

Question

Answer

❖ Is there a way to add types of relationship such as boy/girlfriend or foster child?

❖ Yes, go to Setup -> Picklists and look for the picklist named Relationships

❖ Will this recording be available to us cater the meeting is over?

❖ live answered, Yes it will be linked in the Knowledge Base under the recorded Webinars

❖ Will this recording be available to us cater the meeting is over?

❖ Yes, we will post in our Knowledge Base and send a follow up email.

❖ Will this recording be available to us cater the meeting is over?

❖ Great thanks so much!

❖ Apologies, how did Aidan get to this page?

❖ He opened the Reporting Tab, and selected the option "Data Visualizations". This will appear as an option your accounts on March 13th

❖ Apologies, how did Aidan get to this page?

❖ Oh ok, because I wanted to follow along but didn't see it. Thank you

- ❖ Are these visualizations printable?
- ❖ Each graph will be exportable/printable at first, or you'll be able to take screenshots. We'll be adding the ability to print the whole visualization page soon.
- ❖ Are these visualizations printable?
- ❖ Thanks Tom!
- ❖ How are you gathering this demographic information when we are not allowed to ask such questions other than the clients name?
- ❖ Those requirements vary throughout the organizations we work with. Each of these demographics is a custom field. If the rules and regulations for the programs you administer restrict what you can collect you may have a much simpler configuration.
- ❖ Can I schedule an appointment with a service rep...our panty soft looks outdated to what Aiden is showing..LOL
- ❖ Yes, you can always reach out to [support@pantrysoft.com](mailto:support@pantrysoft.com) or use the support request link in the support dropdown. However, don't worry this is a brand new feature we are demoing. It will be available to everyone in the updating going out the night of March 12th.
- ❖ can you provide definitions for household and unduplicated before we leave today?
- ❖ Yep! Unduplicated just means unique households (i.e. I would be 1 unduplicated household even if I visited every day). Total households is referring to total visits across all households.
- ❖ I didnt know we can add our career closet in this. Is there any way I can import my career closet data into this to be able to utalize this data visualization?
- ❖ Yes, you can use our visit types and schedule templates to administer all sorts of programs. We usually do not do data imports once accounts are live as it can be hard to reconcile information with existing clients. For more information, reach out to support and they can work with you.

❖ What is CSFP?

❖ 60 + food box program

❖ What is CSFP?

❖ Commodity Supplement Food Program <https://www.fns.usda.gov/csfp/commodity-supplemental-food-program>

❖ What is CSFP?

❖ It is a USDA program for seniors. Commodity Supplemental Food Program.

❖ 1. Does the total household number include clients? and 2. Is there any plan to extend the lookback to more than 24 months?

❖ 1 .Total households is the total visits across all households, regardless of how many people are registered to each household. Total clients shows total visits across all household members. 2. Yes! I don't believe there is a limit on the lookback

❖ How can we add relationships such as boy/girlfriend or foster child?

❖ You can add these under setup>picklist> and use the pencil icon to add a new option.

❖ How can we add relationships such as boy/girlfriend or foster child?

❖ thank you

- ❖ can i put info i need by myself or do you have to do it?
- ❖ We will be creating the dashboards in general, but can create custom dashboards and some may have access to creating their own dashboards eventually.
- ❖ What are the age ranges for adult vs senior?
- ❖ That is customizable based on your needs.
- ❖ Do you have Age in demographics. Specifically Infant (0-2), Child (3-18), Adult (19-54) & Senior (55+)
- ❖ To get custom date ranges into the Data Visualization dashboards is right now a manual tweak, but this is so ubiquitous we'll probably need to develop a separate express pipeline to dial this request for folks.
- ❖ Long answer is: it's absolutely possible, it requires a small amount of custom work at the moment, so we have to work out still how to field these very minor requests.
- ❖ Will the Data Visualization be available to every type of account? I don't have it on mine
- ❖ Yes, it will available to all beginning March 13th, 2025.
- ❖ Is there a report identifying specific dempgraphic with client information? We would like to identify specific households with a specific age range eligible for one of our programs.
- ❖ You will still need to utilize a Dynamic Report if you need to see client-specific information in relationship to a demographic question you ask. Please send in a report request for this!
- ❖ Is there a report identifying specific dempgraphic with client information? We would like to identify specific households with a specific age range eligible for one of our programs.
- ❖ Thank you!

