### Agency Express Training User Guide to Online Ordering





# **Always Remember:**

\*Know your order window. Order windows is between TWO WEEKS to TWO BUSINESS DAYS prior to scheduled pickup/delivery day. Meaning, you can place your order as early as 2 weeks, but NO LATER THAN 2 business days before your delivery or pick-up.

- Order within your order window: The Idaho Foodbank (IFB) will be unable to process orders placed outside the order window. Reasonable accommodations may be made for window changes under special circumstances; if this applies to you, please contact a member of Operations as soon as possible.
- Know your online ordering account login information: Store your online account information in a safe and easy-to-locate place. Make sure someone else in you organization knows where this place is in the event that you are not available during a given order window. There is space at the back of this manual to store your username, password, and program code.
- Submit your cart: If you do not click "Submit Cart" after reviewing your order, IFB will not receive your order. Be sure to fully read the pop-up window that appears, and confirm that all items were accepted. If they were not, you must manually remove items from your cart and click "Submit Cart" again. Wait for confirmation that your order was submitted successfully.
- Carefully follow the instruction in the manual: Feel free to refer to this manual if you are having trouble ordering; your answer will likely be inside!



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# Having Trouble Ordering:

- Contact a member of our Operations team:
- Boise warehouse 208.577.2696 or 208.336.9643
- Pocatello warehouse 208.233.8811
- Lewiston warehouse 208.746.2288

Operations staff can help with any online ordering needs.



# Agency Express Training Video:

Please access our Agency Express Training video, which explains how to complete your food order using the Agency Express system.

This can be found on The Idaho Foodbank's Agency Zone, on the right hand panel under the topic 'Agency Express Online Ordering & Reporting'.

Here is the link: <u>http://ifbagency.wpengine.com/a</u> <u>gency-express-online-ordering/</u>







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# **Technical Background Information:**

Note: We recommend using Google Chrome as a browser but Agency Express is compatible with the browsers listed below, if necessary.

Please upgrade to the most recent version of Google Chrome:

- 1. Open Google Chrome on your computer.
- 2. In the top right, click the Chrome menu
- 3. Click 'About Google Chrome'

The current version number is the series of numbers beneath the 'Google Chrome' heading. Chrome will check for updates when you're on this page.

Google Chrome-recommended: https://www.google.com/intl/en/chrome/browser/

Firefox: <u>http://www.Mozilla.org/en-US/firefox/new/</u>

Internet Explorer 11: <u>http://windows.Microsoft.com/en-us/internet-explorer/products/ie/home</u>



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### Idaho Foodbank Partner Agencies

Welcome to Agency Zone Partner Agency Login **Contact Us Protected: Partner Agency Login** This content is password protected. To view it please enter your password below: Password: Enter the password 'partner' ..... Enter and click 'enter'. (c) 2016 The Idaho Foodbank



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http://ifbagency.wpengine.com/partner-agency-login/

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Contact Us: 1-208-336-9643

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#### Agency Express Login Page

#### Type in your user name.

Type in your password.

\*Usually begins with the first letter of your first name and your entire last name. Ex. ATHOMPSON

\*Default password is ' change 12 '



\$

### Type in your program code.

\*You may have multiple program codes, depending on how many programs you operate in partnership with The Idaho Foodbank. <u>Please report under all</u> of your program codes.

Click on 'Log In' once you are done.

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Login		
User Name:		
Password:		
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Remember me next tir	ne.	
Need to clear your userna	me and program code? Click Here	
Log In		



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# Got this Message?

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Activity Status Alert	
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Activity Status Alert	
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Home About Programs Get Involved Events Partner Network Education	News Get Help Volunteer

# Great! You're logged in. click "Close" and continue.



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# Standing Appointment

- Standing Appointment: A known appointment time your regularly use for pick-up or delivery of your food order (i.e. 2nd Tuesday of each month). If you are an agency that receives a delivery, you also have been assigned a standing appointment.
  - Please remember the delivery/pick-up date and time are pre-scheduled by IFB based on the route schedule for delivery and dock availability for pick-ups.
- IMPORTANT NOTE: Make sure to contact your appropriate service branch for additional delivery or pick-up that your agency may need to obtain more food.



