SchoolMoney
Dinner Import

Contents

1. Download the Spreadsheet Template

If you do not have a copy of the spreadsheet template, you can download one from **SchoolMoney** by clicking on Admin, then Import Dinner Menu, and Download File Template in the top right corner.
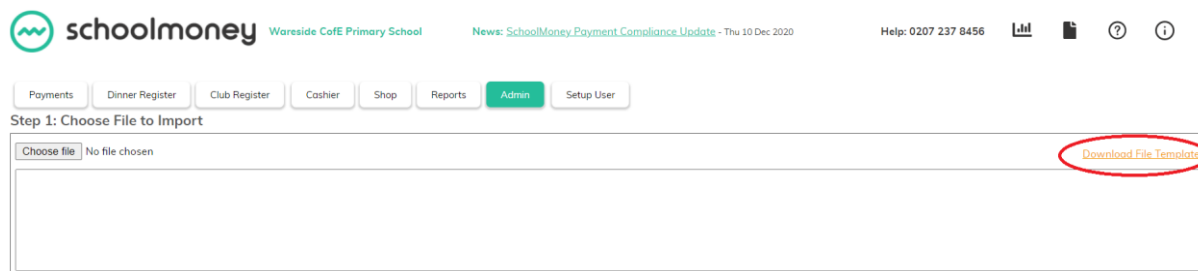
When you open the Spreadsheet template, you will notice that there is some example data that you'll need to delete before you can begin.

Please do not make any changes to the column headings; you cannot add new columns or remove ones that are not relevant to your school. The correct set of headings is shown below:

Item Name	Price	Type	Menu	Available To	Year Groups	Prevent FSM	Monday	Tuesday	Wednesday	Thursday	Friday	Packed Lunch	Prevent Multiple Selections	Allergy Information

Once you have completed the spreadsheet, you can upload this to **SchoolMoney** following the steps in Section 2 below. If at this stage you receive any error messages, please refer to section 3 for a list of common error messages.

If you are still unable to successfully import your menu, please create a **SchoolMoney Support Ticket** by visiting **www.eduspot.co.uk/support**. You will receive an automatic email response to confirm your support ticket has been created.

To speed up the process, please reply to the email, attaching the Spreadsheet you are trying to upload.

2. Completing the Spreadsheet

Item Name

The Item Name column should contain the name of meal as you want it to show on the system for your parents/children to choose from.

Please Note: this field is limited to 50 characters, the system will automatically shorten any item names that exceed this limit. Please do not use any commas in the item names as this will corrupt the comma-separated file.

If your meals include a choice of pudding included in the price, you will need to list these separately as shown below:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Item Name	Price	Type	Menu	Available To	Year Groups	Prevent FSM	Monday	Tuesday	Wednesday	Thursday	Friday	Packed Lunch	Prevent Multiple Selections	Allergy Information
2	Pizza & Chips with Fruit and Yoghurt	2.30		1				Y							
3	Pizza & Chips with Chocolate Brownie	2.30		1				Y							

Price

In the Price column, enter the cost of the menu item. You should not include any '£' or 'p' symbols, just the numeric values. For example, "2.30" for £2.30.

If some of your children receive free meals, either because of Universal Infant Free School Meals or because they are eligible for income-assessed Free School Meals, you do not need to include a £0.00 entry, as the system will automatically remove the costs for eligible children.

Type

The Type column is to help you organise your items, so you may like to enter a brief descriptor such as "Pupil Main Meal" or "Staff Side dish" etc.

Menu

In the Menu column, enter the menu number that each dish belongs to. Most schools have a 3-week rotating menu system so this will usually be 1,2 or 3. However, if you have already used menu slots 1-3 on **SchoolMoney** and you are not yet ready to delete your old menus – we would recommend loading your new menus into the next available slots. So you could use 4,5 and 6 for your new term's menus.

There are 20 available menu slots on **SchoolMoney** and you can check which slots are empty by going to the Admin tab, then Dinner Items, and using the drop-down in the top left to select a menu number to check.

If you have items that are on more than one weekly menu, then you will need to copy the row again, and list it separately for each menu. Please see the example below:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Item Name	Price	Type	Menu	Available To	Year Groups	Prevent FSM	Monday	Tuesday	Wednesday	Thursday	Friday	Packed Lunch	Prevent Multiple Selections	Allergy Information
2	Pizza & Chips with Side Salad	2.30		1			Y								
3	Pizza & Chips with Side Salad	2.30		2			Y								
4	Pizza & Chips with Side Salad	2.30		3			Y								

If you leave this column blank, or enter the word All, then the item will automatically be available every week.

