

## OFFLINE MODE: PLANS

1. WHILE STILL ONLINE, select **Plans** from the Menu in the top left corner.

This will allow you to save data from returning neighbors on individual devices so you don't have to enter every neighbor as new.



2. From the Offline Plans screen, set the date range and click **Update**. Then click **Create New Plan**.

Select dates that will cover most of the neighbors you're likely to see, but not absolutely everyone. The most recent month is a good place to start.

### Offline Plans

When you are ready to go offline and download your plan, please confirm your selections and lock your plan. You must lock your plan prior to downloading

\*Date Range

3/1/2024 TO 3/28/2024

Filter results by keyword...

Event Date	Time of Event	Event	Plan Name	# of Times Loaded	Plan Neighbors	Plan Status
No data available in table						

3. Give your plan a name and click **Next**.

### Offline Plan

1 Plan Name — 2 Plan Event — 3 Plan Neighbors — 4 Summary

#### Name Offline Plan

Name your Plan and then begin making data selections for offline usage

**Plan Name**

\*Name of Plan

April

4. Choose the upcoming **events** for which you will be using Offline Mode and click **Next** (scroll to the bottom of the page if necessary).

### All Events Eligible for Offline Mode

Select an event to save to your device

\*Date Range

3/28/2024 TO 4/28/2024 Update

Filter results by keyword...

Date	Time	Event	Services	Total Reservations	Capacity	
03/28/2024	7:00 AM - 5:00 PM (MST)	On the Road	Food Pantry - TEFAP, Food Pantry	0	20	<span>Select</span>
03/28/2024	9:00 AM - 4:00 PM (MST)	Food Pantry	Food Pantry	0	300	<span>Select</span>

Which of your events will be using Offline Mode? (Choose only one.)

5. Set Neighbor Selection Criteria and click **Update Selected Counts**. Click **Next**. You can add multiple criteria here, or just choose one. Adjust criteria until the selected counts number looks close to the number of neighbors your pantry normally serves.

#### Neighbor Data Eligible for Offline Mode

Select neighbor data to save to your device

**Neighbor Selection Criteria**

Add Another Neighbor Selection Criteria

1

\*Neighbor Selection Criteria

Neighbors previously served by this Agency

\*Date Range

2/1/2024 TO 3/28/2024

Click button to display neighbor count (optional)

**77 Neighbors Selected by This Criteria**

Update Selected Counts

If that number makes sense for your pantry, click **Next** to move on. If it seems low, add a few more criteria.

#### Neighbor Selection Criteria

Add Another Neighbor Selection Criteria

2

\*Neighbor Selection Criteria

Neighbors in a specific zip code

\*ZIP

80908 80910

Add Another Remove ZIP

\*Neighbor Selection Criteria

Neighbors previously served by this Agency

\*Date Range

2/1/2024 TO 3/28/2024

Click button to display neighbor count (optional)

**81 Neighbors Selected by This Criteria**

Update Selected Counts

Here we added **two** selection criteria: zip code (you can add multiple zip codes) and neighbors previously served. These criteria give us 81 possible neighbors.

Feel free to play around with these selections until the numbers look right to you. Then click **Next**.

6. Verify the information and save your plan.

### April Summary

Plan name

Please review and confirm the selections you have made

#### Food Pantry

Filter Selection(s)	Estimated Plan Neighbors
All Neighbors in Zip Code [80908, 80910]	4
All Neighbors Previously Served By This Agency [2/1/2024 - 3/28/2024]	77

**81 Neighbors Selected by This Criteria**

Does this info look right?

Cancel Save Plan

## 7. Lock your plan.

**Offline Plans**

When you are ready to go offline and download your plan, please confirm your selections and lock your plan. You must lock your plan prior to downloading

\*Date Range  
3/28/2024  TO 4/28/2024  [Update](#) [Refresh](#) [Create New Plan](#)

Filter results by keyword... 

Event Date	Time of Event	Event	Plan Name	# of Times Loaded	Plan Neighbors	Plan Status		
3/28/2024	9:00 AM - 4:00 PM	Food Pantry	April	0	81	Open	<a href="#">View</a>	<a href="#">Lock</a>



## 8. When the plan has finished processing, load your plan to your device.

Plans with higher numbers of neighbors will take longer to process.

### Agency Admins only:

- Log to each device under your own login.
- Choose **Plans**.
- Click **Load Plan to Device**.

