FM TRACKS 2.0

User Manual & Guide

May 2022

FARM FRESH RI
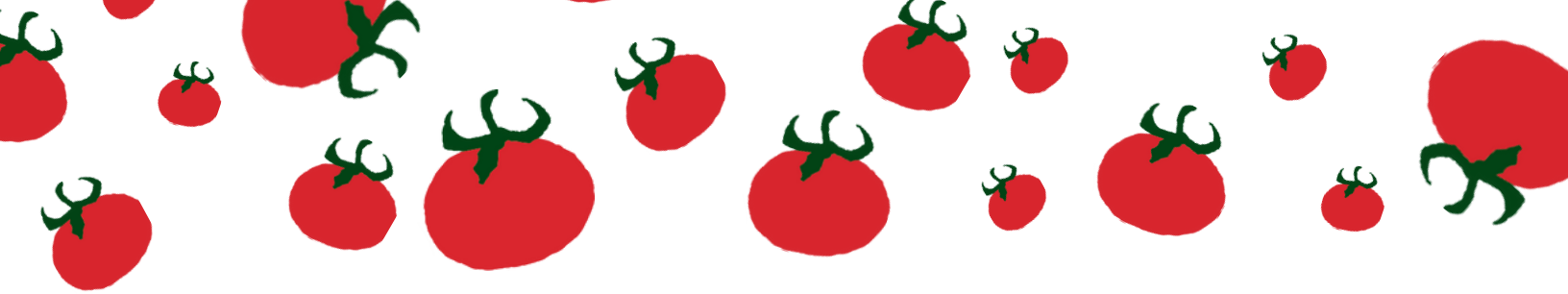
Index

What is FM Tracks 2.0?

FM Tracks 2.0 is the new system Farm Fresh Rhode Island will be using to:
- manage incentive transactions and vendor reimbursement data for markets in Rhode Island utilizing Bonus Bucks
- collect data from markets, outlets, and networks managed by regional partners for FINI and GUSNIP grant reporting needs

The original FM Tracks application was recently purchased by a new organization and increased their pricing model. As a result, FM Tracks is simply out of our budget to continue using with the number of outlets that make up our and partner networks. FM Tracks 2.0 has been created to collect all the information we need while minimizing the transition between platforms.
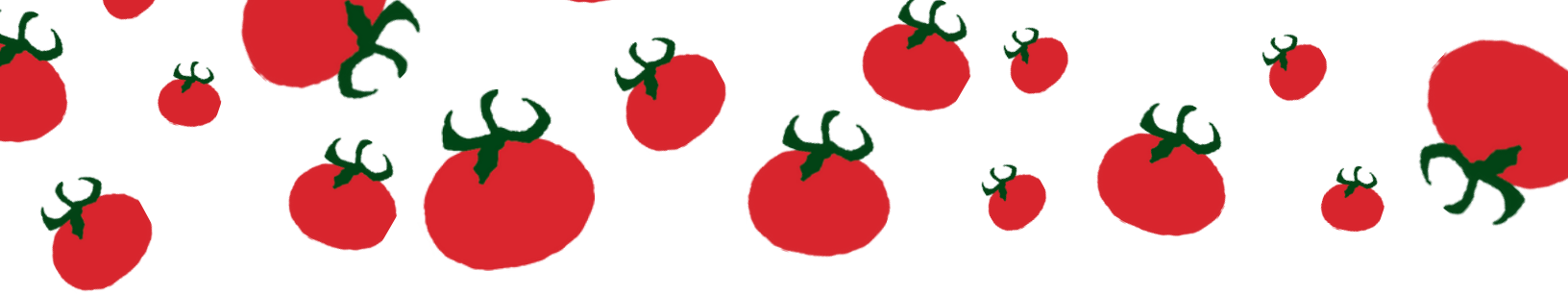
Accessing the Portal

Everyone who needs access will receive an email inviting you to join the platform. Simply follow the link to create an account. It will ask you to create a password to login in to the system. After you have created an account, the platform can be accessed here or through this link:

https://farmfreshri.zohocreatorportal.com/

Access within the application will be determined by your role. All accounts will be able to:

- See records associated with their outlet
- Enter data manually
- Import data from a spreadsheet on your computer
- Export their outlets data
- Search for records
- Group and filter records

Market Managers will be able to do all of the above of their market. Network managers will be able to do all of the above for all markets within their network. FINI Subawardees and Regional Partners will be able to do all of the above for all networks and outlets within their organization.

Having Issues?

RI Farmers Markets: Contact Grace Feisthamel at grace@farmfreshri.org
FINI and Regional Partners: Contact Molly Ellis at molly@farmfreshri.org
Other technical questions: Contact Taylor Jones at taylor@farmfreshri.org

Navigating the Portal

FM Tracks 2.0 is designed to be easy-to-use and intuitive.

All navigation in the application can be done utilizing the menu on the left-hand side of the portal. There are four main sections:

- Market & Network Profiles
- Transaction Data
- Vendor Reimbursements
- Post-market Questionnaires

Simply click on a section to open the menu to see the pages within it. Click again to close it. Only one section can be opened at a time. To select a page, click the page name from the menu.

Types of Pages

There are two main types of pages in the system you will interact with: forms & reports.

Forms look like forms and allow you to input information and submit new records. Each form has a unique icon related to what type of information it collects.

