How to Demo PantryTrak

This guide will walk you through on how to demo PantryTrak and see how the system works.
To get to Demo PantryTrak, in the address bar type:

https://demo.pantrytrak.com

Welcome to DEMO.PantryTrak.com - Food Pantry management tools

Being developed by Pantry Managers, for Pantry Managers....

Click here for the regular login: >> SECURE.PantryTrak.com

With the primary goal of fighting hunger by allowing Pantry Staff and Volunteers to maximize service to their clients.

We will do this by:

- Minimizing paperwork and improve reporting accuracy
- Simplifying the registration and "check-in" processes
- Linking Volunteers, Donors, Suppliers, and Food Banks directly to the needs of the clients being served

Food Pantries and Food Banks will benefit from the accurate and timely reporting.

They can use this information to:

- Better understand the client needs in real-time
- Develop a true un-duplicated count of hungry families/persons in given service area
- Use this data to drive advocacy efforts and inform policy makers and stakeholders in the fight against hunger

Mid Ohio Foodbank

PantryTrak is being developed and supported through the leadership of Mid-Ohio Foodbank, for more information please contact Mark Mollenkopf, mmollenkopf at midohiofoodbank.org, or call 614-317-9450.

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Username and Password

1. Enter the username and password provided by your foodbank and click Login.

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Please enter your User Name and Password -

User Name

Password

LOGIN

System Note: SUNDAY, MAY 11th. - as you can see the Demo system for PantryTrak has it's own server now. You can still login with the same demo username and password that you had been using

REGULAR SYSTEM - You can access the regular PantryTrak system here: secure.pantrytrak.com

Feel free to use any browser you would like... some good choices of secure/fast browsers are - Firefox, Chrome, Safari, etc. You will need to make sure that Javascript is enabled in your browser settings. If you do experience problems with the site using internetExplorer, you may want to give Firefox or Chrome a try. Both are free and easy to install.

WARNING!!! UNAUTHORIZED ACCESS PROHIBITED
You must have authorized permission to access this area. All actions are monitored, recorded, and reported.

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Main Screen Overview

- To practice in demo PantryTrak click on Today’s date.
After clicking on today’s date, the Service Visit List will appear.

This screen may appear with just the search boxes or will have some names in it depending on if someone has been practicing in the system for the day.

<table>
<thead>
<tr>
<th>Service Visit #</th>
<th>Name</th>
<th>Address</th>
<th>City</th>
<th>County</th>
<th>Kids, Adults, Total</th>
<th>Reservation Status</th>
<th>Time</th>
<th>Signed</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>803891</td>
<td>Adams, John</td>
<td>123 Dawn St. (88701)</td>
<td>Mos Eisley</td>
<td>Barrymore</td>
<td>2 + 3 = 5</td>
<td>Reserved</td>
<td>01:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>803817</td>
<td>Barber, Bill</td>
<td>133 Cranwood Ave (88702)</td>
<td>Cabot Cove</td>
<td>Empire</td>
<td>0 + 1 = 1</td>
<td>Served</td>
<td>02:00 PM</td>
<td>Signed Paper</td>
<td>New Family</td>
</tr>
<tr>
<td>803888</td>
<td>Blue, Blue</td>
<td>2344 Canine Road (88803)</td>
<td>Emerald City</td>
<td>Barrymore</td>
<td>2 + 1 = 3</td>
<td>Reserved</td>
<td>10:00 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>803890</td>
<td>Duck, Daffy</td>
<td>125 Main Street (88801)</td>
<td>Bedford Falls</td>
<td>Barrymore</td>
<td>2 + 2 = 4</td>
<td>Served</td>
<td>01:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>803889</td>
<td>Moore, Demi</td>
<td>321 Mace Ln (88802)</td>
<td>Bedford</td>
<td>Barrymore</td>
<td>0 + 2 = 2</td>
<td>Served</td>
<td>12:00 PM</td>
<td>e</td>
<td>New Family</td>
</tr>
<tr>
<td>803897</td>
<td>Mouse, Minnie</td>
<td>327 Disney Lane (88801)</td>
<td>Bedford Falls</td>
<td>Barrymore</td>
<td>1 + 4 = 5</td>
<td>Served</td>
<td>04:00 PM</td>
<td>e</td>
<td></td>
</tr>
<tr>
<td>803896</td>
<td>Rhodes, Dusty</td>
<td>1485 Blue St (88701)</td>
<td>Mos Eisley</td>
<td>Empire</td>
<td>1 + 4 = 5</td>
<td>Reserved</td>
<td>02:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>803892</td>
<td>Smith, Banana</td>
<td>123 Fruit Street, Apt. 21 (88801)</td>
<td>Bedford Falls</td>
<td>Barrymore</td>
<td>1 + 2 = 3</td>
<td>Reserved</td>
<td>01:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>803898</td>
<td>Wayne, Bruce</td>
<td>1234 Wayne Manor Cove, Apt. 55 (88801)</td>
<td>Bedford Falls</td>
<td>Barrymore</td>
<td>1 + 2 = 3</td>
<td>Reserved</td>
<td>04:00 PM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Search For a Demo Family

- In the search bar, type in the last name of a famous person or celebrity and see what results come up.
- To search, type a client’s last name in the box. Try Out:
  - Washington, Burr, Lincoln, Mouse etc..

