Hospitality – Meal Planning

Use Cases - Quick Guide

LS Retail NAV 4.20.01

Contents

1 Introduction

The Hospitality – Meal Planning module is designed for the catering business. The module allows you to create ingredients and build up recipes. You set up menus that are a collection of dishes and are valid on certain weekdays. For each menu, you create day plans in specific stores where you assign the actual recipes or items to the dishes offered, set the dish prices and plan how many portions you are going to make. The weekly sales overview shows the number of portions made versus sold and shows the cost and profit figures of day plans, giving you the means to plan your menus ahead.

Recipes are a collection of ingredients and/or other recipes and additional items along with quantity information for one portion. You set up pricing and cost for recipes in the same way as you set up pricing and cost for ingredients or items. The pricing can be store based. Each recipe can be classified by cooking-time, main ingredient, style and type, and it contains cooking-instructions. It can be edited when needed and updated where used. You can change a recipe temporarily by creating a recipe version and then go back to the normal recipe. You can use the units of your choice in recipes while the system takes care of calculating the portion weight of recipes. This requires that you use units of measure defined on item level (item units of measure) that all relate to the item's base unit of measure, and you set up unit comparison with conversion factors that define how one unit is converted to another. You can store and display nutritional information for recipes showing the nutrient values of your choice. You can enter the values for the recipes and ingredients manually. You can let the system calculate the values for recipes based on their ingredients, or you can build a list of nutrition facts for products and assign an entry from that list to a recipe or an ingredient. This is useful if you want to import a ready made nutrition facts list into your system. You can copy a recipe and change its size at the same time.

When you set up a menu, you connect it to a POS menu. Each dish that you assign to it is associated with a POS button number and has a recommended price. The Meal Planning Calendar window gives you day-by-day overview of the meal planning for a menu. In this window you can see the number of day plans that exist for the selected menu on a specific date (the menu can have one day plan per store). You can also see the existing day plans for a store group. You can create day plans from this window, either on a single date or for a period and drill down to see the Day Plan window for a selected day plan. In the Day Plan window you can print the recipes behind the dishes for the day, with quantities updated to make up the number of portions planned. To order the ingredients you need, you create requisition worksheets for the day plan in this window. You can also create requisition worksheet based on weekly plans from the Weekly Sales Overview window.

2 Use Cases

2.1 Setting up Meal Planning

2.1.1 Configuring Meal Planning Setup

To set up the Meal Planning module in your company, you must specify a number series for recipes and you must specify the unit of measure you want to use for weight in your recipes. You can specify a different unit of measure used to show nutritional information for recipes and specify the weight that the information is expressed in.

1. Open the **Meal Planning Setup** window by selecting **LS Hospitality, Setup, Meal Planning, Meal Planning Setup**.
2. Fill in the fields.

2.1.2 Defining Dishes

You must specify the names of the general dishes you use for your menus (for example Main, Dessert, Soup of the Day). Each dish is connected to a button on the POS terminal. When you create a menu, you assign dishes to it, select which POS button number each dish is connected to and specify the sales price for each dish. Once you have created day plans for the menu, you can select which recipe you want to represent the menu dish on a daily bases.

1. Open the Dishes window by selecting **LS Hospitality, Setup, Meal Planning, Dishes**.
2. Fill in a line for each dish you want to set up.

2.1.3 Setting up Recipe Grouping

Grouping recipes makes it easier for you to find the recipes available for the dish you are planning to have on a menu. The system allows you to group recipes in three ways – based on the main ingredient (for example fish, lamb), on the recipe style (for example Mexican, Indian) and on the recipe type (for example soup, sauce, stew). You can also use the grouping in reports to filter on the information.

1. Open the **Recipe Main Ingredients** window by selecting **LS Hospitality, Setup, Meal Planning, Recipe Grouping, Main Ingredients**.
2. Fill in a line for each main ingredient you want to set up.
3. Open the **Recipe Styles** window by selecting **LS Hospitality, Setup, Meal Planning, Recipe Grouping, Styles.**
4. Fill in a line for each recipe style you want to set up.
5. Open the **Recipe Types** window by selecting **LS Hospitality, Setup, Meal Planning, Recipe Grouping, Types**.
6. Fill in a line for each recipe type you want to set up.

