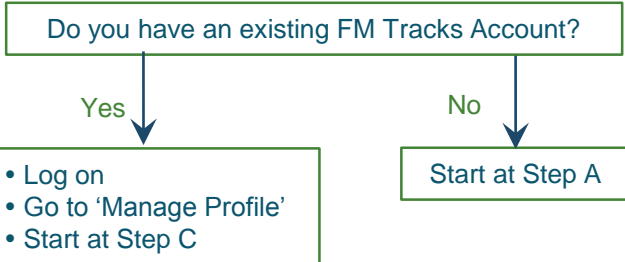# FM Tracks for CSAs: How to Create & Manage Your Profile

The first step to using FM Tracks is to create and customize your CSA'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 and 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 CSAs (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 CSA's main contact
- Location and hours of operation of CSA pickup sites
- 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 the share price)
  - cap (if any) on the incentive (e.g. $20 per day)

Register Your CSA to Create a Profile

A
- Register as a 'Farmers Market' (not a 'Network') even if you have multiple CSA stops/pick-up sites.

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

A | Farmers' Market | Network |

B
- Enter your CSA's name.

  NOTE: Include the word 'CSA' in the name; this helps us to identify groups by type.

B Contact Information
Ministry of Magic, CSA

Enter or Update Days of Operation

IMPORTANT: The information you enter here will impact how FM Tracks prompts you to collect data. You have 2 options for collecting data:

Option 1 – Minimum Required. Collect aggregate data (total sales) for all of your pickup days combined for each week.
Option 2 – Advanced. Collect sales data by pickup day or site (this is welcomed but not required).

C Option 1 – Minimum Required
Enter day of the week of the last pickup in the week (e.g. enter Saturday if you have pickups on Tuesday, Thursday, and Saturday). Enter CSA start and end dates, starting with your first pickup and ending with the last pickup of the year.

C Option 2 – Advanced
Enter day of the week of the first pickup, open/close times, and start/end dates.

D Click 'Add More Days of Operation' to add any more pickup days.

C Days of Operation
Sunday | Open Time | Close Time
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.

(E) Select the types of payment your CSA accepts.

(F) 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 discounted share to SNAP customers, select 'Healthy Food Incentive Program-Discount.'

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

(H) Enter payment types you incentivize (e.g. SNAP), incentive cap, & frequency of the cap.

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

(E) 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 **(F)**

remove incentive ✕

SNAP CSA **(G)** — SNAP / EBT **(H)**

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

➕ Add Incentive Type

Select Additional Customer Tracking (OPTIONAL)

(I) 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.

(I) 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 CSA program), go to 'Manage Profile' to:

- Update your basic program information if there have been any changes, following the steps above.
- Give a CSA 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 CSA 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 CSAs: How to Enter Daily Sales & Data

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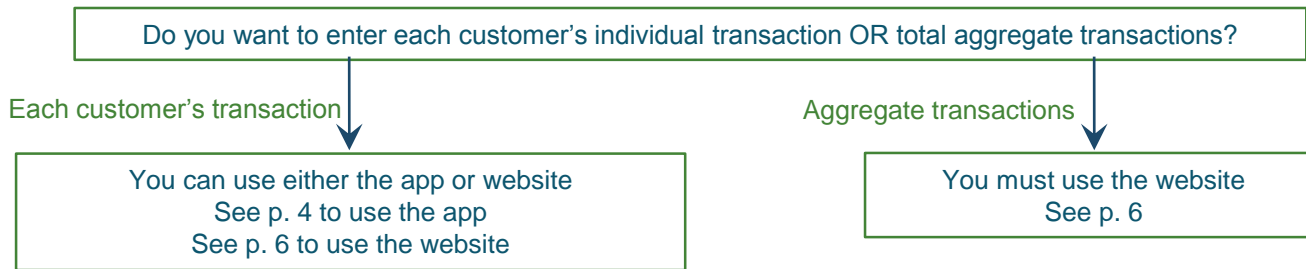
What Data Is Required & How Frequently?

<u>Each week</u>, you must enter, at a minimum:

- Aggregate $ of SNAP sales
- # of new customers
- # of SNAP transactions
- # of producers/vendors that contributed to the CSA
- # of Incentivized CSA shares that were picked up

NOTE: You have the option to enter this information by day or by pickup site 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?