Reports look like data tables by default, however that can change. On report pages, you can view and edit records. Report pages are where you will import and export data. All Report pages in the system have a small upload icon or an information icon:
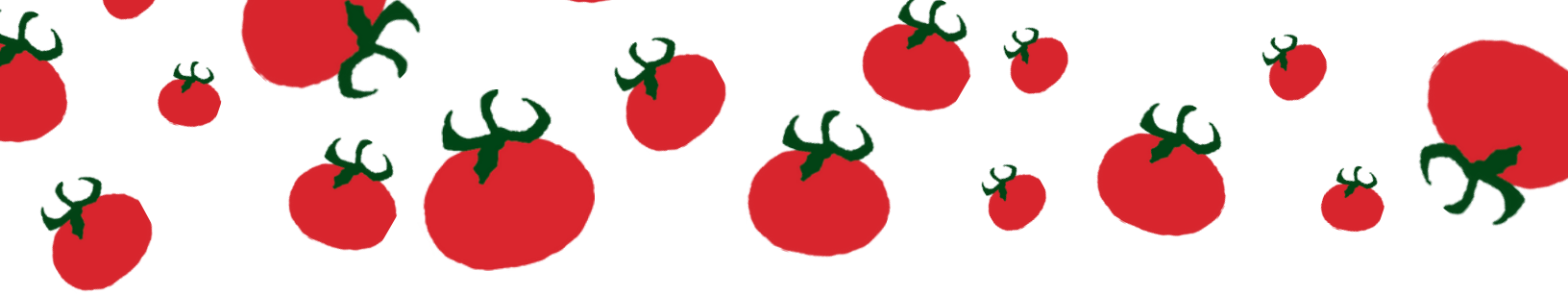
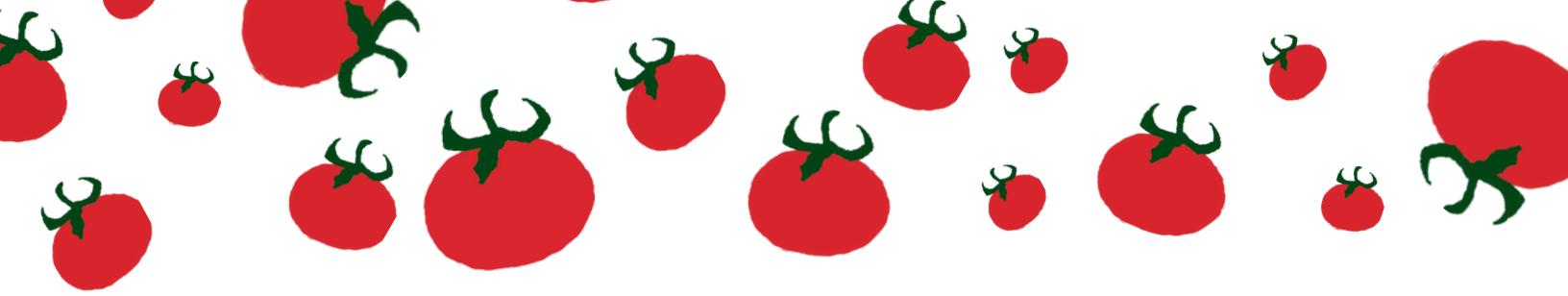# Section & Page Overviews

Market & Network Profiles

This section contains all information related to markets, networks, and the regional partners including:
- Name and contact information
- Addresses and locations
- Outlet days and times
- Accepted payments and Incentives

Market Profiles: This report defaults to a list of all markets. The number of markets displayed depends on your role. Market Managers will only see the listings of markets they manage. This section will be pre-filled as much as possible.

Network Profiles: This report shows a list of networks with contact information. If you click on a record, a detailed view will appear on the right-hand side of your screen. Here you can see the list of markets/outlets within the network and click on a market name to see the information about that market. The views are linked. Again, the number of records you see is related to your role.

FINI Awardee Profiles: This report shows a list with contact information, networks managed, and outlets for each of the FINI Subawardee Organizations.

Section & Page Overviews

Transaction Data

This section contains all information related to financial transactions by customers at markets and outlets. In this section you can:

- Enter individual customer transactions manually
- Upload individual customer transactions from a spreadsheet
- Enter daily totals of customer transactions manually
- Upload daily totals of customer transactions from a spreadsheet
- Access records related to customer transactions
- Edit old records related to customer transactions
- Export records related to customer transactions

Individual Transactions: This form can be used to enter individual customer transactions manually.

Daily Totals (Aggregates): This form can be used to enter daily totals related to customer transactions manually for outlets that do not report individual transactions.

Individual Transactions Report: This report shows all records from the Individual Transactions Form. You can also import multiple records from a spreadsheet on this page. This is also where you can edit old records and export data, as needed.

Daily Totals Report: This report shows all records from the Daily Totals (Aggregates) form. You can also import multiple records from a spreadsheet on this page. This is also where you can edit old records and export data, as needed.
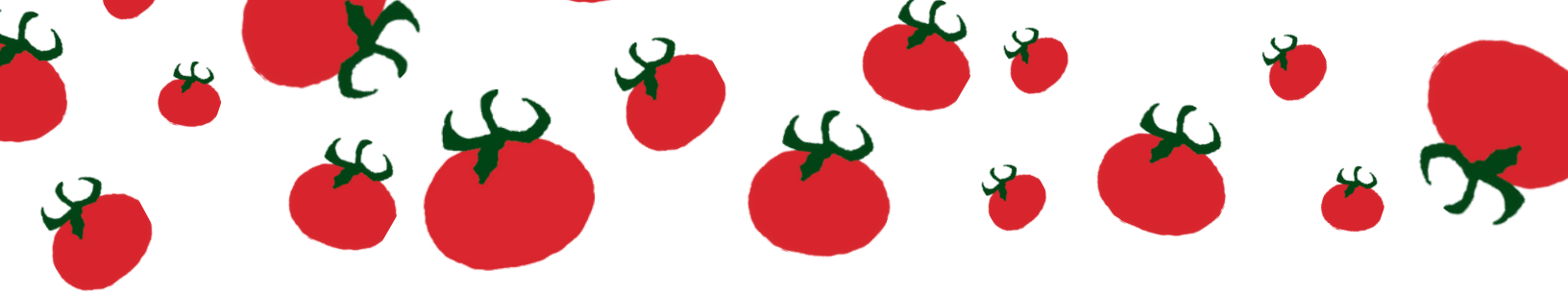
Section & Page Overviews

