

FM TRACKS DEEP DIVE TRAINING

Thursday, November 29th, 2018



Agenda

Introduction
Maximizing Profiles
Entering Data – Web
Entering Data – App
Logs & Reports
Troubleshooting

Introduction

ABOUT WHOLESOME WAVE

wholesome wave

Wholesome Wave is the leading national organization focused solely on helping people in need afford fruits and vegetables. We work to make sure every American has access to affordable, healthy food for their family.

We're based right here in Bridgeport, CT!



FM TRACKS HISTORY WELCOME TO THE TEAM!

- In 2015, Case Western released FM Tracks to be pilot tested at FINI launch; In September 2015, Wholesome Wave began 2.0 development and on-boarded our statewide network in Florida.
- In **2016**, Wholesome Wave released 2.0 to increase ease of use, generate exports, and include vendor reimbursement tools. Expanded use to FINI programs in NYC.
- In 2018, 25+ states have entered transactions and vendor reimbursements building a national incentive dataset
- Today, you join our team!



WHAT IS FM TRACKS?

- FM Tracks is a data collection tool that is used to track nutrition incentives *at farmers markets.*
- We have an App (iPad's only) and a website
- You can use this tool to report, download, and analyze data from your market or your network.





FM TRACKS OVERVIEW TWO PART SYSTEM





FM TRACKS OVERVIEW DATA USE EXAMPLES



Events & Advertising



Summit County WIC distributed vouchers

Geographic Data



Total # zip codes reached



Average proportion of households on SNAP across all zip codes

Total reach of market (square miles)

266.

CUSTOMERS

New Customers

21% had never been to any farmers' market before
53% had never been to this market before



Returning Customers





said that the incentive program increased the amount of produce they were eating

97%

said that the incentive program increased the amount of produce they were buying

Questions?

	3 4 5
	Creating and
ALL HALL	Maximizing your User Profiles
Bath / Asprova Code Brity Hethod Mode	ABC ABC

Bee Heaven Farm at

Pinecrest Gardens Farmers Market

Current Transaction

Not logged in 🕞 WORKING OFFLINE

New Transaction

0

Purchase Information

Purchase amount

Incentive type

Incentive amount

\$8.00

🔿 Cash 🔿 Dheck. 🔿 Credit/Debit Card 🥘 SNAP/EBT

○ Fresh access bucks ● RCT 2 ○ RCT 1.5

BALANCE INFORMATION PS AVAILABLE BALANCE 58.43 CUSTOMER COPY

000016 970062 Sniped Online

1 - - 16.309

STEP 1: GO TO FMTRACKS.ORG



1

Sign Up Today!

Fill out the form below, registering either as a Farmers' Market or Network

2 Once you submit your registration, you will receive an email with instructions to complete your registration and begin using FM Tracks.

Transactions		Payments	Distributed	Incentive and May 07	s Distributed	Custom and the		
More into	218	Moreinfo	\$580,154.72	Moreinto	\$51,848.92	Moreinfo		2,811
Network	cs					٨	dd New N	letwork 🕣
0-			-			м		Religion
O 0mar	lets +add.market						Ø	ť
Markets						9	Add New	Market 🕣
-						Enter Dully Soles & Outo	Marapt Profile	Run Reports
	ransaction: 4/23/2014			() 1 open ;	ost market reports	۲	Ø	ť

Farmers' Market

Network



Register as a "Farmers' Market if you operate one direct-to-consumer farmers market, mobile market or CSA.

STEP 2: CREATE YOUR FM TRACKS ACCOUNT

Farmers' Market

Network

-

?

Register as a "Farmers' Market if you operate <u>one</u> direct-to-consumer farmers market, mobile market or CSA.

Login Information •

Already a member of FM Tracks?

