

# Piedmont Senior Resources

## “Delivery with A Ring” Doorbell Program

### ServTracker CXM Setup

(We have them categorized as ‘Medical Supplies’)

- Administration – Setup – Services – Home Delivered meals
  - Funding = Medical Supply
  - Meal Type = Medical Supply
    - Diet = Med - Doorbell

Create Home Delivered Meals Service Units

Enter Main Service Units Information

Service Date

6/27/2025

Delivery Date

6/27/2025

Client

Schedule

Frozen | Piedmont Senior Resourc...

Funding

Medical Supplies

Meal

Medical Supply

Beverage

None

Diet

Med-Doorbell

Route Group

PSR

Route

Prince Edward 1 Frozen Meals

Status

Active

Get Client By

Last, First

Optional Fields (Defaults to Service Intake Values)

Holiday

☐

Prescription No

Meal Qty

1.00

Beverage Quantity

0

Menu

Select Menu...

Adhoc

☐

Comments

doorbell

Apply

Delete Selected

# Google Sheet Setup

Client Needs

File Edit View Insert Format Data Tools Extensions Help

Menus 100% 123 Default... 10 B I A

C12	A	B	C	D	E	F	G
1	Delivery With a Ring - PSR Doorbell Program						
2	Name	County	Phone #	Date Client Received	# Doorbells	# Clients Received Door Bell	
3		AMEL		6/16/23	1	2	HDM
4		AMEL		4/14/23	1	1	HDM
5		AMEL		10/27/23	1	1	HDM
6		AMEL		12/1/23	1	1	HDM
7		AMEL		6/23/23	1	1	HDM
8		AMEL		6/30	1	1	HDM
9		AMEL		6/23/23	1	1	HDM
10		AMEL		6/23/23	1	1	HDM
11		AMEL		7/25/24	1	1	CAFE
12		AMEL		5/2/25	1	1	HDM
13		AMEL		7/26/24	1	1	HDM
14		AMEL		7/26/24	1	1	HDM
15		AMEL		6/2/23	1	1	HDM
16		AMEL		3/28/25	1	1	HDM
17		AMEL		5/17/24	1	1	HDM
18		AMEL		6/27/25	1	1	HDM
19		AMEL		4/19/24	1	1	HDM
20		AMEL		10/4/24	1	1	HDM
21		AMEL		1/5/24	1	1	HDM
22		AMEL		4/18/25	1	2	HDM