Instructions for Summer Farmers' Market Data Project

<u>For farms collecting and/or sending data on their own</u>

PLEASE NOTE: For this project, it is incredibly important that all data collection is done in a consistent format so that individual farm and market data can be combined and compared. Therefore, there are detailed descriptions below explaining how to collect and handle data.

<u>At Market</u>

A. Before or at the market, log in to your Square account and "Set Up Item Grid" with the products and prices for the day. You can set it up to reflect only the items you are selling on that date. You can change pricing at any time, even half way through the market. **Please note:** Square will not allow you to log in or out without a WIFI connection, so you may want to do that BEFORE you arrive.

B. Early in the market, take a picture of your market stall using the iPad. Get 1-2 pictures including the price list when applicable.

C. Fill in the "Daily Market Log." Please note any significant weather changes and the time as the day goes on. Also note the number of vendors and the number of items that you are selling that day.

D. Record <u>ALL</u> transactions. Use the Daily Market Log to note any mistakes or special notes that you might forget.

NOTE: If you have CSA customers who shop the market stand as "free choice" customers who do not pay you can either skip recording them or create a new item called "CSA customer" which is free and then add it to their order. This second option is not important for the project, but can be useful to the farm.

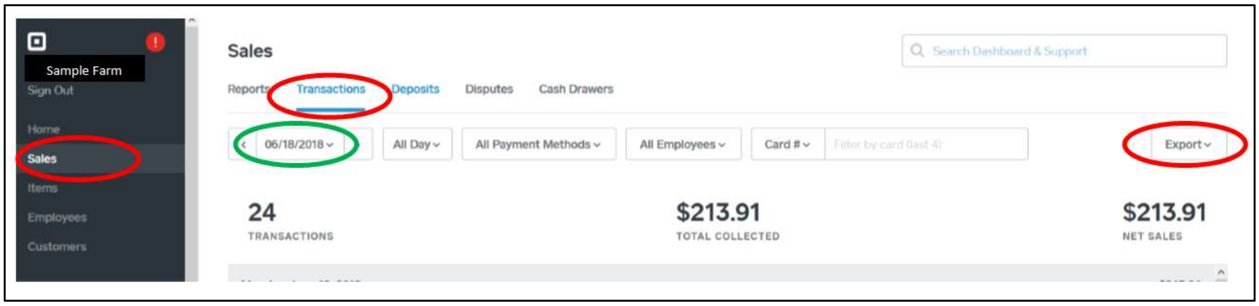
<u>After the Market:</u>

1. Please email the picture(s) of the market stall and a photo of your completed Daily Market Log to the project manager at *email address*.

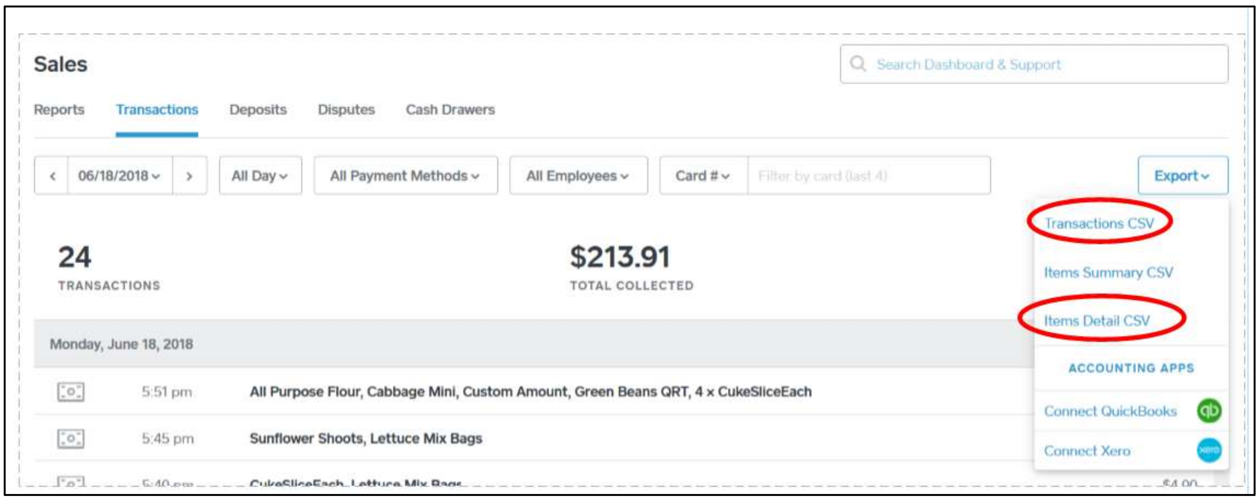
2. Using your computer, log in to your Square account and download 2 reports from your account. Once you have downloaded these, please email to the project manager at *email address*. Please send the following two reports as soon as possible, preferably that evening. **<u>The reports we need are:</u>**

"Transactions" (See screenshots on the next page)
Go to the "Sales" tab on the left menu bar, then to "Transactions" on the upper menu bar. Choose the relevant date (for each <u>single market</u>). From the "Export" drop down menu, chose the "Transaction CSV" and save it to your computer. On this report, please DELETE Columns Y, AH, and AI which are "Pan Suffix", "Customer ID", and "Customer Name" respectively.

"Items Detail" (See screenshots on the next page)
Go to the "Sales" tab on the left menu bar, then to "Transactions" on the upper menu bar. Choose the relevant date (for each <u>single market</u>). From the "Export" drop down menu, chose the "Items Detail CSV" and save it to your computer. On this report, please DELETE Column W, which is "Customer Name.". **Email these two files to the project manager at *email address*. Thanks!!**



Screenshot #1: Choose “Sales” from the menu on the right, then “Transactions” above. Next, choose the date of your market from the calendar that pops up when you click where the green circle is. Next, click the “Export” button to the right. Then see the next screenshot for more.



Screenshot #2: Choose the reports circled here in red.