Sign In Now

- or -

Create a new account:

First Name	Last Name
Email Address	
Password	Repeat Password

STEP 3: INPUT CONTACT INFORMATION

-

Contact Information

Market Name (i.e. 'Cityville' or 'Cityville South')			
Contact Name	Contact Email		Contact Phone Number
Alternate Contact Name	Alternate Contact Ema	il	Alternate Contact Phone Number
Mailing Street Address		Mailing Apartment/Su	uite/Unit
Mailing City		Mailing State	✓ Mailing Zip

STEP 4: INPUT LOCATION INFORMAION

Location Information

Complete one registration for each market location. A market manager may register up to five market locations under one user login ID¹. If you have more than five market locations, then register as a "Network" first to connect the markets.

-

¹ All data entered under the same user login ID will be visible to all market locations.

Farmers' Market Address		Address 2	2		
City		State	~	Zip	
Days of Operation					
Sunday 🗸	Open Time	~	Close Time	~	remove day 🗙
Same Sunday Hours Year Round	Start Date	~	End Date	~	
	🔁 Add More Da	ys of Operati	on		

STEP 5: INPUT DAYS OF OPERATION

Ē

Farmers' Market Address			Address	2		
City			State	*	Zip	
Days of Operation						
Sunday	~	Open Time	*	Close Time	~	remove day ×
Same Sunday Hours Year Round		Start Date	~	End Date	~	
Sunday	~	Open Time	~	Close Time	*	remove day 🗙
Same Sunday Hours Year Round		Start Date	•	End Date	(*)	
Sunday	~	Open Time	~	Close Time	~	remove day 🗙
Same Sunday Hours Year Round		Start Date	* 1	End Date	*:	
		🔁 Add More [Days of Operat	tion		



Complete one registration for each market location. A market manager may register up to five market locations under one user login ID¹. If you have more than five market locations, then register as a "Network" first to connect the markets.

 $^1\,{\rm All}$ data entered under the same user login ID will be visible to all market locations.

1 Farmers Market Lane		Address	2		
Bridgeport		СТ	~	06604	
Days of Operation					
Saturday 🗸	8:00 AM	~	2:00 PM	~	remove day 🗙
Same Saturday Hours Year Round	June 🗸	1 ~	October 🗸	31 🗸	
Sunday 🗸	8:00 AM	~	2:00 PM	~	remove day 🗙
Same Sunday Hours Year Round					
Wednesday 🗸	8:00 AM	~	2:00 PM	~	remove day 🗙
Same Wednesday Hours Year Round	June 🗸	1 🗸	October 🗸	31 🗸	
	🕂 Add More D	ays of Operat	ion		

STEP 6: ADD PAYMENT AND INCENTIVE INFO

Accepted Payment Methods

Cash	Check	Credit / Debit Card	SNAP / EBT
WICCVV	WIC FMNP	Senior FMNP	Produce Rx

Incentives Offered

Select which type of incentive program is operated at your market.

Select "Healthy Food Incentive - Matching Program" if your program provides additional incentive funds to customers who spend federal benefits at the market. Calculate your Matching Amount by dividing the dollar amount of federal benefit spent by the dollar amount of incentive received (e.g. if you distribute \$2 for every \$5 in federal benefit spent, divide \$2 by \$5 and multiply by 100 to calculate your Matching Amount as 40%; if you distribute \$1 for every \$1 in federal benefit spent, divide \$1 by \$1 to calculate your Matching Amount as 100%.)

Select "Health Food Incentive - Discount Program" if your program applies the incentive by administering a discount. Your Matching Amount equals the percentage discount you apply to federal benefit purchases by customers (e.g. if you offer a 50% discount, your Matching Amount is 50%)

Choose Incentive Type	E
remove incentive	c
 🔁 Add Incentive Type	



Accepted Payment Methods

Cash	Check	Credit / Debit Card	SNAP / EBT
WIC CVV	WIC FMNP	Senior FMNP	Produce Rx

Incentives Offered

Select which type of incentive program is operated at your market.

