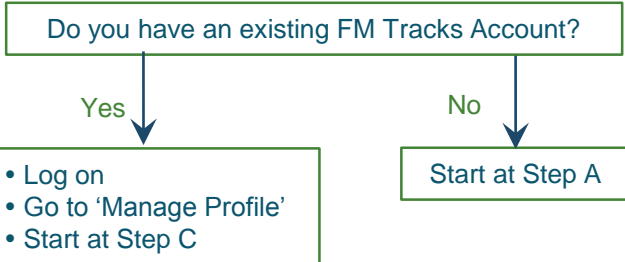# FM Tracks for Mobile Markets: How to Create & Manage Your Profile

The first step to using FM Tracks is to create and customize your mobile market's profile on the FM Tracks website: www.fmtracks.com. It is important that this information is correct and kept up-to-date because it is used to auto-populate fields required in your data entry — which saves time and reduces errors. This guide walks you through the process of creating a profile if you are a new user or updating your profile if you are already registered. NOTE: FM Tracks uses language specific to farmers markets; this guide helps to translate that language for mobile markets (this language will be updated in future versions of FM Tracks).

Getting Started

Do you have an existing FM Tracks Account?

Yes
• Log on
• Go to 'Manage Profile'
• Start at Step C

No
Start at Step A

Information You Will Need

• Name, mailing address, and phone number of mobile market's main contact

• Location and hours of operation of mobile market

• Accepted payment methods (e.g., cash, credit/debit, SNAP/EBT)

• Information about the incentive program:
  - payment methods that are incentivized (e.g. SNAP)
  - discount amount (e.g. 50% off)
  - cap (if any) on the incentive (e.g. $20 per day)

Register Your Mobile Market to Create a Profile

A • Register as a 'Farmers Market' (not a 'Network') even if you have multiple mobile market stops.

NOTE: Mobile markets that registered as a Network in 2015 can continue to use this profile or contact us to change to a market profile.

B • Enter your mobile market's name.

NOTE: Include the word 'Mobile Market' in the name; this helps us to identify profiles by market type.

A Farmers' Market   Network

B Contact Information ⓘ   ⊟
Green's Mobile Market +

Enter or Update Days of Operation

IMPORTANT: The days of operation you select here will inform which days FM Tracks prompts you to complete a Post Market Report.

C • Enter the location (for the first stop if you have multiple stops) and day of operation of your mobile market.

• Include start and end dates for markets that do not run the entire year.

• You can 'Add More Days of Operation' (see **D**) and 'Remove Days' (see **E**) as needed.

C Days of Operation

| Sunday | Open Time | Close Time | **E** remove day ✕ |
| Same **Sunday** Hours Year Round | Start Date | End Date | |

D ⊹ Add More Days of Operation

Enter or Update Payment & Incentive Information

IMPORTANT: All options you select on this page will auto-populate the page you use to enter customer transactions. Any options that are not selected here will not appear on the transaction page, so double check that all information is complete and accurate.

F Select the types of payment your mobile market accepts.

G Provide information on your incentive program.
From the drop-down, select the type of incentive program: Matching, Discount, or Loyalty programs. Use the definitions in the tan box if you need help selecting the correct type. If you provide a discount to SNAP customers, select 'Healthy Food Incentive Program-Discount.'

H Give your program a name. This will help when using the app and running reports from FM Tracks.

I Enter payment types that you incentivize (e.g. SNAP), incentive cap, and frequency of the cap.

You can also 'Add Incentive Type' and 'Remove Incentive' as needed.

F

Accepted Payment Types			
☐ Cash	☐ Check	☑ Credit / Debit Card	☑ SNAP / EBT
☐ WIC CVV	☐ WIC FMNP	☐ Senior FMNP	☐ Produce Rx

Incentives Offered

Healthy Food Incentive Program - Discount **G**   ⊟

remove incentive ✕

Veggie SNAPs **H**   SNAP / EBT **I**

50.00 % $ Incentive Cap (blank for N/A)   N/A

⊕ Add Incentive Type

Select Additional Customer Tracking (OPTIONAL)

J There are two optional fields you may select to appear on your market's Transaction page to track customers: Research ID Field and POS ID Field. (These fields do not replace FM Tracks IDs.)

