

# FoodBank MANAGER

## How to Use Reservations

Please notice that in this example I am logged in as a Team Member. It is a suggested practice that volunteers who are computer operators be set to the role of Team Member. This gives the appropriate permissions to make reservations and process a guest through a visit.

### CALENDAR

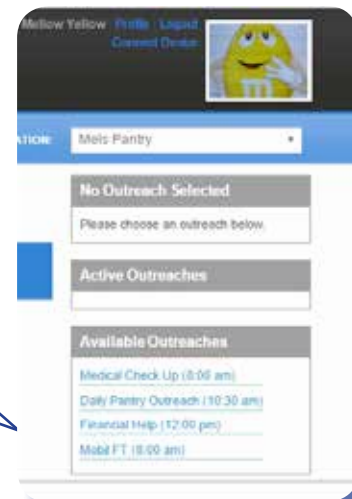
Click on the calendar tab. Click on the day you want to make reservations for. (Please note this can be on the day of the visit, or you may preload any future dates with reservations)



### AVAILABLE OUTREACHES

Under Available Outreaches, click on the outreach that you are taking reservations for.

Mobil FT (8:00 am)



### OUTREACH CONTROLS

Click on Create Guest Reservation.

Create guest reservation



## SEARCH

Search by Address, Name or Phone.

A minimum of 3 characters are needed in the search bar before possible client matches will pop up.

Click on the client's name that you want to give a reservation.

The screenshot shows the 'Create new Reservation' form. At the top, there are three search tabs: 'Search by Address', 'Search by Name', and 'Search by Phone'. Below these are input fields for 'STREET ADDRESS' and 'POSTAL CODE'. A blue arrow points from the 'STREET ADDRESS' field to a dropdown menu that has appeared. The dropdown menu lists two clients: 'Sterling Silver' and 'Polly Ester'. Each client entry includes their name, address, phone number, and date of birth. A blue arrow labeled 'Click' points to the name 'Sterling Silver' in the dropdown menu.

## CLIENT DATA

Some basic client data will pop up. If you wish you can assign a Reservation Time and check the goods/service that they will be receiving under Tracking Methods. (This is not necessary to process the reservation)

Click Save.

The screenshot shows the 'Reservation' form. It contains several input fields: 'FIRST NAME' (Sterling), 'LAST NAME' (Silver), 'STREET ADDRESS' (5214 W GOLDEN AVE), 'CITY' (Precious), 'STATE' (AZ), 'ZIP' (84521), 'HOME PHONE' ((514) 895-9625), 'RESERVATION TIME' (08:00 AM), 'TRACKING METHODS' (FOOD, TO-GO MEAL), and 'STATUS' (Reserved). A green circle highlights the 'Save' button at the bottom left of the form.

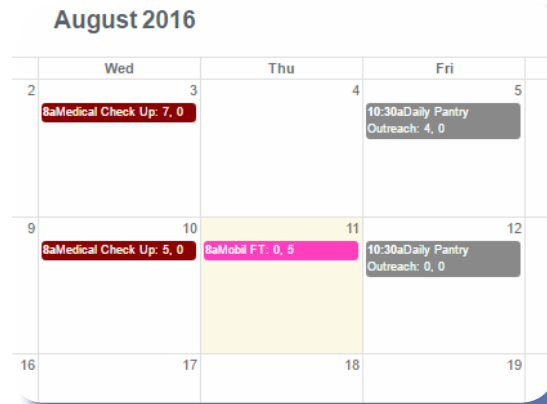
## FINISH

The reservation is now made, click Back to continue to enter more clients.

The screenshot shows a summary card for the reservation. It displays the client's name 'Sterling Silver', the reservation time '8:00 am', and the status 'Reserved'. It also lists the address '5214 W GOLDEN AVE, Precious, AZ 84521' and the phone number '(514) 895-9625'. At the bottom, there are 'Edit' and 'Back' buttons. A blue arrow labeled 'Back' points to the 'Back' button.

## PROCESS A VISIT

Go to calendar and click on the date and outreach you want to process visits for.



Click on Create Visit.

Calendar interface for Thursday, August 11, 2016. The table below shows reserved visits:

Time	First Name	Last Name	Status	View	Create Visit
8:00 am	Sterling	Silver	Reserved	View	Create Visit
8:00 am	Yuda	Mann	Reserved	View	Create Visit
8:00 am	Harry	Palms	Reserved	View	Create Visit
8:00 am	Pearlie	Gates	Reserved	View	Create Visit
8:00 am	PePe	Roni	Reserved	View	Create Visit

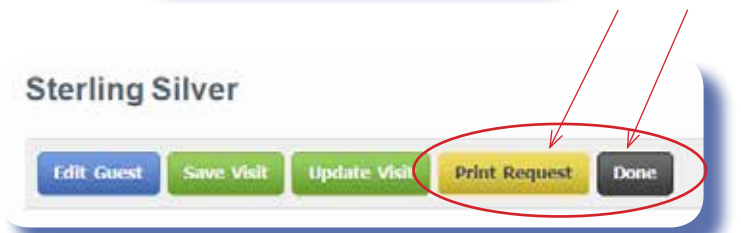
This will take you to your new visit page. (Your visit page may look different than my page - that is OK) Process the client just like any other visit. (ie: edit info if needed, fill out any questions, take signatures)

Click Save Visit.

