Agency Express 3
Quick Reference Guide for Shoppers
(Updated January 2016)

# STEP ONE – LOGGING ON

It is recommended that an agency have at least one main shopper and one back-up shopper. In order to log on to begin shopping, <u>each</u> individual must have the following:

- Agency Express User Name (first initial, last name)
- Password (change12)
- Program Code (0008pXXXX)

**The Agency Express online ordering system can be accessed one of two ways:**

1) Log on to the Food Bank's website: www.feedingal.org. Access the ***Agency Express Online Ordering*** link from the front page **or** click on ***Current Agencies*** link, then scroll to ***CLICK HERE TO LOG IN AND PLACE ORDERS.***
2) You may also access Agency Express by typing the following web address into any Internet browser: www.Agencyexpress3.org

The log-in screen should look like this:
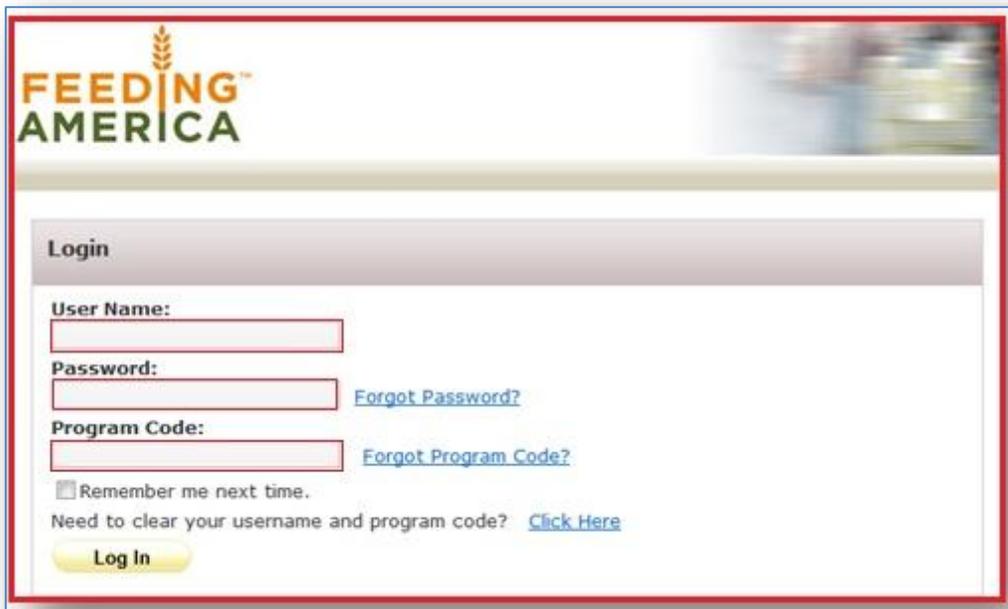
- **User Name:** Each Agency Shopper will have a specific User Name. It is the first initial and last name, e.g. jsmith. No spaces or characters. You cannot have more than one shopper with the same user name in the same Agency. User name is not case sensitive.

- **Password:** The default Password is change12. This is not case sensitive. <u>Please do not change this password</u>. If a shopper changes the password, the Food Bank does not know what it is – although it can be re-set to the default if necessary.

- **Program Code:** The Program Code is always going to be 0008 (the Food Bank's Feeding America 4-digit number) plus the letter **_p_** plus your four digit Agency Account number (e.g., **0008**p**8900**).

- **Remember me next time.** Check this box in order to avoid having to re-enter all Login information each time.

