



we can skip this if needed

Login

logo & header

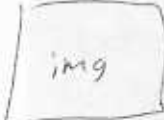
Username:

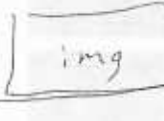
Password:

we can customize this login screen if needed

News & Updates

logo & header

first time each day go to news & updates

Normal news & updates page. This is skipable if needed.

home page

?

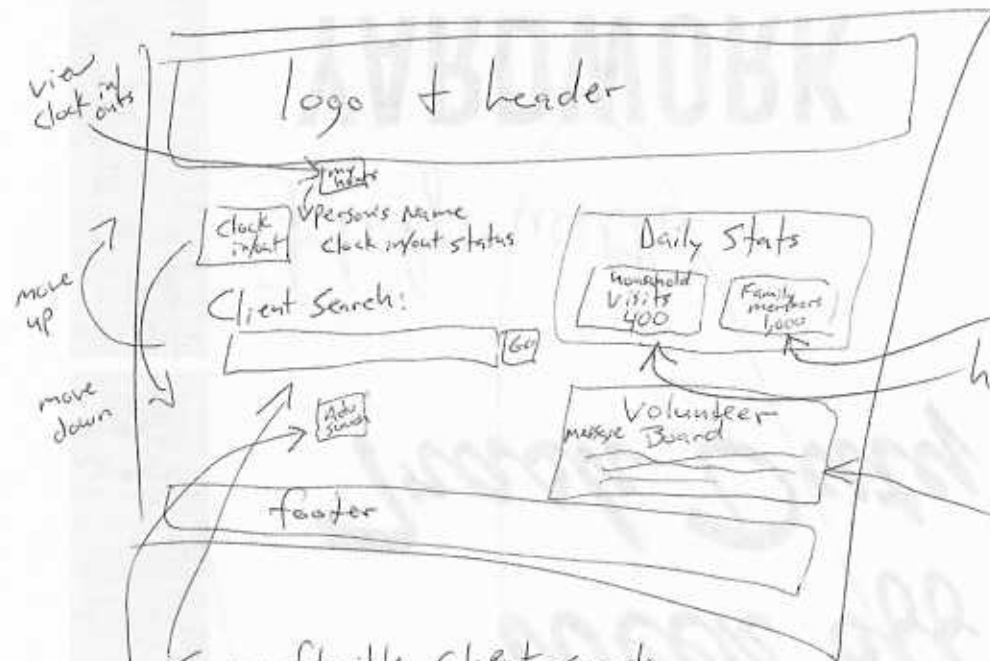
yet to be determined

See other pages & possible dashboards

Any other time, during the day, skip the news & updates & go directly to the main home page

Pg. 1

Volunteer Home



people within each household served
households served today

Notes & instructions for volunteers - these are controlled by admin
- Question - 1 message that we change out or multiple messages that we control/manage?

Super flexible Client search

- first name, last name, first & last name, cell phone, home phone, email, id #, barcode, address

Advanced Client search button
Goes to a new page for advanced options

Question - On the searches... what about a household search and a sub or member search?

- Point them to different searches - one to customers main or household - and one to customer contacts (members or subs)