2.1.4 Units of Measure

Units are a key factor of recipes and the Meal Planning module offers a very flexible use of units. On one hand the units of measure are defined on item level (item units of measure) that all relate to the item's base unit of measure, and on the other the units are compared to other units where the conversion factor defines how one unit is converted into another.

The recipe weight unit of measure, specified in the Meal Planning Setup window, represents the unit in which portion weight of recipes and gross weight and net weight of recipe ingredients is expressed. When you define the ingredient list of a recipe, you can select any unit of measure for the ingredient (if not already entered as an item unit of measure for the ingredient, you must do so and define the unit as a quantity of the item's base unit of measure). The system needs to calculate the gross and net weight of the ingredient and therefore the system requires that all items that are used as ingredients in recipes have the recipe weight unit of measure as an item unit of measure. Recipes (items that have a bill of

material) have an automatically calculated portion weight that is the sum of the net weight of its ingredients. The system assumes that recipes are always for one portion, i.e. that the base unit of measure is a portion. In short, the user must set up the recipe unit of measure for items that are not recipes while recipes automatically show their weight in the portion weight field.

The nutritional information of a product, an item or a recipe can be displayed in three different units of measure. The first is the nutrition weight unit that together with the nutrition weight acts as a comparison unit between all nutrition values. For example, if you select grams as the nutrition unit and nutrition weight as 100, all nutrition values will be displayed per 100 grams. The second unit is the recipe weight unit of measure that is used to display nutrition values for one portion of a recipe (the portion weight). The third is a serving unit that you can choose for a specific item, recipe or nutrition product in order to display nutrition values for the desired serving size and unit. You specify the nutrition weight unit of measure and nutrition weight in the Meal Planning Setup window.

The system needs to know the relationship between all units used. Therefore, you can set up the units used as comparison units of measure and define the conversion factor between them. Some units can only be compared on an item/product level (for example, 1 cup of flour doesn't weigh the same as 1 cup of syrup). When you enter a serving size for a nutrition product expressed in a unit that doesn't compare to the nutrition weight unit directly, you need to specify the serving size as a quantity of the nutrition weight unit (for example 1 cup of flour is 128 g). In the same way, when you enter a serving size for an item or a recipe in a serving unit that doesn't compare to the nutrition weight unit, you need to specify the serving size as a quantity of the nutrition weight unit. In this case though, if you have set up the serving unit as an item unit of measure for the item or recipe, the system will use that information to calculate the serving size as a quantity of the nutrition weight unit.

2.1.5   Defining Nutrients

If you want to store and display the nutritional information on your recipes and dishes, first you need to set up a list of the nutrients you want to display. The system uses this list for both the Recipe/Item Nutrition Value table for recipe and ingredient information and the Product Nutrition Value table for the product nutrition list. You can change the list after you have entered nutritional values for recipes and the product nutrition list. If you modify the name of the nutrient, the system modifies the name for the entries for that nutrient in the two tables. If you delete a nutrient, the system deletes the entries for that nutrient in the two tables after displaying a confirmation dialog. If you insert a new nutrient, the system inserts the nutrient as an entry for all items, recipes and products in the two tables.

1. Open the Nutrients window by selecting **LS Hospitality, Setup, Meal Planning, Nutrition, Nutrients.**
2. Fill in a line for each nutrient you want to set up.
3. **The Line No.** field decides the order the nutrients appear in.

2.1.6   Setting up Product Nutrition Groups and Categories

You can store and display nutritional information for recipes. You can enter the values for recipes and ingredients manually, you can let the system calculate the values for recipes based on their ingredients, or you can build a list of nutrition facts for products and assign a product nutrition code from that list to a recipe or an ingredient. This is useful if you want to import a ready made nutrition facts list into your system. Product nutrition categories and groups let you group products in the nutrition list together to make the search easier when you want to look for the nutritional information of a product that comes close to an ingredient or a recipe. This grouping is optional.

1. Open the Product Nutrition Categories window by selecting **LS Hospitality, Setup, Meal Planning, Nutrition, Product Nutrition Categories.**
2. Fill in a line for each category you want to set up.

3. For each category, open the Product Nutrition Groups window by clicking **Category, Product Nutrition Groups**.
4. Fill in a line for each group you want to set up for the selected category.