- **Need to clear your username and program code? Click Here** If the Shopper previously chose to have the credentials remembered and needs to make a change to the log in information, this will allow him/her to start fresh.
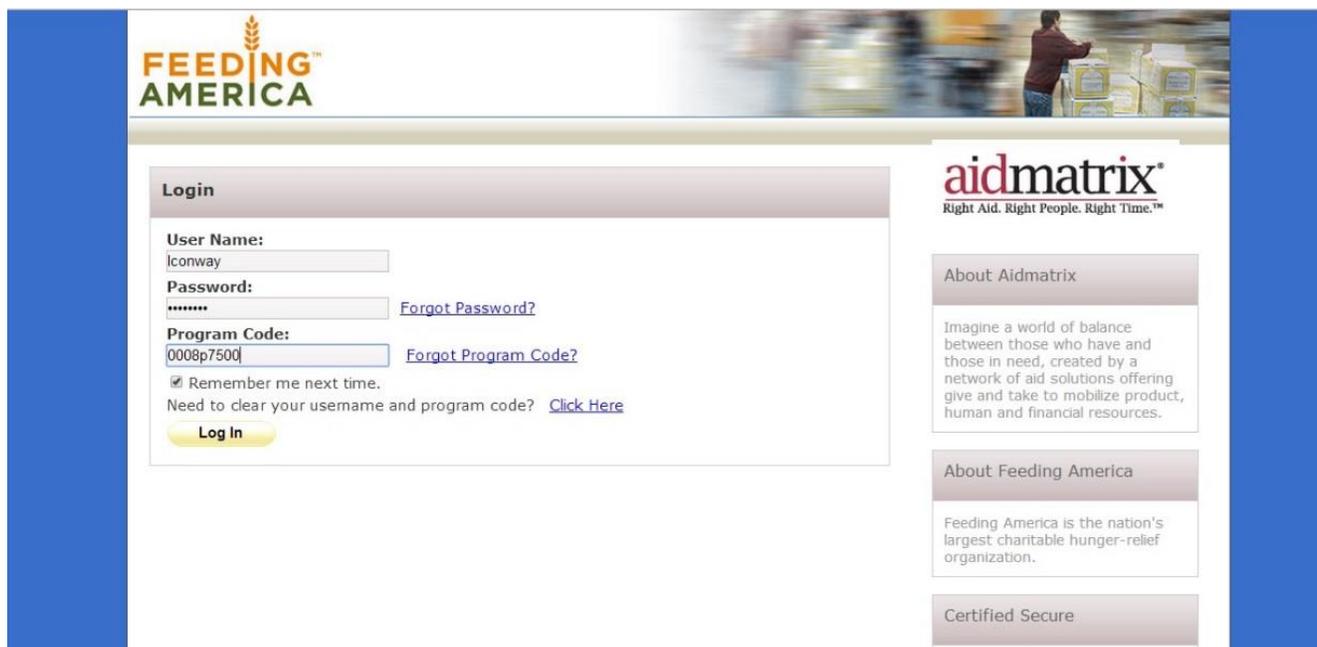
STEP TWO – SCHEDULING AN APPOINTMENT (PICK-UP DATE)

*Before you can begin shopping you must FIRST schedule a time to pick up your order. It is **_VERY_** important to schedule your pick-up date **_BEFORE_** you begin shopping. You can reserve pick-up dates up to 60 days in advance, but you cannot place orders that far in advance. You cannot place an order more than 14 days (2 weeks) before the date you want to pick up. For example, if you are placing an order on Friday, February 5, you should schedule to pick it up any time before Friday, February 19, no later.*

TO SCHEDULE AND RESERVE A PICK-UP DATE:

Using the tabs at the top of the main page in Agency Express:

1) **Select "Order Options", then → Scheduler**

2) Then select **"Pick-up or Delivery"** option from the drop-down box, then choose either pick-up or delivery. You must do this first in order to see dates available in the calendar. **Do not** choose a delivery

date until you have arranged a date with Wayne Linder, Director of Operations. After he confirms delivery is available for your chosen date and location, you may then reserve it as a delivery in Agency Express. It is very important that you speak with Mr. Linder first as we may not always have someone delivering in your area.   Please note delivery is unavailable on Friday except for approved, special circumstances.

3) To select a date, click on the picture of the calendar. A full month of dates will be displayed. Dates in **Yellow** mean those dates are available. Dates with a **"strikethrough"** mean there are no times available for those dates. Select your desired date for pick-up. That date will show up in the window.

4) To choose a "**Time**" on that date, click on the **"clock"**. All available time slots will appear. If you do not see the time you want, that means that time is unavailable and you will have to choose the next available time. *[Time slots are as follows: 7:15 am; 8 am; 8:45 am; 9:30 am; 10:15 am; 11 am; 12:30 pm and 1:15 pm. The last available time slot on Friday is 11 am. The warehouse closes at 1 pm on Friday.]* Choose your desired time slot and click **"Reserve".** **PLEASE BE SURE TO CLICK RESERVE!!**

   Appointment Types/Colors *(some of these options may not apply to your agency)*
   Green – Standing Appointments: these are already reserved for the Agency by the Food Bank.
   Yellow – Open appointments: these are available for the Agency.
   Blue – Dates that have both Standing & Open. If Shoppers select a blue date, for the same time as their standing appointment, they will receive an error that they already have that appointment.
   ~~**Strikethrough**~~ – these dates are **not** available.