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's transactions on-site without using the app, download our pen and paper CSA 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 market to track individual customers. FM Tracks IDs are OPTIONAL.

Your CSA 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 CSAs: 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 CSA pickup day. You do not need an internet connection on-site at your CSA.

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 CSA.

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 full share price), enter the original share 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 50% discount incentive, the SNAP/EBT field shows how much to charge the customer's EBT card.

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.

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 becomes the default.

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

Step 5: Answer Post Market Questions

Access 'Post Market Questions' on the Main Menu.

Transaction and payment redemption totals are calculated based on transactions 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 CSAs 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 the 'Payments Distributed' total in the log; it is incorrect for CSAs.)

Tap 'Submit Post Market Report' when finished.

Step 6: Report Advanced Data – by Site or Day (OPTIONAL)

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

CSAs can use this page to track sales by pickup site or by pickup day of the week. For example, to track by day of the week:

In 'Vendor Name,' enter the day of the week and/or location of the pickup (e.g., Monday, Main Street).

In 'Payments Redeemed,' enter total amount redeemed of SNAP/EBT redeemed and the number of SNAP/EBT transactions for Monday's pickup.

Click 'Submit Reimbursement.'

If you report this data every week, you will have a log of Monday's SNAP/EBT sales throughout the season, and can compare this to other pickup days.

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 market day or for a different market.

Step 8: Connect to the Internet

Connect your iPad or iPhone to the internet after your CSA pickup. 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.

Green's CSA — Post Market Report

Transactions	12
Snap/EBT	12
Payments Distributed	$450.00
Snap/EBT	$450.00
Incentives Distributed	$225.00
SNAP CSA	$225.00
Customers	12
New Users	7
Returning Users	1
Anonymous	4
Payments Redeemed	$0.00
Incentives Redeemed	$0.00

Post Market Report	
*What was the amount of SNAP redeemed by vendors today?	225
*What was the total amount of incentives redeemed by vendors for fruits and vegetables today?	225
*What was the total amount of incentives redeemed for SNAP-eligible items today?	225
*How many producer/vendors were selling at this market today?	1
*How many producer/vendors were selling fruits and vegetables today?	1
*How many of the producer/vendors were eligible to accept SNAP today?	1
*How many paid staff were involved in the administration of the incentive program today?	2
*How many volunteers were involved in administration of the incentive program today?	1
*Did you have any of the following activities today? Check all that	

Transactions | Vendor Reimbursement | Post Market

Add Reimbursement | Reimbursement Log

Vendor Name
MONDAY, MAIN STREET

☐ Sells fruits or vegetables
☐ Sells SNAP Eligible food

Gross Sales
$0.00

Payments Redeemed

Cash	# of Transactions
Check	# of Transactions
Credit / Debit Card	# of Transactions
200	# of Transactions
WIC FMNP	# of Transactions
Senior FMNP	# of Transactions