Select "Healthy Food Incentive - Matching Program" if your program provides additional incentive funds to customers who spend federal benefits at the market. Calculate your Matching Amount by dividing the dollar amount of federal benefit spent by the dollar amount of incentive received (e.g. if you distribute \$2 for every \$5 in federal benefit spent, divide \$2 by \$5 and multiply by 100 to calculate your Matching Amount as 40%; if you distribute \$1 for every \$1 in federal benefit spent, divide \$1 by \$1 to calculate your Matching Amount as 100%.)

Select "Health Food Incentive - Discount Program" if your program applies the incentive by administering a discount. Your Matching Amount equals the percentage discount you apply to federal benefit purchases by customers (e.g. if you offer a 50% discount, your Matching Amount is 50%)

Healthy Food Incentive Program - Matching			~	E
			remove incentive 🗙	
You SNAP We Match		SNAP / EBT		~
100.00	%	\$ 10.00	N/A	~
	🔁 Add Inc	centive Type		

STEP 7: IDENTIFY NETWORK MEMBERSHIP

Network Membership

Not A Network Member Or Network Not Listed

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

Other ID Field

~

Ξ

Ξ



Ξ

-

Billing Information

1		
(-)
(1.1	
)		

Billing options for FM Tracks managed by Organization.

Terms & Conditions

I agree to the terms and conditions.

SIGN UP

Questions – User Profiles?

Entering Data on the Website





Sign Up Today!

- 1 Fill out the form below, registering either as a Farmers' Market or Network
- 2 Once you submit your registration, you will receive an email with instructions to complete your registration and begin using FM Tracks.



Farmers' Market

Network



Register as a "Farmers' Market if you operate one direct-to-consumer farmers market, mobile market or CSA.

Login Information •

Already a member of FM Tracks?

Sign In Now

E



Sign Up Today!

FM				
Transactions		Payments Distributed	Incentives Distributed	Customers
Moreinto	218	Marrieto \$580,154.72	Marginto \$51,848.92	Marcinto 2,811

Already a member of FM Tracks?

Email Address		
Password		
Remember my email address	Forgot your password?	Sign In

Register as a "Farmers' Market if you operate one direct-to-consumer farmers market, mobile market or CSA.

Login Information •



FM TRACKS DASHBOARD

FNE	Search here						Olivia Korth	
Transactions Jan 01 - Nov 29 More info	51	Payments Distril Jan 01 - Nov 29 More info	s544.5	Incentives Distribut	^{ted} \$255.5	Customers Jan 01 - Nov 29 More info		68
Payment Vendor Rein Jan 01 - Nov 29 More info	mbursements \$85	Incentive Vendor Jan 01 - Nov 29 More info	r Reimbursements \$20					
Notwork						Add No.	w Network	Ð
Network						Add Ne	W Network	Ð





HOVER FOR SNAPSHOT

G S	earch here						Olivia Korth	
Transactions Jan 01 - Nov 29 More info	51	Payments Distribut Jan 01 - Nov 29 Snap/EBT Cash Credit/Debit Card Check	\$207 \$178.5 \$125 \$34	Incentives Distr Jan 01 - Nov 29 ——— More info	ributed \$255.5	Customers Jan 01 - Nov 29 More info		68
Payment Vendor Reimbur Jan 01 - Nov 29 More info	rsements \$85	Incentive Vendor I Jan 01 - Nov 29 ——— More info	Reimbursements \$20					





YOUR FM TRACKS OVERVIEW

	6	Check	\$34
Payment Vendor Reim	bursements	Incentive	Vendor Reimbursements
Jan 01 - Nov 29		Jan 01 - Nov	29
More info	\$85	More info	\$20

Networks	Add New Network	(+)
No networks available		
Markets	Add New Market	t 🕂
	Enter Daily Manage Sales & Data Profile	eports
WW Farmers Market Last Transaction: 11/12/2018	 9+ open post market reports (\$) (\$) 	Ľ

🔾 Search here..



A FEW IMPORTANT TABS...