Once the date has been successfully chosen, the **"reserved"** date and time will appear under **"My Appointments"**. If you don't see it listed there, the appointment wasn't reserved. Repeat the steps above.

Standing Appointments –

STEP THREE – ONLINE SHOPPING

After reserving an appointment (pick-up date), you can then begin shopping.

To access the Shopping List:

Go to the tabs at the top of the Agency Express page and select: **Order Options, then → Shopping List**. *[It is recommended you print out the shopping list for easier review.]*

Begin shopping by placing the desired number of items in the **ORDER QTY** (order quantity) box.

PLEASE NOTE: It is critical that the Shopper enters the Order Quantity **AND** clicks on **<Add to Cart> before** going to the next page of the Shopping List. If you go to the next page without adding to the cart, the system will not place those items in your cart.

Add to Cart

Search

Item No. Description

[   ] [   ]

Category

[- Select a Category - ▼]

(Search)   (Show All)   (View Favorites)

Shopping Cart

Total Line Items	Total Due
0	$0.00

Gross Weight
0

Print   Clear Cart | Add to Cart   Check Out

Shopping List   [- Sort By - ▼]

Tip:Please Add to Cart requested items before leaving page

Order Qty	Available Qty.	Item No.	Description	Unit Price	VAP Fee	Pack Size	Feature Type	Gross Weight	Favorite
7	29	55057	BEEF ASST, FRZ 35	4.90	0.00	VARIES		35	☐
	31	48103	DIAPERS, JUMBO PACK L/XL	1.26	0.00	4/10 COUNT		7	☐
10	40	540249	DR. PEPPER, ASST	1.17	0.00	15/12 OZ		13	☐
	40	540217	ENERGY DRINK	1.53	0.00	12/17 OZ		17	☐
	27	540221	ENERGY SHOTS	2.70	0.00	192/3 OZ		43	☐

Once items are added to your cart, you will see a message that items were added with "Success" or problems occurred with an "Error" message. Shoppers must see "Success" messages to indicate items are added to the cart. Any errors will be noted and you will have an opportunity to correct those items before submitting your order.

Reserving Top-Off Items

The Food Bank will sometimes have items that aren't listed on the shopping list, but are available to every agency. Assorted retail meat, deli and frozen items, as well as produce and bread can be added to your cart if we have those items available. We call these items 'top off'. These items can only be added after you go to the check-out screen. These items 'top off' your order. See below for more information about how to add 'top off'.

STEP FOUR – CHECK OUT!

Once you have finished shopping, the Shopper must click on the <**Check Out>** icon which takes you to the check-out page and you will be able to choose the pick-up date that has been associated with your order and to confirm the contents of the Shopping Cart. Clicking on **<Check Out>** allows the shopper to review the order before submitting.   If, after you are on the check -out page and you need to make any changes or add to your order, select <**Continue Shopping>** and that will take you back to the shopping list. Follow the directions in *STEP THREE* and then select <**Check Out>** after you have updated your cart.

Check Out

Remember - if no appointments or pick-up dates were set up via the **Scheduler** before shopping**,** the Shopper will not see any available dates in the calendar on the check-out page. When the check-out screen opens up,

please remember to choose the date you reserved in the scheduler. **YOU HAVE TO DO THIS BEFORE YOU SUBMIT YOUR CART.** Otherwise your order will NOT go through. You have to select your date twice: the first time when you RESERVE the date and the second time after you are in the check-out screen. This is important!

As mentioned earlier, if you desire 'top off' items, you will be able to choose them once you are in the check-out screen. Click on the tabs above the shopping list to choose a 'top-off' item. Clicking on each item informs the warehouse that you would like reserve some of this item. It will show up as "1" item in your cart. *Retail meat is $0.16/pound, produce is $0.10/pound and bread/sweets, free.* You can designate how much of each item you want by listing the amount comments section. For example, if you'd like 100 pounds of retail meat, simply type in the comments section "not to exceed 100 pounds of retail meat" and we will try to accommodate your request **if** we have some on hand. It is not guaranteed that we will have this item at the time you arrive to pick up.

After selecting 'top off' items, a date and time must be entered so that the order will go through. You will not be able to submit your order if you have not chosen your reserved date and time.