- Select 'Research ID' to track customers who are participating in a research study.
- Select 'POS ID' to track IDs created by your POS terminal.

J

Additional Customer Tracking ⓘ

☐ Research ID Field - Add an additional field to your transaction page for your research studies

☐ POS ID Field - Add an additional field to your transaction page to match your POS terminal later

NEW USERS ONLY: Sign Up

Agree to the Terms and Conditions. Click 'Signup.' You will receive a pop-up box confirming your request has been submitted. You will receive an email within 5 business days that your market has been approved. Once approved, log on and follow instructions below to 'Manage Your Profile.'

Manage Your Profile

At least once a year (but anytime there is a change to your program), go to 'Manage Profile' to:

- Update your basic program information if there have been any changes, following the steps above.
- Give a market manager or administrator access to FM Tracks. Click 'Setup,' and scroll down to 'Market Manager Information' to invite the person through email.
- Answer applicable metrics questions (required annually). Click 'Report Metrics.'
- Choose which questions you want to ask customers and mobile market managers (optional). Click 'Choose Market Questions.'
- Congratulations! Your profile is complete. See the following pages for instructions on how to enter transactions on the app or website.

FM Tracks for Mobile Markets: How to Enter Daily Sales & Data

Use FM Tracks to easily track sales and other data for your mobile market. Record all payment types, including SNAP/EBT and other federal benefits, cash, credit, and debit, as well as nutrition incentives applied to purchases. This guide shows you how to enter data on the app and on the website.
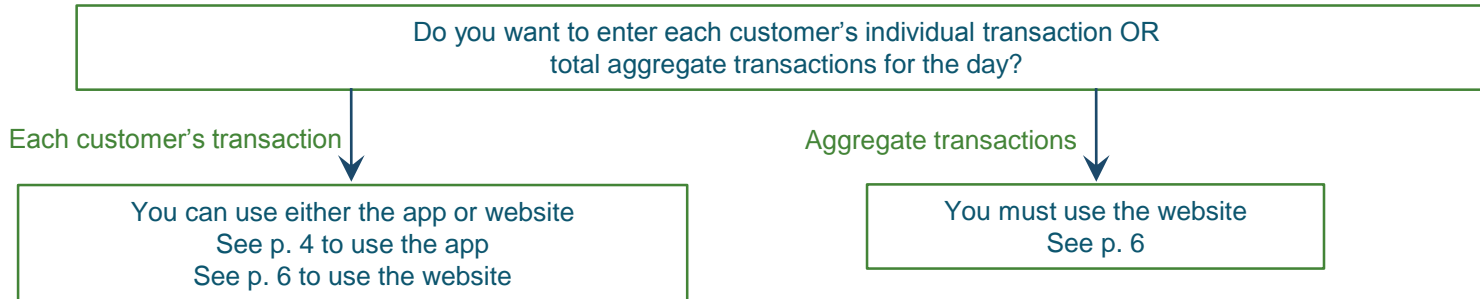
What Data Is Required & How Frequently?

Track the following for each day that the mobile market operates:

- Aggregate $ of SNAP sales
- Aggregate $ of incentives
- # of new customers
- # of SNAP transactions
- # of producers/vendors that contributed to the mobile market
- Responses to Post Market Questions

NOTE: You have the option to enter this information by *location of each mobile market stop* but it is not required.

How Do Your Want to Enter the Data?

Do you want to enter each customer's individual transaction OR total aggregate transactions for the day?

Each customer's transaction

You can use either the app or website
See p. 4 to use the app
See p. 6 to use the website

Aggregate transactions

You must use the website
See p. 6

To capture individual customer transactions on-site without using the app, download our pen and paper Mobile Market Manual Entry Forms from the NNIN Resource Library (www.wholesomewave.org).

