




# FM Tracks App: How to Collect and Enter Daily Sales & Data

Use the FM Tracks app to record all payment types (including credit/debit, SNAP/EBT, and other federal benefits) as well as incentives distributed and redeemed. You can use the app at a farmers market, farm stand, mobile market, or CSA without an internet connection.

This guide shows you how to use the app before, during, and after the market day. Keep this guide with you as a reference and use the  to walk you through the steps.

## Before You Use the App: What to Know

Before you use your app on-site at the market, you must customize your Market Profile on the FM Tracks website at [www.fmtracks.com](http://www.fmtracks.com).

For instructions, see our tool “How to Set Up Your Market Profile.”

### Mandatory Steps for Each Market Day


To meet data reporting requirements, you must:

- Enter Transactions for SNAP incentive program
- Enter redemption data and Post Market responses for SNAP incentive program

### Before & After Each Market Day

You must connect your iPad/iPhone to the internet to download new updates and save your data to the website.

## Navigating the App

 Use the Main Menu to navigate between screens on the app.


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

## FM Tracks IDs

FM Tracks IDs are a way for your market to track individual customers. Your market has 2 choices for formatting IDs. Choose one format and use it consistently across all markets within your network:

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)

## New Transaction Page



Transactions

Transactions

Vendor Reimbursement

Post Market Questions

Sync Log

FM Tracks Website

Change Market

Logout

natasha@wholesomewave.org

TRANSACTION LOG

GL7240  
12:29

\$20.00

\$10.00

\$40.00

\$12.00

\$10.00

\$12.50

\$20.00

\$10.00

\$22.00

\$50.00

11:13

RM3977  
11:13

\$25.00

katiemerritt@wholesomewave.org

Chamber of Secrets

New Transaction

— SNAP/EBT >

\$10.00

— Produce Rx >

\$40.00

+ Add payment method

CUSTOMER

Enter ID Anonymous

LH6307

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.

OH SNAP! +\$10.00

CSA Discount +\$10.00

ADDITIONAL TRACKING

Research ID 1234

POS ID 1234

Show questions

Summary

Payment Amount \$50.00

\$10.00 SNAP/EBT

\$40.00 Produce Rx

Complete Transaction

Cancel

# AT THE MARKET

## Step 1: Log In

Log in using email address and password.

Select the current market from the list of markets affiliated with your account.

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

Information from your FM Tracks profile auto-calculates the incentive 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.

## Step 2: Enter Transactions



### PAYMENT METHODS

Select payment method used and enter amount. You can select up to 4 payment methods per transaction.



### INCENTIVES

Select incentive program(s) and confirm \$ amount(s).



### CUSTOMER

Enter customer's FM Tracks ID.



### ADDITIONAL TRACKING

If applicable, enter customer tracking information.



### SUMMARY

Payment and incentive totals are listed at the bottom.

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

**Chamber of Secrets** New Transaction

**TRANSACTION LOG**

GL7240	12:29	\$20.00
KM6418	12:28	\$10.00
JP4831	12:28	\$40.00
SF7752	12:26	\$12.00
SH7620	12:26	\$10.00
EA6619	12:25	\$12.50
SC7118	12:24	\$20.00
Anonymous		\$10.00

**Payment**

**PAYMENT METHODS**

SNAP \$10.00

+ Add payment method

**CUSTOMER**

Enter ID Anonymous

HJ0731

**INCENTIVES**

Double SNAPs +\$10.00

SNAP CSA +\$7.50

**ADDITIONAL TRACKING**

Research ID 1234

POS ID 1234

Show questions

**Summary**

Payment Amount \$50.00

\$10.00 SNAP/EBT

\$40.00 Produce Rx

Complete Transaction Cancel

## Step 3: Ask Customer Questions



Reveal or hide customer questions with the 'Show Questions' slider.

FM Tracks identifies customers from their FM Tracks ID and asks either New or Repeat Customer Questions.

### Tip: Customer Questions Help You to Improve the Market

Learn about your customers, find out which outreach methods work, and enhance the consumer experience to keep shoppers coming back. You are encouraged – not required – to ask customer questions.

## Step 4: Complete & Save a Transaction



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



Saved transactions appear in the 'Transaction Log' on the left-hand side of the screen.

# AT THE CLOSE OF THE MARKET DAY

## Step 5: Record Vendor Reimbursements



Access 'Vendor Reimbursement' on the Main Menu.

This page is optional; however, the log is a useful record-keeping tool to help you answer **required** Post Market Questions.

FM Tracks remembers vendor details, so you only need to enter them once.

Only the payment methods that you selected on your Market Profile will appear. To add payment methods, edit your Profile on the FM Tracks website.

Vendor	
Name	Enter name
Gross Sales	\$0.00
<input type="radio"/> Sells fruit or vegetables <input type="radio"/> SNAP Eligible	
Payments Redeemed	
SNAP/EBT	\$0.00
# of Transactions	
WIC CVV	\$0.00
# of Transactions	
Produce Rx	\$0.00
# of Transactions	
Incentives Redeemed	
OH SNAP!	\$0.00
CSA Discount	\$0.00
<b>Total Redeemed</b>	
\$0.00	

**Tip: See the Complete Sales Picture**

Track the total sales at your market by asking vendors for their 'Gross Sales.'

## Step 6: Answer Post Market Questions

Access 'Post Market Questions' on the Main Menu.



Transaction and payment redemption totals are calculated based on individual transactions entered and appear in a log on the left-hand side of the Post Market Report when connected to the internet.

Answer Post Market Questions.

Tap 'Submit Post Market Report' when finished.

<b>Payments Distributed</b>	<b>\$141.00</b>
Snap/EBT	\$94.00
Produce Rx	\$40.00
WIC CVV	\$7.00
<b>Incentives Distributed</b>	<b>\$74.50</b>
OH SNAP!	\$64.50
CSA Discount	\$10.00
<b>Customers</b>	<b>7</b>
New Users	5
Returning Users	2
Anonymous	0
<b>Payments Redeemed</b>	<b>\$172.00</b>
SNAP/EBT	\$132.00
Produce Rx	\$40.00
<b>Incentives Redeemed</b>	<b>\$82.00</b>
OH SNAP!	\$82.00

Post Market Report	
*What was the amount of SNAP redeemed by vendors today?	132
*What was the total amount of incentives redeemed by vendors for fruit and vegetables today?	82
*How many total producer/vendors were selling at this market today?	4
*Today, how many of the producer/vendors were selling fruits and vegetables?	3
*Today, how many of the producer/vendors were eligible to accept SNAP?	4

**Tip: Choose the Questions You Want to Ask**

To customize Post Market Questions on the app: go to the FM Tracks website, click on the 'Manage Profile' tab and then the 'Choose Market Questions' tab.

## AFTER THE MARKET

### Step 8: Connect to the Internet

Connect your iPad or iPhone to the internet. 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 a pop up that your data has synced within 48 hours, tap 'Send Log' to send data to FM Tracks Developers. Please contact your Program Manager if you experience any problems. **NOTE:** Pressing 'Send Log' does not sync your data.



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