



Food Pantry Software



Administrative Utility Functions

Administrative Utility Functions

A set of pantry-related utility functions can be performed by those with administrative authorization. To access these functions, click **Utilities** from the main menu and the **Utilities** form will appear.

The image shows a screenshot of a web application interface. The main window is titled "Main Menu" and features the logo of the Society of St. Vincent de Paul, U.S.A. The title "Sacred Heart Food Pantry Middleboro, MA" is prominently displayed. There are two main sections: "Forms" and "Reports". The "Forms" section has a "Select a form" dropdown menu with options: "Recipient Information", "Pantry Check-in", "Closed Accounts", "Utilities", "Export Data", and "Database Maintenance". The "Utilities" option is circled in orange. Below this list is an "Open" button. The "Reports" section has a "Select a category" dropdown menu with options: "Financial Assistance", "Food Dis", "Intakes a", "Holiday I", "Househo", and "Search". Below this list is a "Search" button. At the bottom of the main menu are "Backup" and "Exit Application" buttons. A secondary window titled "Utilities" is overlaid on the main menu. It has a title "Utilities" and a "Select an option" dropdown menu with three radio button options: "Delete closed / inactive recipients" (which is selected), "Close out holiday meal processing", and "Modify holiday meal entries". At the bottom of the "Utilities" window are "Select" and "Close" buttons.

Main Menu

Sacred Heart Food Pantry
Middleboro, MA

Forms

Select a form

- Recipient Information
- Pantry Check-in
- Closed Accounts
- Utilities
- Export Data
- Database Maintenance

Open

Reports

Select a category

- Financial Assistance
- Food Dis
- Intakes a
- Holiday I
- Househo
- Search

Backup

Exit Application

Utilities

Utilities

Select an option

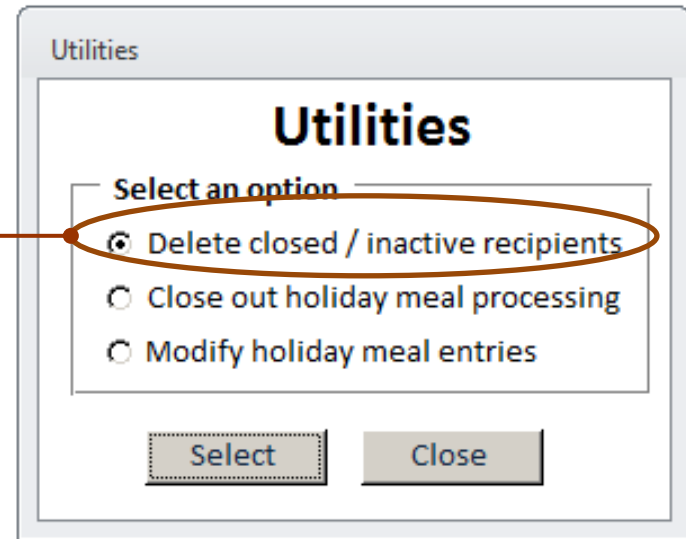
- Delete closed / inactive recipients
- Close out holiday meal processing
- Modify holiday meal entries

Select

Close

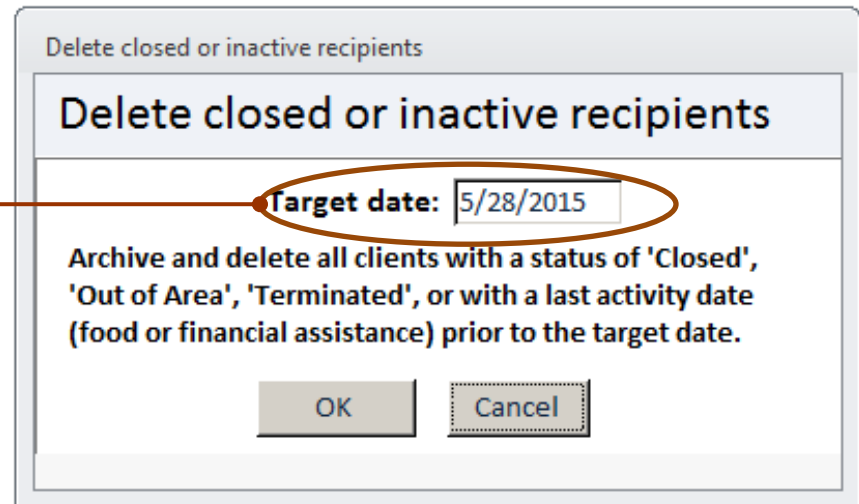
Deleting closed or inactive recipients

Periodically, you may delete closed or inactive recipients from the list of active recipients. From the Utilities menu, select **Delete closed / inactive recipients**. Deleted recipient records are moved to the closed accounts database, and household member records are deleted.



The screenshot shows a window titled "Utilities". Inside, there is a section titled "Utilities" with a dropdown menu labeled "Select an option". The dropdown menu is open, showing three options: "Delete closed / inactive recipients" (which is selected and circled in red), "Close out holiday meal processing", and "Modify holiday meal entries". Below the dropdown are two buttons: "Select" and "Close".

The **Delete closed or inactive recipients** form appears. For recipient records to be defined as inactive, select a date corresponding to the last activity date of the recipients.



