



# Dining - Admin Booking

2017 - Fall Edition

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# Overview

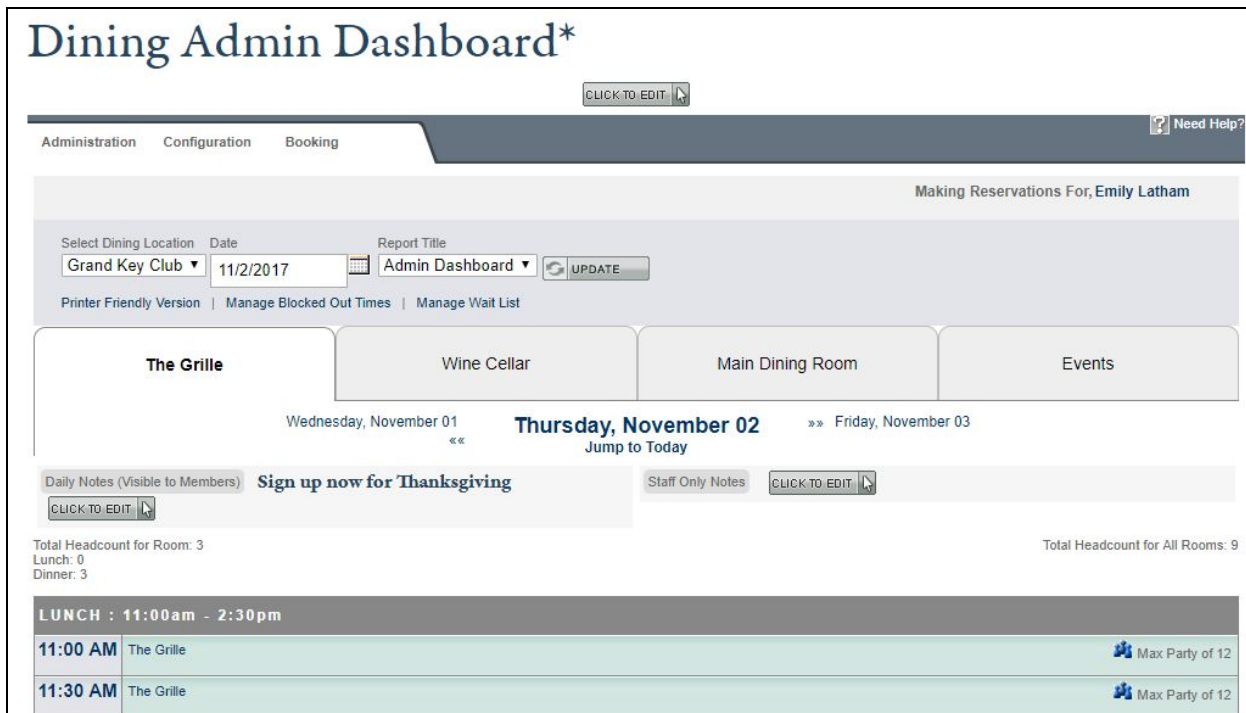
Making **Dining Reservations** on behalf of members can easily be done within the **Dining Admin Dashboard**. Whether a member needs assistance, or if an event is restricted to Admin Booking Only, you will likely be using the **Dining Admin Dashboard** for adding, editing, or deleting reservations often.

## Use Case(s)

- **As an Admin, I would like to add/edit/delete a reservation on behalf of a member.**
- **As an Admin, I would like to review a member's reservation information or view comments on a reservation.**

## Accessing the Tool

To get started, access the **Dining Admin Dashboard**.

