



Dining - Admin Booking

2017 - Fall Edition

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Overview

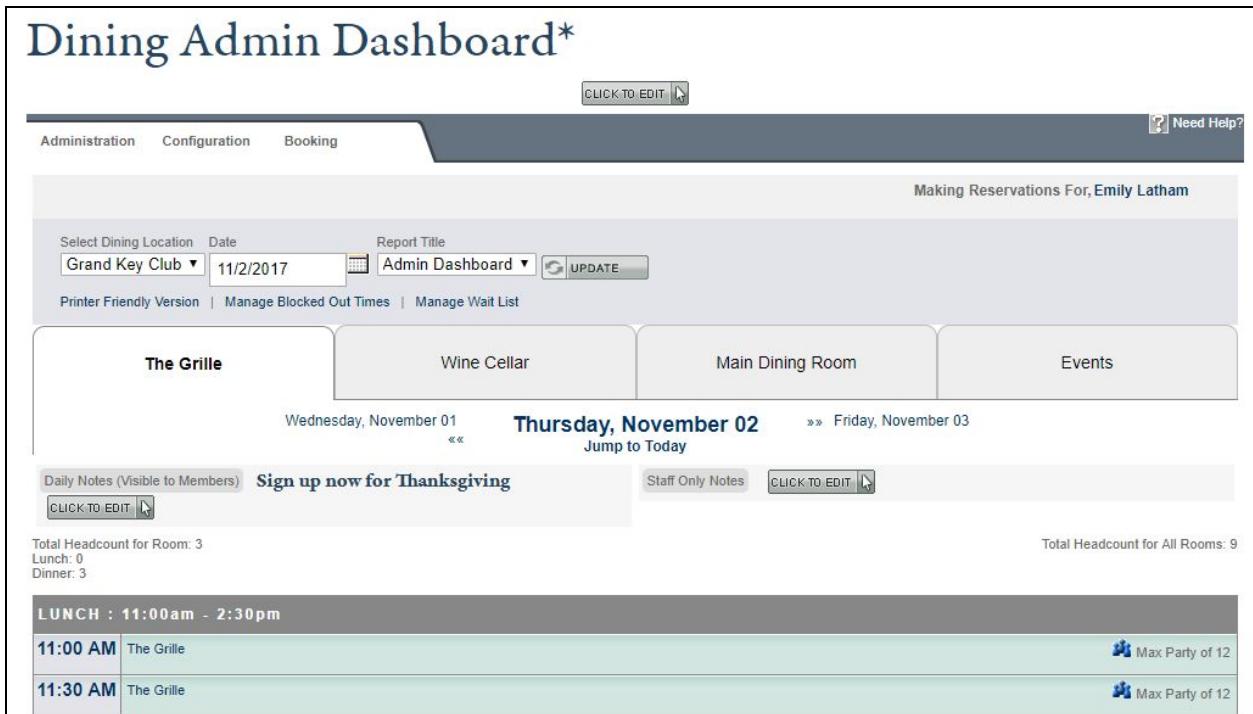
Making **Dining Reservations** on behalf of members can easily be done within the **Dining Admin Dashboard**. Whether a member needs assistance, or if an event is restricted to Admin Booking Only, you will likely be using the **Dining Admin Dashboard** for adding, editing, or deleting reservations often.

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**.