- Normal clock in/out options
- Add in adv or admin timeclock options

- move down the page - put the household & member searches first

* See side note for other possible search options

Main advanced client search

Calendar & elements of time homepage

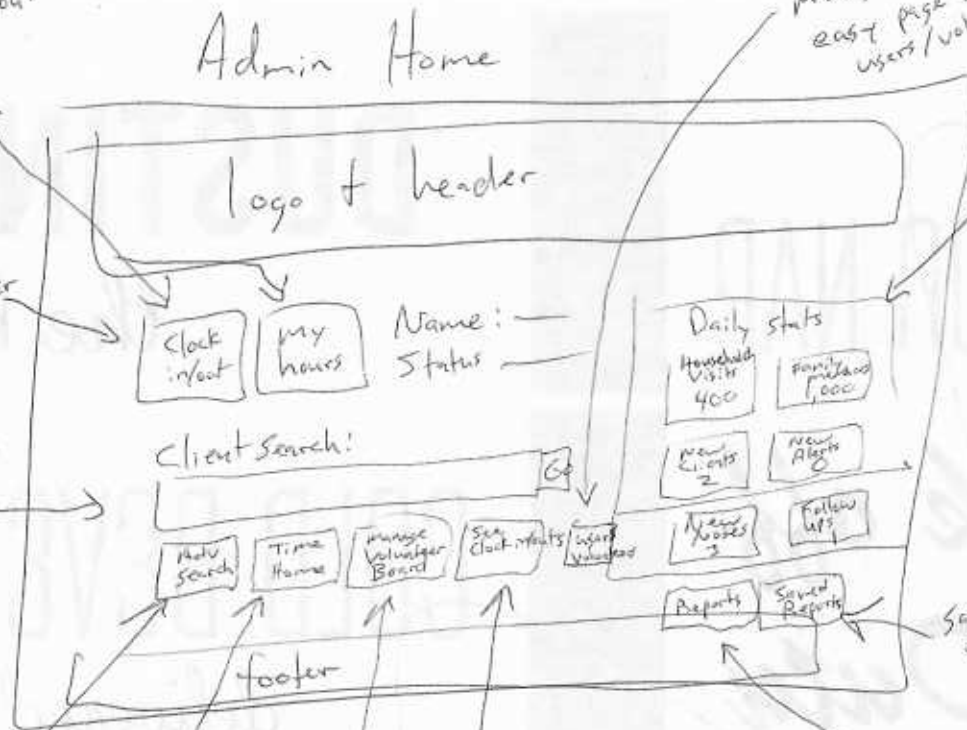
- See other clock in/out records - admin timeclock
- maybe move up by other timeclock options

Go to a special reports page

- Goes to a special page where Admin can manage/control options for Volunteer Message Board
- Question - 1 main message or allow for multi?

manage users & volunteers - easy page to setup & manage users/volunteers & roles/permissions

Stats for the day with drilldown to actual values and details



Search Options

Household:

Member:

- have two searches...
- one for the main household
- one for any person or member within that household
- Add lots of flexibility to each search - wildcards, first names, last names, first & last name combos, cell phone, home phone, email, id#, ~~and~~ barcode, addresses
- These are simple search forms... if more is needed, we fall back to the main admin's advance customer search page

Household Record Page

- view full customer log file with all details

- Just simple household information

- All real member details will be lower in the members section

All people & _____
members...
including the
primary contact
(mother or father)

19.4

Hand-drawn wireframe of a mobile application interface for a church database. The interface is divided into three main sections: a top header, a main content area, and a bottom footer.

Header: Contains a logo and the title "Church Database".

Main Content Area: Divided into two panels.

- Left Panel (Client/Household):** Contains form fields for "Name:", "Address:", "Cell Phone:", "ID#:", and "Barcode:". Below these is a section for "Members/Kids" with a table structure:

Relationship	Name	Age
- Right Panel (Alerts):** Contains a table with columns "Date", "Color", and "Notes".

Date	Color	Notes

Visits Panel (Bottom): Contains a table with columns "Date", "Time", and "Volunteer".

Date	Time	Volunteer

 Below the table is a "more..." link.

Footer: Contains the text "Footer".

Arrows indicate the flow of data and user interaction between these components.

add new alert

If there is an active alert... it will pop up or somehow deny further actions until dealt with

add new visit - big easy button - this
is the main function of the page

show the last five visit with a button to show more, if needed.

- Run out of room - add a notes section to show customer log notes & follow-ups

view full customer log file with all details

- As a note... on the full customer log detail page... add a top mini takeover with links back to the household view thinking... and add new visit buttons

Ran out of room ... thinking...

Household Name:
Address:
Cell Phone:
ID #:
Barcode:
Color:

- On adding new alerts and new visits ... show a modal popup with a really simple add form - this is only for new adds or inserts

- Printed on 8/10/26
- from EOT #13015 in the shop



- Industry recipe maps and world building - somewhat interchangeable terms - this was a new discover for me. I personally like world building better, but if someone is struggling with what that means, you could always say something like: Another term for world building is "industry specific recipe maps". Instead of selling specific modules or software pieces, you assemble industry specific solutions from a number of proven components. You take business functions and application players (like customers, invoices, inventory items, vendors, etc.), mix them together and these become your ingredients. You then setup specific workflows, industry adaptation, and generate desired outcomes. It becomes an industry specific recipe of sorts.