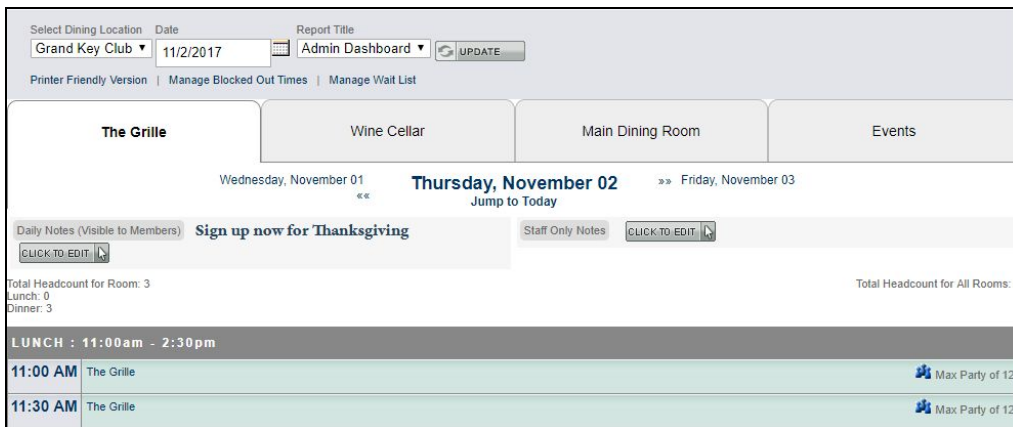


The screenshot displays the Dining Admin Dashboard interface. At the top, it features the title "Dining Admin Dashboard\*" and a "CLICK TO EDIT" button. Below this is a navigation bar with tabs for "Administration", "Configuration", and "Booking", along with a "Need Help?" link. The main content area is titled "Making Reservations For, Emily Latham". It includes a form with fields for "Select Dining Location" (Grand Key Club), "Date" (11/2/2017), and "Report Title" (Admin Dashboard), with an "UPDATE" button. Below the form are links for "Printer Friendly Version", "Manage Blocked Out Times", and "Manage Wait List". The dashboard is divided into four sections: "The Grille", "Wine Cellar", "Main Dining Room", and "Events". A date navigation bar shows "Wednesday, November 01", "Thursday, November 02" (selected), and "Friday, November 03", with a "Jump to Today" link. Below this is a "Daily Notes (Visible to Members)" section with a "Sign up now for Thanksgiving" announcement and a "CLICK TO EDIT" button. A "Staff Only Notes" section is also visible with a "CLICK TO EDIT" button. At the bottom, there is a "Total Headcount for Room: 3" section showing "Lunch: 0" and "Dinner: 3", and a "Total Headcount for All Rooms: 9" section. A "LUNCH : 11:00am - 2:30pm" section is highlighted, showing a reservation for "11:00 AM" at "The Grille" with a "Max Party of 12" icon, and another for "11:30 AM" at "The Grille" with a "Max Party of 12" icon.

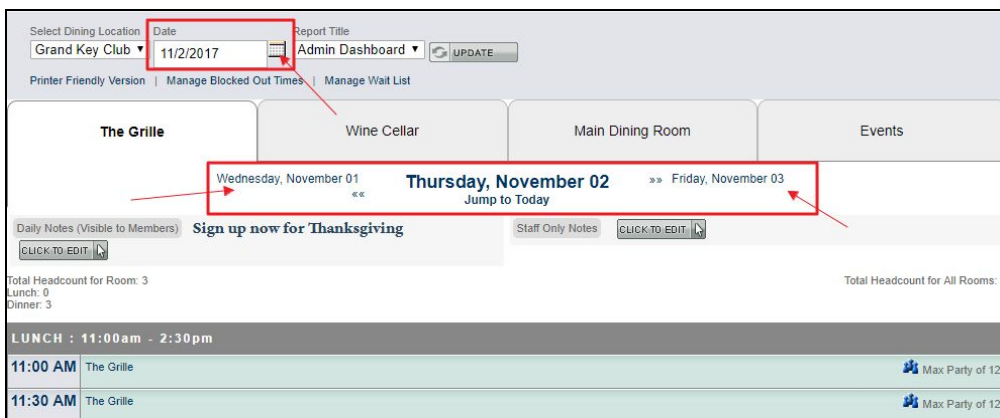
**Please Note:** The locations of your Dining Admin Dashboard may vary depending on your website navigation, however, this is typically located under the Dining Dropdown on the private side of the website.

## Dining Calendar Overview

The Admin Dining Calendar mirrors the Member Dining Calendar, except you will have more options and varied styling.



The calendar will default to today's date, but you may use the datepicker to alter the dates.