Incentives Redeemed
Bonus Bucks

Total Redeemed
$200.00

Submit Reimbursement

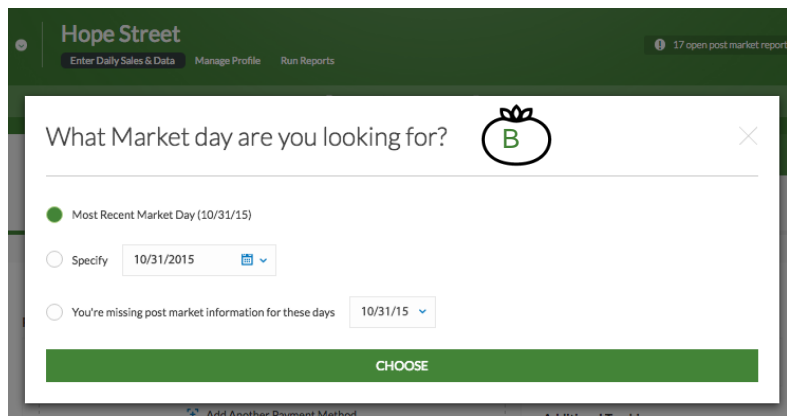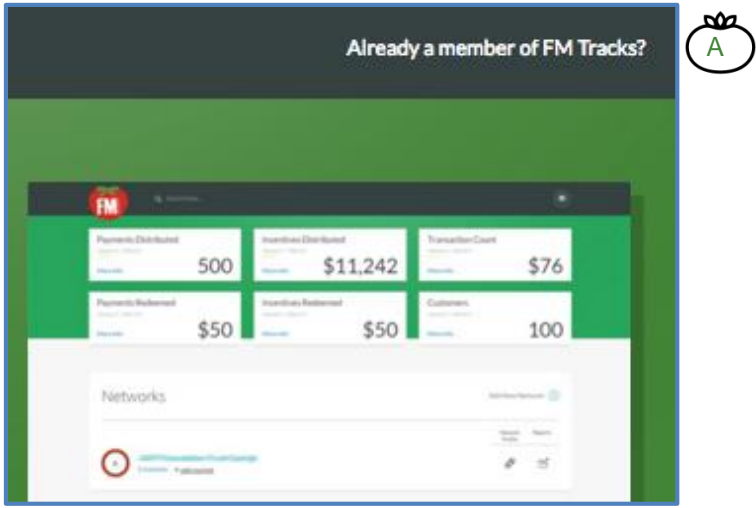| Date	Transactions	Redemptions	Post Market Responses	Status
2016-04-03 14:31:12	7	6	0	Pending

FM TRACKS WEBSITE FOR CSAs: 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).
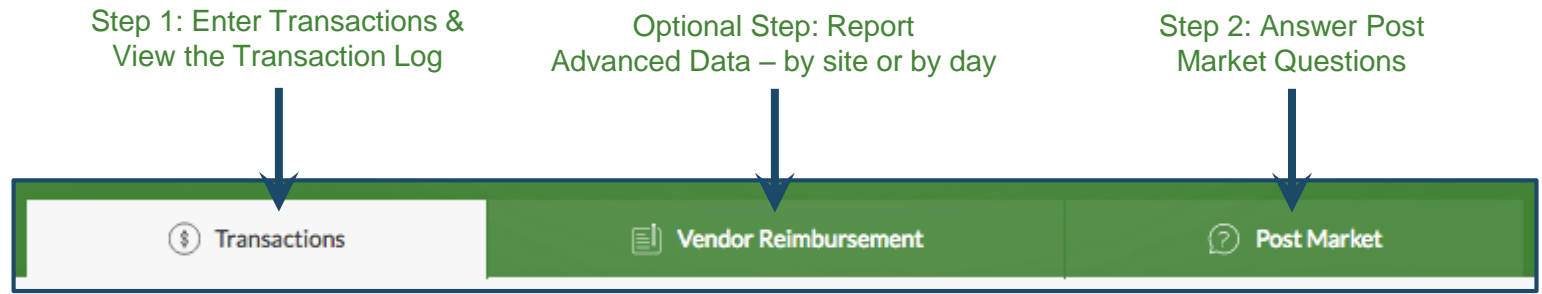
Click 'Sign In.'

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 site or by day

Step 2: Answer Post Market Questions

Step 1: Enter Transactions: Individual or Aggregate

Click the 'Transactions' tab to enter Individual (by customer) or Aggregate (by day/week) Transactions.
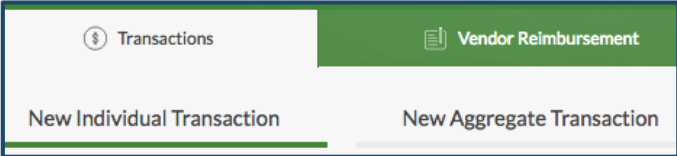
Enter New Individual Transactions

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

C PAYMENT METHODS
Select Payment Method and enter 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 the incentive $ amount.

E CUSTOMER ID
Enter customer's FM Tracks ID & other optional tracking info (editable in 'Manage Profile').

CUSTOMER SURVEYS
Enter responses to customer survey questions.

'Auto-Calculate' calculates the total incentive amount distributed, per customer, based on information you entered in 'Manage Profile'

Fields with missing data appear underlined in red.

Enter New Aggregate Transactions

Click the 'New Aggregate Transaction' tab to enter the total $ amount of purchases for <u>one day (or one week) of CSA pickups</u>, depending on how you set up your profile:

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

Click 'Submit Transaction.'