Questions

yes	no
choose not to respond	
lave you ever shopped at this farmers' market b	efore today?
yes	no
choose not to respond	
low did you hear about this farmer's market?	
word of mouth	poster or flyer
newspaper or magazine	radio or TV
social service agency (SNAP office or WIC clinic) or community organization	WIC or Senior Farmers' Market Nutrition Program materials
healthcare provider	billboard
online newsletter or website	text promotion
social media page (facebook, twitter, etc)	bus or transit promotion/advertisement
FreshLink Ambassador	Driving by
Facebook ad	email
Postcard	FreshEBT
choose not to provide	
low did you get to the market today?	
Walked	Bicycle
Drove Personal Automobile	Bus/Public Transport

✓	WW Farmers Market Enter Daily Sales & Data Manage Profile	Run Reports			48 open post market reports
		Ø	November 26	0	
	(\$) Transactions		Vendor Reimburs	ement	Post Market
N	ew Individual Transaction	New A	Aggregate Tran	saction	Transaction Log

New Aggregate Transaction

# of New Customers	# of Transactions	# of Transactions		
Payment Method 🗸 S Total Payr	nent Amount Incentives			
	Produce Perks	\$ 0.00		
	Wholesome RX	\$ 0.00		

	WW Farmers Marke Enter Daily Sales & Data Manage Profile		48 open post market reports
	(\$) Transactions	J Vendor Reimbursement	Post Market
N	ew Individual Transaction	New Aggregate Transaction	Transaction Log

New Aggregate Transaction


	\odot	November 05 🕟		
(\$) Transactions	<u></u>	endor Reimbursement	2	Post Market
New Individual Transaction	New Ag	New Aggregate Transaction		saction Log
Transactions 26		Payment Distributed Incentives Distributed \$284.00 \$214.00		
Search log			View N	Aore Days
Time Customer Research ID PC	SID Other ID Payment	Amount Incentive	Distributed Entry	Manager
08:26 PM IT6498 None No	ne None Mutiple	\$35.00 Produce Pe	rks \$15.00 Manual	Olivia Korth 🔗 🔟
08:26 PM IJ6483 None No	ne None SNAP/EB	T \$25.00 Produce Pe	rks \$20.00 Manual	Olivia Korth 🖉 🔟
08:25 PM RE5270 None No	ne None SNAP/EB	T \$14.00 Produce Pe	rks \$14.00 Manual	Olivia Korth 🖉 🔟

Add Reimbursement		Re	eimbursement Log
Vendor Name]	Gross Sales	
Name		\$0.00	
Sells fruits or vegetables Sells SNAP Eligible food			
Payments Redeemed		Incentives Redeemed	
	# of Transactions	KDD - FV	
SNAP / EBT			
SNAP / EBT WIC FMNP	# of Transactions	KDD - MED	
	# of Transactions # of Transactions	KDD - MED KDD - WIC	





Submit Post Market Report

Questions - Web?

<text><section-header><section-header><section-header></section-header></section-header></section-header></text>	Bee Heaven Farm at Pinecrest Gardens Farmers Market CHANGE MARKET Not logged in E- VORKING OFFLINE Not logged in E- VORKING OFFLINE Not logged in E- VORKING OFFLINE S8.00
	Current Transaction Incentive type Cresh access bucks RET 2 RET 15 Incentive amount

Entering Data on the iPad

16.309







Thanks for downloading FM Tracks!

If you do not have an account please visit our website to register and get started!

Learn More / Register

Sign in

Email address

Password

LOG IN



WW Farmers Market



Change Market

Inwood Greenmarket

Jackson Heights Greenmarket

KY Demo Market +

Lincoln Hospital Greenmarket

Magnolia

Transactions	New Transaction	
Transactions	Payment	Auto-Calculate Manual
	PAYMENT METHODS	INCENTIVES
Vendor Reimbursement	SNAP/EBT > \$0.00	O Produce Perks \$0.00
	Add payment method	ADDITIONAL TRACKING
Post Market Questions	CUSTOMER ID	Research ID 1234
	Enter ID Anonymous	POS ID 1234
Sync Log	e.g. CP0982	Other ID 1234
FM Tracks Website	CUSTOMER ZIP CODE Enter Zip Code Anonymous e.g. 12345	
Change Market	Show questions	
Logout	Summary	Payment Amount \$0.00
olivia@wholesomewave.org ((•))	\$0.00 SNAP/EBT	