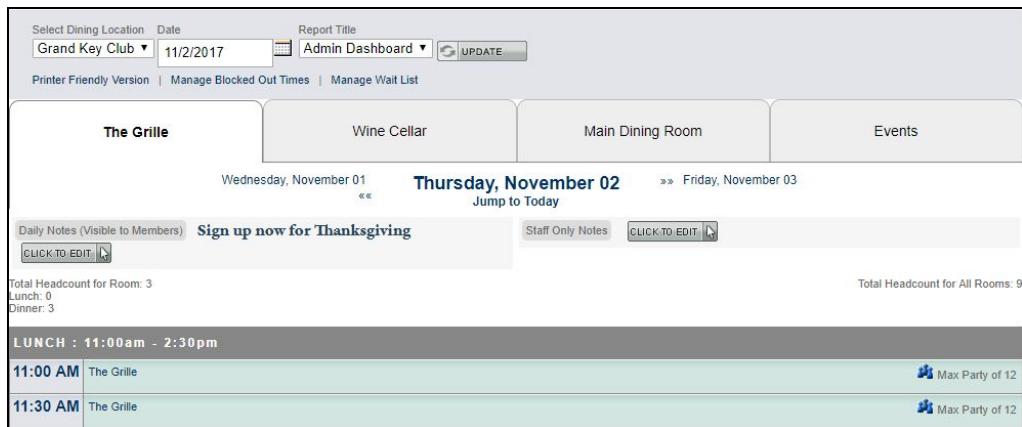


The screenshot shows the Dining Admin Dashboard interface. At the top, there is a header bar with a 'CLICK TO EDIT' button and a 'Need Help?' link. Below the header, a navigation bar includes 'Administration', 'Configuration', and 'Booking'. The main content area is titled 'Making Reservations For, Emily Latham'. It features a search bar for 'Select Dining Location' (set to 'Grand Key Club'), 'Date' (set to '11/2/2017'), and 'Report Title' ('Admin Dashboard'). Below the search bar are links for 'Printer Friendly Version', 'Manage Blocked Out Times', and 'Manage Wait List'. The dashboard is divided into four main sections: 'The Grille', 'Wine Cellar', 'Main Dining Room', and 'Events'. The 'The Grille' section is active, showing a date range from 'Wednesday, November 01' to 'Thursday, November 02' (with a 'Jump to Today' link). A promotional message 'Sign up now for Thanksgiving' is displayed above the reservation grid. The grid shows two entries: '11:00 AM The Grille' and '11:30 AM The Grille', both with a note 'Max Party of 12'. At the bottom, there are links for 'Total Headcount for Room: 3' (Lunch: 0, Dinner: 3) and 'Total Headcount for All Rooms: 9'.

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.

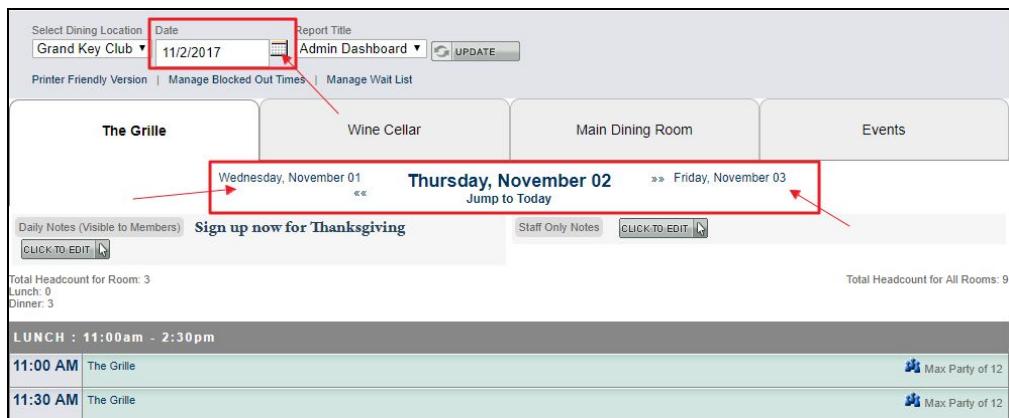


Select Dining Location Date Report Title
Grand Key Club ▾ 11/2/2017 Admin Dashboard ▾ UPDATE

Printer Friendly Version | Manage Blocked Out Times | Manage Wait List

The Grille	Wine Cellar	Main Dining Room	Events
Wednesday, November 01	Thursday, November 02	Friday, November 03	
Jump to Today			
Daily Notes (Visible to Members) Sign up now for Thanksgiving CLICK TO EDIT		Staff Only Notes CLICK TO EDIT	
		Total Headcount for All Rooms: 9	
Total Headcount for Room: 3 Lunch: 3 Dinner: 3			
LUNCH : 11:00am - 2:30pm			
11:00 AM	The Grille	 Max Party of 12	
11:30 AM	The Grille	 Max Party of 12	

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



Select Dining Location Date Report Title
Grand Key Club ▾ **11/2/2017** Admin Dashboard ▾ UPDATE

Printer Friendly Version | Manage Blocked Out Times | Manage Wait List

The Grille	Wine Cellar	Main Dining Room	Events
Wednesday, November 01	Thursday, November 02	Friday, November 03	
Jump to Today			
Daily Notes (Visible to Members) Sign up now for Thanksgiving CLICK TO EDIT		Staff Only Notes CLICK TO EDIT	
		Total Headcount for All Rooms: 9	
Total Headcount for Room: 3 Lunch: 0 Dinner: 3			
LUNCH : 11:00am - 2:30pm			
11:00 AM	The Grille	 Max Party of 12	
11:30 AM	The Grille	 Max Party of 12	

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
LUNCH : 11:00am - 2:30pm	
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.