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<table>
<thead>
<tr>
<th>Service Visit #</th>
<th>Name</th>
<th>Address</th>
<th>City</th>
<th>County</th>
<th>Kids, Adults, Total</th>
<th>Reservation Status</th>
<th>Time</th>
<th>Signed</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>603001</td>
<td>Adams, John</td>
<td>123 Dawn St.</td>
<td>Mos Eisley</td>
<td>Barrymore</td>
<td>2 + 3 = 5</td>
<td>Reserved</td>
<td>01:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>603017</td>
<td>Barber, Bill</td>
<td>133 Cranwood Ave</td>
<td>Cabot Cove</td>
<td>Empire</td>
<td>0 + 1 = 1</td>
<td>Served</td>
<td>02:00 PM</td>
<td>Signed Paper</td>
<td>New Family</td>
</tr>
<tr>
<td>603008</td>
<td>Clue, Blue</td>
<td>2344 Canine Road</td>
<td>Emerald City</td>
<td>Barrymore</td>
<td>2 + 1 = 3</td>
<td>Reserved</td>
<td>10:00 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>603090</td>
<td>Duck, Daffy</td>
<td>125 Main Street</td>
<td>Bedford Falls</td>
<td>Barrymore</td>
<td>2 + 2 = 4</td>
<td>Served</td>
<td>01:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>603009</td>
<td>Moore, Demi</td>
<td>321 Main Ln.</td>
<td>Bedford Falls</td>
<td>Barrymore</td>
<td>0 + 2 = 2</td>
<td>Served</td>
<td>12:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>603007</td>
<td>Mouse, Minnie</td>
<td>927 Disney Lane</td>
<td>Bedford Falls</td>
<td>Barrymore</td>
<td>1 + 4 = 5</td>
<td>Served</td>
<td>04:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>603006</td>
<td>Rhodes, Dusty</td>
<td>1465 Blue St.</td>
<td>Mos Eisley</td>
<td>Empire</td>
<td>1 + 4 = 5</td>
<td>Reserved</td>
<td>02:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>603002</td>
<td>Smith, Banana</td>
<td>123 Fruit Street, Apt. 21</td>
<td>Bedford Falls</td>
<td>Barrymore</td>
<td>1 + 2 = 3</td>
<td>Reserved</td>
<td>01:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>603008</td>
<td>Wayne, Bruce</td>
<td>1234 Wayne Manor Cave, Apt. 56</td>
<td>Bedford Falls</td>
<td>Barrymore</td>
<td>1 + 2 = 3</td>
<td>Reserved</td>
<td>04:00 PM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Search in Primary Zone | Expand the Search
Start typing Last Name OR last 4 digits of Phone or Cell OR part of Last Name, part of First Name (comma in between, with at least 2 letters from both the Last & First names)
**Search Results**

After searching for a last name or address, these columns will appear:

<table>
<thead>
<tr>
<th>Name Search &gt;&gt;</th>
<th>Clear the Search</th>
<th>Address Search &gt;&gt;</th>
</tr>
</thead>
</table>

- **Name**
  - Last, first
- **Last Served**
  - The last time the family received a service at your pantry (Does not show services received at other organizations)
- **Address**
  - Includes, street number, street, address 2, and zip code.
- **City**
- **Phone number**
  - If a family does not have a phone, the word “none” should appear in this field.
- **Merge?**
  - If you see that there are duplicate records of a family, you click the merge field on both records. (The merge will not happen instantaneously, but will eventually take effect.)