New Format for FM Tracks IDs in 2016 (for individual customer transactions)

FM Tracks IDs are a way for your mobile market to track individual customers. FM Tracks IDs are OPTIONAL.

Your market has 2 choices for formatting IDs. Choose one format and use it consistently:

1. First and last initials and last 4 digits of customer's EBT card **OR**
2. Customer's first and middle initials and birth month and day (MMDD)

FM Tracks App for Mobile Markets: How to Enter Daily Sales & Data

Each Time You Use the App

Connect your iPad/iPhone to the internet to get updates and save your data both before & after your mobile market day. You do not need an internet connection on-site at your market.

How to Navigate the App

(A) When logged in, use the Main Menu to navigate between screens.

Access the Main Menu dropdown by tapping on the 3 horizontal lines ☰ that appear at the top of every screen.

Step 1: Log In

Log in using email address and password. Select your market.

Step 2: Enter Transactions

(B) PAYMENT METHODS – Select customer's payment method (e.g., SNAP) and enter amount paid. NOTE: If you offer a discount incentive (e.g., 50% off a purchase), enter the original price, NOT the amount paid by the customer.

(C) INCENTIVES – Select incentive program name and confirm $ amount (which will appear as a negative number if you have a discount program). See Tip box above.

(D) CUSTOMER – Enter customer's FM Tracks ID (optional).

(E) ADDITIONAL TRACKING – If applicable, enter customer tracking information (optional).

(F) SUMMARY – 'Summary' shows payment and incentive totals per transaction. NOTE: If you offer a discount incentive, the SNAP/EBT field shows how much to charge the customer's EBT card.

Tip: 'Auto-Calculate' Saves Time & Reduces Errors

Information from your FM Tracks website profile auto-calculates the incentive matching or discount amount and applies a cap, if applicable. To override this function, tap 'Manual' and type new amount. When editing an old transaction, manual is the default.

Green's Mobile Market + — **New Transaction**

TRANSACTION LOG

JB0912 16:08	$10.00
DB0625 16:08	$5.00
LF1018 16:09	$7.00
DB0817 16:41	$10.00
Anonymous 16:42	$5.00
Anonymous 16:42	$15.00
Anonymous 16:46	$5.00
Anonymous 16:48	$5.00
CP0507 16:57	$5.00

TRANSACTION LOG

NW0631 12:44	$0.00
MO6628 12:41	$12.50
SF4361 12:40	$20.00
KM3400 12:39	$35.00
←	$28.00	Delete

Payment

Auto-Calculate | Manual

PAYMENT METHODS

⊖ SNAP/EBT **(B)** $10.00

⊕ Add payment method

CUSTOMER **(D)**

Enter ID | Anonymous

DT0801

Disclaimer: Valid FM Tracks IDs have two letters followed by four numbers. Registering for an FM Tracks User ID is optional and does not affect your ability to shop, use food assistance benefits, or redeem incentives at the market.

INCENTIVES **(C)**

✓ Veggie SNAPs -$5.00

ADDITIONAL TRACKING **(E)**

Research ID 1234
POS ID 1234

Show questions **(G)**

Summary **(F)** Payment Amount $10.00

$5.00 SNAP/EBT | $5.00 Veggie SNAPs **(H)**

Complete Transaction | Cancel

Delete a transaction from the log by swiping to the left and tapping the red 'Delete' button.

Step 3: Ask Customer Questions (OPTIONAL)

(G) Reveal or hide customer questions with the 'Show Questions' slider. FM Tracks identifies customers from their FM Tracks ID and asks New or Repeat Customer Questions.

Step 4: Complete & Save a Transaction

(H) Tap 'Complete Transaction' to save a transaction. You will receive a prompt to confirm. You are now ready for the next customer.

4

Step 5: Answer Post Market Questions

Access 'Post Market Questions' on the Main Menu.

Transaction and payment totals are auto-calculated based on sales transactions you entered and appear in a log to the left of the Post Market Report <u>when connected to the internet</u>.

Required questions are marked with an asterisk (*).