LUNCH : 11:00am - 2:30pm	
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.

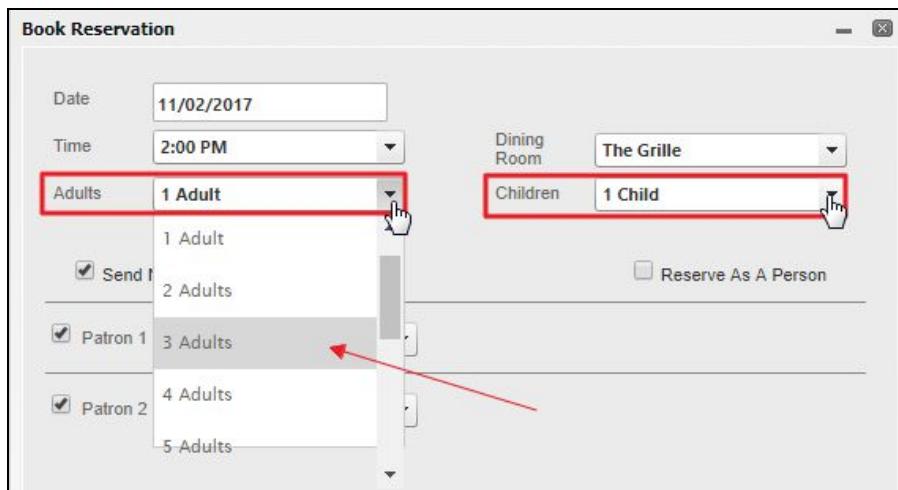
Book Reservation

Date: 11/02/2017	Time: 2:00 PM	Dining Room: The Grille
Adults: 1 Adult	Children: None	
<input checked="" type="checkbox"/> Send Notifications <input type="checkbox"/> Reserve As A Person		
<input checked="" type="checkbox"/> Patron 1 Type Patron Name: <input type="text"/>		
<input type="button" value="Comments"/> <input type="button" value="Admin Notes"/> <input type="button" value="Debug"/>		
<i>Write a comment</i>		
<input type="button" value="Discard Changes"/> <input type="button" value="Make Reservation"/>		

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



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



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



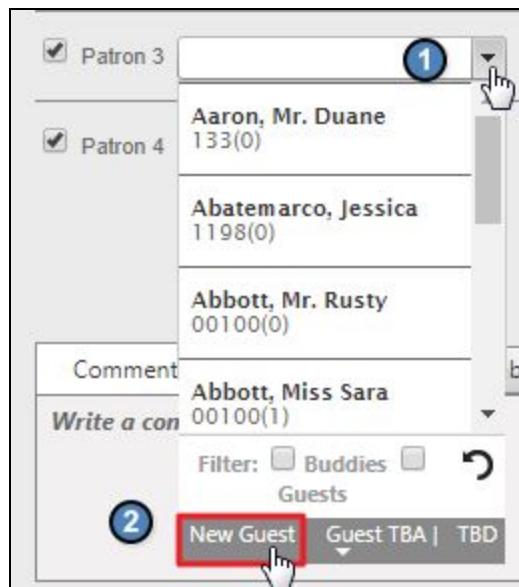
Add the member whom you are booking on behalf of in the first patron slot by typing their first name, then a comma, and then their last name. Click on the member's name to add the member to the reservation.



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.

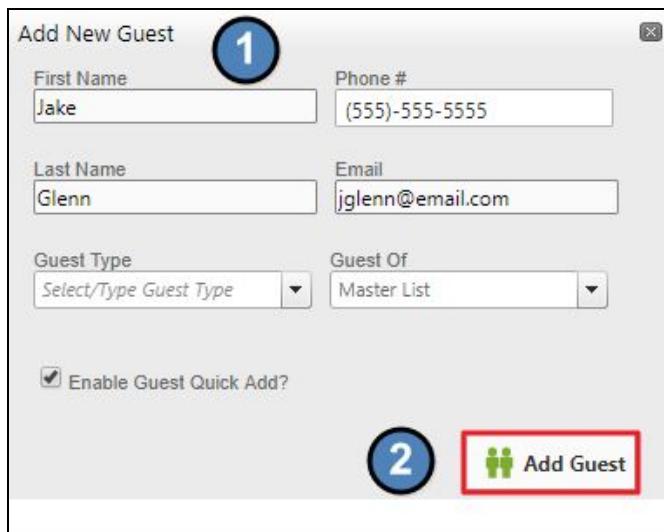
You can easily add Guests to reservations by clicking on the Patron dropdown and choosing **New Guest**.



