school uses e-registration (writeback)
- **Reports** – all admin staff should have access to this
- **Admin** (Customers, Products, Menu, Calendar and Maintenance) – all admin staff should have access to this

1.3 Changing your password

- Log in to the **Hosted Portal** using your existing details
- Click on the **COG** (top right)

- Click **Change Password**
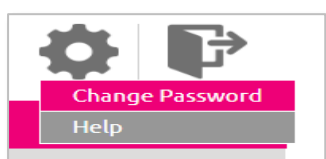
-
- Enter **Current Password**
- Enter **New Password**
- Enter **Confirm Password**
- Click **Submit**
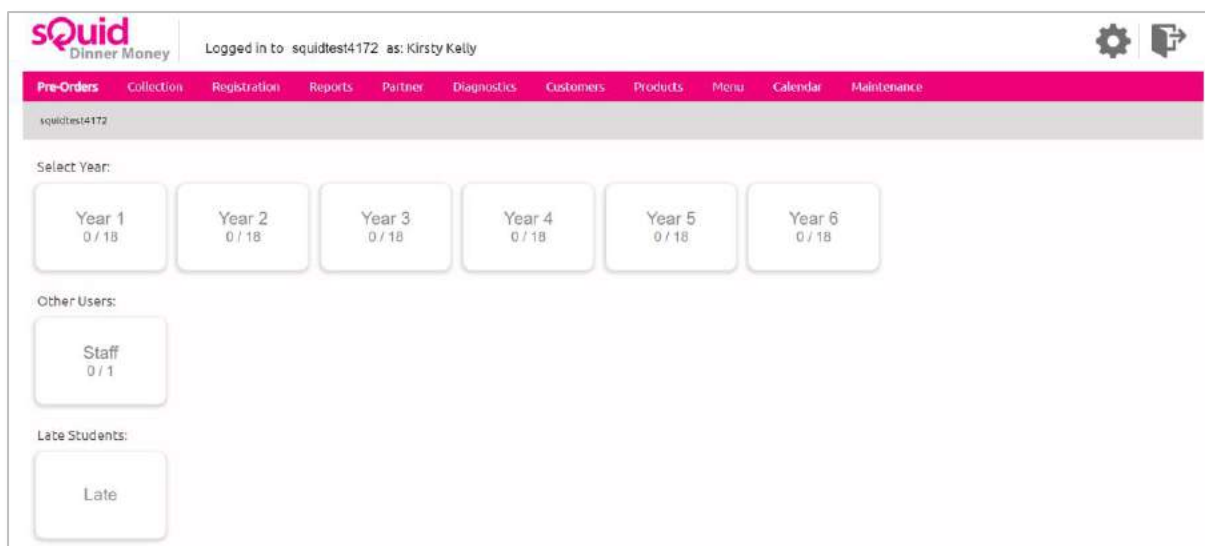
If you do not wish to change your password, you can click **Back** to take you back to the portal.
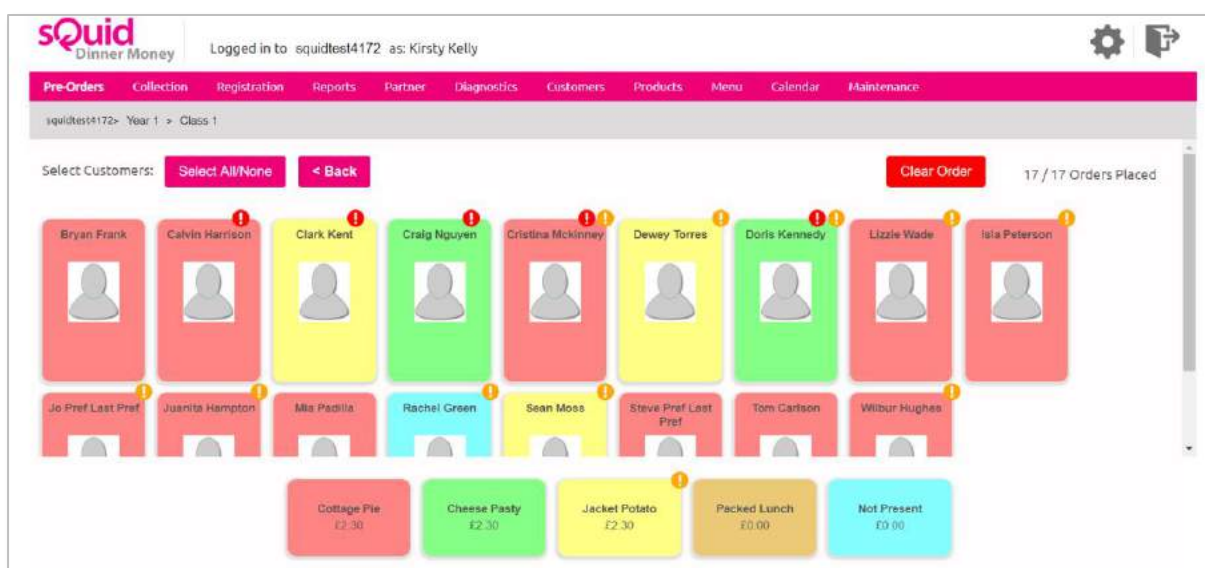
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2. Meal Pre-ordering