WW Farmers Market	New Transaction	
TRANSACTION LOG	Payment	Auto-Calculate Manual
	PAYMENT METHODS	INCENTIVES
	SNAP/EBT > \$0.00	O Produce Perks \$0.00
	Add payment method	ADDITIONAL TRACKING
	CUSTOMER ID	Research ID 1234
	Enter ID Anonymous	POS ID 1234
	e.g. CP0982	Other ID 1234
	CUSTOMER ZIP CODE	
	Enter Zip Code Anonymous	
	e.g. 12345	
	Show questions	
	Summary	Payment Amount \$0.00
olivia@wholesomewave.org	\$0.00	
	SNAD/ERT	

	New Transaction			
TRANSACTION LOG	Show questions			
	Is this your first time ever shopping a	t any farmer	s' market?	
	yes	\bigcirc	no	\bigcirc
	choose not to respond	\bigcirc		
	Have you ever shopped at this farmer	rs' market be	fore today?	
	yes	\bigcirc	no	\bigcirc
	choose not to respond	\bigcirc		
	How did you hear about this farmer's	market?		
	word of mouth	\bigcirc	poster or flyer	\bigcirc
	newspaper or magazine	\bigcirc	radio or TV	\bigcirc
	social service agency (SNAP of		WIC or Senior Farmers' Market	\bigcirc
	healthcare provider		billboard	\bigcirc
	online newsletter or website	\bigcirc	text promotion	\bigcirc



New Transaction

TRANSACTION LOG

PAYMENT METHODS		INCENTIVES	
SNAP/EBT	> \$16.00	Produce Per	rks \$10.00
Add payment me	ethod	ADDITIONAL TRACKI	NG
CUSTOMER ID		Research ID	1234
Enter ID	Anonymous	POS ID	1234
e.g. CP0982		Other ID	1234
CUSTOMER ZIP CODE			
Enter Zip Code	Anonymous		
06470			
Show questions			
Summary		Payment A	Amount \$26.00
\$16.00	\$	10.00	
SNAP/EBT	Prod	uce Perks	
[Complete Transa	action	Cancel

olivia@wholesomewave.org

((



Transactions	New Transaction	
Transactions	Payment	Auto-Calculate Manual
	PAYMENT METHODS	INCENTIVES
Vendor Reimbursement	SNAP/EBT > \$0.00	O Produce Perks \$0.00
	Add payment method	ADDITIONAL TRACKING
Post Market Questions	CUSTOMER ID	Research ID 1234
	Enter ID Anonymous	POS ID 1234
Sync Log	e.g. CP0982	Other ID 1234
	CUSTOMER ZIP CODE	
FM Tracks Website	Enter Zip Code Anonymous	
	e.g. 12345	
Change Market		
	Show questions	
Logout	Summary	Payment Amount \$0.00
olivia@wholesomewave.org ((•)	\$0.00	
	SNAP/FBT	

WW Farmers Market		New Reimb	ursements			
Vendor Name 7	Fotal	Vendor				
		Name Enter name Sells fruit or vege	tables	Gross Sales	0	
		Sells SNAP eligible foods				
		Payments Redeemed		Incentives Redeeme	d	
		Cash	Amount	Produce Perks	\$0.00	
		# of Transactions				
		Check	Amount			
		# of Transactions				
		Credit/Debit Card	Amount			
		# of Transactions				
		SNAP/EBT	Amount			
olivia@wholesomewave.org	((•))	# of Transactions				

