FreshTrak

In Depth: Recurring Service Profiles – Set Up

Use **Service Profiles** to tell the customer <u>WHEN</u> to get food

Service Profiles   ID 877

Active Service Profiles

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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	☑

Showing 1 to 1 of 1 entries   Previous | 1 | Next

Last updated by Amanda Porter o

| ⊕ 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

Service Profiles   ID 877

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

Recurring Service Dates Profile
(will generate into the future once established)
- Regular dates that repeat
  - M-F
  - 3rd and 4th Saturday
  - Every Tuesday

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

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

Recurring Service Profiles

Recurring Service Profiles:
Frequency and Day of the Week

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

- <u>Every</u>: Consistently open on X day(s)
    - Example: Every Week Day

- <u>1st, 2nd, 3rd, 4th, 5th</u>: Open on X day of this week
    - Example: 1st Saturday and 5th Friday

- <u>First 2, First 3, First 4</u>: Open on X day over multiple weeks
    - Example: First 2 Wednesdays of the Month

- <u>Last</u>: Open on the Last X of the Month
    - Example: Last Thursday of the Month

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

| 4:30 PM |

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

Default End Time

| 6:00 PM |

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

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**.

Recurring Service Profiles:
An Example

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

Frequency ❓

First 3 ▾

Day of Week ❓

Wednesday ▾

Appointment Window Length

30

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

4:30 PM ▾

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

Default End Time

6:00 PM ▾

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

- from **4:30 – 6:00 pm.**

Default Service Offered

Choice Pantry - Pantry - Choice - 3 day ▾

Default Capacity

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.

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

Does the Agency Accept Walkins?

Yes ▾

Does the Agency Accept Pre-Registrations?

Yes, Reserve Time ▾

Add

Recurring Service Profiles:
An Example

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

Frequency ❓

First 3 ▾

Appointment Window Length

30

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

Choice Pantry - Pantry - Choice - 3 day ▾

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.

Does the Agency Accept Walkins?

Yes ▾

Add

Day of Week ❓

Wednesday ▾

Default Start Time

4:30 PM ▾

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

Default End Time

6:00 PM ▾

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

Default Capacity

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

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 Pre-Registrations?

Yes, Reserve Time ▾

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

Recurring Service Profiles:
An Example

Frequency ❓

| First 3 | ⌄ |

Day of Week ❓

| Wednesday | ⌄ |

Appointment Window Length

| 30 |

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

| 4:30 PM | ⌄ |

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

Default End Time

| 6:00 PM | ⌄ |

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

Default Service Offered

| Choice Pantry - Pantry - Choice - 3 day | ⌄ |

Default Capacity

| 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.

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

Does the Agency Accept Walkins?

| Yes | ⌄ |

Add

Does the Agency Accept Pre-Registrations?

| Yes, Reserve Time | ⌄ |

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

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

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".

Service Profiles : Recurring Service Dates

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" **