Above the calendar, you can view the total headcount for each room broken down by schedule like lunch or dinner.

Total Headcount for Room: 3 Lunch: 0 Dinner: 3		Total Headcount for All Rooms: 9
<b>LUNCH : 11:00 am - 2:30 pm</b>		
11:00 AM	The Grille	 Max Party of 12
11:30 AM	The Grille	 Max Party of 12

## Booking a Reservation

To begin booking, click on any open time slot.

<b>LUNCH : 11:00 am - 2:30 pm</b>		
11:00 AM	The Grille	 Max Party of 12
11:30 AM	The Grille	 Max Party of 12
12:00 PM	The Grille	 Max Party of 12
12:30 PM	The Grille	 Max Party of 12
1:00 PM	The Grille	 Max Party of 12
1:30 PM	The Grille	 Max Party of 12
2:00 PM	The Grille	 Max Party of 12
2:30 PM	The Grille	 Max Party of 12

This will launch the booking window.

**Book Reservation**

Date:

Time:  Dining Room:

Adults:  Children:

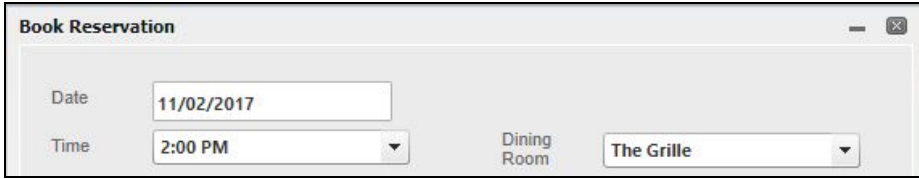
Send Notifications  Reserve As A Person

Patron 1

Comments Admin Notes Debug

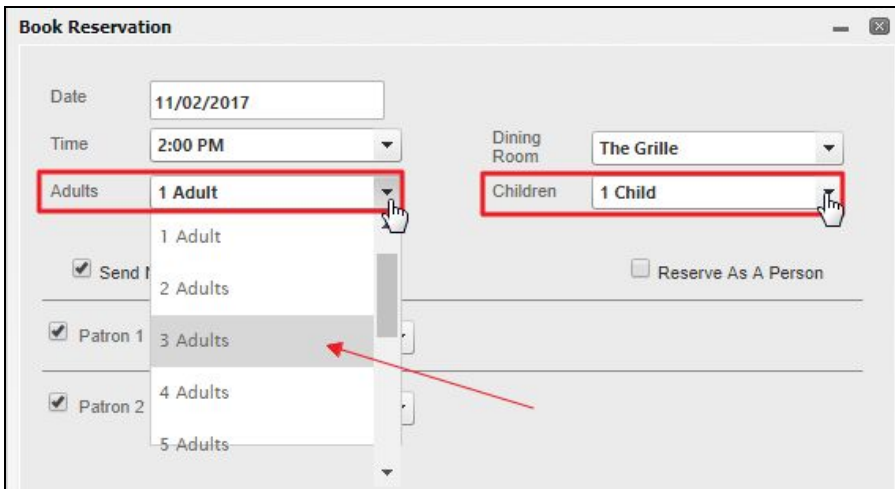
Write a comment

At the top of the booking window, you may change the date, time, and dining room if needed.



The screenshot shows a window titled "Book Reservation" with the following fields: Date (11/02/2017), Time (2:00 PM), and Dining Room (The Grille).

Determine the party size by using the adult drop down and the children dropdown.



The screenshot shows the "Book Reservation" window with the "Adults" dropdown menu open, displaying options from 1 to 5 Adults. The "Children" dropdown is also open, showing 1 Child. A red box highlights the "Adults" dropdown, and another red box highlights the "Children" dropdown. A red arrow points to the "3 Adults" option in the dropdown menu.

Once you set the party size, the patron section below will update accordingly.



The screenshot shows the "Book Reservation" window with the "Adults" dropdown set to 3 Adults and the "Children" dropdown set to 1 Child. The "Send Notifications" checkbox is checked, and the "Reserve As A Person" checkbox is unchecked. The "Patron" section is updated to show four patron entries, each with a checked checkbox and a "Type Patron Name" dropdown menu. A red box highlights the entire patron section.