### Do You Have A "Standing Appointment"?

- If YES, wait until you are finished with your order to schedule your appointment from the "Check Out" page.
- If NO, use the scheduler on your "Order Option" before you place your order. Click on the scheduler dropdown as shown below. Select pick-up or delivery under the "Pickup/Delivery" box, select the date, and then select the time.
  - Please note, if you are an agency who receives a delivery and you've identified a time for delivery under the "Scheduler" option, the time you have selected may not be the exact time our driver will be at your facility. Our drivers have a pretty tight schedule and depending how many deliveries our driver is doing, your delivery time may vary. If you would like to have our driver call you at his last stop before coming to your facility, please let us know on your note section.

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Welcome	Order Options	Report	Food Bank Links	Help	About Aidmatrix	Log Out	Welcome cmckinney - <u>0109P141035P</u>	
	Shopping List Check Out							6
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Pickup /	Delivery Date: ne - 🔻	1	Time:	G	Reserve		F	Food

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# Get Started Shopping!

Select "Shopping List" from the "Order Options Menu."

### **Sorting Items**

(not necessary for shopping, but helpful)

There are a number of different Category methods for finding and sorting items. We recommend "Category" and "Handling Requirement", as these options best define our inventory. Explore each option to find out what meets your needs. Once you select the category you want, click "Search".



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# Adding to Cart:

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1. Enter the quantity of each product you would like to order on the current page. Not to exceed available quantity (or you will get this message)									
Feature Type       Handling Req. Desc. Code ?       Food Source         -Select one-       -Select one-       -Select one-         Search       Show All       View Favorites									
Shonping List - Sort By -   Tip: Please Add to Cart requested items before leaving page 2. Next, click the "Add To Cart" button									
Order Qty	<u>Available</u> <u>Qty.</u>	<u>Item</u> <u>No.</u>	Description	<u>Unit</u> Price	VAP Fee	Pack Size	<u>Feature</u> <u>Type</u>	<u>Gross</u> <u>Weight</u>	Favorite
	3	26D0035	Condiment, Hellmans Ketchup 2/1.5 Gallon	0.00	0.00	2/1.5 Gallon		31	
	14	26D0036	Condiments, Knorr Honey	0.00	0.00	2/1 gallon		22	



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# Adding to Cart, cont.:

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# Helpful Hints:

- You must click "add to cart" on each page before moving to the next page of the inventory list. If you have selected items from page one and do not add them to your cart before moving to page two, the items will not be added to your cart.
- Items are NOT reserved until you "submit cart" at the end of your order. The Idaho Foodbank will not be notified of your item requests until this step is taken.
- You can star items as "Favorites" and search by this category to view items you like to order, when available.



# Checking Out & Making Appointment:

### You must enter a Pickup/Delivery Date and Time before you submit your cart.

When entering information into the "My Appointment" box you will need to enter information from left to right. If it is entered out of order, it will not be accepted and you will have to re-enter the information.

The delivery/pickup date and time are prescheduled by The Idaho Foodbank, based on your ongoing pickup/delivery schedule. Click on the available option (highlighted in green).



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# Checking Out & Making An Appointment:

### The sequence you will need to follow when completing the "My

### Appointment" box is:

### **1. Select Pickup or Delivery PICKUP** If you pick up your order from the Idaho Foodbank. Select Pickup.

**DELIVERY** If you receive product via an Idaho Foodbank delivery truck, you will select "Delivery".

If an incorrect selection is made, you will see no options for date and time. Please re-select the appropriate delivery/pickup option.

**2. Select Date** Click on the calendar and select the option highlighted in **green** (your next regularly scheduled date).



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# Variable Weight:

It is important to know when to order by case and when to order by pounds. Most of the time you will order by case. You can usually tell when to order in pounds when the pack size is estimated, and when the gross weight is only 1 pound.

