PantryTrak Overview

The following pages provide the basic information for logging in and using the key functions.

For more detailed information: there is a 77-page PDF training document on the desktop of the front desk computer. (Note: a printout of this document is in a binder at the front desk.)

When logging in, anything that is input, updated, or changed is automatically saved. In some cases, reversing those changes is difficult. Please DO NOT use the actual PantryTrak system to practice or learn the system.

If you'd like to practice/learn, you can visit this demonstration website. You can input families, make, changes, etc. as this is just a practice website. Feel free to play around in the demo system as much as you want.

- demo.pantrytrak.com
- User Name: demo@mof
- Password: moref00d!
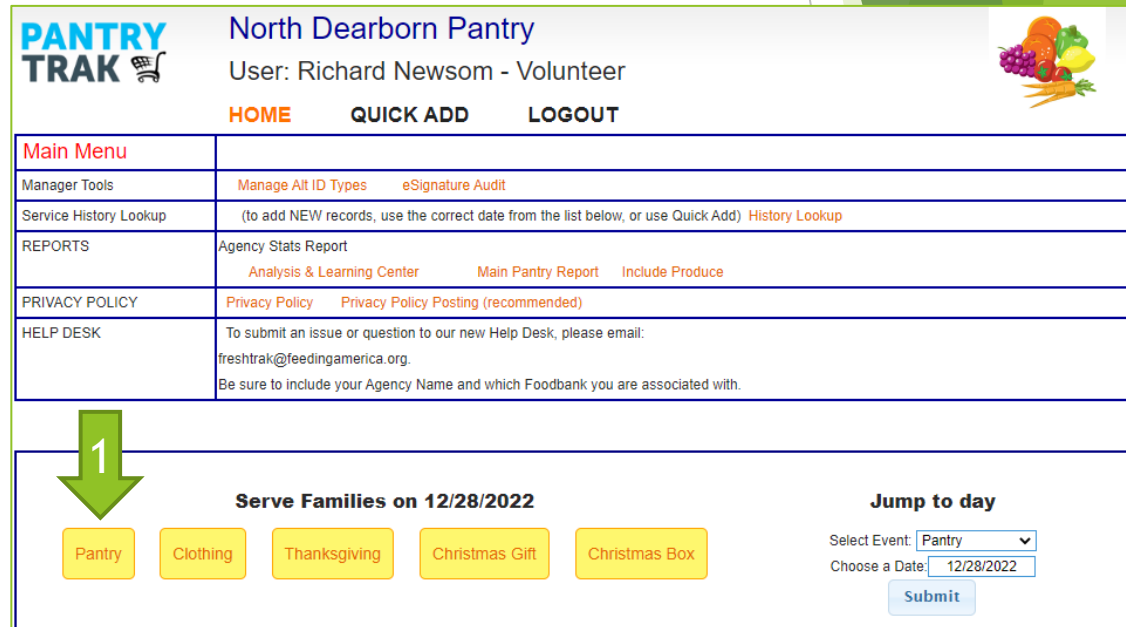
Logging in to PantryTrak