IMPORTANT: For mobile markets with a 50% discount incentive, enter the amount listed in 'Incentives Distributed' from the log as the amount of both 'SNAP redeemed' and 'Incentives redeemed' in the Post Market Report. (Disregard 'Payments Distributed' in the log on the left; it is incorrect for discounts.)

Tap 'Submit Post Market Report' when finished.

Step 6: Report Advanced Data – by Market Stop (OPTIONAL)

Access the 'Vendor Reimbursement' page on the Main Menu. Click 'Add Reimbursement.'

Mobile markets can use this page to track sales by stop along your mobile market route. For example, to track sales by stop:

In 'Vendor Name,' enter the location of the stop (and day of the week if you operate your market on more than one day), e.g. Monday, Main Street.

In 'Payments Redeemed,' enter total amount redeemed of SNAP/EBT redeemed and the number of SNAP/EBT transactions for the Main Street stop.

Click 'Submit Reimbursement.'

If you report this data every week, you will have a log of Main Street's SNAP/EBT sales throughout the season, and can compare this to other stops along your route.

Step 7: Log Out

At the end of each day, tap 'Logout' on the Main Menu. NOTE: You must log out and log back in before entering data on your next mobile market day.

Step 8: Connect to the Internet

Connect your iPad or iPhone to the internet after your market day. Your data will sync automatically within one hour and an alert will pop up when the sync is complete.

Review sync log for completeness and accuracy.

If you do not receive an alert that your data has synced within 48 hours, tap 'Send Log' to send data to FM Tracks Developers. Please contact your Wholesome Wave Program Manager if you have any problems. NOTE: Pressing 'Send Log' does not sync your data.
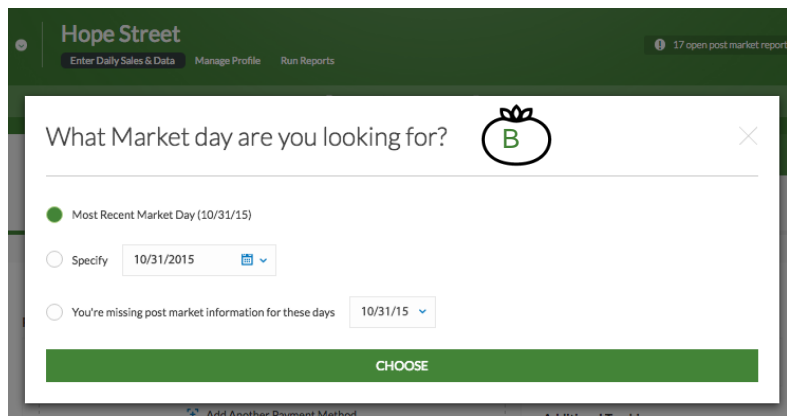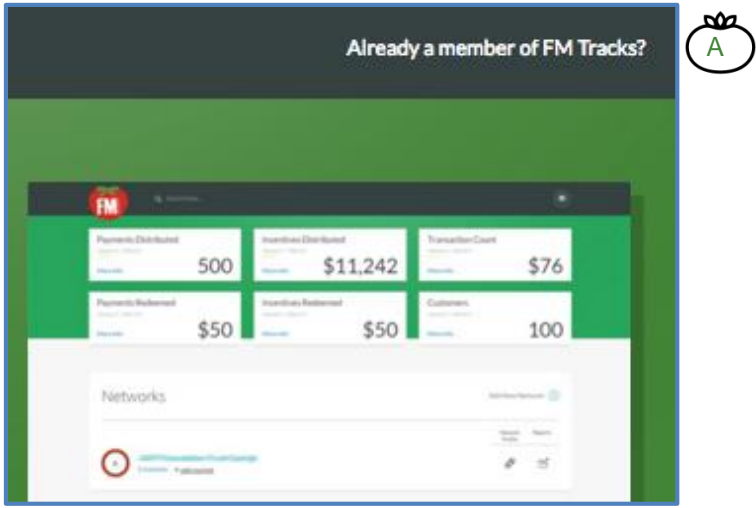
FM Tracks Website for Mobile Markets: How to Enter Daily Sales & Data