Available To

The Available To column is used to indicate whether the item is available to Staff or Students. The only accepted wording that can be entered into this column is 'staff' or 'students'. If you leave this empty, then the item will default to showing to both staff and students. If your staff members pay a different price to students, you will need to copy the row and adjust the price and available to columns accordingly:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Item Name	Price	Type	Menu	Available To	Year Groups	Prevent FSM	Monday	Tuesday	Wednesday	Thursday	Friday	Packed Lunch	Prevent Multiple Selections	Allergy Information
2	Chicken Pasta Salad	2.30		1	Students		Y								
3	Chicken Pasta Salad	2.70		1	Staff		Y								

Year Groups

If you have some menu items that are only available to certain year groups, then you can indicate this here. If your items are available to all year groups, then you leave this column empty. You will need to copy the row for each Year Group that the item is available to as shown below:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Item Name	Price	Type	Menu	Available To	Year Groups	Prevent FSM	Monday	Tuesday	Wednesday	Thursday	Friday	Packed Lunch	Prevent Multiple Selections	Allergy Information
2	Jacket Potato with Cheese and Beans	2.30		1	Students	Year 1	Y								
3	Jacket Potato with Cheese and Beans	2.30		1	Students	Year 2	Y								
4	Jacket Potato with Cheese and Beans	2.30		1	Students	Year 3	Y								

Please note that the wording of the year groups must match perfectly with how they are set up in your system. The best way to check this is to go into Admin and Students on **SchoolMoney** *and look at the Year Group drop-down. Sometimes (especially if your pupil data imports from SIMS) the year groups are double spaced, so if, when importing the menu, you receive an error saying that the year group can-not be found, try changing 'Year 1' to 'Year 1' and so on.*

Prevent FSM

If you do not want a particular item to show as available for Free or Universal meal children, please put a 'Y' in this column. If your items are available to both paid and free meal children, you can leave this column blank.

Monday – Friday Columns

In these columns, you will need to enter a 'Y' (for yes) to indicate which day(s) each item is available. You can just leave the column blank for the days the item is not available.

Packed Lunch

If you would like to add a menu option for a Packed Lunch from Home, please enter a 'Y' in the Packed Lunch column.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Item Name	Price	Type	Menu	Available To	Year Groups	Prevent FSM	Monday	Tuesday	Wednesday	Thursday	Friday	Packed Lunch	Prevent Multiple Selections	Allergy Information
2	Home Packed Lunch	0.00		All				Y	Y	Y	Y	Y	Y		

This column should be left blank for all other items.

Prevent Multiple Selections

Enter a 'Y' in the column if you wish to prevent the same item from being chosen twice on the same day, by the same child.

Allergy Information

In this column, you can enter any allergen information that relates to the menu item such as 'Contain Nuts' or 'Suitable for Vegetarians.' There is no character limit for this column but please avoid the use of commas to avoid errors. We recommend a semicolon as a separator:

O
Allergy Information
Contains Wheat; Contains Dairy; Suitable for Vegetarians.

3. Saving the File

You may find that Excel has saved the file as an XLS or XLSX spreadsheet which will cause an error when you try to import it. If this happens, you will need to save it as a CSV (Comma Delimited) file.

You can do this within Excel. Click on 'File' and then 'Save As', and set the 'File Type' drop-down to: 'CSV (Comma Delimited) (*.csv)' then press Save. We recommend saving the file somewhere you will easily be able to locate it later on, such as in your personal documents folder, etc.
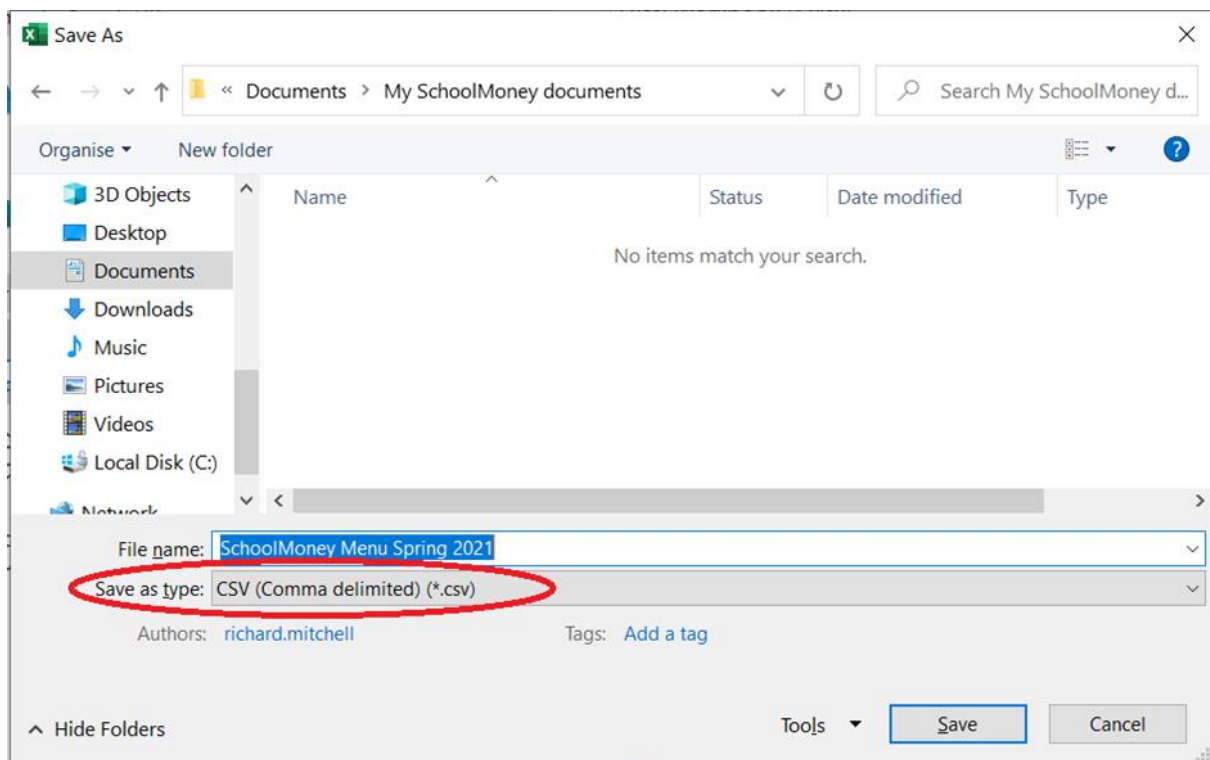
4. Importing the Menu

