



FreshTrak

In Depth: Recurring Service Profiles – Set Up

Use **Service Profiles** to tell the customer WHEN to get food

Service Profiles ID 877

Active Service Profiles

Copy CSV Excel Search:

View	Frequency	Day of Week	Start Time	End Time	Service Type	Service Category	Future Service Dates	Published Service Dates	Propose Service Dates	Generation Status
Edit	1st	Monday	4:30 PM	6:00 PM	Pantry - Choice - 3 day	Choice Pantry	1	1	Propose Dates	<input checked="" type="checkbox"/>

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Last updated by Amanda Porter

[+ Add Recurring Service Dates Profile](#) [+ Add Ad-Hoc Service Dates](#)

Mid-Ohio Foodbank - Adm...
Faux Pantry
Choice Pantry

Monday, 11/2/2020 4:30 PM - 6 PM

3960 BROOKHAM DR
GROVE CITY OH 43123
6143179473

RSVP

Service Profiles

The screenshot shows a web interface titled "Service Profiles" with a sub-header "Active Service Profiles". A yellow message box states: "Everything worked fine, but it looks like there are no Service Profiles tied to this Program". Below the message are two buttons: a green button labeled "+ Add Recurring Service Dates Profile" and an orange button labeled "+ Add Ad-Hoc Service Dates".

Recurring Service Dates Profile

(will generate into the future once established)

- Regular dates that repeat
 - M-F
 - 3rd and 4th Saturday
 - Every Tuesday

Ad-Hoc Service Dates

(will need to be manually created each time)

- Irregular dates or one time events
 - Thursday of the First Full Week of the Month
 - Thanksgiving Distribution on 11/26/2020

You may have a multiple recurring and/or a mix of recurring and Ad-Hoc to correctly manage an agencies open hours.

Recurring Service Profiles

Service Profiles ID 8

Active Service Profiles

Everything worked fine, but it looks like there are no Service Profiles tied to this Program

[+ Add Recurring Service Dates Profile](#) [+ Add Ad-Hoc Service Dates](#)

Frequency ?

Day of Week ?

Appointment Window Length Default Start Time Default End Time

The number of minutes you would like each Appointment Window to be (e.g. 30 will make two 30 minute appointment windows per hour) This option is pre-selected based on the default start time of the event. Please modify as necessary. This option is pre-selected based on the default end time of the event. Please modify as necessary.

Default Service Offered Default Capacity

Optional: Use this field to enter an estimation of how many services each Service Date generated from this Service Profile will be able to provide. Most relevant for programs taking reservations.

Active Date Inactive Date

The earliest date Service Dates will be generated for this Service Profile. Use this field to pre-plan changes to a program's schedule. Must be today or later. The latest date Service Dates will be generated for this Service Profile. Use this field to pre-plan changes to a program's schedule.

Does the Agency Accept Walkins? No Planned End Date

Does the Agency Accept Pre-Registrations?

[Add](#)

Recurring Service Profiles:

Frequency and Day of the Week

Frequency and Day of Week are used together to establish when the agency is open:

- Every: Consistently open on X day(s)
 - Example: Every Week Day
- 1st, 2nd, 3rd, 4th, 5th: Open on X day of this week
 - Example: 1st Saturday and 5th Friday
- First 2, First 3, First 4: Open on X day over multiple weeks
 - Example: First 2 Wednesdays of the Month
- Last: Open on the Last X of the Month
 - Example: Last Thursday of the Month

Frequency ?

Please chose an option

Please chose an option

Every

1st

2nd

3rd

4th

5th

First 2

First 3

First 4

Last

Active Date

Day of Week ?

Please chose an option

Please chose an option

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Week Day (M-F)

Recurring Service Profiles:

Start and End Time and Service Offered

- Start Time: Opening time
 - Defaults to start time of event (at set up), but can be modified
- End Time: Ending time
 - Defaults to end time of event (at set up), but can be modified
- Service Offered: The type of service the customer will receive
 - Defaults to service type of event (at set up), but can be modified

Default Start Time	Default End Time
4:30 PM	6:00 PM
<small>This option is pre-selected based on the default start time of the event. Please modify as necessary.</small>	<small>This option is pre-selected based on the default end time of the event. Please modify as necessary.</small>

Default Service Offered
Choice Pantry - Pantry - Choice - 3 day

Recurring Service Profiles:

Start and End Time and Service Offered

- Active Date: The first date that an event will show up on Freshtrak:Public
 - Defaults to today, but you can set a date into the future.
- Inactive Date: The last date that an event will show up on Freshtrak:Public
 - Defaults to “No Planned End Date” for recurring events that go into the future
 - This means current events will remove themselves as the event ends, but dates will continue to generate into the future.
 - You may want to put an end date on “seasonal events” such as a produce market that will stop in October.