2.1.7 Creating a Product Nutrition List

Creating a product nutrition list is useful, especially if you want to import a ready made nutrition facts list into your system. To assign nutritional information to your items and recipes, you select a product nutrition code for the item or recipe. Before creating the list, you need to set up at least one nutrient.

1. Open the Product Nutrition Card window by selecting **LS Hospitality, Setup, Meal Planning, Nutrition, Product Nutrition Card**.
2. Press **F3** to enter a new product nutrition entry.
3. Fill in the **Product Code** and **Description** fields.
4. The system fills in the lines with the nutrients you have set up.
5. Fill in the **Serving Size** field.
6. In the **Serving Unit of Measure** field, click the **AssistButton** to see the Units of Measure window.
7. Select the desired unit and click **OK**.
8. If the serving unit and the nutrition weight unit are the same or are defined as comparison units with a conversion factor between them, the system automatically calculates the Serving Size in Nutr. UOM field.
9. If not, enter the correct value in the **Serving Size in Nutr. UOM** field.
10. In each nutrient line in the **Value per Serving** fields, enter the corresponding nutrient value.
11. The system automatically calculates the Value per Nutrition Weight field.

2.2 Working with Recipes

2.2.1 Creating Recipe Ingredients

1. Open the Hospitality Item Card window by selecting **LS Hospitality, Hospitality Item Card**.
2. Press **F3** for an empty card.
3. Fill in the fields on the card. The following fields are mandatory:
   - No.
   - Base Unit of Measure
   - Costing Method
   - Price/Profit Calculation
   - Profit %
   - Unit Price
   - Gen. Prod. Posting Group
   - VAT Prod. Posting Group
   - Inventory Posting Group
4. If the base unit of measure is not the same as the recipe weight unit of measure specified in the Meal Planning Setup (for example the base unit is a box but the recipe unit is gram), click Item, Units of Measure to open the Item Units of Measure window. **Note**: If you mark the item as not included in portion weight (see step 7), this step is not necessary.
5. In the **Code** field select the recipe unit.
6. In the **Qty. per Unit of Measure** field enter the quantity per the base unit (for example if the box is 250 g, enter 1/250 – 1 g is 1/250 box or 250 g is 250 * 1/250 or 1 box).
7. On the Recipe tab, place a check mark in the **Not Included in Portion Weight** field, if the item's weight should not be included in the portion weight of a recipe that includes the item (portion weight is the sum of the net weights of its ingredients).

8. Place a check mark in the **Unaff. By Multipl. Factor** field if the quantity of the ingredient in a recipe does not change when the recipe is copied with a multiplication factor that changes the quantities of ingredients in the recipe.
9. If a weight loss occurs in the cooking process, enter the percentage amount in the **Wastage %** field (net weight = gross weight – wastage %).
10. In the **Recipe Item Type** field, select Ingredient.
11. In the **Unit Price** field enter the price of the item or fill in price lines on the Pricing tab.

2.2.2 Setting Nutritional Values (Item Level)

1. Open the Hospitality Item Card window.
2. Click Item, Nutrition to open the Recipe/Item Nutrition window.
3. There are two ways to enter nutrition values:

Through the Product Nutrition List:
4. If you have set up a product nutrition list, click the **AssistButton** in the **Product Nutrition Code** field to see the Product Nutrition List window.
5. Select the desired product (you can use the category and product group filters to aid your selection) and click **OK**.
6. The system enters the contents of the **Value per Nutrition Weight** fields for the selected nutrition product in the **Value per Nutrition Weight** fields for the item and sets the **Nutrition Value** field as Looked Up.

Fill in Manually:
1. In the Serving Size field, enter the serving size you are entering nutrition values for.
2. In the Serving Unit of Measure field, click the AssistButton to see the Units of Measure window.
3. Select the desired unit and click OK. If the serving unit and the nutrition weight unit are the same or are defined as comparison units with a conversion factor between them, the system automatically calculates the Serving Size in Nutr. UOM field. Also, if the serving unit is set up as an item unit of measure for the item, the system automatically calculates the Serving Size in Nutr. UOM field.
4. If the Serving Size in Nutr. UOM field contains 0, enter the serving size as a quantity of the nutrition unit of measure (for example the serving size and unit is 1 box. The box weighs 250 g. The Serving Size in G field (nutrition unit of measure is G) is then 250.
5. In the Value per Serving fields enter the nutrition values per nutrient. The system automatically calculates the Value per Nutrition Weight fields and sets the Nutrition Value field as Entered.

