Agency Express™
Shopper Guide

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Business smart. Community focused.

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PURPOSE OF THIS DOCUMENT

This document describes the Agency Express Shopping functionality. It is meant for the food bank support/training personnel as well as agency super users.

OVERVIEW

Agency Express is a powerful Web-based tool sponsored by Feeding America and TechBridge that will help shoppers shop for and manage food bank orders online. Shoppers can use Agency Express to search for items, view item details, send orders to the food bank, and review the status of orders, as well as create and report on shopper surveys.

This user guide assumes the shopper is familiar with the use of an Internet browser and has access to the Internet. Except in situations specific to the use of Agency Express, instructions on using an Internet Browser or connecting to the Internet are beyond the scope of this user guide.

To use Agency Express, the following is needed:

- Personal Computer
- Internet Access
- Web browser:
  - Internet Explorer 9.0 or higher
  - Firefox 4.0 or higher
  - Chrome
LOG IN TO AGENCY EXPRESS

Once the shopper has received his/her Agency Express User Name, Password, and Program Code, he/she can log in to the website and shop online. Please use the following web address: http://agencyexpress3.org/AgencyExpress30/NewLogin.aspx

The log in page for Agency Express should appear per below:

![Login Page Screenshot]

This screen displays the various fields and links:

- Enter **User Name**, **Password**, and **Program Code** and click on `<Log In>`. Note that the password is not case sensitive. In Ceres, the User Name is referred to as Web Login.

The first time the shopper uses the Agency Express system, he/she is prompted to change the default password. Please see the `<Change Password>` topic for more details.

Other important functions on the log in page include:

- By clicking on the check box, next to **Remember me next time**, the shopper will not need to enter User Name and Program Code each time he/she logs in. He/she still needs to enter his/her password. We do not recommend using this feature on public computers (e.g. library, friend’s house, etc.).
- If the shopper wants to clear the **Remember me next time**, click on the “need to clear your username and program code?” Then click [Click here].
- If the shopper has forgotten his/her password, click on [Forgot Password?] (Go to [Forgot your password]).
- If the shopper has forgotten his/her program code, click on [Forgot Program Code?] (Go to [Forgot your program code]).

A successful login will bring the shopper to the **Welcome** screen.

FORGOT PASSWORD
After having clicked on **Forgot Password?** a new message box will appear on the screen:

- Enter **User Name** and **Program Code** to retrieve the password.
- Click on `<Submit>`.

An email will be sent to the email address on record at the food bank. This email will contain a reminder of the shopper’s password. Use the password from the email to log in using steps 1-2.

**FORGOT YOUR PROGRAM CODE**

After clicking on **Forgot Program Code?** a new screen will appear. This lists all the available food bank UNCs from which to choose. The **Program Code** typically is the **4-digit food bank UNC + p + the agency code**.

<table>
<thead>
<tr>
<th>Food Bank Code</th>
<th>Food Bank Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001</td>
<td>Road Runner Food Bank New Mexico</td>
</tr>
<tr>
<td>0005</td>
<td>Golden Harvest Food Bank</td>
</tr>
<tr>
<td>0006</td>
<td>Capital Area Food Bank of Texas</td>
</tr>
<tr>
<td>0007</td>
<td>Maryland Food Bank</td>
</tr>
<tr>
<td>0008</td>
<td>Community Food Bank of Central Alabama</td>
</tr>
</tbody>
</table>

**AGENCY EXPRESS WELCOME SCREEN**
In the example below – notice that there is a Pop-Up for the Activity Status Alert – click the <Close> button to make the Pop-Up message go away.

This is the Welcome screen and is displayed each time the shopper logs in; however, the contents of this screen will vary.

