



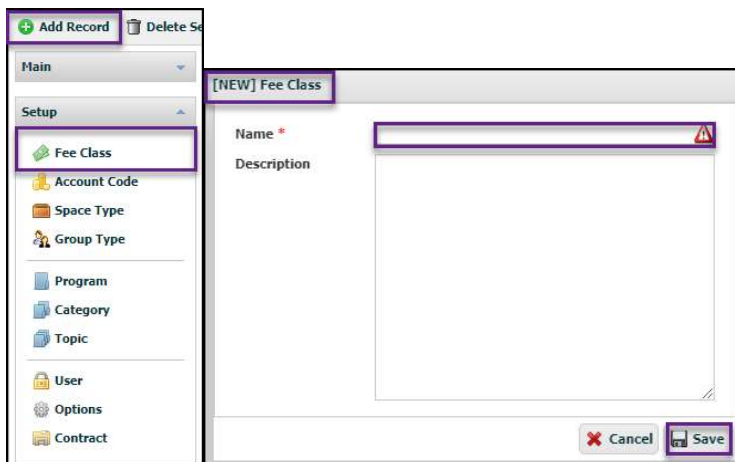
Create a New Reservation

Use Reservations to create a calendar of days for a Class. This Reservation becomes the Class Schedule. A new Reservation must be created for every new Class, and one Reservation can only be attached to one Class. Once a Reservation is attached to a class, it is no longer available to use in any other class.

1. Prior to creating a new Reservation, on the **Setup** menu, verify that there is a **Fee Class** and **Group Type** in the corresponding menu options.



2. Create a new Fee Class and Group Type if none exist.
 - To create a new Fee Class, select **Fee Class**, then **Add Record**. In the **NEW Fee Class** window, enter the **Name** of the Fee Class, then **Save**.



- To create a new Group Type, select **Group Type**, then **Add Record**. In the **NEW Group Type** window, enter the **Name** for the Group, then **Save**.

The screenshot shows a software interface with a sidebar menu on the left. The 'Add Record' button is highlighted with a red box. The 'Group Type' option in the sidebar is also highlighted with a red box. To the right, the '[NEW] Group Type' window is open, showing a text input field for 'Group Type' with a red asterisk and a warning icon. The 'Save' button is highlighted with a red box.

3. Additionally, verify that there is a **Building** present for the location your reservation will take place in.

- To create a new Building, select **Building** under the **Main** menu, then **Add Record**. In the **NEW Building** window, enter the **Name** of the Building, then **Save**.
- Before saving, the user may add the Building's physical address.

The screenshot shows a software interface with a sidebar menu on the left. The 'Add Record' button is highlighted with a red box. The 'Building' option in the sidebar is also highlighted with a red box. To the right, the '[NEW] Building' window is open, showing text input fields for 'Name', 'Address', and 'City, St, Zip', each with a red asterisk and a warning icon. There is also a 'Calendar' dropdown menu. The 'Save' button is highlighted with a red box.

4. After verifying that there is a Fee Class and Group Type, select **Group** under the **Main** menu. Add a new group by clicking the **Add Record** button.

The screenshot shows two parts of the software interface. On the left is the 'Main' menu with options: Reservation, Building, Space, Group (highlighted with a purple box), Question Profile, Course, Class, Manager, Instructor, and Person. At the top of the menu are 'Add Record' (with a green plus icon) and 'Delete Se' (with a trash icon). On the right is the '[NEW] Group' form. It has fields for 'Name *', 'Group Type *' (dropdown), and 'Fee Class *' (dropdown), each with a red warning icon. Below these are tabs for 'Contact', 'Billing', 'Notes', and 'Reservations'. The 'Contact' tab is active, showing fields for 'First, Last', 'Email', 'Address', and 'City, St, Zip'. There is also a section for 'Phone Type' and 'Number' with a green plus icon and a trash icon. At the bottom right of the form are 'Cancel' and 'Save' buttons, with 'Save' highlighted by a purple box.

- In the **NEW Group** window, name the Group, and then assign a Group Type and Fee Class to it.
- Click **Save**.

5. Click on the **Reservation** menu option. Add a new Reservation by clicking on **Add Record**.

The screenshot shows the 'Main' menu with the 'Reservation' option highlighted by a purple box. The menu options are: Reservation, Building, Space, Group, Question Profile, Course, Class, Manager, Instructor, and Person. At the top of the menu are 'Add Record' (with a green plus icon) and 'Delete Se' (with a trash icon).

6. Complete the details of the Reservation in the **NEW Reservation** window:

- Assign the Reservation to a group using the **Group** drop-down menu.
- Give the Reservation a name in the **Purpose** field. This name could match the name of the class to which the reservation will be linked.
- Enter the Reservation's **Start** and **End Times** as well as **Start** and **End Dates**.
- Select the radio button that corresponds to the frequency with which the class occurs.
 - When choosing either **Week** or **Month**, select the radio button that corresponds to the number of times the class occurs.
 - When choosing **Week**, select the days on which the class takes place in addition to which weeks of the month the class occurs.
 - Pick-a-Day
 1. For classes that occur multiple times within each week, select **Week** and **Multiple Times Per Week**, then select the weekdays (Mo, Tu, We, etc.) and week number (Wk1, Wk2, etc.) on which class is offered.
 2. For classes that occur on a particular day (or series of days), select **1* Per Week** and **By Day Number**. The calendar will reflect the dates included in the reservation.

- Pick-a-Week

1. For classes in which daily attendance is taken, select **1*Per Week** and the weekday (Mo, Tu, etc.) on which classes begin.

- Select the appropriate building in the **Spaces** area.
- Click on the **Check Availability** button to verify that there are no scheduling conflicts:

Date	Space	Conflict
06/01/2023	Community Center	
06/02/2023	Community Center	
06/05/2023	Community Center	6:00 AM-6:00 PM 22-23 Extended Day
06/06/2023	Community Center	
06/07/2023	Community Center	
06/08/2023	Community Center	

- If there are conflicts, determine if the reservation information must change. If the decision is to create the reservation despite the conflict, click the tiny button which checks all options for the Reservation.
- Uncheck the boxes next to any days you are not offering the class or childcare.
- Click the **Create** button.
 - **NOTE:** Clicking the **Save** or **Add** buttons will erase the entire reservation.

7. Attach this new Reservation to the appropriate Class on the **Schedule** tab.

[407134] Class

Class Number: Pick-a-Day Preschool 2022-2023 Status: Active

Program: Child Care Enrolled: 8

Course: Pick-a-Day Child Care Waitlist: 0

Conf. Email:

General Instructor & Expenses **Schedule** Arrangements Registration Waitlist Receipt Invoice

Use Facility Reservation: ☒ Yes ☐ No

Reservation Group: 2022-2023 PAD Childcare

Date	Start	End	Space
8/2/2022	6:00 AM	6:00 PM	:Vanco Valley School
8/3/2022	6:00 AM	6:00 PM	:Vanco Valley School
8/4/2022	6:00 AM	6:00 PM	:Vanco Valley School
8/5/2022	6:00 AM	6:00 PM	:Vanco Valley School
8/8/2022	6:00 AM	6:00 PM	:Vanco Valley School

Schedule Description

Rich text editor toolbar: Bold, Italic, Underline, Bulleted List, Numbered List, Source

Reports Cancel Save

Adding Dates to an Existing Reservation

See also article: Add Day(s) to an Existing Registration