Log In

(A) From www.fmtracks.org, click 'Already a Member of FM Tracks" and enter your login (email and password).
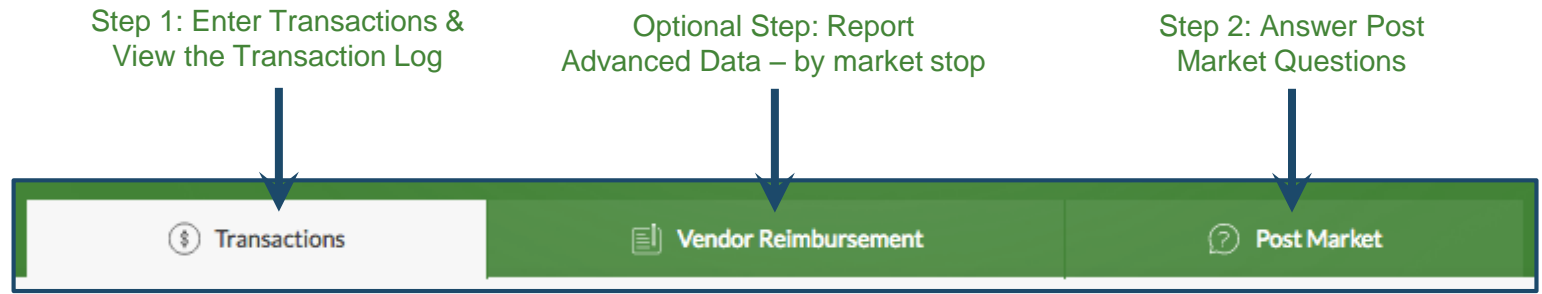
Click 'Sign In.'

To enter sales data, click 'Enter Daily Sales & Data,' labeled with a dollar sign icon ($) next to the market name.

(B) FM Tracks will ask: 'What Market day are you looking for?'
Specify 'Most Recent Market Day' or select another date.

FM Tracks Home Page

Navigating the 'Enter Daily Sales & Data' Tab

Step 1: Enter Transactions & View the Transaction Log

Optional Step: Report Advanced Data – by market stop

Step 2: Answer Post Market Questions

| ($) Transactions | 📋 Vendor Reimbursement | (?) Post Market |

Step 1: Enter Transactions: Individual or Aggregate

Click the 'Transactions' tab to enter individual (by customer) or aggregate (by day) transactions.
NOTE: User has the ability to track by stop (if there is more than one stop per day); see next page.

ⓢ Transactions	🗐 Vendor Reimbursement
New Individual Transaction	New Aggregate Transaction
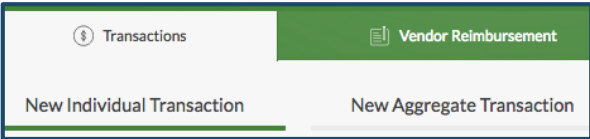
Enter New Individual Transactions

Click the 'New Individual Transaction' tab to enter transactions by customer.

Information from your profile auto-calculates the incentive matching or discount amount and applies a cap, if applicable. To override this function, un-click 'Auto-Calculate' and type new amount.

C   PAYMENT METHODS -- Select Payment Method. Enter total purchase amount. *'Auto-Calculate' is checked by default to automatically calculate the $ amount of your incentive; uncheck if desired.* (Select up to 4 payment methods per transaction.)

D   INCENTIVES – Select incentive program. Confirm incentive $ amount (which appears as a negative number if a discount).

E   CUSTOMER ID – Enter customer's FM Tracks ID & other optional tracking info (which you can select in 'Manage Profile').

F   QUESTIONS – Enter responses to customer survey questions.

G   TOTALS – In this discount program example, you can see: in the total amount swiped on the customer's EBT card in 'Payment' and the total incentive given to the customer in 'Incentive.'