WW Farmers	Market	New Reimb	ursements		
Vendor Name	Total	Vendor			
VICTOR'S VEGGIES	\$40.00	Name Enter name		Gross Sales	Amount
PEGGIES PEACHES	\$15.00	Sells fruit or vege	tables		, in our in
HENRY	\$68.00	Sells SNAP eligib	le foods		
		Payments Redeemed	d	Incentives Redeeme	ed
		Cash	Amount	Produce Perks	\$0.00
		# of Transactions			
		Check	Amount		
		# of Transactions			
		Credit/Debit Card	Amount		
		# of Transactions			
		SNAP/EBT	Amount		
olivia@wholesomew	vave.org ((•))	# of Transactions			

Transactions	New Transaction	
Transactions	Payment	Auto-Calculate Manual
Vendor Reimbursement	PAYMENT METHODS	INCENTIVES Produce Perks \$0.00
Post Market Questions	CUSTOMER ID	ADDITIONAL TRACKING Research ID 1234
Sync Log	Enter ID Anonymous e.g. CP0982 CUSTOMER ZIP CODE	POS ID1234Other ID1234
FM Tracks Website	Enter Zip Code Anonymous e.g. 12345	
Change Market	Show questions	
Logout	Summary	Payment Amount \$0.00
olivia@wholesomewave.org ((•))	\$0.00 SNAP/EBT	

Sync Log

WW Farmers Market

Time	Transactions	Redemptions	Post Market Responses	Status
21:39	1	0	0	Success
21:39	1	0	0	Success
21:41	1	0	0	Success
21:42	0	1	0	Success
21:42	0	0	0	Success

Questions?

Demonstration Logs and Reports





Run Report







Run Report

Market Performance Summary

Payments Distributed Nov 05 - Nov 26		Payment Vendor Reimbursements Nov 05 - Nov 26		Incentives Distributed Nov 05 - Nov 26	
More info	\$420.5		\$0	More info	\$236.5
Incentive Vendor Reimbursements Nov 05 - Nov 26		Transactions Nov 05 - Nov 26		Customers Nov 05 - Nov 26	
	\$0	More info	40	More info	58



Payments Distributed

Payment Vendor Reimbursements

Incentives Distributed



Credit/DebitCard Market Match **Market**Match SeniorFMNP WIC FMNP WICFMNP SNAP/EBT Snap/EB1 All Payments distributed All Incentives distributed All Payments redeemed All Incentives redeemed (from transaction log) (from redemption log) (from transaction log) (from redemption log)

\$0

Transactions Customers

O







Copyright © 2018 Prevention Research Center for Healthy Neighborhoods at Case Western Reserve University. All rights reserved. • Terms & Conditions





Copyright © 2018 Prevention Research Center for Healthy Neighborhoods at Case Western Reserve University. All rights reserved. • Terms & Conditions



Questions – Logs/Reports?

Troubleshooting

INSTRUCTIONS UPDATING FM TRACKS APP

Ē



INSTRUCTIONS TAKING SCREENSHOTS ON THE WEBSITE

PC



MAC

How to take a screenshot of your entire screen

1. Press Shift-Command (光)-3.

2. Find the screenshot as a .png file on your desktop.

How to take a screenshot of a selected portion of your screen

1. Press Shift-Command-4. The pointer changes to a crosshair.

2. Move the crosshair to where you want to start the screenshot, then drag to select an area.

While dragging, you can hold Shift, Option, or Space bar to change the way the selection moves.



INSTRUCTIONS TAKING SCREENSHOTS ON APPLE DEVICES

- 1. Press and hold the Sleep/Wake button on the top or side of your device.
- 2. Immediately press and release the Home button.
- 3. To find your
 screenshot, go to
 the Photos app >
 Albums and tap
 Camera Roll.



THANK YOU!!

Questions? Email olivia@wholesomewave.org



wholesomewave.org

Photo credit Jameel Khaja, Gabriella Marks, Kendall Photo, Boereck, Shannon Collins, Gary Yost, Christian Cable, frankieleon, Evan Amos, Hassocks5489, SA 2.5, SA 3.0, Digital Vision, Dat Nguyen Richard Howard, Mike Mozart, Takeaway & Glenn Charles