Active Date

10/28/2020

The earliest date Service Dates will be generated for this Service Profile. Use this field to pre-plan changes to a program's schedule. Must be today or later.

Inactive Date

The latest date Service Dates will be generated for this Service Profile. Use this field to pre-plan changes to a program's schedule.

No Planned End Date

Recurring Service Profiles:

Reservations and RSVP

If an agency would like to take RSVP or Registrations, this is set from the “Does the Agency Accept Pre-Registrations?”

- No: The agency does not accept pre-registrations from FreshTrak: Public
- Yes, RSVP: The customer will see the “RSVP” button
 - This is a “count me in feature” that creates a service event, but the customer is welcome to attend any time during the event’s open hours
- Yes, Reserve Time: The customer will be asked to select a specific time range to attend
 - Appointment Window Length: how broad/specific the time slot is.
 - Example: 60 minutes is a range of one hour (11 am -11:59 am)
 - Default Capacity: how many customer’s the event can manage.
 - The software will automatically divide the number of reservations per appointment length window based on capacity
 - The event will stop showing on FreshTrak:Public if the capacity is reached.

Does the Agency Accept Pre-Registrations?

No

Please chose an option

No

Yes, RSVP

Yes, Reserve Time

Appointment Window Length

60

The number of minutes you would like each Appointment Window to be (e.g. 30 will make two 30 minute appointment windows per hour)

Default Capacity

100

Optional: Use this field to enter an estimation of how many services each Service Date generated from this Service Profile will be able to provide. Most relevant for programs taking reservations.

Recurring Service Profiles: An Example

- Faux Pantry is open the **first three Wednesdays** of each month from **4:30 – 6:00 pm**.
- Due to parking lot restrictions, they would like to take **timed reservations**. They'd like **half hour** time slots.
- They can serve **150 customers** during the 1.5 hours they're open.
- They will still accept customers **without a reservation**.

Frequency ?	Day of Week ?	
First 3	Wednesday	
Appointment Window Length	Default Start Time	Default End Time
30	4:30 PM	6:00 PM
The number of minutes you would like each Appointment Window to be (e.g. 30 will make two 30 minute appointment windows per hour)		This option is pre-selected based on the default end time of the event. Please modify as necessary.
Default Service Offered		Default Capacity
Choice Pantry - Pantry - Choice - 3 day		150
Optional: Use this field to enter an estimation of how many services each Service Date generated from this Service Profile will be able to provide. Most relevant for programs taking reservations.		Inactive Date
Active Date		
10/28/2020		The latest date Service Dates will be generated for this Service Profile. Use this field to pre-plan changes to a program's schedule.
The earliest date Service Dates will be generated for this Service Profile. Use this field to pre-plan changes to a program's schedule. Must be today or later.		<input checked="" type="checkbox"/> No Planned End Date
Does the Agency Accept Walkins?		Does the Agency Accept Pre-Registrations?
Yes		Yes, Reserve Time
<input type="button" value="Add"/>		

Recurring Service Profiles: An Example

- Faux Pantry is open the **first three Wednesdays** of each month

The screenshot shows a configuration form for a recurring service profile. A green box highlights the 'Frequency' and 'Day of Week' dropdowns, which are set to 'First 3' and 'Wednesday' respectively. Another green box highlights the 'Default Start Time' and 'Default End Time' dropdowns, which are set to '4:30 PM' and '6:00 PM'. A green arrow points from the text 'from 4:30 - 6:00 pm.' to the 'Default End Time' dropdown.

Frequency [?]

Day of Week [?]

Appointment Window Length
The number of minutes you would like each Appointment Window to be (e.g. 30 will make two 30 minute appointment windows per hour)

Default Service Offered

Active Date
The earliest date Service Dates will be generated for this Service Profile. Use this field to pre-plan changes to a program's schedule. Must be today or later.

Does the Agency Accept Walkins?

Default Start Time
This option is pre-selected based on the default start time of the event. Please modify as necessary.

Default End Time
This option is pre-selected based on the default end time of the event. Please modify as necessary.

Default Capacity
Optional: Use this field to enter an estimation of how many services each Service Date generated from this Service Profile will be able to provide. Most relevant for programs taking reservations.

Inactive Date

No Planned End Date

Does the Agency Accept Pre-Registrations?

- from **4:30 – 6:00 pm.**

Recurring Service Profiles: An Example

- They'd like **half hour** time slots.