- ❖ Can I add seniors, disabled by household members?
- ❖ Yes. Disabled would be a question you can add under support -> demographic questions. Something like adults, children, seniors, can be reported on just based on the built in age or dob fields. In addition to these visualizations those can also show in your dynamic reports.
- ❖ Can you show us the report with White race with Hispanic ethnicity
- ❖ live answered
- ❖ This is for Aggregate report.
- ❖ Yes, correct.
- ❖ Reporting. duplicate and unduplicate matches daily but when we run monthly. Its alway off. Why?
- ❖ We may want to dig into this offline. Several factors can contribute here.
- ❖ How will user permissions impact what data they see in these reports? If they don't have multi-location permissions, will they only see the totals for their location or will they need to filter by their location manually?
- ❖ Great question. I am also wondering the same thing.
- ❖ How will user permissions impact what data they see in these reports? If they don't have multi-location permissions, will they only see the totals for their location or will they need to filter by their location manually?
- ❖ live answered

❖ How can we be certain that our data is staying within pantry soft and not leaving the instance for data processing ?

❖ live answered

❖ Can you drop the price break down in here please?

❖ The ones you have seen will be free, anything above this will have a fee.

❖ Can you drop the price break down in here please?

❖ Thank you I just saw toms break down in the chat. I appreciate it.

❖ Will there be an option to drill down to pull up a list of clients from the visualization?

❖ live answered

❖ Will there be an option to drill down to pull up a list of clients from the visualization?

❖ I'd like to know too! Thanks for asking

❖ Will there be an option to drill down to pull up a list of clients from the visualization?

❖ You would need to utilize Dynamic reports for client by client data.

❖ I'm sorry are you saying all Data Visualization is extra? or is there a basic level that is included?

❖ These two base dashboards are included!

❖ Do we have to pay a fee if we don't want anything customized for our account?

❖ No, these two base visualizations are included. The fee is for custom work.

❖ Will you still be able to go into dynamic reports as they sit today and pull data for offline reporting?

❖ Yes! Dynamic reports will remain unchanged

❖ Yes please lets do that webinar

❖ live answered

❖ Yes please lets do that webinar

❖ Agreed!

❖ So I am a little confused, are you stating for me to be able to report my ethnicities, we will have to pay an additional fee for a specialized report? I was under the impression this was available when we agreed to this program and am continually told it is not available. The organization that suggested this software has this ability but yet, I do not.

❖ Yes I would like to have this information as well

❖ So I am a little confused, are you stating for me to be able to report my ethnicities, we will have to pay an additional fee for a specialized report? I was under the impression this was available when we agreed to this program and am continually told it is not available. The organization that suggested this software has this ability but yet, I do not.

❖ Yes this would be great since we are also able to provide assistance for our housing insecure students now

❖ is there a place that notes if we can make referrals to SNAP, HEAP, etc

❖ ok

❖ So the new base data visualization will allow me to pull my ethnicities? This was one MAIN reason for using pantry soft.

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❖ Regarding pricing - Base Data Visualizations shared here: Free!

❖

❖ Only custom data visualizations will be an additional cost.

❖ live answered

❖ This sounds like a conversation about how to flag a customer record as being enrolled in a certain program, or answered a certain custom question. If your intent is to "count" those folks, you could determine this in the Visualization. If your intent is to see who those folks are, it's more the purview of a Dynamic Report. Go ahead and send a support ticket if you need specifics on this.

❖

❖ Also check out Program Tags and Custom Questions in our Knowledge Base (Support Menu in your app).

❖

❖ Yes, you will be able to view counts of answers to any registration, demographic, or interview question you would like.

❖ Great, wish I would have known this wasn't available until the new reporting system.



- |   |  |
|---|--|
| ❖ Can we get reports that show how many clients come through during a specific time, at specific locations?   | ❖ That information is available in your Dynamic Reports specifically Visits in Range.  |
| ❖ Can we get reports that show how many clients come through during a specific time, at specific locations?   | ❖ I am trying to find out general info or a report to break out from specific client, just number of visits in a specific time range to put in a chart   |
| ❖ Can we translate values - example bit fields to Yes & No?   | ❖ live answered  |
| ❖ Hi! Sorry I'm late so I definitely missed this - is this data visualization tool through PantrySoft itself or is it through a third party like Tableau?   | ❖ The visualizations are created using AWS QuickSight. Once these roll out you might notice a small tag on the bottom of the report that says "Powered by QuickSight"  |
| ❖ It seems I don't currently have any Demographic Questions set up. But I do have a number of demographic questions on my registration "form". Why is this? | ❖ live answered  |
| ❖ It seems I don't currently have any Demographic Questions set up. But I do have a number of demographic questions on my registration "form". Why is this? | ❖ A demographic question is collected for every household member, while a registration question is collected for the household as a whole. It is common that registration questions would actually be demographic information. |