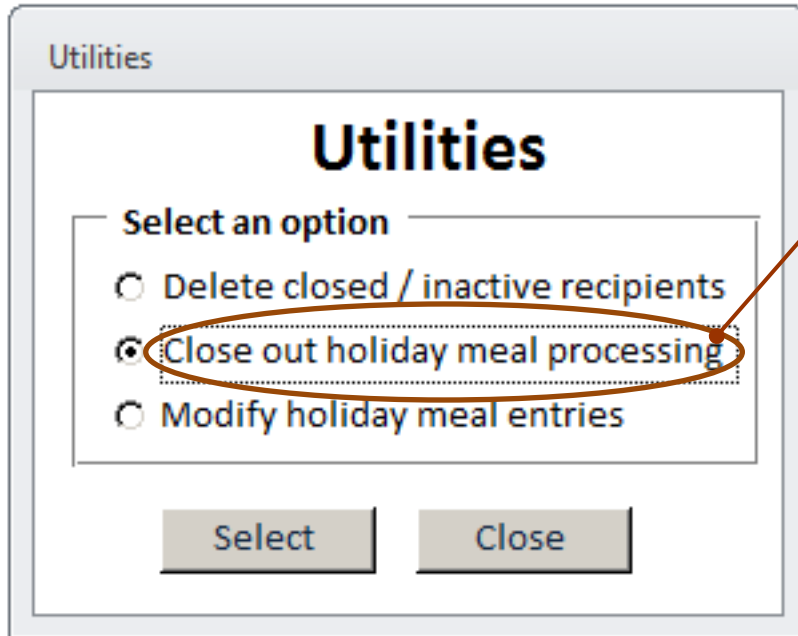
The screenshot shows a window titled "Delete closed or inactive recipients". The main heading is "Delete closed or inactive recipients". Below the heading is a text input field labeled "Target date:" with the value "5/28/2015" entered and circled in red. Below the input field is a paragraph of text: "Archive and delete all clients with a status of 'Closed', 'Out of Area', 'Terminated', or with a last activity date (food or financial assistance) prior to the target date." At the bottom of the window are two buttons: "OK" and "Cancel".

Closing Out a Holiday Meal

After meals have been distributed for a given holiday, an administrator must “close out” that holiday. Those meals that have not been distributed will have their status set to “Failed Pickup,” and an appropriate suspension period will be created for those pantry members who did not pick up their meal.

Closing Out a Holiday Meal

Select ***Close out holiday meal processing*** from the ***Utilities*** menu.



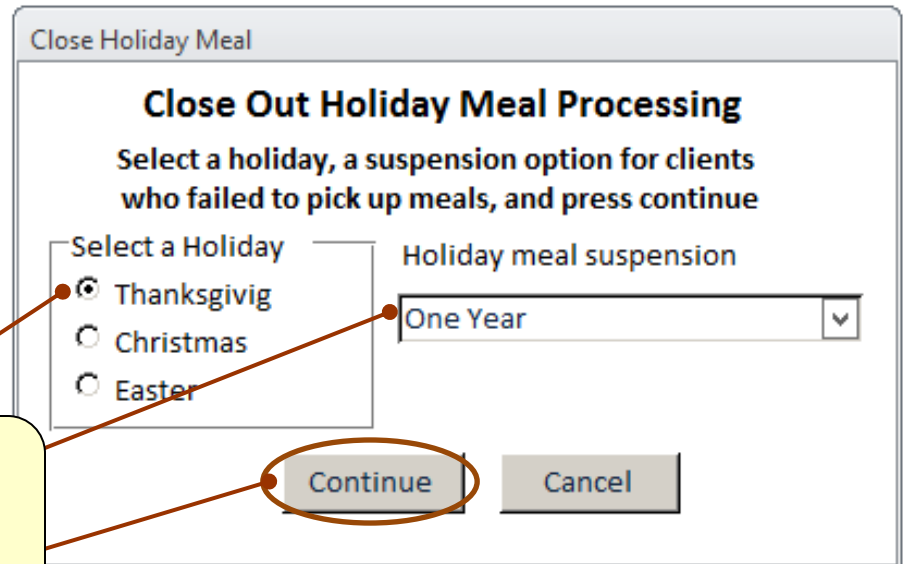
Utilities

Utilities

Select an option

- Delete closed / inactive recipients
- Close out holiday meal processing
- Modify holiday meal entries

Select Close



Close Holiday Meal

Close Out Holiday Meal Processing

Select a holiday, a suspension option for clients who failed to pick up meals, and press continue

Select a Holiday

- Thanksgivig
- Christmas
- Easter

Holiday meal suspension

One Year

Continue Cancel

When the dialog box appears, click the holiday being closed out, select a suspension option, and click ***Continue***.

Correcting a Holiday Meal Status

If there are corrections to be made to a recipient's status after closing out a holiday meal, select **Modify holiday meal entries** on the **Utilities** form.

Select an option

Delete closed / inactive recipients

Close out holiday meal processing

Modify holiday meal entries

Select Close

When the **Modify Holiday Meal Entries** form appears, select a recipient by name or ID. The administrative user can then

1. Click a holiday suspension entry on or off
2. Delete a holiday meal entry or
3. Toggle the status of a meal between "Failed Pickup" and "Distributed".

Modify Holiday Meal Entry

Modify Holiday Meal Entries

Name

ID

Name: Catherine Bonner
Address: 421 East West Street
Middleboro

Suspensions

Easter Thanksgiving Christmas

Year	Holiday	Status
2016	Easter	Failed Pickup
2015	Christmas	Distributed
2015	Thanksgiving	Distributed
2014	Christmas	Distributed
2014	Thanksgiving	Distributed