Order Qty	<u>Available</u> <u>Otv.</u>	<u>Item</u> <u>No.</u>	Description		<u>Unit</u> Price	<u>VAP</u> Fee	Pack Size	Feature Type	<u>Gross</u> <u>Weight</u>	Favorite
	211	<u>23P0005</u>	Protein - Non-Meat, Poa Buiter 12/18 oz	anut	22.81	2.36	12/18 oz		15	
	112	<u>25D0007</u>	Snack, Powerbars, Rep 15-20 lbs	backed	0.00	0.00	15-20 lbs	$\leftarrow$		
	36	<u>25F0014</u>	Snack, Pretzel Soft Fro pretiels per case	zen 50	0.00	0.00	50 pretzels per case		19	
	1	25F0019	Snacks, Bagel Bites, Cl N Repperoni 4/40 ct	heese	0.00	0.00	4/40 ct		9	
	6	<u>25D0066</u>	Snacks, Chips assorted Approx 5-15 lbs	ł	0.00	0.00	Approx 5-15 lbs		1	



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# Submitting Your Order:



2. You will be asked if you are sure you want to submit the order, please click on the OK button to confirm

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# Submitting Your Order, cont.:

3a. You will then see a pop up
box telling you whether your
order was successfully
submitted.
\*Read this carefully! \* See





3b. \*\*If the pop up box does not say "submitted successfully", your order has not been submitted!\*\*

You must manually remove items from your cart where the value ordered exceeds the quantity available. Once you have done this, click "Submit Cart" again!



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3b.

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# Reviewing Your Order:

Once your order is submitted you may review it in "Order Management" (found under the "Order Options" tab).

This is also a good place to check to be sure your cart was submitted; an order will appear here once the cart is submitted.



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# **Order Management:**



MPORTANT: see the next page for specific instructions on how to edit an order that has already been for specific instructions on how to edit an order that has already been created.

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# Editing an Order In Order Management:

### **IMPORTANT, PLEASE NOTE:**

- There is a delay of approximately 20 minutes between the time your order is first submitted and the time the pencil will be available to log in for edits.
- The pencil icon will not appear if the order is not open for editing. If the status column shows "food bank only", you may not edit your order. Edits must occur during your assigned order window.
- ALWAYS re-enter your cart <u>via the pencil icon</u> when editing an order. If you create a new order without following this process, <u>both orders will be lost</u>.



### Editing an Order In Order Management:

 To add on to your submitted order, click the **pencil icon**. This will reopen your shopping cart and allow you to add items to your order, as well as adjust the quantities of items you have already submitted.

To cancel your order entirely, click the red button with the X.

 After you click the pencil icon you will receive this message.
 Click "OK" and you will be redirected to your shopping cart.

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)rder Management							
	Reference Number	<u>Status</u>	<u>Gross Weight</u>				
📥 🛚 🖉	PO170083	Acknowledged	732.00				
-	PO170178	Rejected	0.00				
<u> </u>	PO170105	Invoiced	42.00				
	PO170088	Invoiced	47.00				

Message from webpage

You are editing a submitted order. All changes are subject to foodbank approval. Please remember to \*\*\*SUBMIT\*\*\* the order once you have completed your changes.

#### OK

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### Editing an Order, cont.:

3. To do more shopping, click "**Continue Shopping**" and you will be redirected to the shopping list.

4. Shop, add or remove items, and review your cart as discussed in previous slides.



5. Remember to "Submit Cart" after editing your order! If you forget, The Idaho Foodbank will not receive your original order or the edited order.

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6. When your order is submitted successfully, you will receive this message. Click OK. \*\*See also, page 17 step 3b\*\* rogemer, we can solve nunger.

Message from webpage



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OK

### Editing order- Important!



If you attempt to <u>edit</u> your order there is high likelihood that you could lose some or potentially all of previously ordered items. This potential problem is because there is a delay in the available inventory that you see while in the order and what is actually available in the inventory control software that the Idaho Foodbank uses. This delay causes the items on your order to be <u>temporarily unavailable</u> when you're trying to <u>re-submit</u> your newly edited order. If you try to wait out this delay your items will eventually become available again for you but unfortunately they also become available for everyone else who could be placing orders as well. This is potentially when you could lose part of or all of your ordered items.