2.1 Entering meals

- Open Google Chrome and enter the web link for the sQuid Dinner Money Hosted Portal
- Enter your username and password (this is unique for each user)
- Click on **Pre-Orders** tab
- Select **Year** and then **Class**

- Click on the **student name** and press **meal required**. Students will then be highlighted in the chosen meal colour
- Should you need to change the meal option if you make a mistake, click on the student again and the change option
- Repeat the above steps for all students
- You can check you have entered the right number of meals by looking at the count check on the right hand side of the screen
- Meals are automatically saved after each selection

You can also select multiple children by clicking on each child, so they are highlighted, and then selecting **meal choice**. The highlighted children should now change colour to match the colour of

their meal choice. You can also press **Select All/None** to highlight everyone and then make the meal selection.

If you have Warnings (allergies) set up against a child, you will see an orange Exclamation mark icon showing.

If you have switched on the Insufficient Funds markers, you will see a red Exclamation mark icon showing for any people without sufficient funds to order a meal.

Please note, meals will automatically save after each selection so there is no **Save** button.

To view another Year or Class you can either press the **Back** button, or when you are in a class simply hover over the **Year** or **Class** to view a dropdown box to select.

2.2 Checking Pre-orders are correct

- Once you have entered all meals through on the **Pre-orders** tab, go to the **Reports** tab
- Click on the arrow of the **dropdown box** under Reports and select **Whole School** report
- Check that the **Selection Summary** has the data you wish to select
- Click **Create Report**
- You can view your requested report under **Last 5 Reports**
- Click on **PDF** or **CSV** over on the right hand side to open the report (you may need to refresh your screen if this is not showing)
- This will give you an overview of how many meals have been ordered
- Check this against number of meals the school should have ordered
- If it is incorrect you will need to check through each class to find errors to correct

Unfunded Meals
Any students listed in this section do not have sufficient funds to purchase the meal they have selected.

Warnings
Any students listed in this section have warnings (allergies) assigned to them and to the meal they have selected.

2.3 If Whole School Pre-orders report is incorrect

- Go to the **Reports** tab
- Click on the arrow of the **dropdown box** under Reports and select **Class Overview** report
- Check that the **Selection Summary** has the data you wish to select
- Click **Create Report**
- You can view your requested report under **Last 5 Reports**
- Click on **PDF** or **CSV** over on the right hand side to open the report (you may need to refresh your screen if this is not showing)
- Check number of meals on report against each class from registers
- When you have identified the class containing the error(s) go back to the **Pre-order** tab and amend as above
- Re-run and check **Whole School** or **Class Overview** report again to check it all tallies
- If there are still errors, repeat the process until the report is correct

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2.4 Online Pre-orders

Online Pre-orders are if your school is set up for parents to pre-order meals online. When you click on **Pre-orders** tab all orders placed online will have a globe above student. You can still enter meals for any children who have not ordered online by following instructions in section 2.1

For same day reports follow instructions in sections 2.2 and 2.3. For details of advance orders you can use the following reports;-

- **Advanced Pre-order Summary** - This will give you an overview of how many of each meal has been ordered, and any students who have insufficient funds for their meal (Unfunded), and any allergies entered against a student (Warnings)
- **Advanced Pre-order List** - This will list each person in the class and what they have ordered for a specified date range

Beware of running reports before your cut off time as parents could still order meaning your reports could be incorrect.
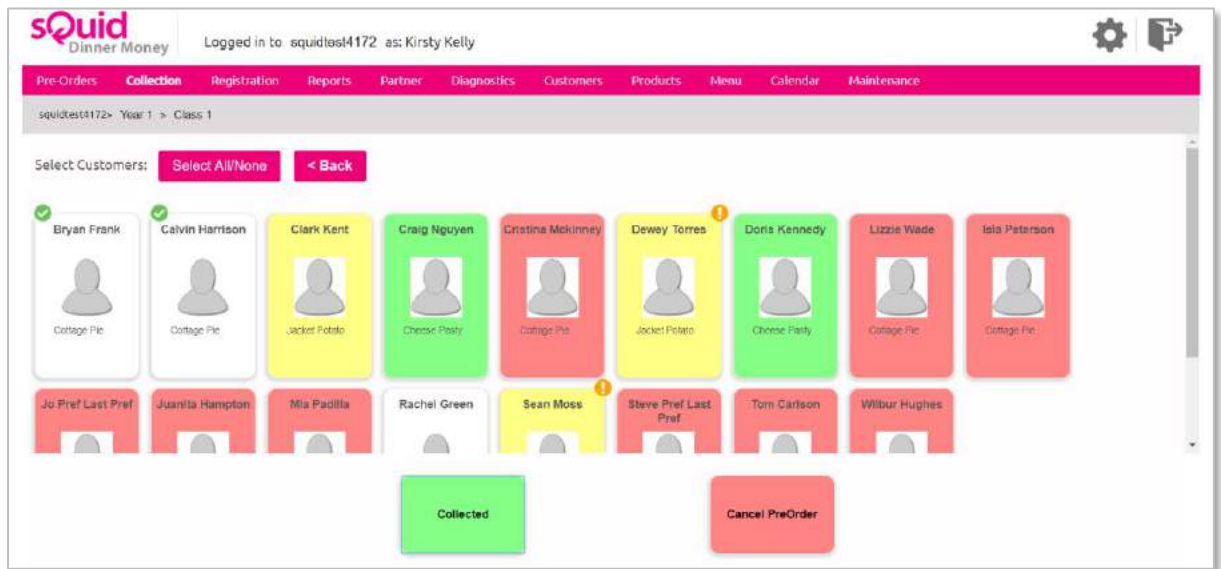
3. Meal Collection