Vendor Reimbursements

This section contains all information related to vendor reimbursements at markets. In this section you can
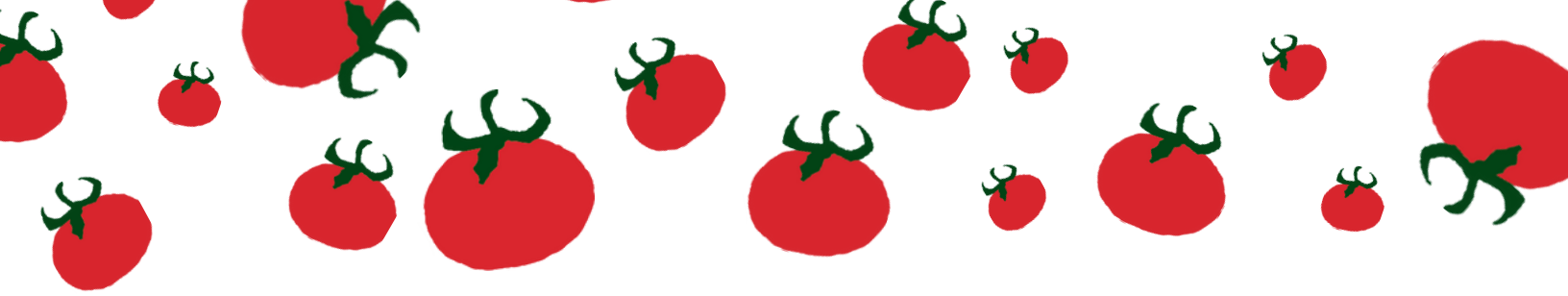- Enter individual vendor reimbursements manually
- Upload individual vendor reimbursements from a spreadsheet
- Enter aggregates of vendor reimbursements manually
- Upload aggregates of vendor reimbursements from a spreadsheet
- Access records related to vendor reimbursements
- Edit old records related to vendor reimbursements
- Export records related to vendor reimbursements

Individual Vendor Reimbursements: This form can be used to enter vendor reimbursements manually.

Batch Vendor Reimbursements: This form can be used to enter aggregate information about vendor reimbursements for outlets that do not report out individual reimbursements by vendor.

Individual Vendor Report: This report shows all records from the Individual Vendor Reimbursements Form. You can also import multiple records from a spreadsheet on this page. This is also where you can edit old records and export data, as needed.

All Batch Vendor Reimbursements: This report shows all records from the Batch Vendor Reimbursements form. You can also import multiple records from a spreadsheet on this page. This is also where you can edit old records and export data, as needed.

Section & Page Overviews

Post-Market Questionnaires

This section contains all information related to post-market questions. In this section you can

- Answer post-market questions via form
- Upload post-market question answers from a spreadsheet
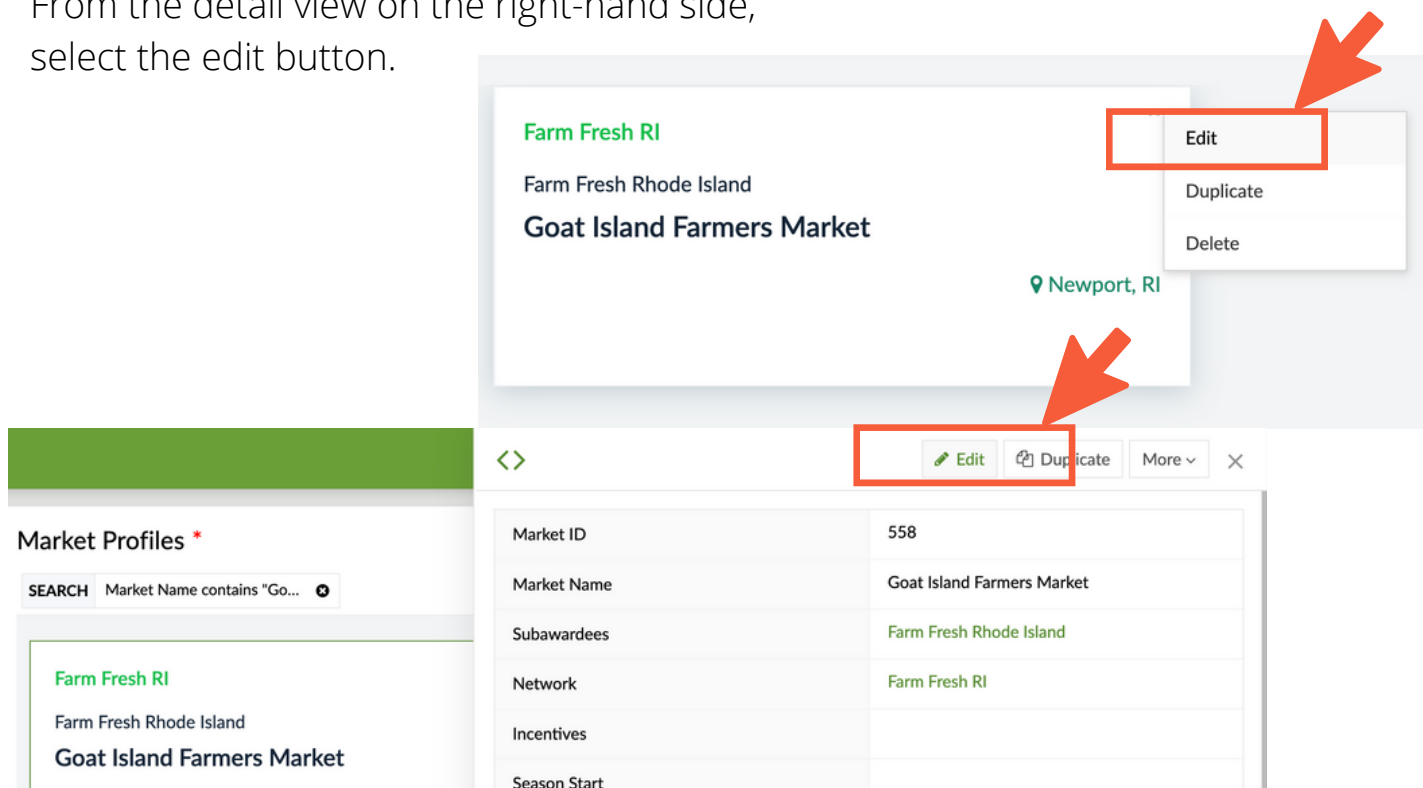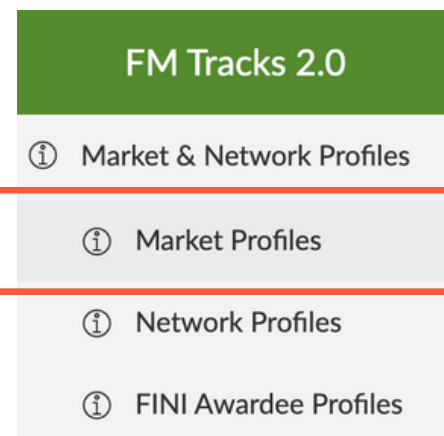- Access all past questionnaires
- Edit past questionnaires