2.2.3 Creating a Recipe

1. Open the Recipe Card window by selecting **LS Hospitality, Meal Planning, Recipe Card**.
2. Press **F3** for an empty card.
3. On the General tab, fill in the **Description** field, **Item Grouping** fields, and the **Production Time (Min.)** field.
4. Enter the recipe unit price in the **Unit Price** field.
5. On the Invoicing tab, select **Standard Cost** as the costing method and fill in the **Inventory Posting Group, Gen. Prod. Posting Group** and **VAT Prod. Posting Group** fields.
6. In the **BOM Sales Type** field, select **Explode at Posting** if you want stock to be deducted for each ingredient.
7. On the Grouping tab, you can assign a style, a type and a main ingredient grouping to the recipe.
8. Place a check mark in the **Available as Dish** field, if the recipe stands for a complete dish. When you assign a recipe to a dish, you let the Recipe List form show only recipes available as dishes.

9. On the Ingredients tab, on a new line, click the **AssistButton** in the **Item No. field** to see the Recipe/Item List window.
10. Select the desired ingredient or recipe and click **OK**.
11. Fill in the **Quantity per** field and the **Unit of Measure** field. The system fills in the remaining fields automatically.
12. Repeat steps 9 - 11 for the rest of the ingredients you want to enter.
13. On the Instructions tab, enter instructions for the recipe.
14. In the **Unit Price** field enter the price of the recipe or fill in price lines on the Pricing tab.

2.2.4   Creating Recipe Versions

You may want to change a recipe temporarily and then go back to the normal recipe. To do that, you first set up recipe version codes and create recipe version lines for the version code.

1. Open the Recipe Card window by selecting **LS Hospitality, Meal Planning, Recipe Card**.
2. Browse to the recipe you want to set up versions for.
3. On the Versions tab, on a new line, click the **AssistButton** in the **Recipe Version Code** field to see the Recipe Versions Codes window.
4. Select an existing code or create a new one on a new line and select it and click **OK**.
5. Click the **AssistButton** in the **Item No**. field to see the Recipe/Item List window.
6. Select the desired ingredient or recipe and click **OK**.
7. Fill in the Q**uantity per** field and the **Unit of Measure** field. The system fills in the remaining fields automatically.
8. Repeat steps 3 – 7 for the rest of the version lines you want to create.

2.2.5   Switching to a Recipe Version

When you want to switch to a specific version of the recipe, you select the version code in the Recipe Version Code field on the recipe header. The system transfers the version lines to the ingredient lines for the recipe.

1. On the Recipe Card window, the General tab, click the **AssistButton** in the **Recipe Version Code** field to see the Recipe Version Codes window. (If there was a different code in the field, the system deletes the ingredient lines marked with that code once you select a new version code).
2. Select the version you want to switch to (note that there have to be existing lines for this version code in the version lines for the recipe for anything to happen).
3. Click outside the field.
4. The system inserts the version lines into the ingredient lines for the recipe. You can see that the new lines are marked with the recipe version code you selected. The system deletes any ingredient lines marked with another code.
5. If the recipe is used in other recipes (the Used in Other Recipes field has a check mark), click **Functions, Update Recipe Where Used**.

2.2.6   Switching Back to the Normal Recipe

1. On the Recipe Card window, the General tab, delete the code in the **Recipe Version Code** field.
2. Click outside the field.
3. The system deletes the ingredient lines marked with the code you deleted.
4. If the recipe is used in other recipes (the **Used in Other Recipes** field has a check mark), click **Functions, Update Recipe Where Used.**

2.2.7 Adding Additional Items

A recipe may need additional items, such as a tray, that are not actually ingredients in the recipe. You can mark them as not included in the recipe's portion weight and as not affected when copying the recipe with a multiplication factor to make the portion larger (for example a 1.5 times larger recipe still needs just one tray).