3.1 How to collect meals

- Open Google Chrome and enter the web link for the sQuid Dinner Money Hosted Portal
- Enter your username and password (this is unique for each user)
- Click on **Collection**
- Select **Year** and then **Class**
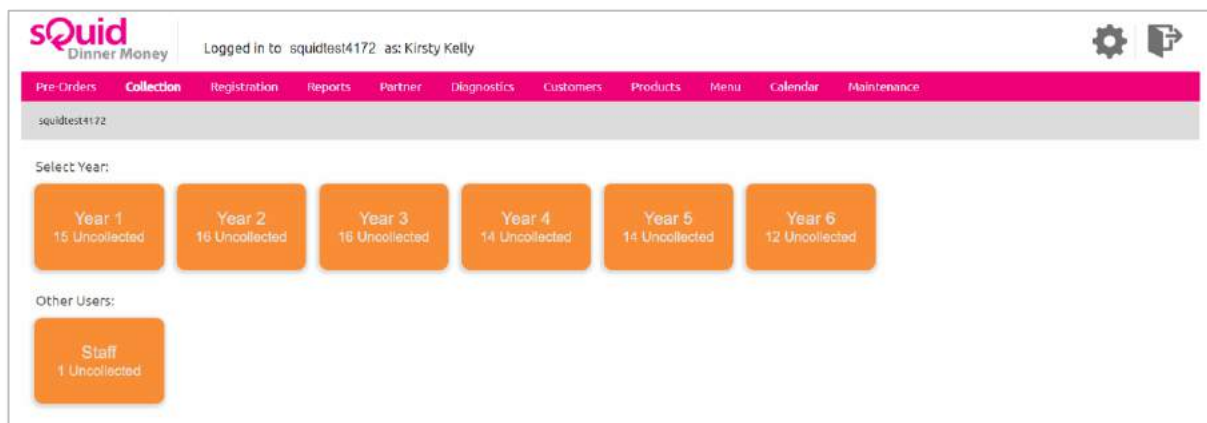
- You will see that each child is highlighted in the colour of their chosen meal and has their meal choice(s) shown below their picture
- Click on **student name** and press **Collected.** The student will no longer be highlighted in the chosen meal colour and return back to grey with a green tick above their name
- Repeat for all students

You can also select multiple children by clicking on each child, so they are highlighted, and then select **Collected**. The highlighted children should now no longer be highlighted in the chosen meal colour and should return back to grey with a green tick above their name. You can also press **Select All/None** to highlight everyone and then select **Collected**.

Should anyone no longer require their meal, you can click on the child so they are highlighted and then select **Cancel Preorder.**

4. E-registration (Writeback)

4.1 Entering AM Registration

Enter your meals as normal and this will write back a present mark into SIMs. Make sure you have selected all students and that they are highlighted as either having a Meal, Packed Lunch or Not Present.

Please be aware that it can take up to 10 minutes for the registration marks to writeback to SIMs.

There are 3 statuses shown for e-registration:

- **Submitted** – Data has been sent to SIMs to write the marks
- **Completed** – SIMs has written the marks against that child
- **Mark Already Set or Mark** – there is already a mark written in SIMs against that child that we are unable to override

Should you mark someone as Present that should have been Absent, this will need to be changed in SIMs.

