

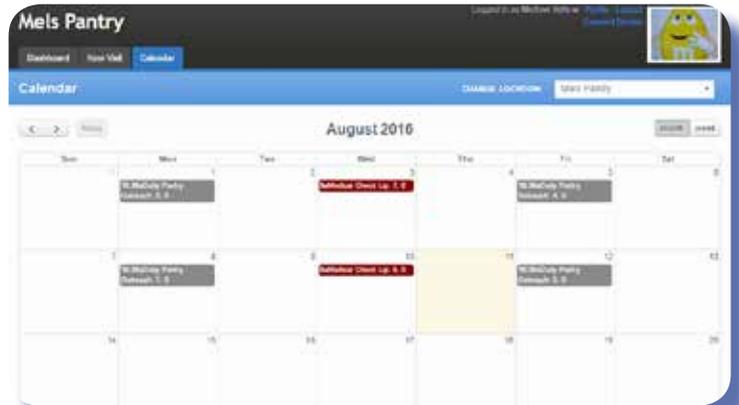
# FoodBank MANAGER

## 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

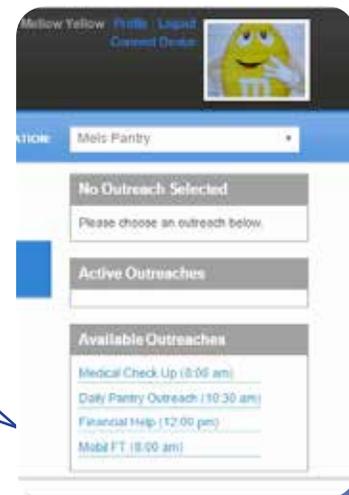
Click on the calendar tab. Click on the day you want to make reservations for. (Please note this can be on the day of the visit, or you may preload any future dates with reservations)



### AVAILABLE OUTREACHES

Under Available Outreach, 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 with three search tabs: 'Search by Address', 'Search by Name', and 'Search by Phone'. The 'Search by Address' tab is active, showing input fields for 'STREET ADDRESS' and 'POSTAL CODE'. A blue arrow points to the 'STREET ADDRESS' field. Below the search tabs, a dropdown menu is open, displaying two client suggestions. The first suggestion is for 'Sterling Silver' with address '5214 W GOLDEN AVE, Precious, AZ 84521' and phone '(514) 895-9625'. The second suggestion is for 'Polly Ester' with address '11 N 31ST AVE, Glendale, AZ 85027' and phone '(455) 305-9630'. A blue arrow labeled 'Click' points to the name 'Sterling Silver' in the dropdown.

## 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 with various input fields. The 'FIRST NAME' field contains 'Sterling' and the 'LAST NAME' field contains 'Silver'. The 'STREET ADDRESS' field contains '5214 W GOLDEN AVE'. The 'CITY' field contains 'Precious', the 'STATE' field contains 'AZ', and the 'ZIP' field contains '84521'. The 'HOME PHONE' field contains '(514) 895-9625'. The 'RESERVATION TIME' is set to '08:00 AM'. The 'TRACKING METHODS' section has 'FOOD' and 'TO-GO MEAL' checked. The 'STATUS' is set to 'Reserved'. A green circle highlights the 'Save' button at the bottom of the form.

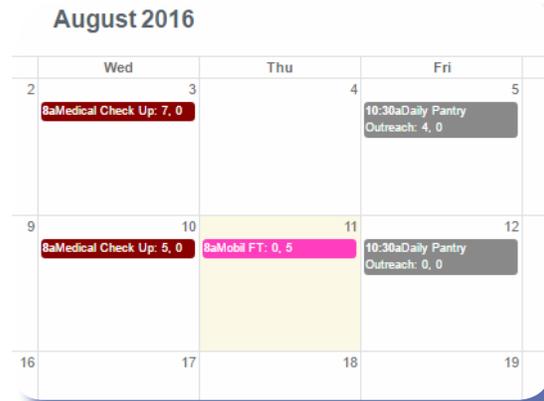
## FINISH

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

The screenshot shows a summary card for the reservation. The title is 'Reservation' and the client name is 'Sterling Silver'. The 'Reservation Time' is '8:00 am' and the 'Status' is 'Reserved'. The 'Address' is '5214 W GOLDEN AVE, Precious, AZ 84521'. The 'Phone Number(s)' are 'Home: (514) 895-9625', 'Work:', and 'Cell:'. A blue arrow labeled 'Back' points to the 'Back' button at the bottom of the card.