1. On the Recipe Card window, the Additional Items tab, on a new line, click the **AssistButton** in the **Item No.** field to see the Item List window.
2. Select the desired item and click **OK**. You can select both items and recipes.
3. Fill in the **Quantity per** field and the **Unit of Measure** field. The system fills in the remaining fields automatically.

2.2.8 Setting Nutritional Values (Recipe Level)

1. Open the Recipe Card window.
2. Click **Recipe, Nutrition** to open the Recipe/Item Nutrition window.
3. There are three ways to enter the nutrition values:

Calculate from Ingredients:
1. Click the **Calculate** button. The system sums up the nutrition values for the recipe ingredients to calculate the Value per Portion Weight fields. Then it calculates the Value per Nutrition Weight and sets the Nutrition Value field as Calculated.

Through the Product Nutrition List:
1. If you have set up a product nutrition list, click the **AssistButton** in the **Product Nutrition Code** field to see the Product Nutrition List window.
2. Select the desired product (you can use the category and product group filters to aid your selection) and click **OK**.
3. The system enters the contents of the **Value per Nutrition Weight** fields for the selected nutrition product in the **Value per Nutrition Weight** fields for the item and sets the Nutrition Value field as Looked Up. It automatically calculates the Value per Portion Weight fields.

Fill in Manually:
1. In the **Serving Size** field, enter the serving size you are entering nutrition values for.
2. In the **Serving Unit of Measure** field, click the **AssistButton** to see the Units of Measure window.
3. Select the desired unit and click **OK**. If the serving unit and the nutrition weight unit are the same or are defined as comparison units with a conversion factor between them, the system automatically calculates the Serving Size in Nutr. UOM field. Also, if the serving unit is set up as an item unit of measure for the item, the system automatically calculates the Serving Size in Nutr. UOM field.
4. If the Serving Size in Nutr. UOM field contains 0, enter the serving size as a quantity of the nutrition unit of measure (for example the serving size and unit is 1 box. The box weighs 250 g. The Serving Size in g field (nutrition unit of measure is g) is then 250.
5. In the **Value per Serving** fields enter the nutrition values per nutrient. The system automatically calculates the Value per Nutrition Weight and Value per Portion Weight fields and sets the Nutrition Value field as Entered.

2.2.9 Copying a Recipe

You can create a new recipe by copying an existing one. The new recipe will contain the same ingredients, additional items, version lines, nutritional information, price lines and instructions. If you want to change the size of the recipe's portion, you can copy the recipe with a multiplication factor. The system will then multiply the Quantity per field with the factor for each ingredient. You must set up number series for recipes in order to be able to copy recipes.

Copying without a Multiplication Factor:
1. Open the Recipe Card window.
2. Browse to the recipe you want to copy.
3. Click **Functions**, **Copy Recipe**.
4. Click **Yes** in the confirmation window that appears.
5. The system creates a new recipe with the next number in the recipe number series and copies the selected recipe's header, ingredients, additional items, version lines, nutritional information and instructions to the new recipe.
6. The system displays a window with the number of the new recipe.
7. Click **OK**.

Copying with a Multiplication Factor:
1. Browse to the recipe you want to copy.
2. Click **Functions, Copy Recipe with Factor**.
3. Click **Yes** in the confirmation window that appears.
4. In the window that appears, enter the multiplication factor asked for (1 is default). If you click **Cancel** in the window, the system cancels the copying.
5. The system creates a new recipe with the next number in the recipe number series and copies the selected recipe's header, ingredients, additional items, version lines, nutritional information, price lines and instructions to the new recipe. It multiplies the Quantity per field for each ingredient with the multiplication factor unless the ingredient is marked as being unaffected by the multiplication factor.
6. The system displays a window with the number of the new recipe.
7. Click **OK**.

2.2.10 Printing a Recipe

1. Open the Recipe Card window.
2. Browse to the recipe you want to print.
3. Click **Print, Recipe.**
4. The Recipe report window appears.
5. Click **Preview** or **Print**.

2.2.11 Updating Cost and Weight

The unit cost of a recipe always equals the total of the unit costs of its ingredients. The Unit Cost field on the item cards of the ingredients must be filled in so that the unit cost of the recipe is calculated correctly.