1. Go to Pantrytrak.com and then click on Login in the upper right

2. Enter ID and password. Note, the ID is NOT case sensitive, but the password IS case sensitive.

3. Read the Privacy Policy, then input your Name and Initial to confirm that you agree and will adhere to the Policy.
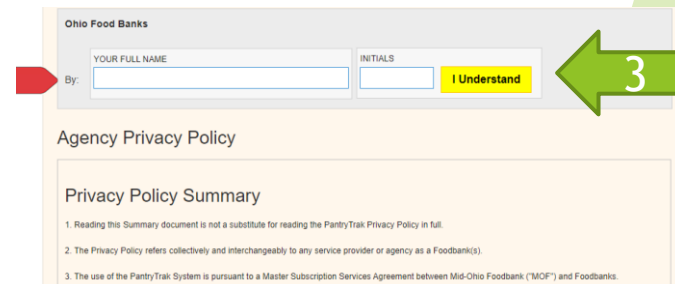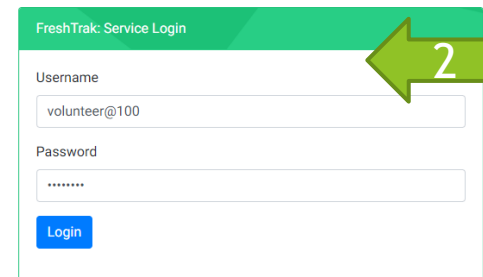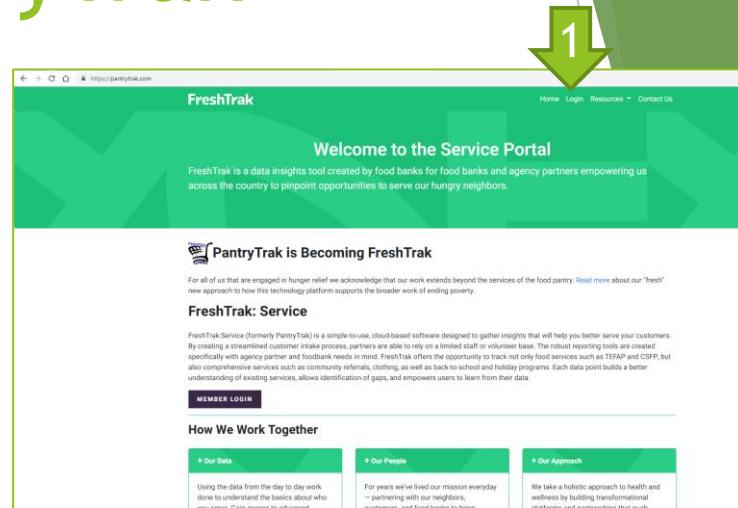
How to Begin – Choose the Service Delivered

1. Choose the service associated with why the Patron is visiting today. The vast majority of patrons come for food so please select "Pantry".

Note: If patron is there for multiple services (e.g. Food and Clothing, you will be able to capture that later so just select the primary purpose for their visit.)

Searching for a Patron/Family

1. Search for the patron. ALWAYS do a search even if they have never visited North Dearborn Pantry before. They may have visited another pantry in the area and their information could already be in the system.

Notes / Tips
- You can search by Name, Address, Date of Birth, Phone Number, or Patron ID
- When searching by name:
  - Input a few characters of the last name, then a comma, then the first character of the first name. For example, this search will return all patrons who are R. Smith

Selecting a Patron

1. If shown, click on the desired Patron Name. If the same patron (with the same address) is shown multiple times, select the top one on the list).

2. The last time this patron was served at the pantry is listed here.

3. If this patron is not listed, then click on "Add New Family & Visit".

Verify Patron Info

1. Use info shown to confirm this is the correct patron.

2. Update data as necessary including adding/removing family members as the household changes. To help you notice if there is missing information, it will be shown in pink.

Input Patron Visit

1. Choose the correct service. System will default of "Pantry – Choice – 14 day". This is our normal food pick-up.

2. The date and time of service is automatically filled. If necessary, it can be updated.

3. Click on "Not Required" for signature.

4. Click on "Served" as we fill food orders as soon as the patron arrives.

5. The "Alt IDs" button is used to input our patron number. See next slide for instructions on adding a patron ID number.

6. If they also got clothing, picked up a holiday food box, etc. then you can add a secondary service.

Notes / Tips
- The system automatically saves your entries so no need to click save.
- When finished with the above steps, simply close the entire window and you'll be able to search for your next patron. DO NOT click the button above for "Close Window & Add Another Service" unless you are actually adding another service for the same patron.

Add a Patron ID Number

1. Click the button for "Alt IDs".

2. Click "Add Alt ID". Do this for the head of household ONLY.

3. Type in the patron ID from the master list at the front desk.

4. ID Type should be set to "Any Card".

5. Click "Add ID"

Adding a New Patron/Family (Step 1)

1. Input all patron info. (Note: Housing type not needed).

2. Input the quantity of each age group in the household.

3. Click Next

Adding a New Patron/Family (Step 2)

1. Input all family info. DO NOT input the head of household on this screen.

2. Click "Finish Adding New Family".

Adding a New Patron/Family (Step 3)

1. Confirm data was input correctly and update it as needed.

2. Additional notes can be captured as needed (e.g. Township, allergies, special needs, etc.)

3. Finish adding their service info for this visit (see previous pages for instructions).