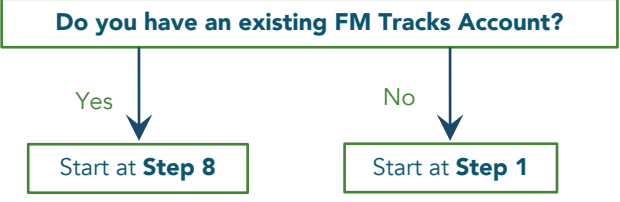


# FM Tracks Website: How to Create & Manage Your Market or Network Profile



Create and customize your FM Tracks profile on the FM Tracks website: [www.fmtracks.org](http://www.fmtracks.org). It is important to update your profile because the information you enter will be used to auto-populate fields required for entering customer transactions — saving time and reducing errors.

## Getting Started



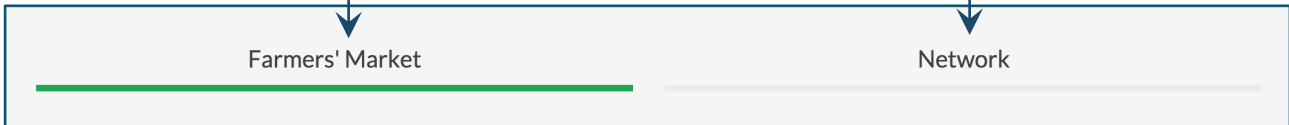
- Information You Need to Complete a Profile**
- Name, mailing address, and phone number of main contact for the market or Network administrator
  - Location and hours of operation of your market(s)
  - Accepted payment methods
  - Information about the incentive program:
    - payment methods that are incentivized (e.g. SNAP),
    - percentage of payment matched (e.g. 100% for a \$1 for \$1 match),
    - cap (if any) on the incentive (e.g. \$20 per day)

## Step 1: Select Whether to Register as a Farmers Market or a Network

**Farmers Markets:** Register as a 'Farmers Market' only if your market operates at a single location.

**CSAs & Mobile Markets:** Register as a single 'Farmers Market' for all of your stops/pick-up sites.

Register as a 'Network' if you operate multiple markets or one program that operates at more than one location.\*



**\*NOTE:** You can create multiple market profiles under one Network profile. Register the Network first and, once its approved, you may add individual market sites.

## What's Your Next Step?



## Step 2: Enter Network Contact Information

Enter contact information and the number of markets in your Network and click 'Sign Up.'

Your request will be forwarded to FM Tracks administrators for approval. You will receive an email within 5 business days that your Network has been approved and inviting you to sign on to the website. **At that time, you may register new markets or invite Market Managers to register the markets themselves (see Step 3).**

# Step 3: Add Markets to Your Network

As a Network Manager, you have 2 options:

- Invite a Market Manager to register their market
- Register the market yourself

Invite Manager to register

Register the market yourself

On your home page, click 'Add New Market.'

Enter Market Manager's email to invite them to enter the market details.

They will start at Step 4.

On your home page, click 'Add New Market.'

Enter market name in the 'Add Market Now' field.

Start at Step 4.

# Step 4: Enter Market Information

Enter contact information and the location and days of operation of your market.

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

**IMPORTANT:** Make sure this information is accurate. The days of operation you select here will inform which days FM Tracks prompts you to complete a Post Market Report.

You can also 'Add More Days of Operation' (see C) and 'Remove Days' (see D) as needed.

## Step 5: Enter Payment & Incentive Information

**IMPORTANT:** All options you select on this page will auto-populate your Transaction page; any options that are not selected will not appear, so double check that all information is complete and accurate.

### Select the types of payment your market accepts.


**Note:** Produce Rx refers to a fruit and vegetable prescription and is a payment type, not an incentive.

Accepted Payment Types			
<input type="checkbox"/> Cash	<input type="checkbox"/> Check	<input checked="" type="checkbox"/> Credit / Debit Card	<input checked="" type="checkbox"/> SNAP / EBT
<input checked="" type="checkbox"/> WIC CVV	<input type="checkbox"/> WIC FMNP	<input type="checkbox"/> Senior FMNP	<input type="checkbox"/> Produce Rx

**Provide information on your incentive program(s).** From the drop-down menu, select the type of incentive program among Matching, Discount, and Loyalty programs. Use the information in the tan box that defines each type of program to help you select the correct type.

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

Healthy Food Incentive Program - Matching


 remove incentive x

Name of incentive program →

Percent matched (100% = 1:1) →  %

Incentivized Payments →

Frequency →

 Add Incentive Type

Payment types you incentivize →

Incentive cap and frequency →

## Step 6: Select Network Membership

**Select the Network from the Network Membership drop-down box** if your market is part of an existing Network. Leave blank if not part of a Network.

Network Membership ●

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Potter Network

### Optional Step: Select Additional Customer Tracking

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**.

If you are participating in Wholesome Wave's Randomized Control Trial or another research study, select 'Research ID' to track lottery ticket numbers. Select 'POS ID' to track IDs created by your POS terminal. These fields do **not** replace FM Tracks IDs.

Additional Customer Tracking ●

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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

## Step 7: 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 confirming that your market has been approved.

## Step 8: Manage Your Profile

Once you receive the email that your request was approved by FM Tracks administrators, go to 'Manage Profile.'

- **To give a Manager administrative access to your Market or Network once registration is complete,** go to your Market or Network profile page, click 'Setup,' and scroll down to 'Market/Network Manager Information' to invite the Manager. Note: Managers for a Network have access to *all* markets within the Network.
- **To answer metrics questions** (required once per year), click 'Report Metrics.'
- **To choose which questions you want to ask** customers and Market Managers, click 'Choose Market Questions.'
- Congratulations! Your profile is now complete and you are ready to start entering transactions.