To calculate init costs of recipes:
1. Open the Recipe Card window and then browse to the card for the new recipe that you have created.
2. Click **Functions, Calc. Standard Cost.**

The program copies the costs of the items that comprise the recipe. The cost of each item is multiplied by the quantity, and the total cost is inserted in the Standard Cost field of the recipe. If the Costing Method is Standard, the Unit Cost field is also updated.

When the unit cost of recipe ingredients change or the recipe ingredients changes (an ingredient is deleted or added), the unit cost of the recipe is not updated automatically. You can run the Calc. Standard Cost function on each recipe that contains the ingredient with the changed cost.

The portion weight of a recipe always equals the total of the net weight of its ingredients that are included in the portion weight. The portion weight has informative value and is used to calculate nutritional information. The Net Weight field on the recipe ingredient lines for items (non-recipes) is automatically calculated from the Quantity per field using the relationship between the Unit of Measure and the Recipe Weight Unit of Measure (Meal Planning Setup table) in the Item Units of Measure table for the item. The Net Weight field on the recipe ingredient lines for recipes is automatically calculated from the Quantity per field using the Portion Weight of the recipe.

When you change a recipe included in other recipes in a way that affects its portion weight and portion cost, the portion weight and portion cost of recipes that the recipe is included in is not updated automatically.

To update a recipe where used:
1. Open the Recipe Card window and then browse to the card for the recipe that you have changed (the Included in Other Recipes field is marked Yes).
2. Click **Functions, Update Recipe where Used**.

The program recalculates the gross and net weight of the recipes that include the recipe. For each of those recipes, it recalculates the gross and net weight of the recipes they are included in and so forth until all recipes affected have been updated.

You can run the Calc. Std Costs and Recipe Weight function to regularly recalculate the cost for your BOMs and gross weight and net weight for your recipes at the same time. You can also place a check mark in the Upd. Cost and Weight w/Posting field in the Meal Planning Setup window to ensure that the cost and weight for each sold recipe is updated before the sale is posted.

To recalculate the cost for all recipes and other BOMs and weight for all recipes:
1. Click **LS Hospitality, Periodic Activities, Calc. Std. Costs** and **Recipe Weight**.
2. Click **Yes** in the confirmation window that appears.

2.3 Planning Menus

2.3.1 Creating a Menu

A menu in the Meal Planning module is a collection of dishes that is offered on specific days. The price of each dish can be set for the menu itself, but can be changed for a specific day. A menu is set up for a store group. It is valid on certain week days as a default.

1. Open the Menu Card window by selecting **LS Hospitality, Meal Planning, Menu Card.**
2. Press **F3** to enter a new menu.
3. On the General tab, fill in the **Code** and **Description** fields.
4. Place a check mark in the **Point of Sale Link** field.
5. In the **POS Menu ID** field, click the **AssistButton** to see the POS Menu List window.
6. Select the POS menu you want to use and click **OK**.
7. In the **Cost per Portion per Minute** field, enter how much one minute of preparing a portion costs for this menu.
8. In the **Default Store Group** field, click the **AssistButton** to see the Store Group List window.
9. Select the store group you want this menu to belong to as default and click **OK**.
10. If you want to have prices on dishes different between stores for this menu, place a check mark in the **Price per Store** field.

Note

When you select to have store bases pricing, the system will create store sales price lines for the items and recipes behind dishes where the Sales Code field is the same as the number of the store in question. Therefore you need to create a customer price group for each store with Sales Code field the same as the store number.

11. If you want to have the pricing the same between all stores for this menu, click the **AssistButton** in the **Price Group Code** field to see the Customer Price Groups window.
12. Select the price group valid for all stores and click **OK**.
13. On the Validation tab, place a check mark in the fields of the days the menu is valid on (a check mark in the **All Days** field places a check mark in all the day fields).
14. On the Purchasing tab, fill in the fields acc. to online help.

2.3.2 Assigning Dishes and Sales Prices

For each dish you want to assign to a menu:
1. In the Menu Card window, on a new line, fill in the POS Button No.
2. In the Dish Code field, click the AssistButton to see the Dish List window.
3. Select the dish you want to assign to the menu and click OK.
4. In the Recomm. Price Incl. VAT field, enter the recommended price of the dish.

2.3.3 Using the Meal Planning Calendar

The Meal Planning Calendar window gives you an overview of the meal planning for a menu.