Payment Method   ✓ Auto-Calculate   Incentives

SNAP / EBT   **C** $ 10.00   **D**   ✓ Veggie SNAPs (-$5.00)   edit

[+] Add Another Payment Method

Customer ID   **E**

e.g.CP0982   ☐ Anonymous

Questions   **F**

Have you ever shopped at this farmers' market before today?
○ yes   ○ no
○ choose not to provide

Is this your first time ever shopping at any farmers' market?
○ yes   ○ no
○ choose not to provide

How did you hear about this farmer's market?

G   Total Currency

$10.00

Payment

$5.00
SNAP / EBT

Incentive

$5.00
Veggie SNAPs

Enter New Aggregate Transactions

Click the 'New Aggregate Transaction' tab to enter the total $ amount of purchases for <u>one day of operation of your market (or by stop), depending on how you set up your profile</u> (see 'How to Create & Manage Your Profile'):

H
- Enter # of New Customers
- Enter # of Transactions
- Select Payment Method (e.g. SNAP/EBT) and Enter total $ amount
- Select Incentive program and Enter total $ amount

Click 'Submit Transaction.'

H   New Aggregate Transaction

# of New Customers		# of Transactions
Payment Type ⌄	$ Total Payment Amc	Incentives
		☐ Fruit and Vegetable Bonus Bucks (FINI) $ 0

Fields with missing data appear underlined in red.

Transaction Log: Search, Edit, or Delete

I   Each day (or stop) you entered data for has its own log. Click the 'Transaction Log' tab to:
- Search for a transaction or 'View More Days' to see a different day
- Edit 🖉 or delete 🗑 a transaction

I

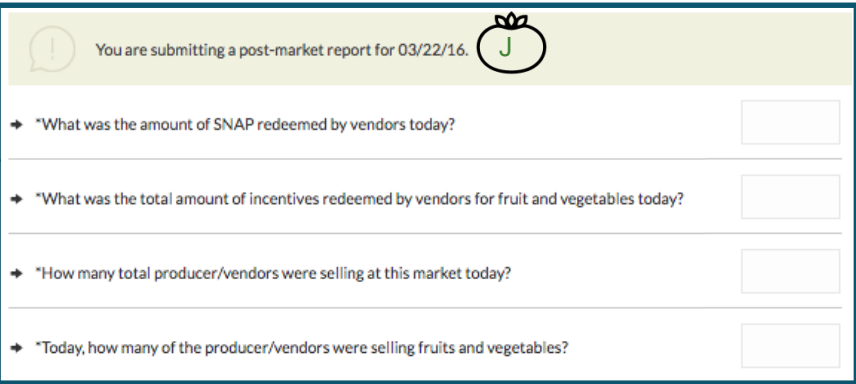| Payment	Amount	Incentives	Distributed	Entry		
SNAP / EBT	$7.00	Veggie SNAPs	$3.50	Manual	🖉	🗑
SNAP / EBT	$5.00	Veggie SNAPs	$2.50	Manual	🖉	🗑
SNAP / EBT	$10.00	Veggie SNAPs	$5.00	Manual	🖉	🗑

Step 2: Answer Post Market Questions

Click the 'Post Market' tab to answer post market questions. You are required to submit only one Post Market Report for each day (i.e., <u>not</u> for each stop).

A pop-up box will appear: 'You're missing post market information for these days.' Choose market date from the dropdown. *You will be prompted to answer questions for each market day, based on dates of operation you entered in your Profile page.*

J Answer required questions (marked with an asterisk, *) about payments and incentives redeemed and number of vendors participating. Reminder: For mobile markets with a 50% discount incentive, the amount of SNAP redeemed equals the amount of incentives redeemed.

Click 'Submit Post Market Report.'

You are submitting a post-market report for 03/22/16.

→ *What was the amount of SNAP redeemed by vendors today?

→ *What was the total amount of incentives redeemed by vendors for fruit and vegetables today?

→ *How many total producer/vendors were selling at this market today?

→ *Today, how many of the producer/vendors were selling fruits and vegetables?