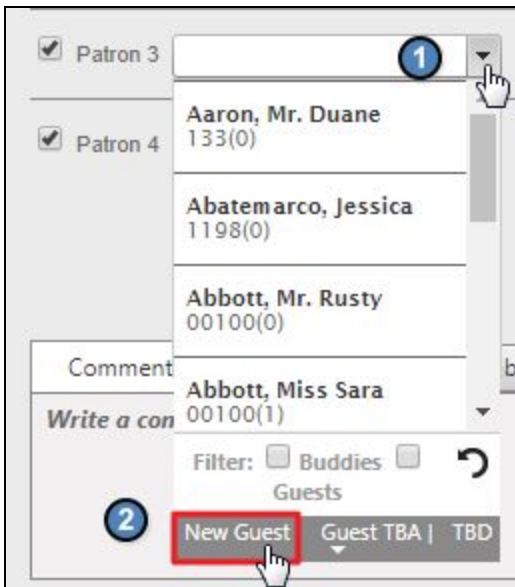
Add the member whom you are booking on behalf of in the first patron slot by typing their first name, then a comma, and then their last name. Click on the member's name to add the member to the reservation.



**Please Note:** The member added to the Patron 1 field will be the owner of the particular reservation.

Continue adding known patron's, or you may leave the slots as 'Patron' which will convert to TBD's.

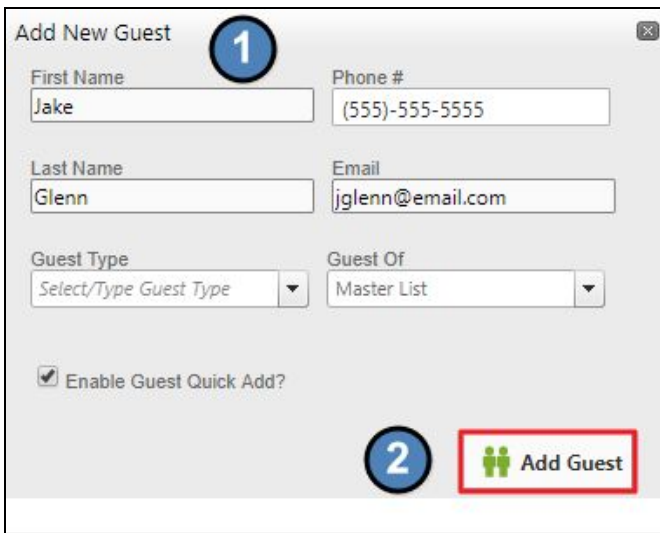
You can easily add Guests to reservations by clicking on the Patron dropdown and choosing **New Guest**.



A pop warning will launch, **click OK**.

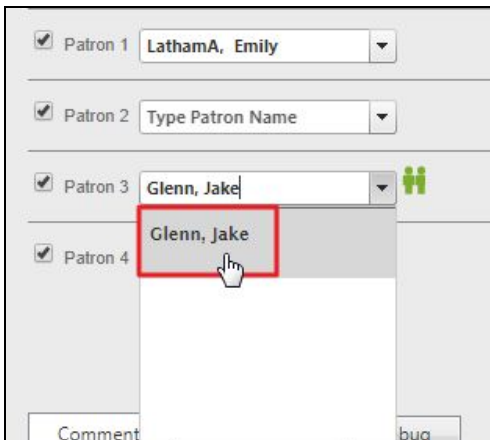


Add the Guest's information and then **click Add Guest**. This will allow you, or the member, to easily select the Guest in the future for reservations.