To view the window, click **LS Hospitality, Meal Planning, Meal Planning Calendar**.

Functionality:

- After each date in the window the system shows the number of day plans that exist for the selected menu on this date (the menu can have one day plan per store).
- You can use the Menu Filter field to see the existing day plans for a menu.
- You can use the Store Group Filter field to see the existing day plans for a store group.
- If you click the DrillDown button on a date with one existing day plan, the system displays the Day Plan window with this day plan.
- If you click on a date with more than one day plan, the system displays the Day Plan List window where you can select which day plan to view and click Day Plan, Card to see the Day Plan window for the plan.
- You can create day plans from this window, either on a single date or for a period (see the following sections).

2.3.4 Printing Menu Assignments

You can print a list of the day plans that have been defined for a menu along with their dishes and recipe or items, planned quantity of portions and price.

1. Open the Meal Planning Calendar window by selecting **LS Hospitality, Meal Planning, Meal Planning Calendar.**
2. In the **Menu Code** field, click the **AssistButton** to see the Menu List window.
3. Select the menu you want to print menu assignments for and click **OK**.
4. In the **Store Group Code** field, click the **AssistButton** to see the Store Group List window. The menu's Default Store Group is selected by default.
5. Select the store group you want to print menu assignments for and click **OK**.
6. Click the date you want to start printing menu assignments for. You can browse to the desired date using the Starting Year and Starting Month.
7. Click **Print, Day Plan Menus**.
8. The Day Plan Menus report window appears.
9. Click **Preview** or **Print**.

2.3.5 Creating Day Plans on a Selected Date

A day plan is defined for a menu in one store on a specific day and includes the dishes offered and the recipes or items behind each dish. Each dish has a planned number of portions and an actual number of portions produced.

1. Open the Meal Planning Calendar window by selecting **LS Hospitality, Meal Planning, Meal Planning Calendar**.
2. In the **Menu Filter** field, click the **AssistButton** to see the Menu List window.
3. Select the menu you want to create day plans for and click **OK**.
4. In the **Store Group Filter** field, click the **AssistButton** to see the Store Group List window. The menu's Default Store Group is selected by default.
5. Select the store group you want to create day plans for and click **OK**.
6. Click the date you want to create day plans for. You can browse to the desired date using the Starting Year and Starting Month
7. Click **Functions**, **Create Day Plans on Selected Date**.

Note

If you leave the Menu Filter and/or Store Group Filter fields blank, the system now displays the Menu List window and/or Store List window in which you have to select a menu and a single store in order to create the day plan.

8. The system creates day plans for each store in the store group selected.
9. The Day Plan List window opens, showing a line for each day plan created.

Note

> The system creates a day plan on the selected date even if the menu is set up as not being valid on that day of the week.

2.3.6 Creating Day Plans for a Period

1. Open the Meal Planning Calendar window by selecting **LS Hospitality, Meal Planning, Meal Planning Calendar.**
2. In the **Menu Code** field, click the **AssistButton** to see the Menu List window.
3. Select the menu you want to create day plans for and click **OK**.
4. In the **Store Group Code** field, click the **AssistButton** to see the Store Group List window. The menu's Default Store Group is selected by default.
5. Select the store group you want to create day plans for and click **OK**.
6. Click the date you want to start creating day plans for. You can browse to the desired date using the Starting Year and Starting Month.
7. Click **Functions, Create Day Plans for Period**.
8. The Create Day Plans for Period window appears, showing the menu, store group and starting date you have selected. You need to fill in all the fields in the window.
9. In the **End Date** field, enter the ending date of the period you want to create day plans for.
10. Click **OK**.

The system creates day plans only for the weekdays the menu is valid on within the period requested for each store in the store group selected. A window appears displaying the number of day plans created.

Note

> If no date within the period was valid in the menu group, the system creates no day plans and displays a message with this information.

2.3.7 Viewing a Day Plan

1. Open the Meal Planning Calendar window by selecting **LS Hospitality, Meal Planning, Meal Planning Calendar.**
2. Filter the dates by selecting the desired menu and store group in the **Menu Filter** and **Store Group Filter** fields.
3. Click the **DrillDown** button in the desired date field.
4. If there is more than one day plan the Day Plan List window appears. Select the day plan you want to view and click **Day Plan, Card.**
5. The **Day Plan** window appears.