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### When You are Done...

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# Frequently Asked Questions:

#### Q: Why didn't I receive what I ordered?

- A: This can happen for several reasons:
  - $\checkmark$  Inventory is often viewed by multiple programs at one time. An item may be ordered by another agency while you are still shopping, or items may have been requested at virtually the same time.
  - $\checkmark$  Products are not fit for distribution at the time the order is picked (especially with perishable products). This would likely be due to spoilage, damage, dating, or other conditions that would make a product unfit for consumption.
  - ✓ You requested more cases than the "Maximum Quantity" listed for this product.
  - $\checkmark$  If you are a food bank ordering "Meal Program Only" items they will be manually removed from your order. This policy exists out of respect for our donor guidelines.
  - $\checkmark$  Occasionally, inventory in the warehouse has been miscounted and the amount listed online did not accurately reflect the number in the warehouse.

### Q: When can I view a list of the actual items I will receive on my order?

A: When your ordered is released to the warehouse for picking you will receive an email. This should occur approximately 48 hours before your delivery/pickup.

#### Q: How do I print a copy of an order that I have placed?

A: Past orders can be viewed and printed in the "Order Management" section. See page 15 of this manual.



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# Frequently Asked Questions:

### Q: Why do we have order windows and how do they work?

A: Order windows ensures The Idaho Foodbank the time needed to manage the volume of orders and product packing and distribute the food to our nearly 220 partner agencies. We have set our order window to be 48 business house prior to an agency's scheduled pick-up/delivery allowing time to pulling and staging the order(s). An example of the order window is if an agency needs an order to be picked up or delivered on Tuesday, they would need to place their order by 8 AM the previous Friday. A member of our Operations staff processes each order and makes any necessary adjustments if needed. Then, our warehouse staff is provided a "pick sheets" for all orders and this is what they utilize to pull the order. The day before the pickup/delivery, our warehouse staff packages all of the orders to be shipped out.

#### Q: What should I do if I missed my order window?

A: Agency Express will not allow you to place an order outside of the order window. The appointment will not appear as an available time when scheduling in the shopping cart section of Agency Express. However, we understand that everyone gets busy and forgets occasionally. Please contact a member of our Operations staff, and we will make reasonable accommodations to reschedule the order. We understand that this can be more challenging for agencies outside of the Treasure Valley that receive a delivery; so in these instances, we will by-pass the order window and manually place your order to meet the delivery deadline. Should a continual reoccurrence of the deadline be missed, the agency may have their delivery canceled for the month.



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# **Glossary of Terms:**

- □ Available Qty: The amount of product available to order.
- **Category:** Item classification.
- Cost per Serving: Cost per serving of the item
- **Cube Size:** Dimensions of each unit. (not currently utilized)
- **Description:** This is the name of the product.
- **Extra Info.:** extended information about the product.
- **Feature Type:** A special category for the product.
- **Food Source:** Where we obtained the product.
- Gross Weight (in Ibs): Weight of the product
- Handling Requirements: How the product needs to be stored.
- □ Item No.: Unique code that identifies each product.
- Pack Size: Number of items in each unit.
- Packaging Type: How the item is packaged.
- **Price per Unit:** Fee per unit of the product.
- **Unit of Measure:** How the product is distributed.
- **Unit Price:** Cost per unit of the product
- Servings per Unit: number of servings this product would provide.



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# Questions?

Please direct all online ordering related calls to the Operations department so we can best serve you!

### **OPERATIONS DEPT.**

(208) 577-2696 or (208) 336-9643 – Boise warehouse (208) 233-8811 – Pocatello warehouse (208) 746-2288 – Lewiston warehouse

Email <u>orders@idahofoodbank.org</u> (if your need is not urgent)



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