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



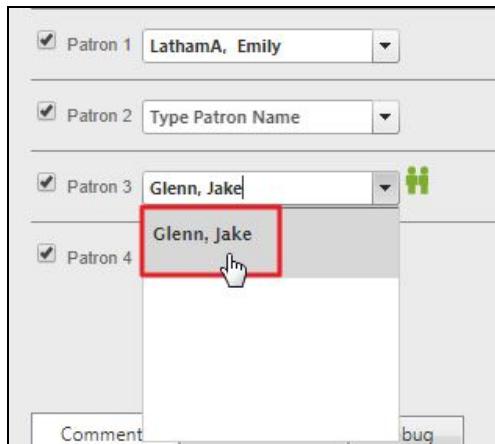
Add the Guest's information and then **click Add Guest**. This will allow you, or the member, to easily select the Guest in the future for reservations.



The image shows the "Add New Guest" dialog box. It contains the following fields:

- First Name: Jake (circled with a blue circle labeled "1")
- Phone #: (555)-555-5555
- Last Name: Glenn
- Email: jglenn@email.com
- Guest Type: Select/Type Guest Type
- Guest Of: Master List
- Enable Guest Quick Add?
- Buttons: "2" (circled with a blue circle), a green icon, and a red-bordered "Add Guest" button.

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

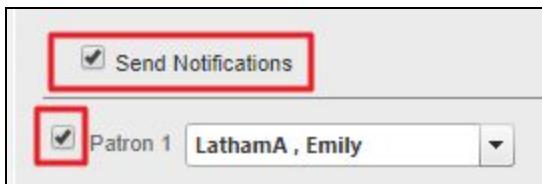


The image shows a dropdown menu for selecting a guest for a reservation. The menu has four items, each with a checkbox and a dropdown arrow:

- Patron 1: LathamA, Emily
- Patron 2: Type Patron Name
- Patron 3: Glenn, Jake (highlighted with a red box)
- Patron 4: Glenn, Jake (highlighted with a red box and a cursor icon)

Below the dropdown are two buttons: "Comment" and "bug".

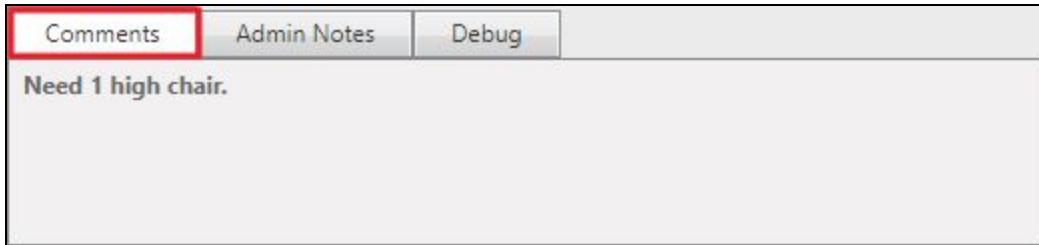
To the left of each patron's name there will be a checkbox which is tied to event notifications. It is best to leave this checked so patrons will receive email notifications on their reservation.



A screenshot of a software interface for booking a table. At the top, there is a checkbox labeled "Send Notifications" which is checked. Below this, there is a dropdown menu showing "Patron 1" and "LathamA , Emily". The entire row containing the checkbox and the dropdown is highlighted with a red box.

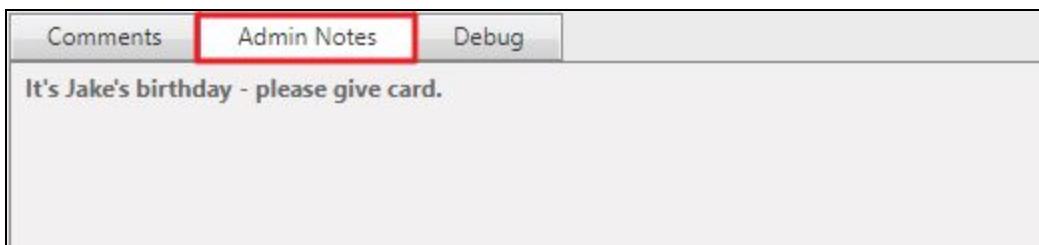
At the bottom of the booking window, you can add two types of comments: member comments and Admin Notes.