4.2 Entering Late Marks

- You can access the Late students by going to either the **Pre-orders** or **Registration** tab
- Click on **Late.** This will show you all students who have no meal or Not Present selected against them
- If you are on **Pre-orders** tab, Click on **student name** and press the **meal required**. Student will then be highlighted in the chosen meal colour
- If you are on **Registration** tab, Click on **student name** and press either **Present** or **Late**. Student will then be highlighted in the chosen colour
- The student will then disappear from the **Late** screen

4.3 Entering PM Registration

- Go to the **Registration** tab
- Select **Year** and then **Class**
- Click on **student name** and select either **Present** or **Absent**. Student will then be highlighted in the chosen registration mark colour
- Repeat for all students
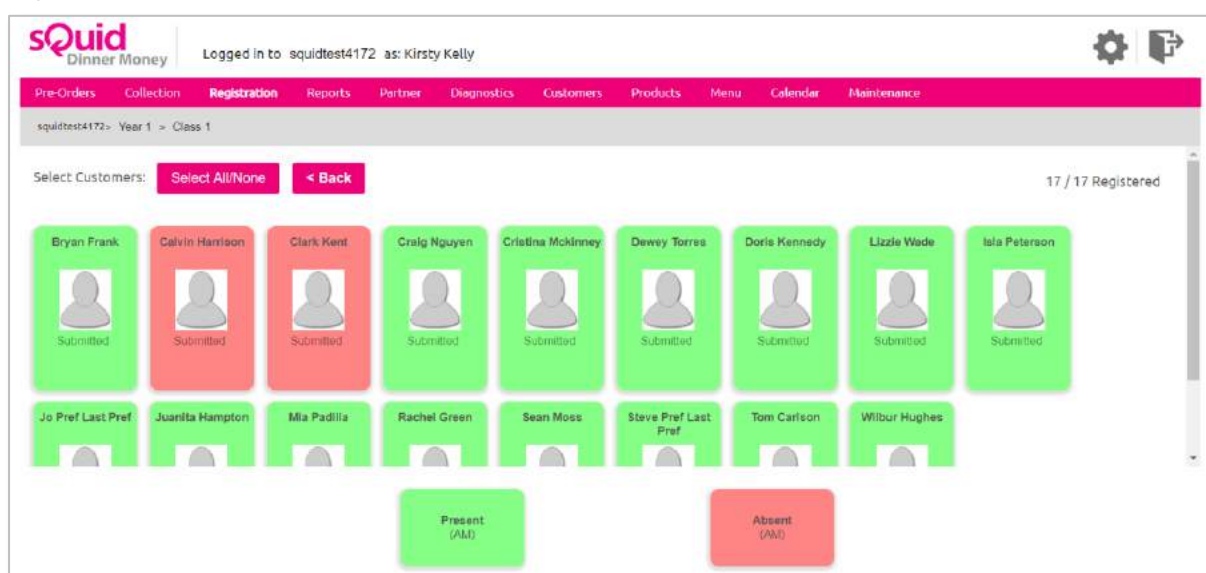
Once your PM registration cut off time has passed, the **Present** button will automatically change to say **Late.** Your cut off time is controlled under maintenance in your sQuid Admin.

You can also select multiple children by clicking on each child, so they are highlighted, and then selecting registration mark choice. Your highlighted children should now change colour to match the colour of their registration mark choice.

Please note, marks will automatically save after each selection so there is no **Save** button.

To view another Year or Class you can either press the **Back** button or when you are in a class, simply hover over the **year or class** to view a dropdown box to select.

4.4 Amending your AM or PM Start Times

- Go to the **Maintenance** tab
- Select **Registration**
- Amend the relevant time
- Select **Save**

5. Reports

5.1 How to run and open reports

- Go to the **Reports** tab
- Click on the arrow of the **dropdown box** under Reports and select your required report
- Use the calendar to change date range if required
- Check that the **Selection Summary** has the data you wish to select
- Click **Create Report**
- You can view your requested report under **Last 5 Reports**
- Click on **PDF** or **CSV** over on the right hand side to open the report (you may need to refresh your screen if this is not showing)

You can click **View All** next to **Last 5 Reports** to see reports ran previously

There are a several reports that can be generated by the sQuid Dinner Money system. Following is an overview of what information the most popular reports will show you.

5.2 Financial Reports

- **End of Day** – Overview of your daily cash numbers of meals taken
- **sQuid Reconciliation Report** – Same as End of Day but with your FSM broken down in to Key Stage 1 and 2
- **Allowance Uptake Report** – Overview of your FSM and UIFSM numbers
- **Debtors Report** – Overview of debt at your school (due to the amount of data that this report has to process, it may take slightly longer to generate)
- **Funds Deposit** – Displays any online or cash top ups
- **Funds Withdrawn** – Displays any online or cash withdrawals

5.3 Customer Reports

- **Class Report** – This will list each person in the class and what they have ordered
- **Rejected at Till** – Will show you if the system has rejected any meals due to insufficient funds
- **Packed Lunch Count by Day** – Number of packed lunches entered on to the system

5.4 Product Reports

- **Whole School – Pre Order Summary** - This will give you an overview of how many of each meal has been ordered, and any students who have insufficient funds for their meal (Unfunded), and any allergies entered against a student (Warnings)
- **Product Sales Analysis –** Overview of products sold
- **Category Sales Analysis –** Overview of number of meals sold, broken down by Paid, FSM, UIFSM and Staff Meals
- **Current Pre-order Menu –** Show you the menu for the day
- **Class Overview** - This will give you an overview of how many meals have been ordered in each class

6. Customers

6.1 New people

New people and any Free School Meal changes are automatically pulled through from the school's MIS system. This happens overnight so any changes you make will show the following day in sQuid Dinner Money.