- ❖ It seems I don't currently have any Demographic Questions set up. But I do have a number of demographic questions on my registration "form". Why is this?
- ❖ Currently my key demographic questions that are in my registraion do not show up in my report.
- ❖ did I miss the response to reporting duplicated and unduplicated members as a reporting method for our food bank donors. is it still through the dynamic reporting?
- ❖ That information will be available in Data Visualizations and Dynamic Reports.
- ❖ Can you tell us what the default age ranges are for the child, adult, senior?
- ❖ We work with you to set these up within the system at your launch. If you're not confident that it is accurate for your needed age ranges, please send in a helpdesk ticket so we can double check for you!
- ❖ Can you tell us what the default age ranges are for the child, adult, senior?
- ❖ Got it. Thanks. I do not recall that...I'll put in a ticket;)
- ❖ Can you tell us what the default age ranges are for the child, adult, senior?
- ❖ I will keep an eye out for it. Thank you!
- ❖ And...I am SUPER excited about this new reporting tool...thank you!
- ❖ live answered

❖ I want to know about the "ghost accounts" would we be able to delete them, when that arises by ourselves?

❖ live answered

❖ are the knowledge updates going to be videos on Youtube? Webinars? etc

❖ As we get closer to the release we will add some videos. We will also attach all webinars. Right now it is a q/a.

❖ Would it be easier to clarify what the base data visualization tools and reports look like? Is there a way for us to see what a base report looks like, or is that unique to each program that uses pantrysoft?

❖ The dashboards immediately available to everyone will be entirely uniform between Pantrysoft installations. You'll use filters (like 'show specific custom questions') to dial in pantry specifics.

❖ Am i correct that you were working on a merge tool?

❖ live answered

❖ Can you make email address NOT REQUIRED? Not all clients have emails plus it would help with this ghost account. NO?

❖ Do you need this required for Primary and not household members? We can help you navigate this if you want to send in a support ticket [support@pantrysoft.com](mailto:support@pantrysoft.com)

❖ Can you make email address NOT REQUIRED? Not all clients have emails plus it would help with this ghost account. NO?

❖ I was just speaking to the challenge of requiring an email to register. This is problematic for me specifically because not all of my clients have email (or want to disclose it), and I don't need an email. But if it creates a problem say with ghost accounts and clients who are signed up at multiple food banks.

❖ What is a merge tool?

❖ This will be a tool to let you merge clients.

❖ Will adult placeholders affect any of the reports?

❖ Yes they will. Those are member records in the system, and they'd be counted unless you put in some kind of flag you can filter for.

❖ Can we do this for only visiting clients during a certain window? Are we able to retire or mark clients as inactive?

❖ live answered

❖ Can we do this for only visiting clients during a certain window? Are we able to retire or mark clients as inactive?

❖ The Full Activity Counts has filters for the date range that you want to see. Yes, you can mark clients as Inactive.

❖ We are brand new to Pantry Soft and I am very excited to see the availability of reporting provided for us. Data Visualization will be a welcomed surprise to our current reports. Thank you!!

❖ It is exciting and welcome to PantrySoft :D

❖ We are brand new to Pantry Soft and I am very excited to see the availability of reporting provided for us. Data Visualization will be a welcomed surprise to our current reports. Thank you!!

❖ Thank you!! Coral is awesome!

- ❖ I just noticed there was a setting for Birthday gift under Household Member Settings. It is listed for the current month. We provide a cake mix, icing, etc if the child has a birthday between today and their next eligible pantry date in 30 days. Is there a way to adjust the timeline the icon would show so that if the birthdate is in the next 30 days instead of current month?
- ❖ One of the graphs that shows how many people come on a certain date, will the graph show the dates that we did not serve people? (will the graph jump from 300 to 0 back to 280 and then down to 0?) It was a line graph that is on the data visualization.
- ❖ One of the graphs that shows how many people come on a certain date, will the graph show the dates that we did not serve people? (will the graph jump from 300 to 0 back to 280 and then down to 0?) It was a line graph that is on the data visualization.
- ❖ Where in the data visualization report would we find the total number of visits, household served, and household members served?
- ❖ Will there be any updates to the duplication report?
- ❖ Is the system scheduled to be down any time?
- ❖ We can put that in as a request and see what the team will say.
- ❖ Or will it just show how many people came on the days that have numbers, to show a better trend line
- ❖ Only dates with visits will reflect in that chart. Good question!
- ❖ This will be on the Base Data Visualization called "Full Activity Counts"
- ❖ live answered, This is in the works
- ❖ live answered, No