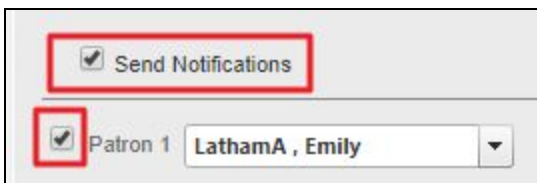
A screenshot of a web form titled "Add New Guest". The form has several input fields: "First Name" with "Jake", "Phone #" with "(555)-555-5555", "Last Name" with "Glenn", and "Email" with "jglenn@email.com". There are two dropdown menus: "Guest Type" with the text "Select/Type Guest Type" and "Guest Of" with "Master List". A checkbox labeled "Enable Guest Quick Add?" is checked. At the bottom right, there is a green "Add Guest" button with a person icon. A blue circle with the number "1" is next to the "First Name" field, and another blue circle with the number "2" is next to the "Add Guest" button. The "Add Guest" button is also highlighted with a red rectangular box.

Once the Guest information is added, **click on the Guest's name** in the dropdown to add the guest to the reservation.



A screenshot of a reservation form. It shows four "Patron" rows. "Patron 1" has "LathamA, Emily" selected. "Patron 2" has "Type Patron Name" selected. "Patron 3" has "Glenn, Jake" selected, and a dropdown menu is open below it, also showing "Glenn, Jake". The "Glenn, Jake" option in the dropdown is highlighted with a red rectangular box, and a hand cursor is pointing at it. "Patron 4" is empty. At the bottom, there is a "Comment" field and a "bug" button.

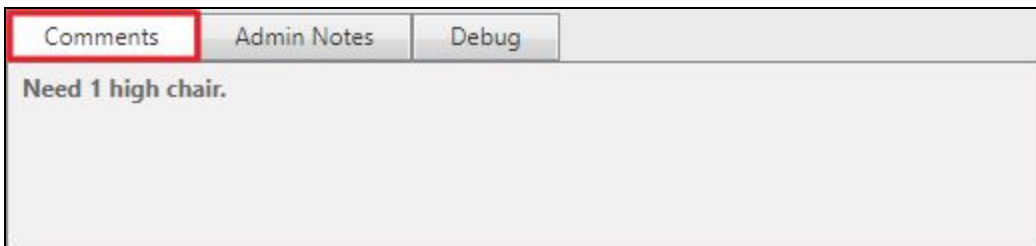
To the left of each patron's name there will be a checkbox which is tied to event notifications. It is best to leave this checked so patrons will receive email notifications on their reservation.



A screenshot of a form with two rows. The first row contains a checked checkbox followed by the text 'Send Notifications'. The second row contains a checked checkbox followed by the text 'Patron 1' and a dropdown menu showing 'LathamA , Emily'. Red boxes highlight the checkboxes in both rows.

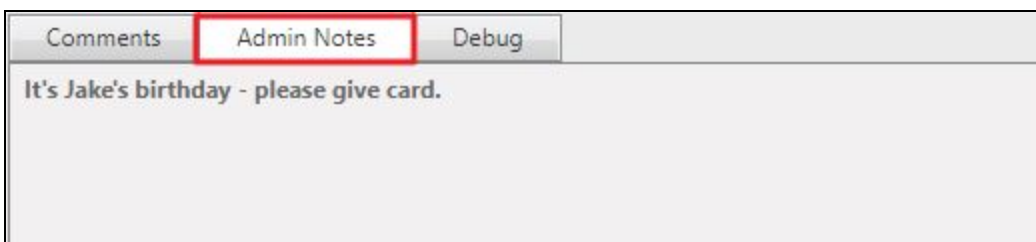
At the bottom of the booking window, you can add two types of comments: member comments and Admin Notes.

**Member comments** are visible to members, and is typically just filled out by members.



A screenshot of a form with three tabs: 'Comments', 'Admin Notes', and 'Debug'. The 'Comments' tab is selected and highlighted with a red box. Below the tabs, the text 'Need 1 high chair.' is displayed.