6.2 Finding the unique SRN (sQuid Reference Number) for a person

- Go to the **Customers** tab
- Search for the required person and press **Green Plus** icon next to the person's name
- Find the 16-digit account number and three digit CVV number
- You will need those details to send a sQuid Registration Letter to the new person

6.3 Adding and withdrawing cash

- Go to the **Customers** tab
- Search for the required person and highlight them
- Click on **Adjust Funds**
- Enter notes in the **description** box
- Select the transaction type (**Cash Deposit** – top up with cash or **Redeem** for withdrawal)
- Add the amount to be deposited or withdrawn in the **Additional Funds** box
- Click **Save**

6.4 Transferring funds

This would be if you need to transfer funds from one person to another. ie. If a sibling leaves in Year 6 and you can transfer funds to a younger sibling.

- Go to the **Customers** tab
- Search for the required person and highlight them
- Click on **Adjust Funds**
- Enter notes in the **description** box
- Select the transaction type (**Transfer**)
- Add the amount to be transferred in the **Additional Funds** box
- In **Search Account**, start typing in part of the name of the child you wish to transfer to (at least 3 letters)
- Use the **dropdown box** to select person you wish to transfer to

- Click **Save**

6.5 Adding manual Free School Meal or Universal Free School Meal value to an individual user

This would be a one off if you needed to add a Free School Meal or Universal Free School Meal to a child on the same day you added them to your MIS.

- Go to the **Customers** tab
- Search for the required person and highlight them
- Click on **Adjust Funds**
- Enter notes in the **description** box
- Select the transaction type (**FSM Deposit** or **UIFSM Deposit**)
- Add the amount to of your Free School Meal or Universal Free School Meal value to be deposited in the additional funds box
- Click **Save**

To remove a deposit off someone who no longer requires FSM or UIFSM, repeat as above but select **FSM Reclaim** or **UIFSM Reclaim** as transaction type

6.6 Amending individual overdrafts and spend limits

- Go to the **Customers** tab
- Search for the required person and press **View Person**

- Click on **Adjust Account** tab
- Set limits to the required amount in **Overdraft Limit/Daily Cash Limit** boxes for the individual
- Click **Save**

Kirsty Bloom Split Year Class								
Personal	Info	Address	Photo	Account	Purses	Warning	Identity	**Adjust Account**

Daily Cash Limit:	0
OverDraft Limit:	10

6.7 Adding warnings (eg. allergies) to individual

- Go to the **Customers** tab
- Search for the required person and highlight them
- Click on **Edit Warnings**
- Tick the warnings (allergies) to be added to the person
- Click **close**

Kirsty Bloom Split Year Class								
Personal	Info	Address	Photo	Account	Purses	**Warning**	Identity	Adjust Account

Warnings

☐ 4. Tomatoes	☑ 2. EU Peanuts	☑ 2. EU Eggs
☐ 4. Restrict Student	☑ 2. EU Nuts	☐ 2. EU Crustaceans
☑ 3. Non halal	☑ 2. EU Mustard	☐ 2. EU Cereals
☐ 1. Medical	☑ 2. EU Molluscs	☑ 2. EU Celery
☑ 2. EU Sulphites	☐ 2. EU Milk	☐ 2. eggs
☐ 2. EU Soybeans	☐ 2. EU Lupin	☐ 2. Cheese
☐ 2. EU Sesame	☐ 2. EU Fish	

You need to make sure you have assigned warnings (allergies) to your products as well for this to show on reports.

7. Products

7.1 Adding a new product

- Go to the **Product** tab
- Click **Add Product**
- Select required product category from the category drop down eg. Mains
- Add a description for the product you're adding
- Enter the description in Line1 and Line 2 (this will be what is displayed on the buttons for people to order)
- PLU – ignore this box
- **Student Cost** – select **The product has no VAT applied** from the drop down box and then enter the cost of the product for students in the **Price** box
- **Other Cost** - select **The product has VAT applied** from the drop down box and then enter the cost of the product for staff members/adults. If the price you have includes VAT, enter the amount in the **Total** box rather than the Price box.

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- Make sure **Products available for free meal** is ticked
- Click **Save**

7.2 Amending product price

- Go to the **Product** tab
- Search for the required product and click to highlight and press **Edit Product**
- Amend the prices to the correct one
- Click **Save**

You need to make sure you change your FSM and UIFSM value should you change your products price. See section 11.1 for how to amend.

7.3 Adding warnings (e.g. allergies) to products

- Go to the **Product** tab
- Search for the required product and click to highlight and press **Edit Product**
- Tick all the warnings (allergies) in the box on the right hand side that relate to the selected product
- Click **Save**
- Repeat until you have added warnings (allergies) to all required products

You need to make sure you have assigned warnings (allergies) to your individual users for this to show on reports.