- Took some other notes on 8/10/26 on some post-it notes
- The new notes were very similar to what I took on 8/3/26 or EOT #13015 - Trying to figure out what ^{are} the most important things & how they fit together
- Just for fun ... I somewhat feel like I am circling around & around - as I do, I understand it, the current project or piece, more & more. It would be nice just to do one round, but circling helps me get a better picture. Sometimes looping (circling over & over again) may be required.
- It reminds me ... Study it out in your mind & then ask: if it be right - just this morning I was thinking about the concepts of "Ask, seek, know" and how we may need to, on purpose, loop back around with more knowledge, needs, and/or context - that may help the process.
- I printed out an application form - then did a small comparison between the online form & the pre-printed paper copy. There are quite a few differences. We may need to settle on what is important & what is standard - get everything on the same page.

~~test~~ Questions + wireframes for the food pantry
Volunteer workflow + interface

- Do we want to use the ~~existing~~ existing adilas pages + flow or full custom?
- ColdFusion or HTML with AJAX/Fetch ColdFusion + API's? Frameworks?
- How soon is the online client app needed?
- How deep is it? The online client app?
- I have volunteers - what is their path?
- I have admin - what is their path?
- I have clients - what is their path?
- What do I want to ~~take~~ take out?
 - ^{simple} Login, corp key, news + updates, adv header + adv footer
- What do I want to add?
 - Custom header + custom footer - super simple

Continued - Questions & wireframes for the food pantry volunteer workflow & interface

- Open the customer quick search to handle address & address 2 - see cfc/search.cfc - search for customer-tax-id
- Most of the pages already use black box technology
 - maybe tie into that - this would save time
- If it doesn't exist... how can I make it more easy to add a global custom header or footer - maybe another if in the GetTopSecretPaths.cfc or GetSecurePaths.cfc
- Use the mini scan cart settings for the customer search - that makes it really simple
- There is already a huge toolset that exists out in the ecommerce world that could be the base of the customer/client portal section
- If a certain page needs black box code, open it up, so that it can play.
- On the customer/client log page... I may need a simple version & a more advanced versions - based on permissions or roles. I would like to use the same page with different modes - similar to the stock-unit details page... simple or advanced mode

Pg. 2

Assistance Report - June 2026

Cache Community Food Pantry

Agency Assistance Report (page 1 of 13)

Report Filters

Include private records: Yes
 Date range: May 01, 2026 to May 31, 2026

Brandon's
 CPT

Report Summary

Assistance Records: 1203

Assisted Cases by Gender:

Female: 530
 Male: 299

Assisted Cases by Ethnicity:

African-American: Black 19
 Asian: 29
 Caucasian: white 396
 Hispanic: 304
 Middle Eastern: ? - not on application 11
 Native American: 11
 Other: 15
 Pacific Islander: 21
~~Unknown:~~ 14
 Indian: ? - not on application 3

Assisted Cases by Employment:

Unemployed: 522
 Employed: 290

← online application & printed application are different

Assisted Cases by Marital status:

~~Divorced:~~ 17
 Married: 385
 Unmarried: 375
~~Child:~~ 1
~~Not Provided:~~ 11
~~Other:~~ 13

← online & printed are different

Assisted Cases by Other:

~~At Risk of Being Homeless:~~ 8
 Disabled: 114
 Homeless: 17

← disabled was only asked for on sub contacts
 ← didn't see this on any applications

Children (0 - 17) Assisted: 2
 Adults (18 - 59) Assisted: 617
 Seniors (60+) Assisted: 213
 Other (unknown) Assisted: 3
Total Cases Assisted: 836

← as a note... this is just based on the main client or household - all reports above this are based on these primary records

Assisted Household Members by Gender:

Female: 1310

← This gets into subs of the main household or family members

Male:

1241

Assisted Household Members by Ethnicity:

African-American:	Black	58
Asian:		99
Caucasian:	white	855
Hispanic:		981
Middle Eastern:	? not on application	22
Native American:		22
Other:		54
Pacific Islander:		78
Unknown:	? not on application	106
Indian:	? not on application	13

Assisted Household Members by Employment:

Unemployed:	989
Employed:	492

- only on subs or family members

Assisted Household Members by Marital status:

Divorced:	17
Married:	498
Unmarried:	404
Child:	180
Not Provided:	23
Other:	13

← this seems to deal with the primary household vs the subs or family members

Assisted Household Members by Other:

At Risk of Being Homeless:	14
Disabled:	184
Homeless:	21

← homeless was not found on the application

Children (0 - 17) in Assisted Households:	983
Adults (18 - 59) in Assisted Households:	1273
Seniors (60+) in Assisted Households:	324
Other (unknown) in Assisted Households:	30

← households members

Total Households Assisted:

831 households with a total of 2611 members

Duplicated Household Members by Gender:

Female:	1944
Male:	1874

← New section - both main household plus all members

Duplicated Household Members by Ethnicity:

African-American:	Black	92
Asian:		168
Caucasian:	white	1265
Hispanic:		1437
Middle Eastern:	? not on application	32
Native American:		34
Other:		76
Pacific Islander:		131
Unknown:	? not on application	176
Indian:	? not on application	16

↓
seems extra or overstated (duplicated)**Duplicated Household Members by Employment:**

Unemployed:	1460
Employed:	743

NAME + BDAY

KIDS
 ~~~~~  
 ~~~~~  
 ~~~~~

CLIENT  
 DOB  
 ADDRESS  
 CARD #

HISTORY OF  
 VISITS  
 ~~~~~  
 DATES

ALERTS
 NOTES.

OF VISITS LEFT

VOLUNTEER MESSAGE ← not on the client record but on another screen

VISITS
 FIVE MOST RECENTLY
 CLICK LINK FOR MORE
 EXP DATE & BLOCK IF
 PAST

VISITS - SHOW DATE + TIME STAMP

CHECK IN PROCESS

APP OPTION

SCAN PHONE → CHECK OFF DATE + TIME + NUMBER OF VISITS (1 OR 2)
 3RD ATTEMPT WOULD BE BLOCKED

CARD OPTION

PRESSENT CARD, WE PUNCH IT, RECORDED VISIT



This is the pre-printed English application form

Date _____

Office Use Only

ADD

EMP

PW

Demographics

Name _____

Least

First

Sex

DOB (or age)

Address

Street Address

City

State

Zip Code

different online

Phone Number

Spouse Name (if applicable)

☐ Single ☐ Married ☐ Children under 18
in household

Email

Race/Ethnicity (Select all that apply)

☐ Hispanic, Latino, or Spanish Origin ☐ White ☐ Black ☐ Pacific Islander
☐ Asian ☐ American Indian/Alaska Native ☐ Other

Employment

☐ Full-Time ☐ Part-Time ☐ Unemployed

Income Monthly Gross

59

Other Income (Check all that apply and specify monthly amount)

☐ Food Stamps \$ _____ ☒ TANF \$ _____ ☐ Child Support \$ _____ ☐ Pension \$ _____ ☐ Worker's Comp. \$ _____
☐ Unemployment \$ _____ ☐ WIC \$ _____ ☐ SSI \$ _____ ☐ Social Security \$ _____ ☐ Other (_____) \$ _____

Household Information

Name _____

DOB
(or age)

Sex

Disability?

Employed?

Monthly Income

whole section is just a notes field online

[illegible]



FOOD PANTRY

- Printed on
8/10/26
from the
website

- As a note...
There is also
an application
in Spanish

- Notes are to
compare online
with pre-printed
applications

Apply for Assistance

(Fill out this form)

Please note, current students must go to the Student Nutrition Access Center (SNAC) on the campus of USU. If you have kids you are able to come to the food pantry.