Step 3: Report Advanced Data – by Stop (OPTIONAL)
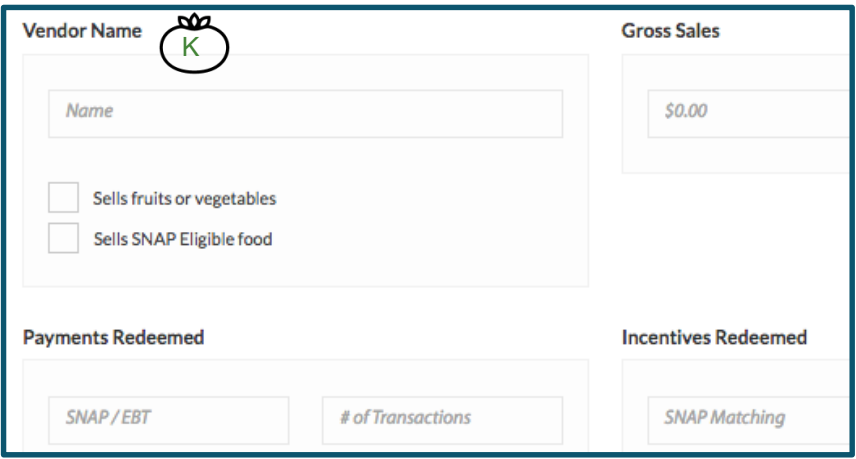
Click the 'Vendor Reimbursement' tab and 'Add Reimbursement.'

Mobile markets can use this page to track sales by stop along your mobile market route. For example, to track by each stop:

K In 'Vendor Name,' enter the location of the stop (and day of the week if you operate your market on more than one day), e.g. Monday, Main Street.

In 'Payments Redeemed,' enter total amount of SNAP/EBT redeemed and the number of SNAP/EBT transactions for the Main Street stop.

Click 'Submit Reimbursement.' If you report this data every week, you will have a log of Main Street's SNAP/EBT sales throughout the season, and can compare this to other stops along your route.

Vendor Name | Gross Sales

Name | $0.00

☐ Sells fruits or vegetables
☐ Sells SNAP Eligible food

Payments Redeemed | Incentives Redeemed

SNAP / EBT | # of Transactions | SNAP Matching
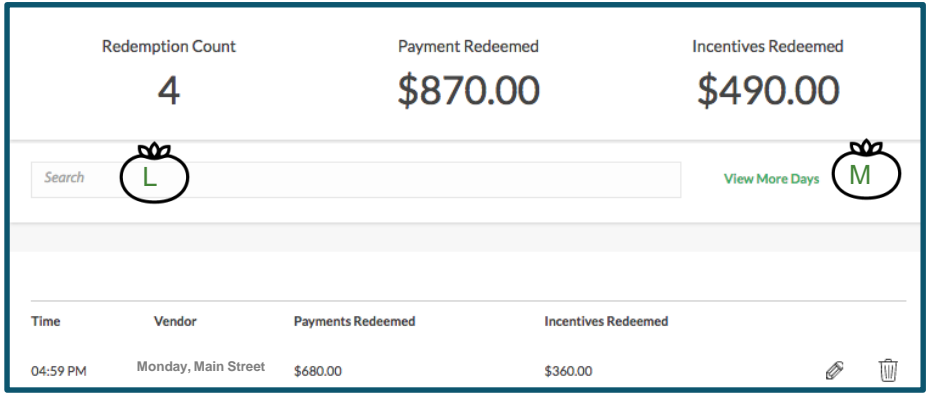
Reimbursement Log: Search, Edit, or Delete

Each market day has its own log. Click the 'Reimbursement Log' to:

L • Search the reimbursement log.

• Edit 🖉 or delete 🗑 a transaction.

M • Click 'View More Days' to view other logs.

Redemption Count	Payment Redeemed	Incentives Redeemed
4	$870.00	$490.00

Search | View More Days

Time	Vendor	Payments Redeemed	Incentives Redeemed		
04:59 PM	Monday, Main Street	$680.00	$360.00	🖉	🗑