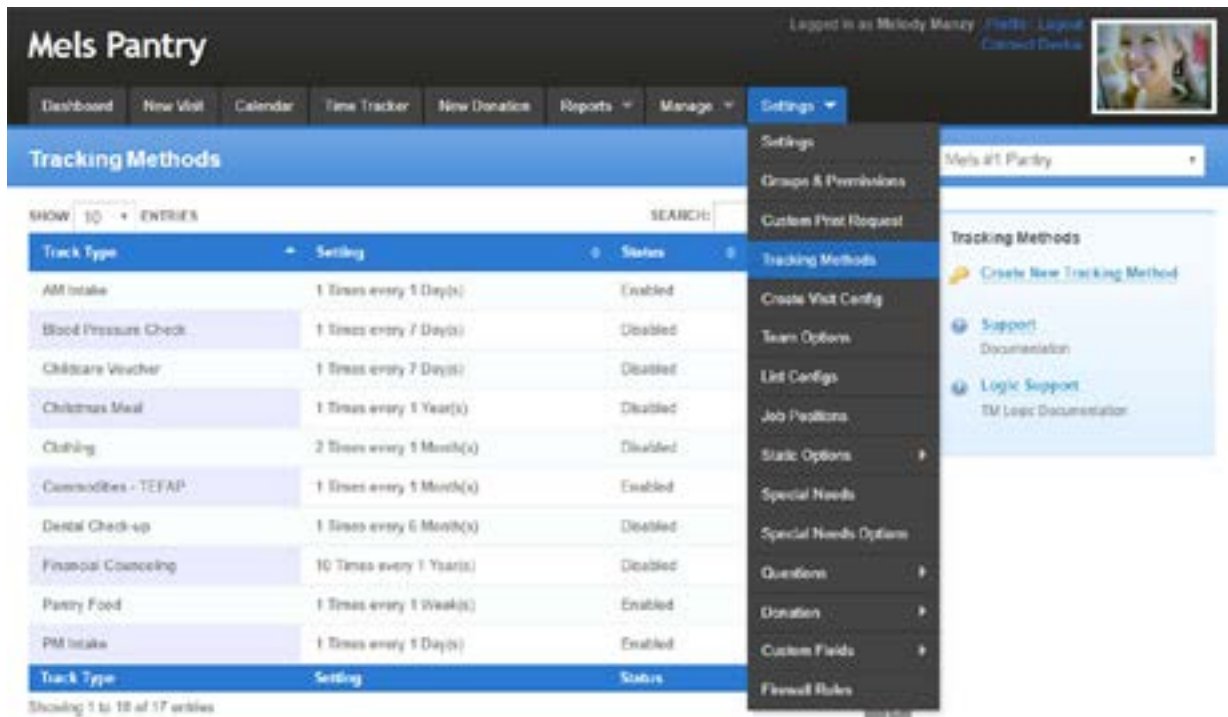


FoodBank MANAGER

PRESET WEIGHT OR ITEMS

If your pantry takes pre-weights or pre-counts items of the goods that you provide, you can set these up under each Tracking Method. You have the choice to apply the same preset weight or item count to each household or you can set it up to go off family size.

To apply presets, go to Settings > Tracking Methods



Mels Pantry

Logged in as Melody Marney / Profile Logout Contact Desk

Dashboard New Visit Calendar Time Tracker New Donations Reports Manage Settings

Tracking Methods

SHOW 10 ENTRIES SEARCH:

Track Type	Setting	Status
AM Intake	1 Times every 1 Day(s)	Enabled
Blood Pressure Check	1 Times every 7 Day(s)	Disabled
Childcare Voucher	1 Times every 7 Day(s)	Disabled
Christmas Meal	1 Times every 1 Year(s)	Disabled
Clothing	2 Times every 1 Month(s)	Disabled
Commodities - TEFAP	1 Times every 1 Month(s)	Enabled
Dental Check-up	1 Times every 6 Month(s)	Disabled
Financial Counseling	10 Times every 1 Year(s)	Disabled
Pantry Food	1 Times every 1 Week(s)	Enabled
PM Intake	1 Times every 1 Day(s)	Enabled