7.4 Adding warnings (e.g. allergies) to individual users

- Go to the **Customers** tab
- Search for the required person and highlight them
- Click on **Edit Warnings**
- Tick the warnings (allergies) to be added to the person
- Click **close**

You need to make sure you have assigned warnings (allergies) to your products for this to show on reports.

7.5 Creating a new warning (e.g. allergies)

- Go to the **Product** tab
- Click **Edit Warnings**
- Once you have entered all of the information below click **Add**
- **Name** - add a descriptive name for the warning you're adding
- **Message** - the warning message is what will be displayed to users and/or till operators
- **Level** - there are several warning levels available:

1. **Simple Warning -** displays the warning message when a product with this warning is selected.

2. **Yes/No confirmation -** displays the warning message and Yes/No buttons to confirm that the user wants to continue or cancel this selection.
3. **Show but don't allow -** displays the warning message and stops the product from being selected.
4. **Remove option -** removes the product from display when a person with the warning applied is making a selection.
5. **Type -** choose who sees the warning (on a per-user basis), or apply the warning to everyone

You need to make sure you have assigned this new warning to both your individual users and products affected for this to show on reports.

8. Meal Deals

8.1 Adding a new meal deal

- Go to the **Products** tab
- Click **Meal Deal** tab

- Click **Add Meal Deal**
- Add a description for the meal deal you're adding
- Enter the description in Line1 and Line 2 (this will be what is displayed on the buttons for people to order)
- Leave **Student Cost** and **Other Cost** as **The deal is for selection only**
- Add **Choice 1** and **Choice 2** ie. Choice 1 is Meal and Choice 2 is Drink
- Make sure **Products available for free meal** and **Products are individually priced** are ticked

- Click **Add Meal Deal**

- Search for the required meal deal and click to highlight and press **Edit Choices**
- Click on the section to wish to add products to ie Meal
- Search for products you wish to add under Choice 1 (Meal) by using the **Product Search** box
- Highlight Product and Click **Add**
- Your product will now show under **Meal**
- Repeat to add as many products as you wish to show
- Repeat above for your Choice 2 ie. Drink
- Once completed, click anywhere on screen outside of the box to close

Please note, the options will automatically save after each selection so there is no **Save** button.

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9. Menu

9.1 Setting the menu

- Go to the **Menu** tab
- Select the desired day and week from the **day selection** and **week selection** buttons.
- Select the square you wish to add the product to
- Select the product from **Search Product** box
- Your product will now display in your selected square
- To change the colour of the button, select the square you wish to change the colour of and
- select the colour buttons you wish it to be
- Your selected square will now show in your selected colour
- If you are wanting a meal deal to show select the meal deal from the **Search Meal Deal** box
- If you wish to delete a product or meal deal showing in a square, select square and click **Clear Slot**
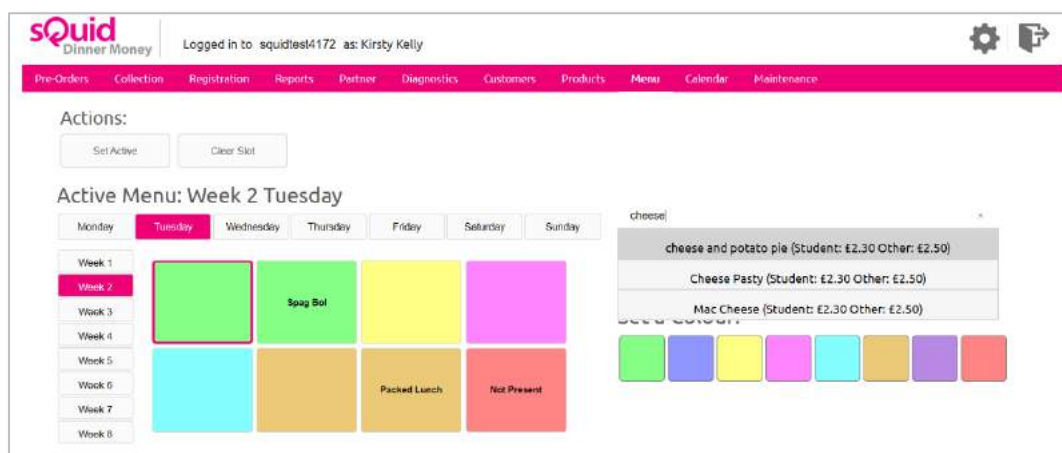

Please note, the menu will automatically save after each selection so there is no **Save** button.

9.2 Changing Today's Menu

You will do this if the **Pre-orders** tab in the classrooms is displaying the wrong meal choices or you have a special menu for the day that you haven't added to the calendar.