Post-Market Questions: This form can be used to answer post-market questions
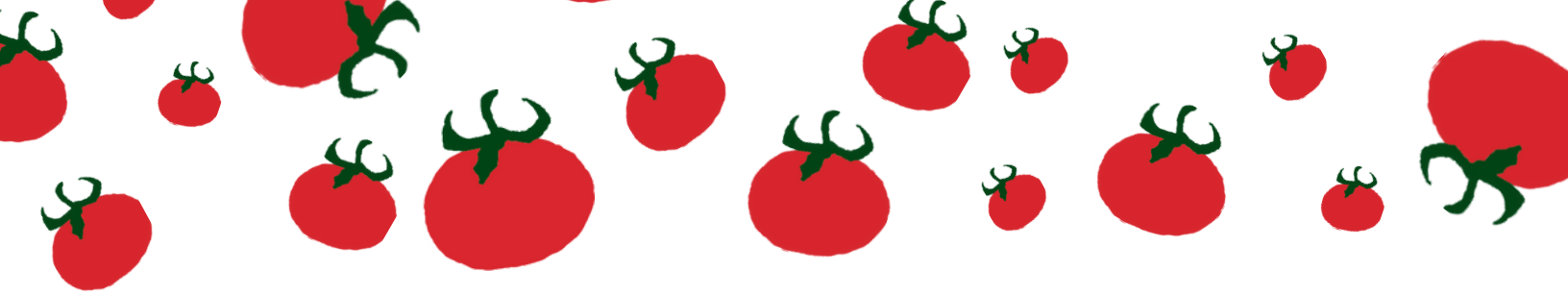
Batch Vendor Reimbursements: This form can be used to upload answers to post-market questions.

Common Actions

Editing Your Market Profile

1. Navigate to the Market Profiles Report: Using the navigation menu on the left-hand side, select Market & Network Profiles and then Market Profiles from the drop-down menu
2. Find the card for the market you wish to edit. Depending on your role, this may require searching (see Searching for Records on Page 22)
3. Either click on the three dot menu icon in the upper-right corner of the market card <u>OR</u> click on the market card to open the detailed view. From the detail view on the right-hand side, select the edit button.

FM Tracks 2.0

ⓘ Market & Network Profiles

ⓘ Market Profiles

ⓘ Network Profiles

ⓘ FINI Awardee Profiles

Farm Fresh RI

Farm Fresh Rhode Island

Goat Island Farmers Market

📍 Newport, RI

Edit

Duplicate

Delete

✏ Edit   ⛁ Duplicate   More ⌄   ✕

Market Profiles *

SEARCH   Market Name contains "Go...   ✖

Farm Fresh RI

Farm Fresh Rhode Island

Goat Island Farmers Market

Market ID	558
Market Name	Goat Island Farmers Market
Subawardees	Farm Fresh Rhode Island
Network	Farm Fresh RI
Incentives	
Season Start	

Editing Your Market Profile Cont.

4. This will open up the form view with all the market information.
5. Find the information you need to update/edit and simply change the information by removing and re-entering the data, or adding a new field in the sub forms.
6. After making the necessary changes, scroll all the way to the bottom of the form and hit the update button to save your work!
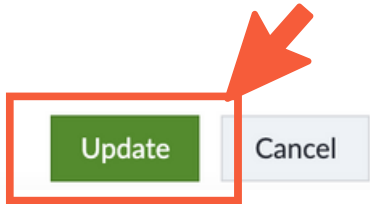
Updating Your Vendor List

1. Follow Steps 1- 4 for Editing Your Market Profile to open up the form view for your market
2. Scroll down to the subform named Market Vendors
3. Select Add New. This will create a record for you to input information

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Updating Your Vendor List Cont.

4. Input all fields about your vendors:
    a. Vendor Name
    b. State: the state the vendor operates out of
    c. Zip code: the zip code the vendor's business is in
    d. SNAP Eligible Vendor?: check the box if the vendor is eligible to receive SNAP from customers
    e. Sells Fruits & Vegetables?: check the box if the vendor sells produce
5. To add more vendors, select the add new option under the form.
6. Continue this process until all vendors are added. Please Note: The Vendor Reimbursement forms pull from this list. Please include all vendors that you will track vendor reimbursements from.
7. Once you have added all vendors click the update button at the bottom of the page.