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



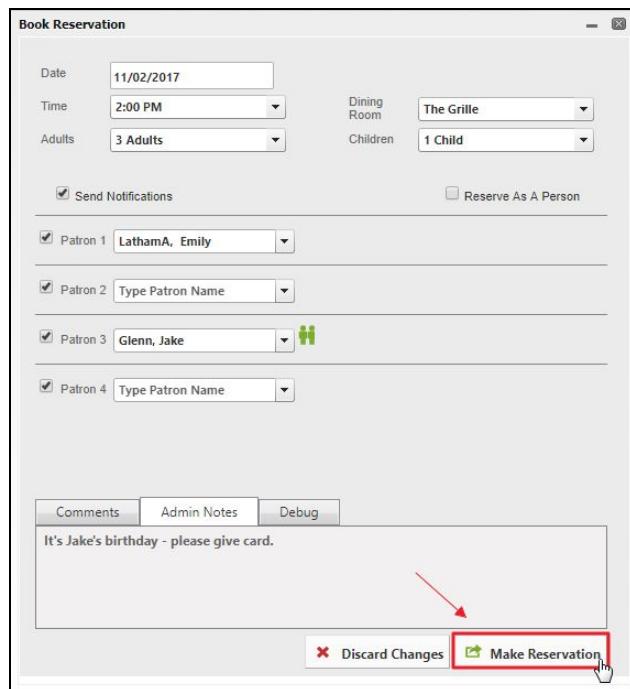
A screenshot of a software interface for booking a table. At the top, there are three tabs: "Comments" (which is selected and highlighted with a red box), "Admin Notes", and "Debug". Below the tabs, there is a text input field containing the text "Need 1 high chair.". The entire text input field area is highlighted with a red box.

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 software interface for booking a table. At the top, there are three tabs: "Comments", "Admin Notes" (which is selected and highlighted with a red box), and "Debug". Below the tabs, there is a text input field containing the text "It's Jake's birthday - please give card.". The entire text input field area is highlighted with a red box.

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



The screenshot shows the 'Book Reservation' window. It includes fields for Date (11/02/2017), Time (2:00 PM), Dining Room (The Grille), Adults (3 Adults), and Children (1 Child). There are checkboxes for 'Send Notifications' and 'Reserve As A Person'. The 'Comments' section contains the note: 'It's Jake's birthday - please give card.' A red arrow points from this note towards the 'Make Reservation' button at the bottom right, which is highlighted with a red border.

Changing a Reservation Status

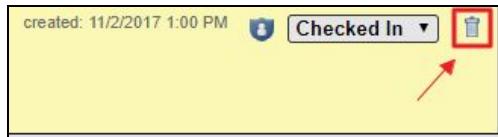
Once the reservation is on the calendar, you can easily change the reservation status to help manage seatings.

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

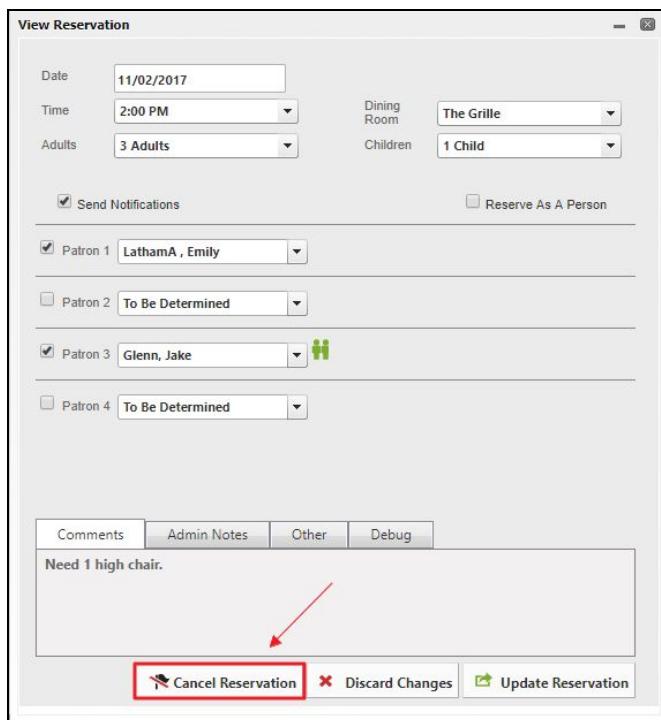
You can easily cancel a reservation directly on the Admin Dining Calendar. There will be a trashcan associated with each reservation. Simply **click** the trashcan to **delete** the reservation.



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.