2.3.8 Deleting a Day Plan

1. Open the Day Plan window for the desired day plan (see).
2. Click in the header of the window.
3. Press F4 to delete the plan.
4. Click Yes in the confirmation window that appears.
5. Close the window.

2.3.9 Selecting Recipes and Planning Portions

Once you have created a day plan, you need to select dishes for the plan and assign recipes or items to each dish. Then you plan how many portions you want to make for each dish.

1. Open the Day Plan window for the desired day plan (see Viewing a Day Plan).
2. Click **Functions, Get All Dishes**. The system inserts a line for each dish assigned to the menu.
3. In the **Recipe/Item No.** field in the first line, click the **AssistButton** to see the Recipe/Item List window.

Note

There are three types of filters on this window:

- **Recipe Item Type Filter**: Lets you view recipes only, ingredients only, non-marked items only or all items.
- **Show Avail. Dishes Only**: Lets you view only recipes with a check mark in the **Available as Dish** field.
- **Recipe Grouping Filters**: Lets you view recipes with certain main ingredients and of certain types and styles. The default filters that you have set up for the dish become active in this window.

4. Click **Recipe/Item, Card** to view the Recipe Card or the Hospitality Item Card for a recipe or an item on the list.
5. Delete or add filters as you like until you find the item or recipe you want to assign to the dish.
6. Click **OK**.
7. The system now finds the item price that will be valid in the day plan's store on the day plan's date. It compares it with the recommended price for the dish. If these are not the same, the system displays a window asking you whether you want to change the item price to the recommended price.
8. If you click **Yes**, the system creates a sales price line with the recommended price using the price group assigned to the menu or the price group of the store (depending on the menu setup). The starting date is the day plan's date. The Item Price Incl. VAT field shows the recommended price (the price that is now valid on the day plan's date).
9. If you click **No**, the system does not create any sales price lines and the Item Price Incl. VAT field shows the price that is now valid for the item or recipe in the day plan's store on the day plan's date.
10. You can change the Item Price Incl. VAT field afterwards. The system will then ask you to confirm the change and perform the necessary sales price line updating with the new price.
11. In the **Planned Qty. of Portions**, enter the amount of portions you plan to make for the dish.
12. The system calculates the **Cost, Price** and **Profit** fields.

2.3.10 Copying Day Plans

You can copy the lines of a day plan to other existing day plans within a period.

1. Open the Day Plan window for the desired day plan (see).
2. Click **Functions, Copy Day Plan**. The Copy Day Plan window appears. The Store Group Code field contains the store number of the day plan as a default. The Starting Date contains the date of the day plan as a default.
3. In the **Store Group Code** field, click the **AssistButton** to see the Store Group List window.
4. Select the desired store group and click **OK**.
5. In the **Starting Date** and **Ending Date** fields, enter the start and end of the period you want to copy the day plan lines to.
6. Place a check mark in the **Overwrite if Lines Exist** field if you want the function to replace the existing lines of the day plans you are copying lines to with the lines of the current day plan.
7. Click **OK**.

8. A window appears, informing you to how many day plans the lines of the current day plan were copied.

Note

All day plan line fields are copied except the Actual Qty. Produced field and the Item Price Incl. VAT field. The system finds the item prices that are valid on the date and in the store of the day plan copied to.

2.4 Preparing Meals

2.4.1 Ordering

1. Open the Day Plan window for the desired day plan (see).
2. Click **Functions, Create Requisition.**

2.4.2 Cooking

Once you can start cooking for the day, you can print out a list of the recipes you need to make for the day with quantities multiplied with the planned quantity of portions and the instructions for preparing.

1. Open the Day Plan window for the desired day plan (see).
2. Click **Print, Day Plan Recipes**.
3. The Day Plan Recipes report window appears.
4. Click **Preview or Print**

2.5 At the End of the Day

2.5.1 Sales Overview

The weekly sales overview shows the number of portions made versus sold and shows the cost and profit figures of day plans, giving you the means to plan your menus ahead.

1. Open the Weekly Sales Overview window by selecting **LS Hospitality, Meal Planning, Weekly Sales Overview**.

To create requisition worksheet for the selected week:

1. Click **Functions, Create Requisition**.