Mobile app screenshot of the 'Create New Visit' form for Sterling Silver. A green callout bubble labeled 'Save Visit' points to the bottom of the form. The form fields include:

- Certification Date: Jul 17, 2016
- Birthdays
- Guest #
- Household Total: 2
- Physical Address: 3214 W COLDEN AVE, PHOENIX, AZ 84321
- Relig Observed:  Yes  No
- Weight of Food Given: 1.1
- To Go Meals Given For: 0
- ID Presented:  Yes  No
- Signature: Sterling Silver (handwritten), August 11, 2016, 1:53 am

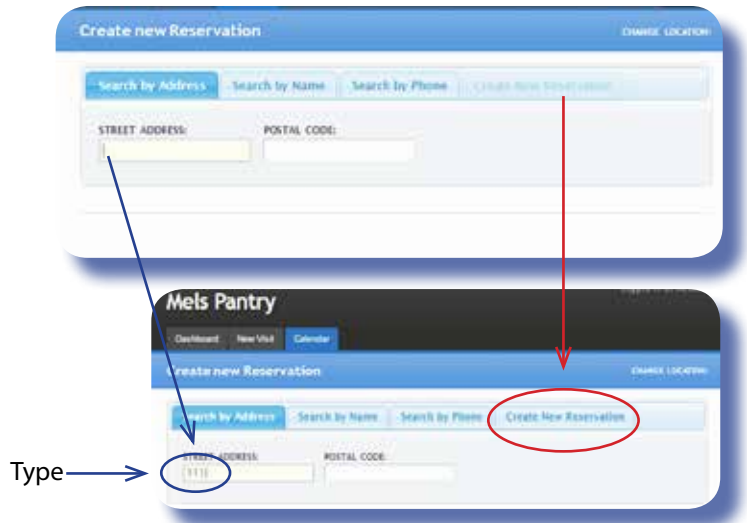
Print Request if this is a feature you use, otherwise click Done and proceed to check in the next client.



## ADDING A NEW CLIENT

A minimum of 3 characters are needed in the search bar before the Create New Reservation button will be made available.

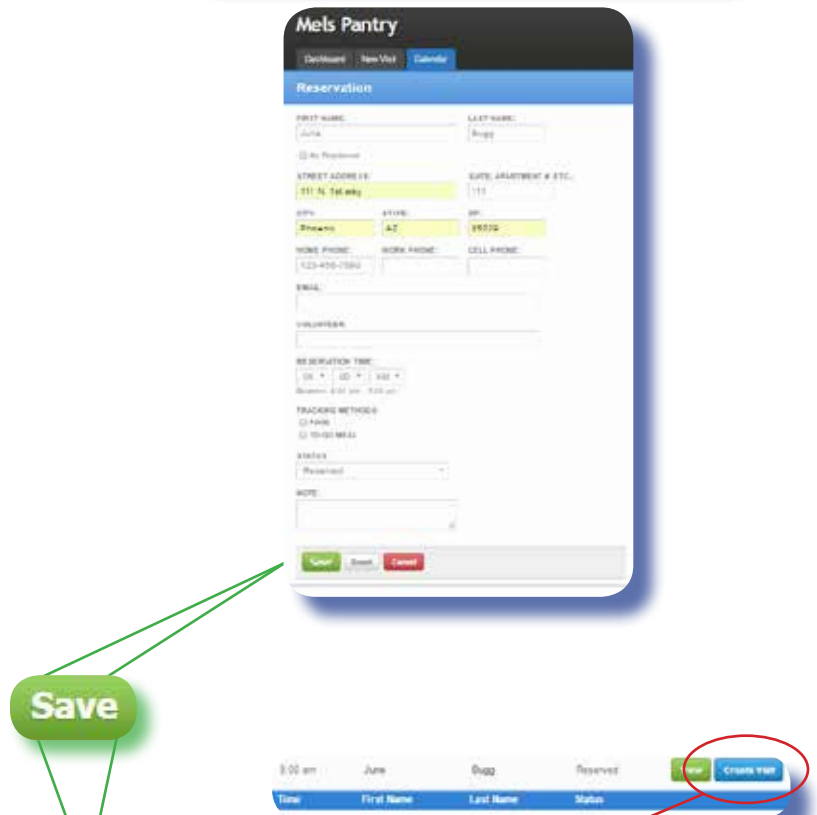
Click on Create New Reservation.



## CLIENT DATA

Fill in the client data. We will call this client June Bugg. If you wish you can assign a Reservation Time and check the goods/ service that they will be receiving under Tracking Methods. (This is not necessary to process the reservation)

Click Save.



## FINISH

When June Bugg comes in for her visit, locate her reservation and click Create Visit.

Because June Bugg is a new client, the Create Guest field will appear first so that you can finish adding her information. Click Save when done. This will take you to the New Visit page, process the visit as usual.

