Hamper Program QuickStart
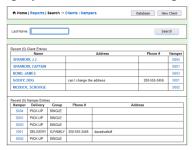
HOME – displays a search field, the last five client entries, and the last five hamper entries in descending order.

REPORTS – displays information related to children, hampers, and group size

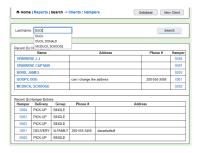**SEARCH** – returns to **HOME** page

CLIENT – displays all clients in database even ones that are inactive

HAMPERS – displays a sorted list of hampers

To find a client

1. Enter last name into the **LAST NAME** field. Similar names will appear.

2. Select the name you want and click **SEARCH** or single click the name. The client's profile appears.
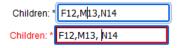

3. Ask client if **PICK-UP** or **DELIVERY**. If delivery, verify address, phone number, and other details.

> Note: Be sure to verify household dynamics as phone numbers may change, number of people associated with household may change.

4. Click **SAVE CLIENT**. This client now has a hamper attached to their profile.

To create a new client

1. Search for **LAST NAME** to verify client isn't already in the database.

2. If client isn't found then click **NEW CLIENT**. A blank client profile appears.

3. Enter **LAST NAME** and **FIRST NAME.**

4. Ask client if **PICK-UP** or **DELIVERY**. **PICK-UP** is default. If **DELIVERY**, verify address, phone number, and other details.

5. Select **GROUP SIZE** (**SINGLE** is default).

6. Enter **CHILDREN** in this format: **M+AGE,F+AGE,.**

> Note: A red line indicates the format isn't correct.

7. Click **SAVE CLIENT**. The hamper appears at the bottom of the screen identifying the hamper as a **SINGLE, COUPLE, FAMILY,** or **EXTRA LARGE FAMILY.**

To delete a hamper

1. Select a **HAMPER**. **HAMPER** details appear.

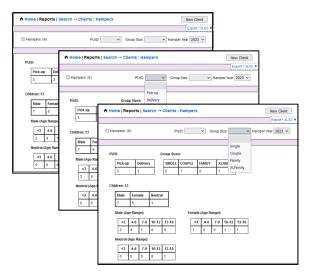2. Select **ARE YOU SURE?** and then **DELETE HAMPER.** The **HAMPER** is deleted.

To delete a client

1. Select a **CLIENT**. **CLIENT** details appear.

2. Select **ARE YOU SURE?** and then **DELETE CLIENT.** Both the **CLIENT** and the **HAMPER** are deleted.

Reports

Depending on selections; identifies number of children (**AGE RANGE** and **GENDER**), in each **GROUP SIZE** for both **PICK-UP** and **DELIVERY.**

Note: Print to PDF using the browser print function.

Report/Exports

1. On the **REPORTS** page, click **EXPORT *.XLSX.** A drop-down appears.

2. Click **DOWNLOAD**. A **SAVE FILE** dialog appears.

3. Save the file to a predetermined or default location**.**

4. Open the file. The following appears:

Client/Export

1. On the **CLIENT** page, click **EXPORT *.XLSX.** A drop-down appears.

2. Click **DOWNLOAD**. A SAVE FILE dialog appears.

3. Save the file to a predetermined or default location.
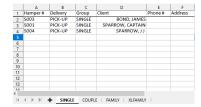
4. Open file. The following appears:

Hamper/Export

1. On the **HAMPER** page, click **EXPORT *.XLSX.** A drop-down appears.

2. Click **DOWNLOAD**. Save the file to a predetermined or default location**.**

3. Open file. The following appears:

Note: Each group size is found in separate **WORKSHEETS.**

General Items

- Recommend using Firefox as the browser
- Red lines indicates a mandatory field, an error, or something you need to do first
- Extra large family (**XLFAMILY**) consists of four or more people

Administrator

We strongly recommend you create a backup at the end of the hamper season. If anything untoward happens to the data, this backup can be used to start a new season.