Tell us about yourself

First Name *

First Name ✓

Middle Name

Middle Name - not on printed

Last Name *

Last Name ✓

Gender *

Male ✓

Email *

Email ✓

Phone *

Phone ✓

♥ Donate

Address ✓

City *

City ✓

State *

State ✓

Zip / Postal Code *

Zip / Postal Code ✓

Country *

United States of America ▼

Date of Birth (mm/dd/yyyy) *

✓ - or age on printed

Ethnicity *

- ☐ Native American/Alaskan ✓
☐ Asian ✓
☐ Black ✓
☐ White ✓
☐ Hispanic ✓
☐ Pacific Islander ✓
☐ Other ✓

— on paper ... Hispanic, Latino, or Spanish Origin

Tell us about your housing situation

← whole section missing from paper application

Rent/Month (\$) *

Rent/month

Own (\$)

Own

Share (\$)

Share

Subsidized (\$)

Subsidized

Are utilities included?

Yes ▼

Name of Landlord *

Name of Landlord

♥ Donate

Tell us about your family

— not on printed form
— there are 3 checkboxes for
☐ Single ☐ Married ☐ Children under 18 in Household

Household Type

- ☐ Two Parent w/ children
- ☐ Female Single parent
- ☐ Male Single Parent
- ☐ Single Adult no children
- ☐ Multiple Adult no children
- ☐ Senior Citizen
- ☐ Multiple Household

Spouse Name

Spouse's Date of Birth (mm/dd/yyyy)

Spouse Name ✓

— not on printed

Does your spouse work?

Yes — not on printed ✓

Additional Family Members: (Please include their name, age, birthday, gender, and if they have a disability)

— on printed form — there is a small table with 8 rows...

Name	DOB Age	Sex	Disability?	Employed?	monthly Income
------	------------	-----	-------------	-----------	----------------

Tell us about your finances

— on printed — only three checkboxes for
Employment: ☐ Full-Time ☐ Part-Time
☐ Unemployed

Employment Place *

Hourly (\$) *

Employment Place — not on printed

Hourly (\$) — not on printed

Hours/week *

Monthly Gross Income *

Hours/week — not on printed

Monthly Gross Income ✓

Are you receiving other assistance? *

- ☐ Food Stamps ✓
- ☒ ~~Donate~~ OSSI
- ☐ Child Support ✓
- ☐ AFDC

— printed has a few different ones ... it also asks for a value or \$ amount per section
Supplemental Security Income ✓
Aid to families with dependent children — not on printed

- ☐ Unemployment ✓
- ☐ W.I.C. women, infants, & children ✓
- ☐ Social Security ✓
- ☐ Pension ✓
- ☐ Disability - not on printed
- ☐ Other ✓
- ☐ Medicaid - not on printed
- ☐ Worker's Comp ✓
- ☐ None - not on printed

By signing this form, I acknowledge that the food I receive from the Cache Community Food Pantry is donated, sorted, shelved, and bagged by volunteers.

I also recognize that there may be some foods present that may be past the expiration date and it is my choice to use them or not.

Therefore, I release the Cache Community Food Pantry, its volunteers, Community Partners, and any donor, from any claim associated with the products provided to me.

☐ I accept

[Continue Application](#)

Help us fight hunger in Cache Valley

[Apply for Assistance](#)

♥ [Donate](#)

Cache Food Pantry

"Food Pantry Workspace"

- printed on 8/3/26
- Industry Adaptation project

Industry Specific Recipe Map

Working with a possible client, the Cache Food Pantry (<https://cachefood.org/>). They already have a CRM system, but it is too complicated. The owner of the pantry, Matt Whitaker, wants to use adilas as a simple CRM. I told him that we could customize a few pages to help them out. He has some older volunteers that help him and they are not very tech savvy. Something super simple.

My plan is to keep the main adilas system in place as the backbone. The simple pages would just help with quick repetitive processes and searches. If they need more meat (application power), they can roll over to the existing adilas backend pages.