Showing 1 to 10 of 17 entries

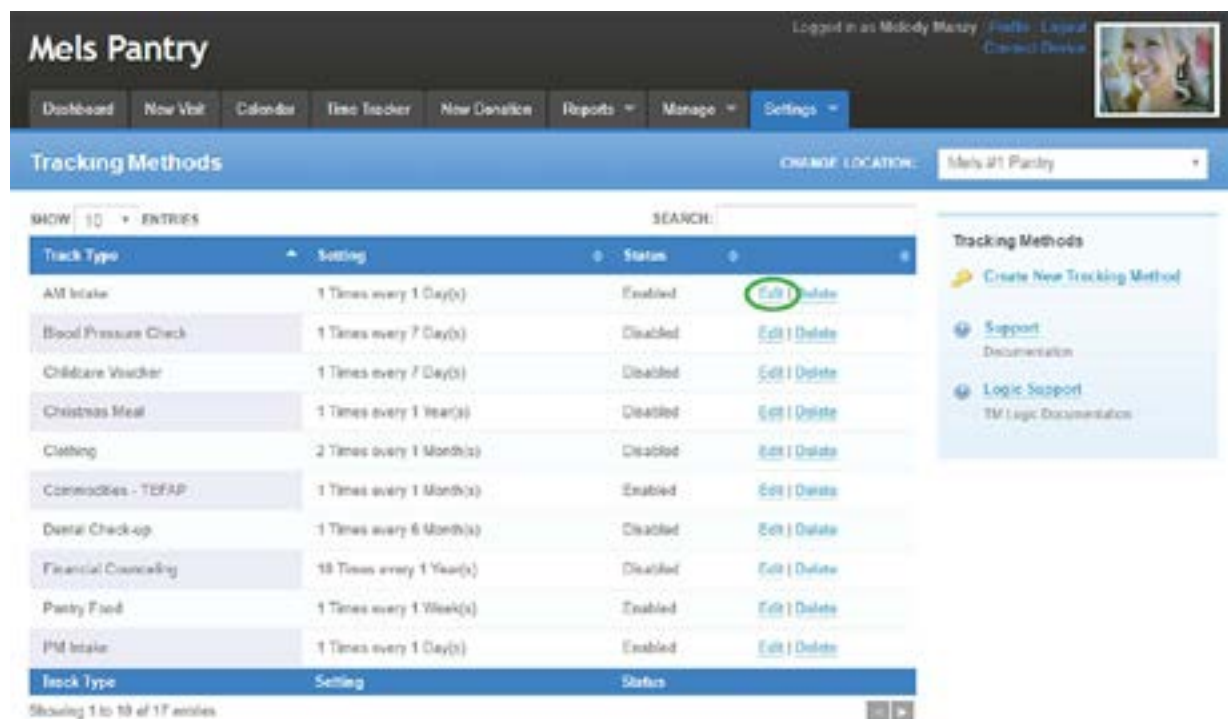
Settings
Groups & Permissions
Custom Print Request
Tracking Methods
Create Visit Config
Team Options
List Configs
Job Positions
Static Options
Special Needs
Special Needs Options
Questions
Donation
Custom Fields
Firewall Rules

Mels #1 Pantry

Tracking Methods

- Create New Tracking Method
- Support Documentation
- Logic Support TM Logic Documentation

Next, click on 'Edit' of the Tracking Method you want to apply presets to.



Mels Pantry

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Dashboard New Visit Calendar Time Tracker New Donations Reports Manage Settings

Tracking Methods

CHANGE LOCATION: Mels #1 Pantry

SHOW 10 ENTRIES SEARCH:

Track Type	Setting	Status	
AM Intake	1 Times every 1 Day(s)	Enabled	Edit Delete
Blood Pressure Check	1 Times every 7 Day(s)	Disabled	Edit Delete
Childcare Voucher	1 Times every 7 Day(s)	Disabled	Edit Delete
Christmas Meal	1 Times every 1 Year(s)	Disabled	Edit Delete
Clothing	2 Times every 1 Month(s)	Disabled	Edit Delete
Commodities - TEFAP	1 Times every 1 Month(s)	Enabled	Edit Delete
Dental Check-up	1 Times every 6 Month(s)	Disabled	Edit Delete
Financial Counseling	10 Times every 1 Year(s)	Disabled	Edit Delete
Pantry Food	1 Times every 1 Week(s)	Enabled	Edit Delete
PM Intake	1 Times every 1 Day(s)	Enabled	Edit Delete

Showing 1 to 10 of 17 entries

Tracking Methods

- Create New Tracking Method
- Support Documentation
- Logic Support TM Logic Documentation

Find the 'RECORD BY:' section.

Edit Tracking Method CHANGE

TRACK TYPE:
Commodities - TEFAP

STATUS:
Show

TIMES: 1 PER: 1 PERIOD: Month(s)

TRACK BY:
Address

ASSOCIATION LINK: Choose One ASSOCIATION ACTION: View

RECORD BY:
in Household

signature

When you choose either weight or items, the option to set up presets will open below the field.

RECORD BY:

- Weight
- # in Household
- Weight
- items**
- Usage

DEFAULT: # OF ITEMS/WEIGHT
= 0
(items/weight)

RECORD BY:
Weight

DEFAULT: # IN HOUSEHOLD
0 TO +

DEFAULT: # OF ITEMS/WEIGHT
= 0
(items/weight)

To give all households the same number of items or same weight regardless of how many live in the house, leave the 'DEFAULT: # IN HOUSEHOLD' field set as '0 to +'. Then in the 'DEFAULT: # OF ITEMS/WEIGHT' put in your preset answer. In my example below, every household that comes in for a Commodities visit, will have the weight of 30 pounds applied to their visit.

RECORD BY:

Weight

DEFAULT: # IN HOUSEHOLD

0 TO +

DEFAULT: # OF ITEMS/WEIGHT

= 30
(items/weight)

To give each household a preset weight or preset number of items according to household size, change the 'DEFAULT: # IN HOUSEHOLD' field to represent your first group '0 to +'. When you plug in a number into the + field, it will generate another set of household size fields that starts with the next number.

RECORD BY:

Weight

DEFAULT: # IN HOUSEHOLD

0 TO 2



DEFAULT: # OF ITEMS/WEIGHT

= 30
(items/weight)

3 TO 4



= 40

(items/weight)

5 TO 6



= 50

(items/weight)

7 TO +



= 60

(items/weight)

Make sure to click on 'Save' when you are done.