

# NC Online Meal Ordering System

## *Instructions for Using and Customizing the Meal Order Form in Google Forms and Google Sheets*

### Purpose

The NC Online Ordering System Template, a free and easy tool created using Google Forms, allows schools to set up their own online meal ordering system. This document provides the steps for customizing the tool and using it to manage online meal orders.

### Materials Needed

- A Google Account (sign up for one [here](#), it's free and this is the first step to using the form!)
- A preview version of the form, available [here](#)
- The editable version of the NC Online Ordering Template, available [here](#) (must have/create a google account to access)
- Your cycle menu, offer vs. serve policy, a calendar, etc.
- The accompanying video tutorial, available [here](#)

### Step 1: Customize Your Order Form

*To help you follow along with the video, we've included [timestamps] for the point in the video each specific step is covered. To jump to a step, simply fast forward to that point in the video.*

1. [1:30] Familiarize yourself with the [preview version of the form](#) by responding to it as a parent would, before getting started. It's always helpful to begin with the end in mind!
2. [3:00] Start by clicking the link for the [editable version of the form](#). You'll be prompted to enter your Google account login details. Once the copy is made, change the form name to include the word "Master" or "Template" and move the form to a folder in your Google Drive by clicking the folder icon next to the form name.
3. [4:00] Need to have other people on your team edit the form too? Add collaborators, share an editable version of the form, and add users to your Google Folder too.
4. Time to customize your master form!

*TIP! [Covered at the 4:18 Minute Mark] If you have a cycle menu, you might consider customizing this "Master" version with your required student information, specific OVS language, number of standard entrees and sides, and then making a copy for each week of your cycle menu. Then, once each week of your cycle menu has also been customized, make date-specific copies. The instructions that follow will lead you through the steps to do this.*

Things to customize initially:

- [5:30] The title of the form and initial ordering instructions
- [6:05] Student information needed (you may need more or less information than what the template form includes, such as adding a "pick up location" question)
- [9:30] Number of entree and side choices
- [11:35] Milk types

Other things you may want to customize:

- [5:45] The image at the top of the form or the theme of the form to match your district
- [13:00] The confirmation message once the form is submitted and other settings

# NC Online Meal Ordering System

## *Instructions for Using and Customizing the Meal Order Form in Google Forms and Google Sheets*

5. [8:00] Check your question branching. The form is set up to go to different sections based on the selection of the user. If you've added or removed questions or sections, these settings may have been changed. Double check things are correct before moving forward.
6. [14:12] Preview the form to double check everything by clicking the eye icon in the top right and filling out the form. You can even submit a response and then later delete it.
7. [14:45] Make a copy of the form to customize it for the first week of your menu. Customize the actual menu item names based on your menu.
  - a. [16:30] Optional: Insert photos of your menu items to help market your delicious offerings!
8. [17:25] Once you've created your cycle menu versions, make a copy of each form (last time, we promise!) and customize that copy with the specific dates of the menu, the order deadline, etc. This will be the form you send to parents. You may want to preview it a final time to confirm it's accurate.

### Step 2: Send Your Form

1. [19:25] Once your form is done, go to the "Responses" tab and click "Accepting Responses" so it's green.
  - a. [19:30] Optional: To be notified via email when responses are received, click the 3 small dots and the "Get responses" option (the first in the list).
2. [19:35] Go to the top right and click the "Send" button. You can send the form via email, via a link, or embed it on a website. Most often you'll be sending the link, so we focused on that method here. Click the link icon and click the "Shorten URL" box. Click the "copy" button. The link is now copied to your clipboard.
3. [20:00] Send this link to parents, put it in emails, on social media, on websites - wherever you need! Remember this link is unique to the specific order form and date you created it for, so you will need to send a new link (to a new form) to parents each week. Therefore, it may be helpful to include these links on a page on your website so parents can bookmark a specific location (i.e. [yourwebsite.org/online-ordering](http://yourwebsite.org/online-ordering)) to return to each week for accessing the latest order form.

### Step 3: Compile Your Orders

1. [20:20] Now it's time to review your responses. Return to the "Responses" tab of your form. You should see multiple responses here. We recommend switching the form to "Not Accepting Responses" once the order deadline has passed. Click the green Google Sheets icon and leave the "Create a new spreadsheet" selection, and click "Create" and "Open" in the window that pops up.
  - a. Note: This new sheet will be added to the same folder your form is in. If you'd like it saved somewhere else, use the folder icon on the sheet to move it.
2. Now it's time to make sense of all these orders! Here are the steps to follow:
  - a. [22:30] Rename the tab to "Master" then duplicate it and name that tab "Monday" or the date.



# NC Online Meal Ordering System

## *Instructions for Using and Customizing the Meal Order Form in Google Forms and Google Sheets*

- b. [23:15] Go to the Monday tab and delete any unnecessary information, such as Timestamp and Email Address. Move columns to help with grouping students together, such as moving the “Teacher Last Name” column to column A.
- c. [23:55] Add a filter to the sheet by clicking to highlight row one then going to Data > Create a filter. If you already know you want to group orders by teacher, for example, then you can use the filter to sort the orders alphabetically now.
- d. [24:30] Next, make duplicates of this sheet for the other days of the week (Tuesday - Friday).
- e. [24:50] Go back to Monday and delete the columns that correspond to the other days of the week, so that the Monday tab only includes Monday’s orders. Repeat this for each subsequent tab/day.
- f. [25:45] Use the filter to group orders as necessary, such as to tally up the number of entrees needed.

### Bonus Tips

- [20:55] If you worry people may try to use an old link for ordering, consider customizing the “Not accepting responses” message with the link to your new form (or where they should go to get the new link).
- [27:00] If you’d like to print your form, use the print option on the Google Sheet and customize as needed.
- [28:20] If you’d like to get total counts for each item selected, you can do that by looking at the summary responses in your Google Form, or by using formulas in your Google Sheet.
  - [29:25] To use formulas, paste the following formula at the bottom of the sheet, and customize as follows:
    - =COUNTIF(H2:H60, "Entree #1")
      - H2:H60 is the range for the column of the data you’re counting (i.e. Entree choices)
      - "Entree #1" is the name of the menu item you want to count up (make sure you type this exactly)
- [18:30] If you plan to have multiple order forms for many months, consider organizing your Google Drive folders by grade, month, etc. to keep things organized.