Market Vendors

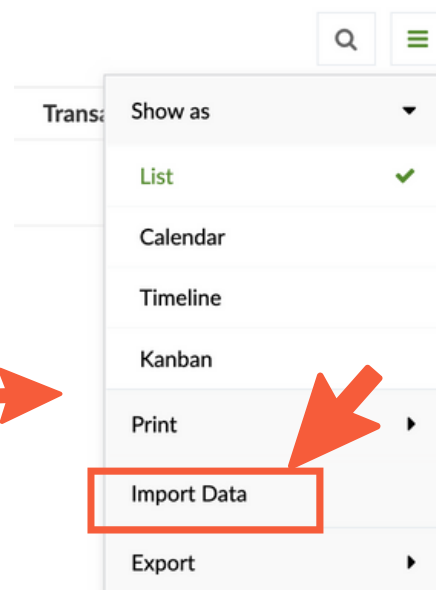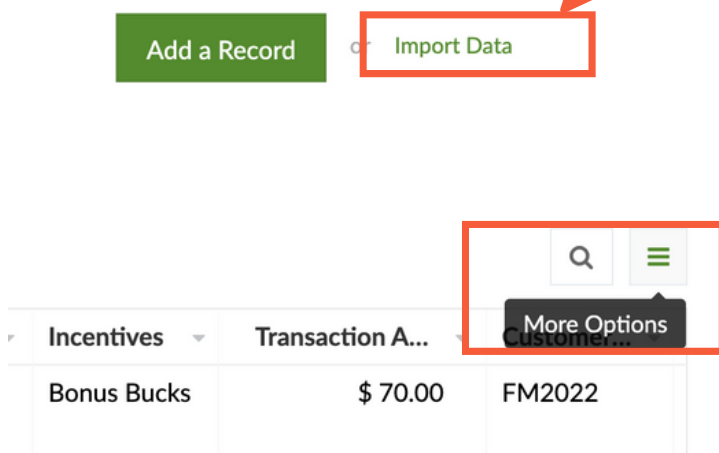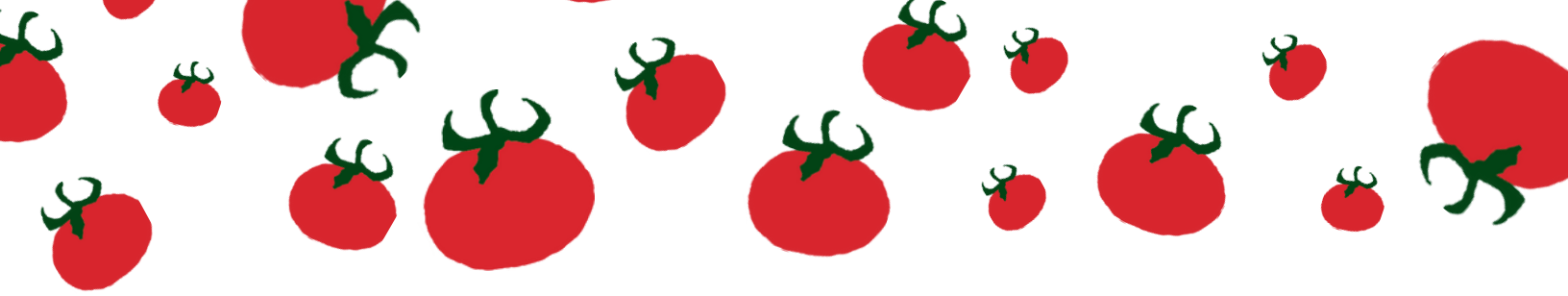| *Vendor Name	State	Zip Code	SNAP Eligible Vendor? *	Sells Fruits & V
Island Thyme	RI	02840	☑	☑
Goat Island C...	RI	02841	☑	☐

+ Add New

Update   Cancel

Entering Customer Transactions Manually

1. Navigate to the appropriate form using the navigation menu on the right-hand side. All the forms are located in the Transactions Data section.
   a. If you are entering individual transactions, use the Individual Transactions form
   b. If you are entering daily totals or aggregate data, use the Daily Totals (Aggregates) form
2. Fill in the form with as much information as you can
   a. Market Name: Select your market's name from the drop down menu. The number of markets you see depends on your role. To search through multiple markets, start typing the market name. The results will start filtering based on your input.
   b. Date: the date of the transaction
   c. Customer ID: how you identify the customer based on your system
   d. Customer Zip Code: where the customer lives
   e. Incentives: Choose the appropriate incentive from the drop down list. The incentives listed are based on your selection in your market profile.
   f. Swipe Amount: the amount swipe by the customer on their card
   g. Incentive Amount: this is a formula based on the incentive chosen
   h. Transaction Amount: this is a formula based on the incentive chosen.

*Please note: You do not need to enter in Incentive Amount or Transaction Amount on either form

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ⓘ Market & Netw...les >

👁 Transaction Data ∨

    👁 Individual Transactions
    ㉔ Daily Totals (Aggregates)
    ☁ Individual Transactions R...
    ☁ Daily Totals Report