Submit Cart

Although the Date and Time have been selected, the Shopping Cart has Items, and a Reference PO Number is assigned, the order will not be processed unless the Shopper **clicks on <Submit Cart>.** *This is absolutely essential.* **PLEASE SUBMIT CART!**

EXPLANATION OF OTHER ICONS:

Clear Cart will empty the contents of the Cart (although this will not be visibly empty until they update the cart). **<Continue Shopping>** will take them back to the Shopping List.

Update Cart will accept any changes to quantities made from the Shopping Cart screen. **Only** Submit Cart **processes the actual order and sends it to the Food Bank.**

Print is available all through the shopping process to either Print or View the Order.

Agency Express and the Food Bank's inventory system are set to synchronize every 15 - 30 minutes. **The Shopper will receive a confirmation email** after your order has been acknowledged by the Food Bank inventory system.

The email will read:

"Thank you for your order. It is currently being reviewed by a member of the Food Bank staff. Please check your order prior to your pickup date as it is subject to change by the Food Bank staff."

If you need to verify the status of an existing orders, the shopper must go to the **Order Options tab, click on → Order Management**. In the example, the Order has been "Acknowledged" by the Food Bank but can still be edited by the Agency Shopper.

Once you are in Order Management, you will be able to review your recently submitted order(s). The icons to the left of the PO/Reference Number indicate that the Shopper can either **Print** - , **Delete** - , or **Edit** - the order at this stage. You will not be able to edit your order until **after** you receive a confirmation email. **REMEMBER: it will take at least 30 minutes for your order to be submitted to inventory. Do not try to make any changes or edits to your submitted order before this time.**

Once the order is "Released" to the Warehouse for processing and picking, only the Print option will be available and the shopper will no longer be able to edit the order.   You will have up to **_three days_** before your pick-up date to make any changes or edit. **We caution against making multiple edits (more than three) to your order.**

FREQUENTLY ASKED QUESTIONS (FAQs)

1. **How do I know if my order has changed from the quantities I originally ordered?**
   You can confirm the quantities on your order by logging into Agency Express and going to-> **Order Options** -> **Order Management**. Locate the PO # in the Reference Number column, and click on the **Print** icon. The **Quantity Accepted** column displays the quantities acknowledge by the Food Bank. Please allow 15 minutes from the time you submit the order. ***Please note: These quantities remain subject to change by the Food Bank or quantity available at the time of order fulfillment.***

2. **What do I do if I am unable to select a date or a date is not showing for me to attach to my order?**
   If there are no dates in the **Scheduler**, be sure you have selected the correct option of Delivery or Pick-up and if there are still no dates, contact your Food Bank.
   a. If there are no dates when you get ready to **Check Out** it could be because you forgot to go to the **Scheduler** first:
      i. Go to **Order Options** -> **Scheduler** select *Pickup* or *Delivery,* and a date highlighted in yellow
      ii. Press **Reserve.**
      iii. A successful reservation will appear on a grid under **My Appointments**, the reserved date and time will be available at **Check Out**.

3. **What do I do if I submitted an order, but it does not show up in Order Management?**
   If an order is not displayed in **Order Management**, you did not click the <**Submit**> button. The order was not sent to the Food Bank, and you will have to submit a new order. The inventory may have

changed when you submit a new order, so it is very important that you click the <**Submit**> button after creating an order.

4. **How can I change my order after I've submitted it?**
   a. An order can be canceled or edited only up until the time that the Food Bank Releases the order to the warehouse for processing and picking. ***The Food Bank will release orders three (3) days before its scheduled pick up/delivery date. Example: an order scheduled for pick up Friday will be released to the Food Bank at the close of business on Tuesday.***
   b. An order can be edited in the Acknowledged status, but can never be edited once it is in Released status.
   c. Under **Order Management** if you see these icons in the first column:
      i. **A red circle with an X** - order can be canceled by the shopper.
      ii. **A pencil** - order can be edited by the shopper.
   d. After editing an order, click <**Submit**> to send the edited order to the Food Bank. Failure to click <**Submit**> means no changes are recorded and the warehouse did not receive your order.

5. **How do I know how many pages are on the shopping list?**
   At the bottom of the first page, you will see boxes with numbers starting with the number **1**. If your shopping list is 5 pages, there will be 5 boxes with the numbers 1-5. To move to another page, click on the box/number you wish to access.