Here are some of their known needs:

- I have all of the database pieces and functionality already, just need to organize things for their flow. They will most likely be using customers (main records), customer contacts (subs of the main customers – family members or people in the same household), elements of time (calendar and scheduling – events and alerts), customer log notes (sub of customers for extra notes or small events) with follow-ups available. Possibly flex grid to cross tie households together or other special relationships.
- Matt has provided some voice dictation as a small starting point. See other file.
- Simple client records. There may also be household dependents and independents. We need to track and flag both dependents and others living in the same house that are independents.
- We can already handle any custom fields that they need. I will work with them to get that information. It just needs to be noted that there will be custom fields.
- Address searches are important, as they need to see how many visits per household.
- Eventually, they need reporting per visit (anybody who comes in and gets food) and per household (how many actions per address).
- They want to add an alert system – if there is an alert, it notifies them before any other actions can take place. We can either use customer logs or small elements of time with either colors or what we call action status values (pending, completed, etc.).
- They talked about a small app. I'm seeing that as a simple responsive web app or mini customer/client portal. Maybe let them sign-in, check for any communications, and super limited actions. Not all of these have been determined yet.
- In the future, Matt knows other food bank or food pantry owners. If we can make this really simple, he would like to white label it out to other food pantries.

- Once again, this is a mini custom skin over the top of the whole or bigger adilas application.

I'm open to suggestions. Once again, I already have all of the functionality, I just wanted to pass a few things along to help with flow, checklists, ideas, and project management.

Notes from Chat GPT chat session

re-read on
8/3/26
see EOT #
13015 in the
shop

- Industry Adaptation Project
- Guided experience for one specific workflow
- Not software ... more of a "Volunteer Operations Console"
At the software level...
- What do I need to know right now? - Try to stay ahead of them
- Goals:
 1. Simple Client Intake - paper & online - make it simple
 2. Find People Instantly
 - Name
 - Address * (important)
 - Barcode
 - Household
 3. Protect Volunteers
 - Alerts - possible work flow disruption feature
- meaning, we may need to stop the normal flow until the alert is dealt with or acknowledged
 4. Track Visits
 5. Future Client App
 - Round II or phase II - not in the MVP

- Workflow Mapping
 - what do they actually do & in what order?
 - This is an MVP bridge type app
 - keep one platform
 - Create a focused front-end
 - Hide complexity
 - Expose power only when needed
 - Let organizations grow into the larger ecosystem
- 
- Mini Skin Framework
 - ^{industry specific} Recipe Map - ingredients, workflow, industry adaptation, and desired outcomes
 - Serve people over software
 - ↑
focus here
 - Look for moments vs screens - aka "workflow map"
 - ↑
flow & questions
how can I help?
 - ↑
interface & software
 - plan it, this mini project framework, as a case study or industry recipe
 - industry recipe maps and world building
 - instead of selling modules, demonstrate how to assemble solutions from proven components
 - Reusable blueprints

as a note... I reread the ChatGPT doc on 8/10/26 - I made a number of sub notes on post-it notes - see addit's for details

7/23/26

CACHE Food Pantry

- They use *Casis insight* as their current case management system
- Christine Rich - data assistant
- Case working
- ~~Ethnicity~~ Ethnicity & Nationalities
- Lots of excel work, scanning, & entering stuff into the existing database toolset - multiple entry work
- Translation between English & Spanish - they have clients that speak just English, just Spanish, and a mix
- Online apps
- Sandy & Genie Geani helpers
- Tons of partially done applications - they sign up online & then never come in for an interview
- They get the online applications, they then have to enter them into the system - print them, re-type them, scan them, & file them
- Frustration - how reports get alphabetized
- Wild card searches for databases - they need this
- Duplicated numbers and non-duplicated numbers (unique visits by households)
- Looking for super simple interfaces & work flow

Food pantry (continued)

7/23/26

- App - it shows their visits left for the month
- They are using physical punch cards - some times the cards get lost - other times they "forget" (on purpose) the card & a volunteer lets them in
- Alerts to say no - the system is the bad guy
 - It would be nice to have an online app that leads into the real system
- Make the alerts bigger - important
 - He was making some napkin level drawings - check ^(matt) these out
- On the reports ... quick monthly report
 - small filters based on the main report
 - allow a save option (extra)
 - most times, quick on the fly search criteria
- Their current online application is on their website
 - Clients - categories "pending" & "Active"
 - client status - active & inactive (don't serve if inactive)
 - students - lots try to get help - they go somewhere else
- They need a clock in/out section for their volunteers
- He wants a quick way to communicate with his volunteers
 - Say an element of time that he can change the messages