

How to Update a Visit

Click on the New Visit tab. Change the date to reflect the visit date you want to update a visit on. Next select the outreach that your client is located in. (For this help doc, our outreach is Daily Pantry Outreach and the client is Otto Graff)

Mels Pantry

Dashboard New Visit Calendar Time Tracker New Donation Reports

Create new Visit (Jul 1, 2016)

Change Date Select an Outreach Create Outreach

Select an Outreach

Daily Pantry Outreach (10:30 AM)

Medical Check Up (8:00 am)

Financial Help (12:00 pm)

Mobil FT (8:00 am)

SEARCH:

Use Tab, Semicolon ";", or Buttons to the right to change columns.

Scroll down to the bottom of the page to Guests checked in.

Double click on the client you need to update. (do not open the green plus sign)

Guests checked in

Visit On	Name	Hlt Total	Food	Clothing	To Go Meals	Children Visited	Emergency Food Assistance
Jul 1, 12:22 pm	Quinn White	1	Yes	Yes	Yes	Yes	Yes
Jul 1, 12:33 pm	Don Wagner	1	Yes	Yes	Yes	Yes	Yes
Jul 1, 12:34 pm	Otto Graff	1	Yes	Yes	Yes	Yes	Yes
Jul 1, 12:38 pm	Sam Moore	1	Yes	Yes	Yes	Yes	Yes
Jul 1, 12:28 pm	Patricia Bond	1	Yes	Yes	Yes	Yes	Yes
Jul 1, 11:53 am	Robert	1	Yes	Yes	Yes	Yes	Yes

To edit information that is found in the guest record, click on Edit Guest. Edit the information and click Save.

Dashboard New Visit Calendar Time Tracker New Donation Reports

Create New Visit

Otto Graff

Edit Guest Save Visit Update Visit Print Request Done

Save

To edit information that is in the Create New Visit field, just apply your changes and click Update Visit, then click done.

(In this example I added Jon Hancock as the pick up person.)

Create New Visit CHANGE LOCATION

Otto Graff

Edit Guest Save Visit Update Visit Print Request Done Request Signature

General Create New Visit Visit History Files

Create Visit

Nuclear Family

Assigned Location: Mels Pantry

Certification Date: Jun 10, 2016

Guest #: 6

To Go Meals Given For: 0

Pick up Person

ID Presented: Photo ID Residence

Signature: Signature is out of date.

Request Signature

Save Visit Update Visit Print Request Done Request Signature

Update Visit

Done

Otto Graph's visit is now updated.

Guests checked in

SHOW 100 • ENTRIES SEARCH

Visit On	Name	HH Total	Food	Clothing	To-Go Meal	Childcare Voucher	Emergency Food Assistance	
Jul 1, 12:32 pm	Dusty Rhodes	4	Yes	Yes	Yes	Yes	No	Checked In ▾
Jul 1, 12:33 pm	Tish Hughes	2	Yes	Yes	No	Yes	No	Checked In ▾
Jul 1, 12:36 pm	Tom Morrow	3	Yes	Yes	Yes	Yes	No	Checked In ▾
Jul 1, 12:36 pm	Earl E. Bird	2	Yes	No	Yes	No	No	Checked In ▾
Jul 1, 1:15 pm	Rita Burke	1	Yes	No	Yes	No	No	Checked In ▾
Jul 1, 2:17 pm	Otto Graff	3	No	No	Yes	No	No	Checked In ▾

Showing 1 to 6 of 6 entries