- Go to the **Menu** tab
- Find the right weekly menu so it is displayed
- Click **Set Active**

This will change the display straight away for classes. If any meals had been entered on the old menu options, they will now need to add a meal from the new selection.
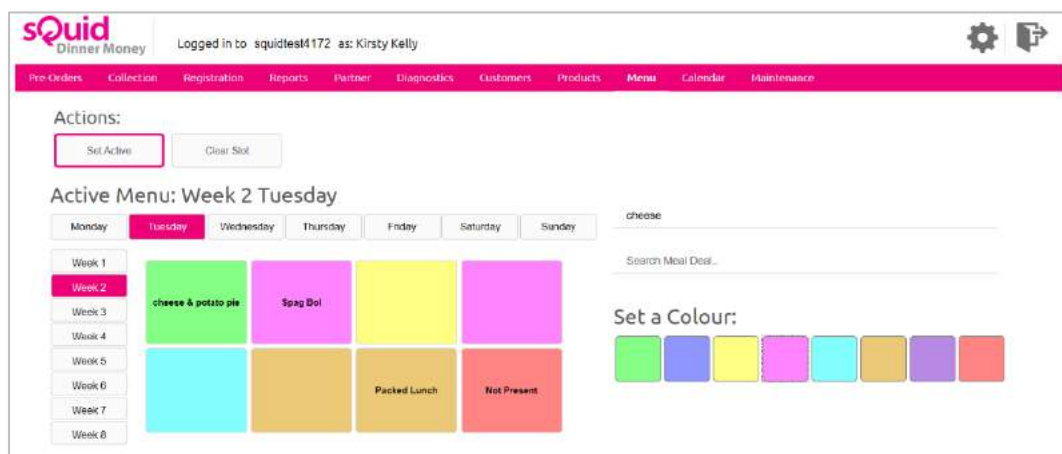
10. Calendar

You need to ensure that your calendar is set up for each academic year or your Pre-orders will not work. You can see overview of your Calendar Year and Start Date when you go to the Calendar tab.

10.1 Setting the calendar

You can select the menu option that you want to apply to a day from the Order Menu list on the sidebar. This menu list is populated from the choices you add in the Pre-order view.

- Go to the **Calendar** tab
- Select the month that you want to apply an order menu to using the list on the left hand side
- Click the date you wish to add the menu for to highlight
- Select the menu option from Select Menu(s) on the right hand side (press CTRL and click menu days to highlight multiple)
- Click the date square you wish to add the menu for to highlight
- Click **Set Menu**
- Your date square(s) will now show the day and week you have selected
- Repeat until your calendar has menus set up
- To add a week at a time, you can CTRL + select the days of the week to highlight on the right hand side and click **Set Menu**
- If you only have Week 1 Day 1 set up then you can duplicate the menu. Select square where you have Week 1, Day 1 set up and select **Duplicate Menu**
- Enter the number of times you wish the menu to be duplicated for (enter 350 for year) and click **Save**
- To remove a menu, select the relevant day and then select **Clear Menu** from the toolbar

10.2 Editing the calendar dates

You should ideally only change this during Summer Holidays to set up the next Academic Year's calendar.

- Go to the **Calendar** tab
- Click **Edit Calendar**
- Enter **Year End** date first and then the **Year Start** date second
- Click **Save**

10.3 Adding holidays and inset days to the calendar

- Go to the **Calendar** tab
- Click **Edit Calendar**
- Under **Add Holiday(s),** enter **Start Date** and **End Date** of the holiday – If this is an Inset date you will enter the same day in both
- Enter a **comment** for your holiday ie. Summer Holidays or Inset Day 01/01/2019
- Click **Add**
- Your holiday will now show in the box above
- Click **Save**

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11. Maintenance

11.1 Amending VAT, UIFSM and FSM accounts

- Go to the **Maintenance** tab
- Click **Settings**
- Click **Financial**
- Enter your new value in the box next to the line that you wish you to change eg. **FSM Amount, UIFSM Amount** or **VAT**
- Click **Save**

You need to make sure you change your FSM and UIFSM value should you change your products price.

11.2 Amending Daily Global spend and Overdraft Limits

- Go to the **Maintenance** tab
- Click **Settings**
- Click **Financial**
- Enter your new value in the box next to the line that you wish you to change eg. **Global Overdraft Limit** or **Global Daily Spend Limit**
- Click **Save**

12. How to enter meals

01 Log in to the hosted portal

Open Google Chrome and go to **https://dinnermoney.squidcard.com**. Enter your username and password. Your username is typically your email address.

Should your school's public IP address have changed, you will be sent a token by email to allow access to the system.

02 Select year and class

On the **Pre-orders** tab, select the **year** and then the **class** from the new options that will appear.

03 Select student and meal option

Select a student, and select the meal option required. The student will then be highlighted in the colour of the meal selected.