Once you have completed your Spreadsheet, you are now ready to import it into **SchoolMoney**. To do this click on the Admin tab, and then the Import Dinner Menu Icon.

There are three steps to importing your Dinner Menu:

Step 1: Choose File to Import

Click on the grey Choose File button, and navigate to the folder on your computer where you have saved the Spreadsheet. Once you have found it, double-click on it.

Step 2: Validate File

Press the green Validate button and review the information shown below.

Any information shown in black as a caution is for information purposes only. You will still be able to import your menu if you are happy to continue.

Anything shown in red is an error and will prevent you from being able to proceed with the import. You will need to adjust your spreadsheet, save it, and then press F5 on your keyboard to refresh SchoolMoney before trying again.

Please see below for a list of common error messages and how to correct them.

Step 3: Import File

Once you receive no errors and are happy with any cautions shown, you can click on the green Import button to complete the process. You will receive a message to confirm that the import has been completed successfully.

5. Common Error Messages

Please see below for a list of common Error and Caution messages that you might receive whilst validating your import, and how to resolve them.

File type must be .CSV. Please check your file and try again. For further help please contact product support

Your Spreadsheet file has not been saved as a CSV. Please follow the steps above to save the Spreadsheet as a Comma Delimited CSV file.

Invalid amount for price. - Unable to Import. Please try again

Check you have not entered '£' or 'P' symbols in the price column. Check that you have not used any commas anywhere in the spreadsheet, check there are no empty rows in the spreadsheet.

Error on line X: invalid option for 'Year Group'

If you have set items as being available for specific Year Groups, please check that these are worded exactly the same as they show on **SchoolMoney** under Admin and Students. (Please note that sometimes the year groups will be double spaced, so 'Year 1' becomes 'Year 1')

Number of columns in the data row does not match the number of headers. - Unable to import. Please try again

Check that you have not added or removed any columns from the spreadsheet. Please refer back to the original Menu Template file if necessary.

Caution on line X: Item Name exceeds its 50 character limit

One or more of the item names that you have entered exceeds the limit of 50 characters. The file will still import but the item name(s) will be cut short. If this happens, you can always go into Admin and then Dinner Items to amend them.

Caution on line X: No Year Group supplied. Year Group will be set to 'All'

You have not specified any year groups for one or more of your items, so they will automatically show as available to all year groups.

Caution on line X: No Menu supplied. Menu will be set to 'All'

You have not specified a menu number for one or more of your items, so they will automatically show as available every week.

If you are still unable to successfully import your menu, or receive any other error messages, please create a **SchoolMoney** **Support Ticket** by visiting **www.eduspot.co.uk/support**

You will receive an automatic email response to confirm your support ticket has been created. To speed up the process, please reply to the email, attaching the Spreadsheet which you are trying to upload. We will then be able to review the file for you to determine what is causing the error.

6. Contact Details

We hope this user guide has helped you to use the **SchoolMoney** system. If you have any questions or require further assistance, please get in contact with us and we will be more than happy to help.

Telephone number: **02072378456**

Online: **www.eduspot.co.uk/support**

We look forward to hearing any ideas or feedback you have about **SchoolMoney**, so let us know what you think!