## PROCESS A VISIT

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



Click on 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.



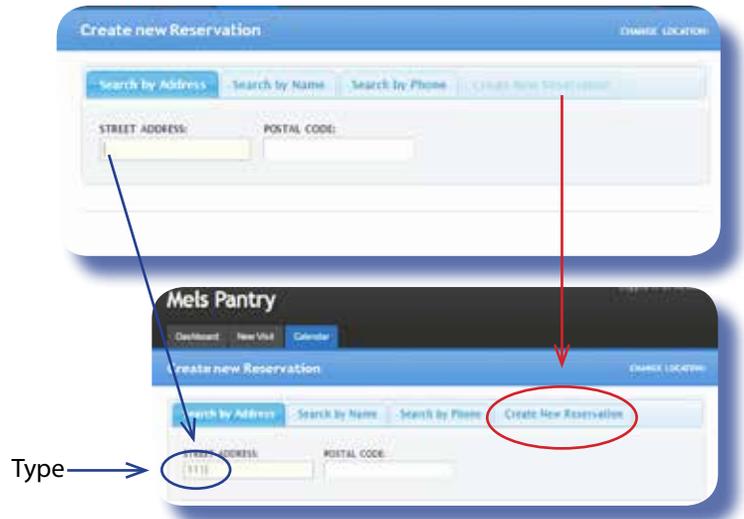
Print Request if this is a feature you use, otherwise click Done and proceed to check in the next client.



## 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.

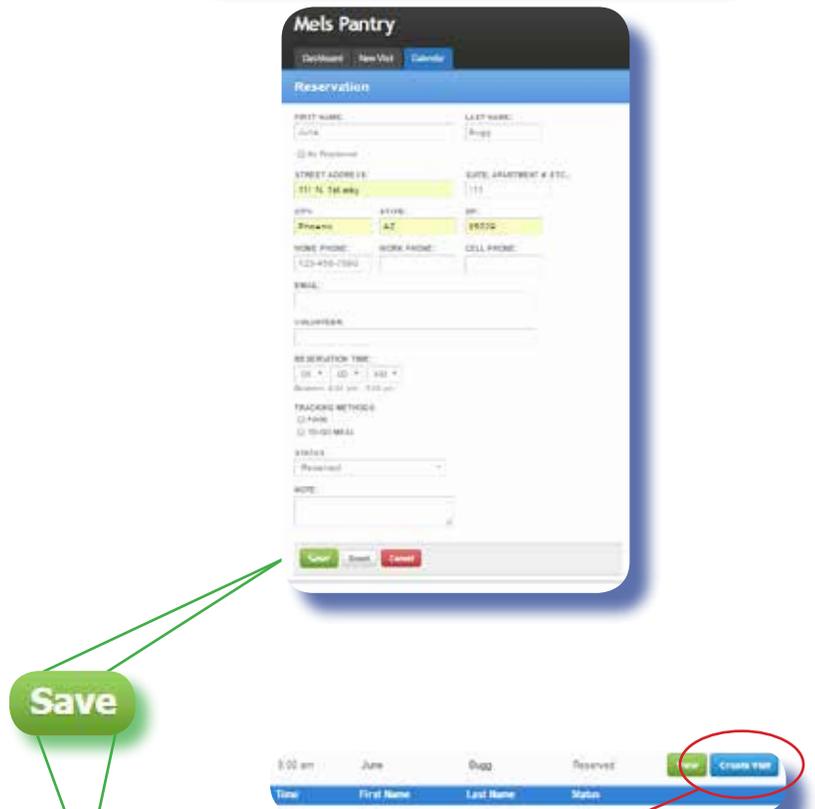
Click on Create New Reservation.



## 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.