Transaction Log: Search, Edit, or Delete

G
Each day (or week) 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
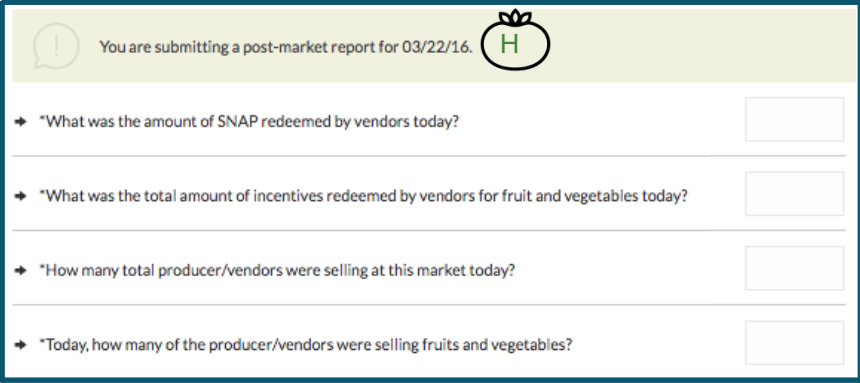
Step 2: Answer Post Market Questions

Click the 'Post Market' tab to answer post market questions.

A pop-up box will appear: 'You're missing post market information for these days.' Choose CSA 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.*

(H) Answer required questions (marked with an asterisk, *) about payments and incentives redeemed and number of vendors participating.

Reminder: For CSAs 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. (H)
>
> → *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?

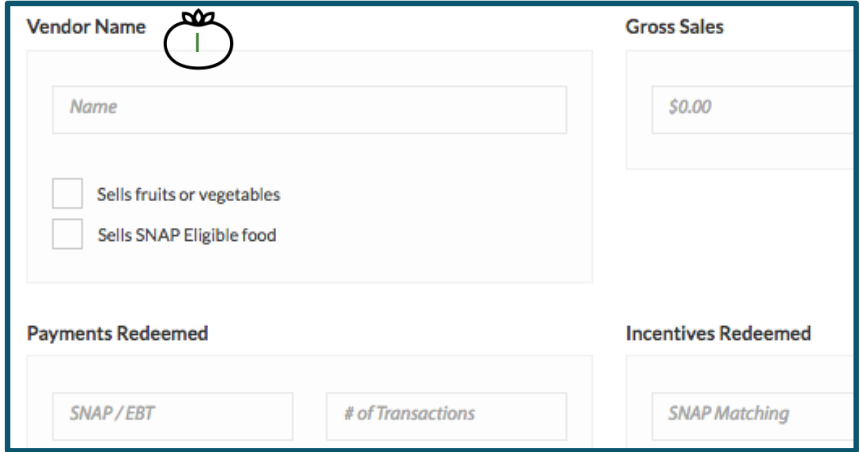## Step 3: Report Advanced Data – by Site or by Day (OPTIONAL)

Click the 'Vendor Reimbursement' tab and 'Add Reimbursement.'

CSAs can use this page to track sales by pickup site or by day of the week. For example, to track by day of the week:

(I) In 'Vendor Name,' enter the day of the week of the pickup (e.g., Monday, Main Street).

In 'Payments Redeemed,' enter total amount of SNAP/EBT redeemed and the number of SNAP/EBT transactions for Monday's pickup.

Click 'Submit Reimbursement.' If you do this every week, you will have a log of Monday's SNAP/EBT sales throughout your CSA season. You can then compare this to your other pickup days.

> **Vendor Name** (I)   **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:

(J) • Search the reimbursement log.

• Edit ✏ or delete 🗑 a transaction.

(K) • Click 'View More Days' to view other logs.

> | Redemption Count | Payment Redeemed | Incentives Redeemed |
> |---|---|---|
> | 4 | $870.00 | $490.00 |
>
> Search (J)   View More Days (K)
>
> | Time | Vendor | Payments Redeemed | Incentives Redeemed | | |
> |---|---|---|---|---|---|
> | 04:59 PM | Farmer A | $680.00 | $360.00 | ✏ | 🗑 |
> | 04:56 PM | FARMER D | $110.00 | $50.00 | ✏ | 🗑 |