💲 Vendor Reimbursements >

? Post-market Questionnaires >
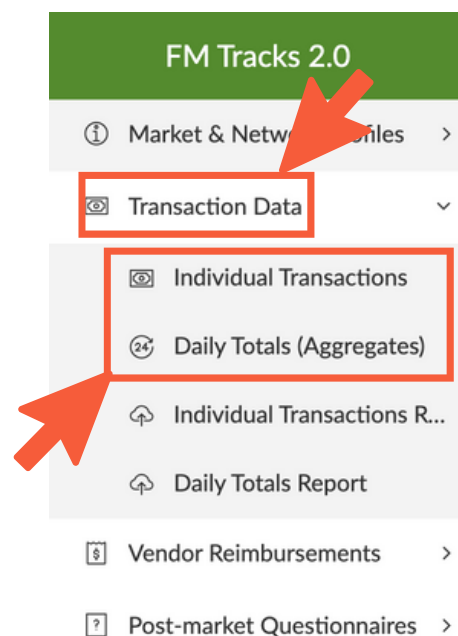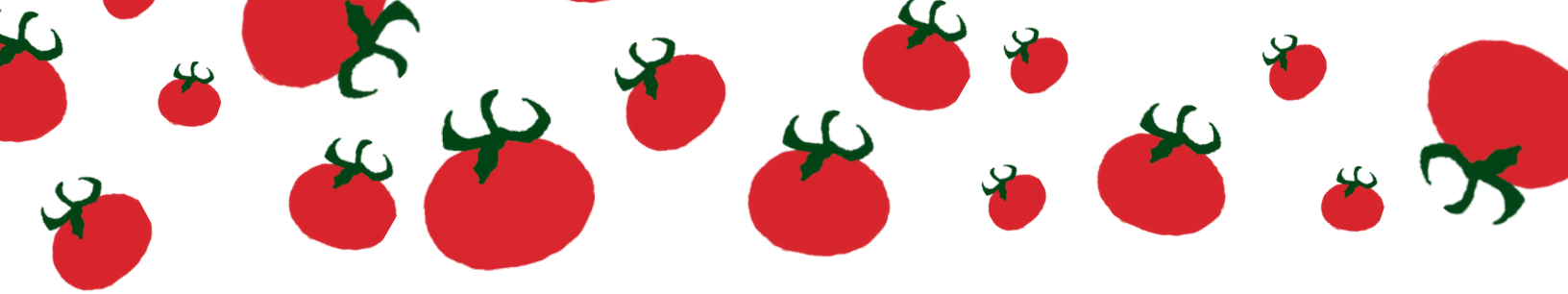
Entering Customer Transactions Manually, Cont.

3. After entering Swipe Amount, simply hit enter to submit your record <u>OR</u> click into the Incentive Amount field. Both actions will cause the last two fields to auto-populate. If you click into Incentive Amount, click the submit button at the bottom at the page to submit the record.

Individual Transactions

Market Name   -Select-   ⌄

    goat

Date

    Goat Island Farmers Market

Incentives   -Select-   ⌄

    Bonus Bucks

Swipe Amount

Swipe Amount	35	$
Incentive Amount	35.00	$
Transaction Amount	70.00	$

Incentive Amount & Transaction Amount will auto-populate based on the Incentive chosen and the Swipe Amount entered
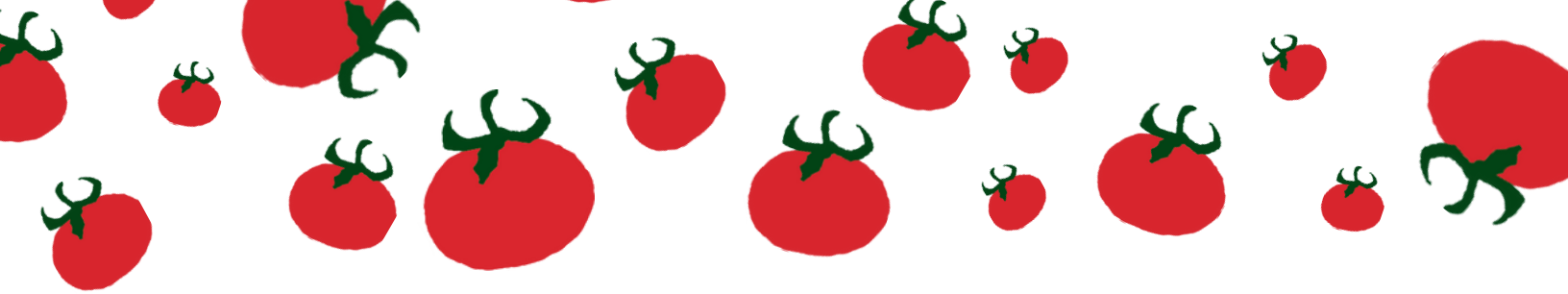
Submit   Reset

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Importing Customer Transactions From a Spreadsheet

1. Navigate to the appropriate report using the navigation menu on the right-hand side. All the reports are located in the Transactions Data section.
   a. If you are entering individual transactions, use the Individual Transactions Report
   b. If you are entering daily totals or aggregate data, use the Daily Totals Report
2. Use can use the Excel spreadsheet provided by Farm Fresh RI for easy upload or use your own tracking document. Please note that these instructions are using the FFRI Excel Resource
3. If this is the first time importing records, select the import records option in the middle of the screen. Otherwise, click on the hamburger menu in the upper right-hand corner (it will say 'more options' when you hover.) Select Import Data from the list of options

Importing Customer Transactions From a Spreadsheet, Cont.

4. The data import page will pop-up. Choose the correct file type and click the browse button. Navigate to the appropriate file on your computer to open.

5. This will bring you to the data import page. Please note:
   a. Incentive Amount and Transaction Amount need to be filled out in the data spreadsheet, if importing. The formulas in the form entry do not work after the fact. The FFRI Excel resource has built in formulas that just need to be pulled down as you enter new records.
   b. The Market Name in the spreadsheet needs to match the name in your Market Profile exactly.

Importing Customer Transactions From a Spreadsheet, Cont.

6. If using the FFRI Excel Resource, all fields will match automatically. Make sure the sheet name matches the information you are uploading.

If using your own document, you will need to match the columns appropriately. To do this, select the small drop down under each column header and choose the right value.

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Importing Customer Transactions From a Spreadsheet, Cont.

If you see a field in without a green check mark next to it, it will not be included in the import. If you are using the FFRI Excel Resource please make sure all fields are checked. If using your own document, you will need to make sure the appropriate fields are checked.