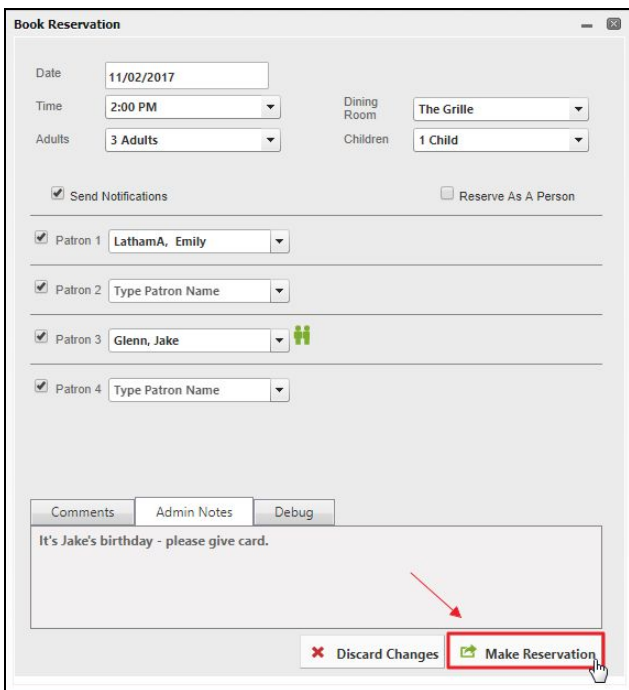
If you would like to make **Admin Notes** that will be visible to Admins about the reservation, please use the **Admin Notes** section.



A screenshot of a form with three tabs: 'Comments', 'Admin Notes', and 'Debug'. The 'Admin Notes' tab is selected and highlighted with a red box. Below the tabs, the text 'It's Jake's birthday - please give card.' is displayed.



To make the reservation, **click Make Reservation.**



## Changing a Reservation Status

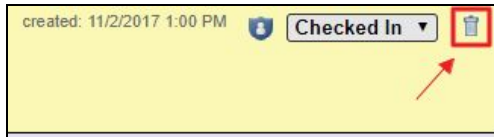
Once the reservation is on the calendar, you can easily change the reservation status to help manage seatings.

To the far right of the reservation there will be a dropdown that you may use to signify when the patron(s) arrive, when they are seated, and when they leave.



# Canceling/Edit Reservations

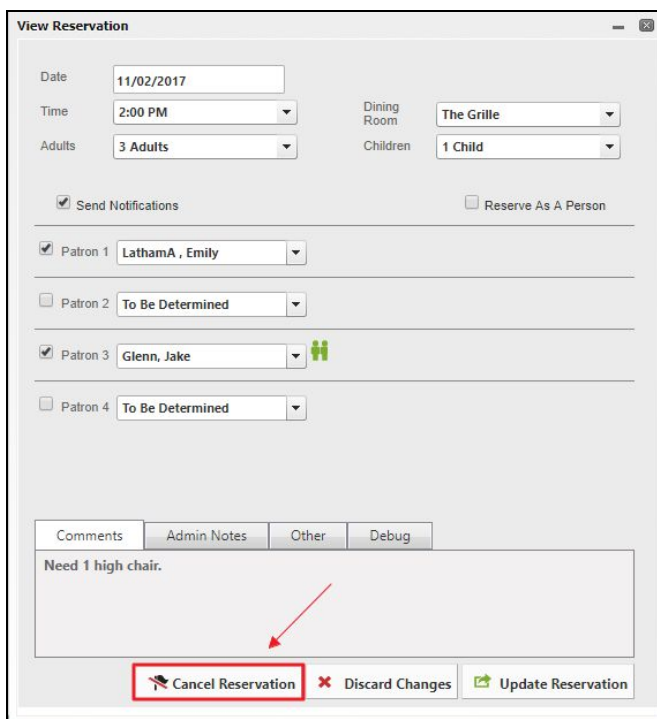
You can easily cancel a reservation directly on the Admin Dining Calendar. There will be a trashcan associated with each reservation. Simply **click** the trashcan to **delete** the reservation.



You may also edit the reservation by clicking on the reservation.



From here, you can either make edits to the reservation or you may cancel the reservation.



## FAQs

**Q: As an Admin, if I make a reservation on behalf of a member, will they still receive email notifications?**

A: Yes! So long as the notification checkbox is left enabled, the member will receive a confirmation email once the reservation is made. The member will also receive any further communications such as if the event is edited or canceled.

## Best Practices

- Be sure to not make reservations, edits, or cancel a reservation before speaking with the member.
- Navigate to the day of the reservation on the calendar before making reservations so you may review the schedule before adding additional reservations.