You can select multiple students by clicking on each one so that they are highlighted, and then selecting the **meal choice**. The highlighted students should now change colour to match the colour of their meal choice. Alternatively, '**Select All/None**' can also be clicked to highlight **all** students, and then the meal selection can be made.
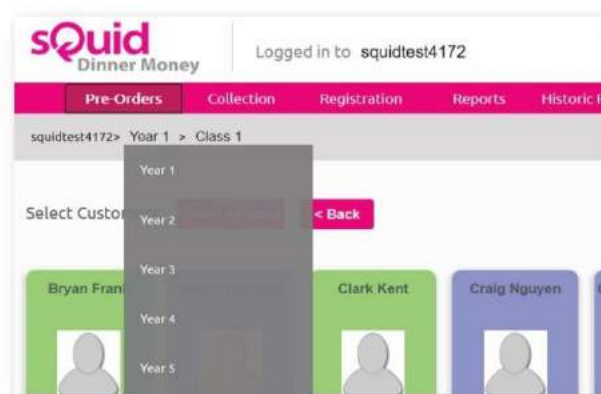
NB: There is no 'Save' button, as meals are saved automatically after each selection.

If a meal has been selected in error, press 'Clear Order'.

04 Enter meals for another class

To view another year or class, either press the **back** button, or when you are in a class, hover over the relevant **year** or **class** to view a dropdown menu from which to select.

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13. How to mark meals as collected

01 Log in to the hosted portal

Open Google Chrome and go to:
https://dinnermoney.squidcard.com. Enter your username and password. Your username is typically your email address.

Should your school's public IP address have changed, you will be sent a token by email to allow access to the system.

02 Select year and class

On the **Collections** tab, select the **year** and then **class** from the new options that appear. This will show an overview of the number of meals ordered by year and class.

03 Confirming meals

Students will show as highlighted in the colour of their chosen meal option.

04 Collecting meals

Click on the required student and click '**Collected**'. The student will no longer be highlighted in their chosen meal colour, and will revert to grey.

Repeat the process until all students from the selected class have had their meals '**Collected**'.

You can select multiple students by clicking on each one so that they are highlighted, and then selecting '**Collected**'. Their colour will then revert to grey. Alternatively, click '**Select All/None**' to highlight **all** students, then click '**Collected**'.

If a student has a meal selected in error, or no longer requires the meal, select the student and then click '**Cancel pre-order**'.

05 Repeat the process for other years/classes

Once all students have had their meals **'Collected'** and the screen is blank, click the **back** button and repeat steps 03-05 to repeat the process for other years/classes.
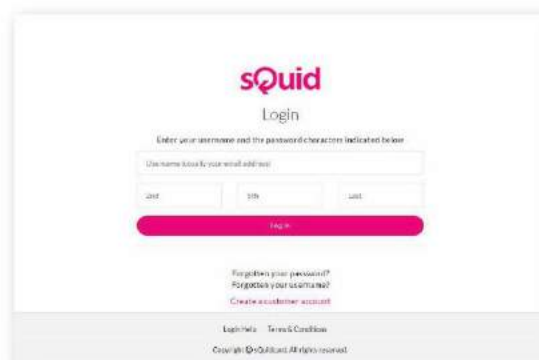
14. How to pre-order your child's meal

01 Log in & top up your sQuid account

Log in at **https://portal.squidcard.com**

Top up your catering purse with enough funds to cover all of the meals that you would like to order.

If your child is entitled to any free school meals, you do not need to add funds and should proceed to the next step.
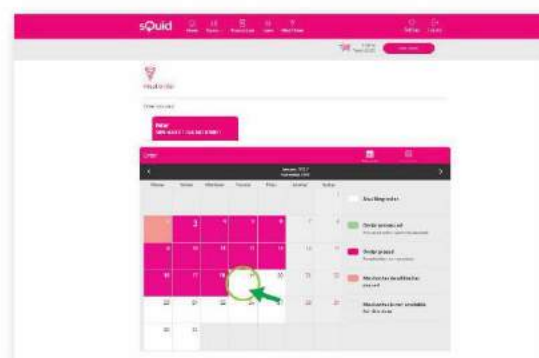
02 Access the meal pre-order calendar

Click on the user that you would like to place an order for, and then click **Meal Order** in the pink navigation bar.
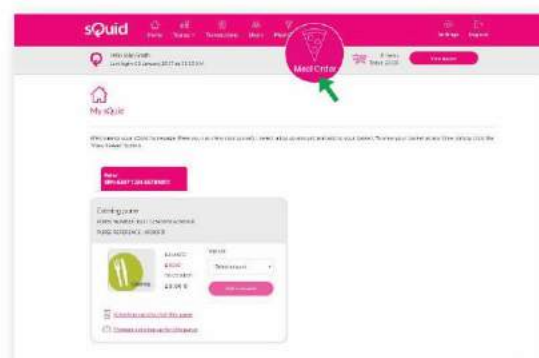
03 Pick a day

Simply click on a specific day in the future to access the meal options for that day.

04 Choose a meal

You will then need to click on the specific meal option from the choices given.

If your child is entitled to any free school meals, the price of a meal will still be shown, but you will not be charged.

Once you have made your selection, a green tick will appear next to your choice. Click **Save** to confirm.

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05 Order placed

The **Order placed** confirmation message will appear on screen, and the selected date on the calendar will change from white to pink.

Simply repeat steps 3 and 4 for each day that you would like to order a meal for.

06 View orders

You can view any meal orders which have been placed by clicking on **View orders**.

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