7. After everything has been matched, hit the Import button in the lower right-hand corner. You will receive a pop-up telling you the import is complete and a summary of how many records were added. Hit close and the report will reload with the new information.
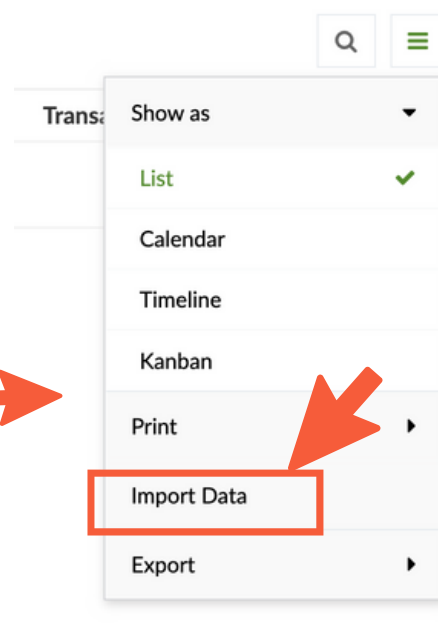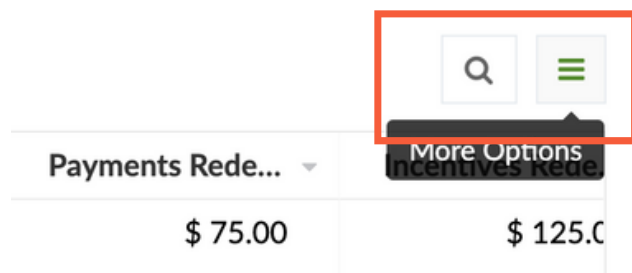
Entering Vendor Reimbursements Manually

1. Navigate to the appropriate form using the navigation menu on the right-hand side. All the forms are located in the Vendor Reimbursements section.
   a. If you are entering individual transactions, use the Individual Vendor Reimbursements form
   b. If you are entering daily totals or aggregate data, use the Batch Vendor Reimbursements form
2. Fill in the form with as much information as you can
   a. Market Date: The date of the transaction(s)
   b. Market Name: Select your market's name from the drop down menu. The number of markets you see depends on your role. To search through multiple markets, start typing the market name. The results will start filtering based on your input.
   c. Market Vendors: Select the name of the vendor from the drop-down menu. The vendors that you see are related to the Vendors in your market profile. If you do not see the vendor you need, please navigate to your profile and make sure they are listed. Note: This field is for individual reimbursements only.
   d. Payments Redeemed: The payment amount the vendor redeemed on that market day
   e. Incentives Redeemed: The incentive amount the vendor redeemed on that market day
3. Hit the Submit button at the bottom of the page

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ⓘ Market & Network Profiles ›
◎ Transaction Data
⑂ Vendor Reimbursements ⌄

⑂ Individual Vendor Reimb…
▦ Batch Vendor Reimburse…
⌁ Individual Vendor Report
⌁ All Batch Vendor Reimbu…

Submit   Reset
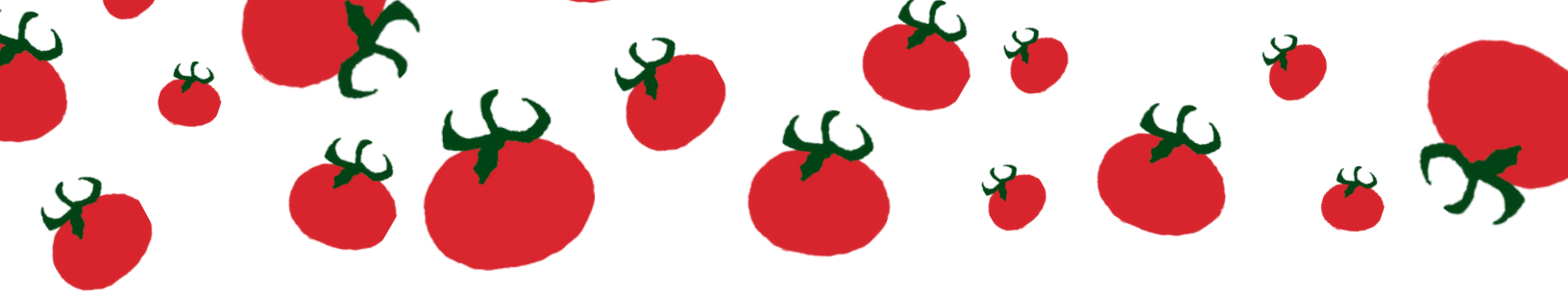
Importing Vendor Reimbursements From a Spreadsheet

1. Navigate to the appropriate report using the navigation menu on the right-hand side. All the reports are located in the Vendor Reimbursements section.
   a. If you are entering individual reimbursements, use the Individual Vendor Report
   b. If you are entering daily totals or aggregate data, use the All Batch Vendor Reimbursement Report
2. Use can use the Excel spreadsheet provided by Farm Fresh RI for easy upload or use your own tracking document. Please note that these instructions are using the FFRI Excel Resource
3. If this is the first time importing records, select the import records option in the middle of the screen. Otherwise, click on the hamburger menu in the upper right-hand corner (it will say 'more options' when you hover.) Select Import Data from the list of options

Importing Vendor Reimbursements From a Spreadsheet, Cont.

4. The data import page will pop-up. Choose the correct file type and click the browse button. Navigate to the appropriate file on your computer to open.

5. This will bring you to the data import page. Please note:
   a. The Market Name in the spreadsheet needs to match the name in your Market Profile exactly.
   b. The Market Vendor name needs to match the name listed in your Market Profile exactly.

Importing Vendor Reimbursements From a Spreadsheet, Cont.