The screenshot shows a form for configuring a recurring service profile. The form includes several fields and sections:

- Frequency**: A dropdown menu set to "First 3".
- Day of Week**: A dropdown menu set to "Wednesday".
- Appointment Window Length**: A text input field containing "30". A green box highlights this field, with a green arrow pointing from the text "They'd like half hour time slots." to it.
- Default Start Time**: A dropdown menu set to "4:30 PM".
- Default End Time**: A dropdown menu set to "6:00 PM".
- Default Service Offered**: A dropdown menu set to "Choice Pantry - Pantry - Choice - 3 day".
- Default Capacity**: A text input field containing "150".
- Active Date**: A date input field containing "10/28/2020".
- Inactive Date**: A date input field that is currently empty.
- Does the Agency Accept Walkins?**: A dropdown menu set to "Yes".
- Does the Agency Accept Pre-Registrations?**: A dropdown menu set to "Yes, Reserve Time". A green box highlights this field, with a green arrow pointing from the text "Due to parking lot restrictions, they would like to take timed reservations." to it.
- Buttons**: A green "Add" button is located at the bottom left of the form.

Due to parking lot restrictions,
they would like to take **timed**
reservations.

Recurring Service Profiles: An Example

Frequency ?

Day of Week ?

Appointment Window Length
The number of minutes you would like each Appointment Window to be (e.g. 30 will make two 30 minute appointment windows per hour)

Default Start Time
This option is pre-selected based on the default start time of the event. Please modify as necessary.

Default End Time
This option is pre-selected based on the default end time of the event. Please modify as necessary.

Default Service Offered

Default Capacity
Optional: Use this field to enter an estimation of how many services each Service Date generated from this Service Profile will be able to provide. Most relevant for programs taking reservations.

Active Date
The earliest date Service Dates will be generated for this Service Profile. Use this field to pre-plan changes to a program's schedule. Must be today or later.

Inactive Date
The latest date Service Dates will be generated for this Service Profile. Use this field to pre-plan changes to a program's schedule.

No Planned End Date

Does the Agency Accept Walkins?

Does the Agency Accept Pre-Registrations?

- They will still accept customers **without a reservation.**

- They can serve **150 customers** during the 1.5 hours they're open.

Recurring Service Profiles: Propose Dates of Service

Once you add a recurring service date, you'll be asked to "Propose service dates". Think of this as a check on the computer logic to ensure that the DATES look correct before dates begin generating automatically. You're given two chances to review. Once you're sure click check box next to "The Yellow Service Dates look correct, Automatically Generate Service Dates".

Propose Dates of Service

You are a special PantryTrak Admin, you are viewing information for Mid-Ohio Foodbank (#21).

Proposed Dates of Services for First 3 - Wednesday

- This tool shows Service Dates that were proposed between 10/28/2020 and 11/30/2020 for First 3 - Wednesday
- This tool obeys the **Active Date** and **Inactive Date** of the Service Profile. If any of the proposed dates were before 10/28/2020, or after No End Date they were removed and cannot be added through this process.
- This tool's default behavior also strictly obeys the official PantryTrak/FreshTrak US Public Holiday schedule and will not automatically generate Service Dates. [Which Holidays?](#)

Copy CSV Excel Search:

Add?	Date	Day of Week	Public Holiday?	Name of Holiday
<input checked="" type="checkbox"/>	11/4/2020	Wednesday	N	
<input checked="" type="checkbox"/>	11/11/2020	Wednesday	N	
<input checked="" type="checkbox"/>	11/18/2020	Wednesday	N	

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[Add Service Dates](#)

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secure.pantrytrak.com/core/admin/schedule/event_dates_propose..._c1.php?fb_id=21&esp_id=1618&calendar_date=20201118

Controls

Service Dates are not Generating Automatically

Change Auto-Generation Status?

- All Service Dates shown are connected to the Faux Pantry event for Mid-Ohio Foodbank - Admin Account
- The Service Dates created from this schedule Profile are shown in **Yellow**
- The Service Dates created from other schedule profiles are shown in **White**
- The Service Dates attached to service profiles that are set to auto-generate are shown with a green on them

The **Yellow** Service Dates look correct, Automatically Generate Service Dates

Change Calendar Month?

11/18/2020
To change the month the calendar loads for, please select a date.

Calendar

November 2020

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1	2	3	4 First 3 Wednesday 11/4/2020 Wednesday	5	6
7	8	9	10	11 First 3 Wednesday 11/11/2020 Wednesday	12	13
14	15	16	17	18 First 3 Wednesday 11/18/2020 Wednesday	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

Service Profiles : Recurring Service Dates

Service Profiles ID 877

Active Service Profiles

Copy CSV Excel Search:

View ▲	Frequency ▲	Day of Week ▲	Start Time ▲	End Time ▲	Service Type ▲	Service Category ▲	Future Service Dates ▲	Published Service Dates ▲	Propose Service Dates ▲	Generation Status ▲
Edit	First 3	Wednesday	4:30 PM	6:00 PM	Pantry - Choice - 3 day	Choice Pantry	3	3	Propose Dates	<input checked="" type="checkbox"/>

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Last updated by Amanda Porter on 10/28/2020 @ 1:27 PM

You'll now see an Active Service Profile with Future Service Dates, Published Service Dates and a "green" Generation Dates.

This means all is correct.

** Be sure your "master" – event level Publishing Status is set to "publish in resource events" **