<table>
<thead>
<tr>
<th>Name</th>
<th>Family ID</th>
<th>Last Served</th>
<th>Address</th>
<th>City</th>
<th>Phone number</th>
<th>Merge?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Washington, Denzel</td>
<td>178476</td>
<td>08/29/2014</td>
<td>13533 E 222nd Street, Apt. 1 (88801)</td>
<td>Bedford Falls</td>
<td>216-555-5525</td>
<td></td>
</tr>
<tr>
<td>Washington, George</td>
<td>178933</td>
<td>08/19/2014</td>
<td>1600 Pennsylvania Ave (88801)</td>
<td>Bedford Falls</td>
<td>740/222/2222</td>
<td></td>
</tr>
<tr>
<td>Washington, George</td>
<td>178934</td>
<td>08/19/2014</td>
<td>1600 Psyvia Ave. (88801)</td>
<td>Bedford Falls</td>
<td>740-222-2222</td>
<td></td>
</tr>
<tr>
<td>Washington, George</td>
<td>178663</td>
<td>08/21/2014</td>
<td>456 Mt. Vernon Blvd. (88803)</td>
<td>Emerald City</td>
<td>214-043-1789</td>
<td></td>
</tr>
<tr>
<td>Washington, Kerry</td>
<td>178479</td>
<td>08/25/2014</td>
<td>1465, East Green St (88801)</td>
<td>Bedford Falls</td>
<td>514-125-3386</td>
<td></td>
</tr>
</tbody>
</table>
Searching for Clients-Hover Over

- The hover over function is a great way to get a sneak peak into a client record.
- To use it, place your mouse over the family ID number, but do not click on it.

After you hover over the ID, you will see:

- Client’s name
- Client’s address
- Phone number,
- Who is the family
- Past five service visits

After hovering over, click on the Family ID to enter into the client’s record.
Checking In a Family in the Demo System

- After bringing up a client, you can see their name, address, phone number, and information about the members of the household.
- If there are any inaccuracies, changes can be made on this screen.
  - For example, if Mr. Brown lived at 997 and not 998, you could click on the address box to make the necessary changes.
- If no changes are needed, click on the “E-Signature” Tab.
E-Signature

- On this screen the client is self-certifying that they are eligible to receive assistance.
- The top box includes all the information that is on the previous screen except for the detailed information about household members.
- In the top right corner is the gross income limit, stating that the household should be earning less than the amount shown in order to receive services.

To Sign the Form:
- The volunteer, then clicks in the initials box and then has the client type their initials. (Note: In a real pantry environment, the volunteer will not type the client’s initials in the box, they must type their own)
- Volunteer then hits the TAB key.
- The Client then hits “enter” key on your keyboard.
Completed E-Signature

- After signing, you will return to this screen and you will see the following changes:
  - Signed Electronic Form is highlighted
  - Record is marked as served and will contribute data towards your monthly report
  - Service date and time will be updated to current date and time.
- Congratulations! You are done serving this family. Go ahead and click “close window” to practice serving another family.
- After practicing serving families already in the system, go to next slide to learn about adding a new family.
In the real system, sometimes when you search, the family you are looking for will not be there.

If you can’t find them, then you’ll add them to the system. To do this, click on Add New Family and Reservation.
Add New Client

- To add a new client, enter the following:
  - First and last name of head of household (including the middle name is preferred but optional).
  - Address - Street address of the family, and if there is an Apartment or Lot enter that in the second box.
  - Zip code. If necessary, select the proper county. (In the demo system, please only use 88801, 88802, 88803, 88701, and 88702 for your zip codes).
  - Phone number (if client has no phone, enter "None").
  - Date of Birth (format must be: mm/dd/yyyy i.e. 09/20/1992)
  - Gender
  - Total # in each age group of the family. Include the head of household in the proper category. (Don’t leave any age group blank, enter a zero if there are no family members in that age group.)
- Click next
Add New Client

- Enter the names and birthdays of other members of the family.
- Click add and return to slide for 8 further instructions.
1. **Family Notes** - If client has an food allergy or special need, you can record it in this box.

2. **Proxy** - if a client designates a proxy, the name can be saved in this box. If you have more questions about proxies, contact your Foodbank for assistance.

3. **Service box** - To capture a different service from your default service, click on service box, and then choose the appropriate service.

4. **Status Box** - This box will let you inactivate or activate family members. So if a person leaves the household you Inactivate them or if a person reenters the household you activate them.

5. To add new family members click on family members tab.
Wrap-Up

- Feel free to practice or continue training in the PantryTrak Demo with the username and password supplied during your training.
- For more information, to schedule a training, or for help getting started with PantryTrak, contact:
  - Erinn Garrison (egarrison@midohiofoodbank.org - or - 614.317.9406)
  - Bill Nance (bnance@midohiofoodbank.org - or - 614-274-7770)
  - Tammy Tucker (ttucker@midohiofoodbank.org - or - 614-317-9426)
  - General Inquires (pantrytrak@midohiofoodbank.org - or - 614.317.9479)
  - David Pickering (dpickering@midohiofoodbank.org -or- 614.317.9479)