6. If using the FFRI Excel Resource, all fields will match automatically. Make sure the sheet name displays the right tab from the document.

If using your own document, you will need to match the columns appropriately. To do this, select the small drop down under each column header and choose the right value.

Importing Vendor Reimbursements From a Spreadsheet, Cont.

If you see a field in without a green check mark next to it, it will not be included in the import. If you are using the FFRI Excel Resource please make sure all fields are checked. If using your own document, you will need to make sure the appropriate fields are checked.

7. After everything has been matched, hit the Import button in the lower right-hand corner. You will receive a pop-up telling you the import is complete and a summary of how many records were added. Hit close and the report will reload with the new information.

Finding a Specific Record

1. Navigate to the Report with the information you are trying to find using the navigation menu on the left-hand side
2. Click the search icon on the upper right section of the table. This will open a search menu. The search menu will show all fields in the table
3. Click on the field you would like to search by and choose the criteria. The criteria will be different based on the field type. Here are some examples:

Note: When entering text to search by hit 'enter' after you finish typing. The text will turn from a green drop down to a grey box
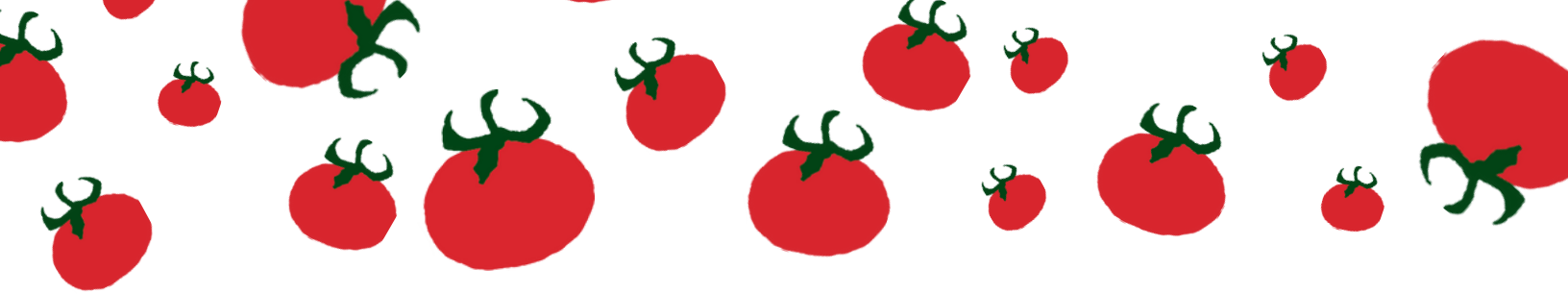
Finding a Specific Record, Cont.

4. Hit the Search button at the bottom of the search menu.
5. The results will appear filtered in the report.

Editing a Single Record

1. Find the Record you need to edit using the above steps
2. Click anywhere within the row of that record. The row will change to a yellow background when you hover over it. This is open the detailed record view.
3. Select the Edit button in the upper right-hand corner. This will open up the record as a form
4. Edit the fields you need to
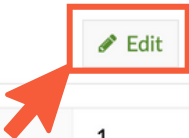5. Click the Update button at the bottom of the form.

Editing Multiple Records

1. If you realize a mistake in multiple records already entered into the program, you can update them together. Find the records you need to update, using the instructions on page 22
2. Check the checkbox at the start of each record to be updated and then select the edit button at the top of the table.
3. A pop up will appear on the right-hand side of the screen, asking you which field you want to edit. You can only edit one field at a time.
4. Select the field you need and enter the new value to be applied to all selected records.
5. Hit the update button at the bottom of the menu.
6. A pop up will appear confirming you want to alter these records.
7. Repeat steps 2-6 until all records are corrected.

Individual Vendor Reimbursements

Bulk edit allows you to apply same value to multiple records.

× Market Date

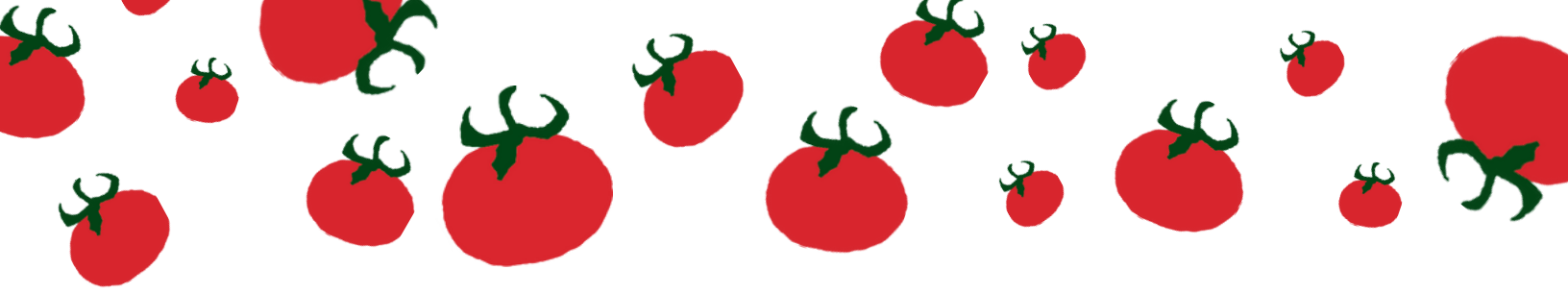Market Date

05-09-2022

Apply

The changes will be applied to the 2 selected records. Are you sure you want to continue?

Yes   No

Contact Information

Have feedback or questions, we would love to know!

RI Farmers Markets:
Contact Grace Feisthamel at grace@farmfreshri.org

FINI and Regional Partners:
Contact Molly Ellis at molly@farmfreshri.org

Other technical questions or account issues:
Contact Taylor Jones at taylor@farmfreshri.org

FARM FRESH RI