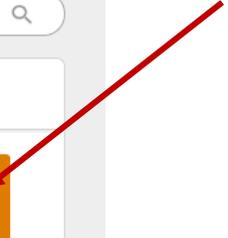
**Offline Plans**

When you are ready to go offline and download your plan, please confirm your selections and lock your plan. You must lock your plan prior to downloading

\*Date Range  
3/28/2024  TO 4/28/2024  [Update](#) [Refresh](#) [Create New Plan](#)

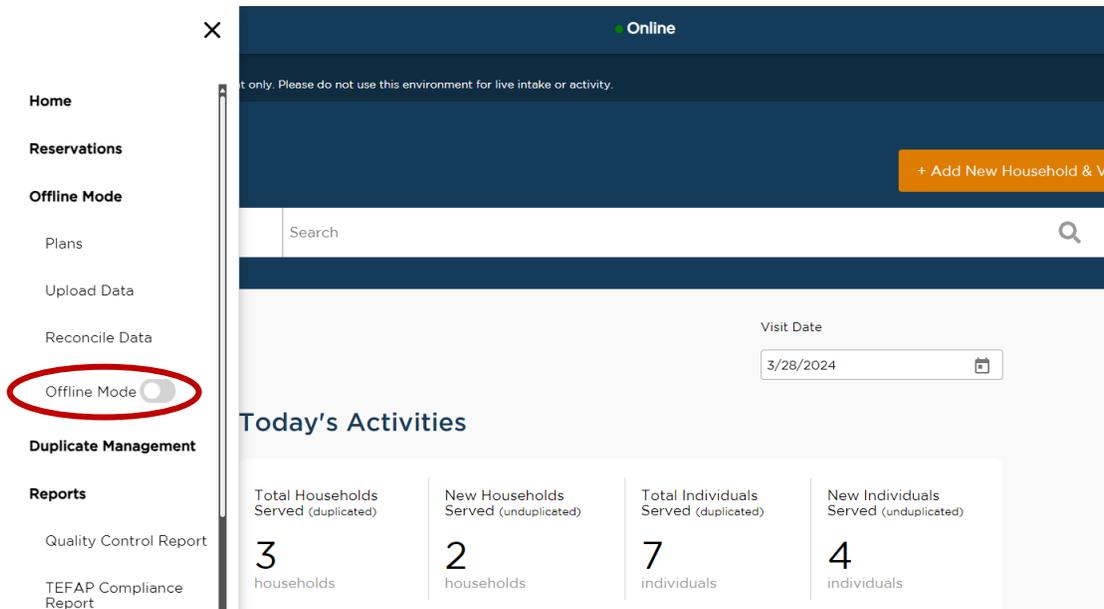
Filter results by keyword... 

Event Date	Time of Event	Event	Plan Name	# of Times Loaded	Plan Neighbors	Plan Status		
3/28/2024	9:00 AM - 4:00 PM	Food Pantry	April	0	58	Ready	<a href="#">View</a>	<a href="#">Load Plan to Device</a>



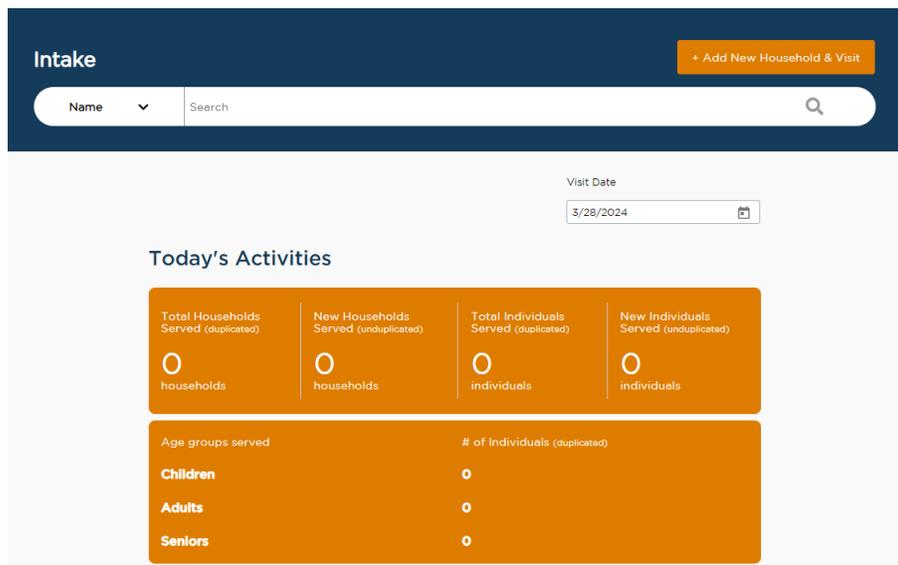
## 9. Click Yes to download data. Now you're ready for your distribution!

10. BEFORE GOING OFFLINE, select the Offline Mode toggle switch in the menu.



11. You can now turn off WiFi or move away from your service area, and do neighbor intake as usual!

- a. The orange screen indicates that you are in Offline Mode.
- b. The intake numbers will be specific to your device only; they will not be able to track input on other devices while offline.



12. After the distribution and neighbor intake is over, reconnect each device to WiFi or service and **turn off** the Offline Mode switch in the menu.
13. For each device, select **Upload Data** from the menu and click **Upload**. Your data will upload to the online site.
14. Finally, select **Reconcile Data** and click **Reconcile**. Check each of the three tabs to verify the information, and then click **Save**.
15. Offline Mode Complete!