- **Welcome** - To return to this Welcome screen at any time, click on Welcome.
- **Order Options** – This section will contain links to Shopping List, Check Out, Order Management, and optionally Scheduler.
- **Report** – This section will contain links to Survey Responses (Survey Management).
- **Foodbank Links** – This section contain links that were set up by the food bank. These could be FAQ’s, documentation, surveys, and links to other applications that the food bank would want the agency to have access to. This information is controlled by the admin at the food bank.
- **Help** – This section contains the Change Password and Contact Us.
- **Log Out** – Logs the shopper off the system.
- **Content Area** – Custom content can be displayed in this area. The content is determined by the admin at the food bank.
SHOPPER DETAILS

Clicking on the program code provides a description of the shopper’s information as shown here.

SHOPPING

The shopping process for a simple order is illustrated below. The flag symbol indicates an order status change in Agency Express. Shopper instructions for shopping and submitting orders are in this section.

Agency Express™ Order Process - Simple

Ceres and Agency Express
It is important to remember that most of the information in Agency Express, except for what shoppers enter, comes from Ceres. The two systems are kept in sync through constant communication. These updates occur approximately every 5-10 minutes.
SCHEDULING MODELS - PRE-RESERVATION

There are two primary ways that food banks manage the agency appointments. These are the Pre-reservation model and the Open model. While shopping is the same under the two models the shopping process begins differently.

Under Pre-reservation model, the food bank establishes standing appointments and assigns them to the agency. These appointments are set up in Ceres and sent to Agency Express. The food bank may make open appointments available for the agency as well.

Under the Pre-reservation model the shopper starts with the **Scheduler**, accessing it from **Order Options ➔ Scheduler**. Once in that screen, he/she sees any available appointments.

If there are only Standing Appointments available, they appear in the **Scheduler** in green rows:
If there are Standing and Open Appointments, the Standing Appointments are listed in rows, and above the rows under the Scheduler banner, Open Appointments show on the calendar in gold. If there are both Standing and Open Appointments on the same day, the date on the calendar will be blue.

Once the shopper sees available appointments he/she selects the Date, chooses a Time from the pop-up (below), and clicks <Reserve>.

Once successfully completed, the reserved date and time will appear on the My Appointments grid.
Recap - Appointment Types/Colors:

Green – Standing Appointments, these are already reserved for the agency

Gold – 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 appointment has been reserved, the shopper can access the shopping pages by selecting Order Options -> Shopping List.
SCHEDULING MODELS – OPEN

When using the Open Model, the shopper skips the Scheduler tab, and goes directly to the Shopping List. The appointment for the order is selected in the Checkout process.

SHOPPING LIST

The Shopping List is where shoppers can search for, gather information, and select items for their orders. There are four sections to the Shopping List:

- Search Options
- Shopping Cart
- Action Icons
- Shopping List

Each section is pictured and then described in detail below:
All item information comes from Ceres. When the Shopping List is first displayed it will show all the products that are available for the shopper. The shopper can limit the items displayed by choosing the Item No. or Description field listed and entering pertinent data or selecting from one of the drop downs below and then clicking the <Search> button:

- Item No. – Item detail information from Ceres
- Description – Product description
- Category – Product category examples
- Select a Category -
  - Assorted Non-Food
  - Baby Food/Formula
  - Beverages
  - Bread/Bakery
  - Cereal
  - Creamer Assorted Flavor Single Serve Size Powder
  - Dairy
  - Desserts
  - Dough Uncooked
  - Dressings
  - Fresh Fruits/Vegetables
  - Fruit Canned & Frozen
  - Grain

### Feature Type examples

- Free Item
- New Item
- Discounted Item

### Handling Req. examples

- Refrigerated Food
  - Frozen Food
  - Dry

### Description Code examples and legend

- **(H)**=Healthy for all ages including Seniors
- **(SH)**=Second helpings
- **(K)**=Kosher
- **(LF)**=Low Fat
- **(SF)**=Sugar Free
- **(EDBL)**=Edible
- **(M)**=

### Food Source

- HS
- KC
- BKS
- USDA
- PURCHASED
- COOP
- GOVT
- PUR
- DONATED
The food bank can also select a limited search format which includes only three search options on the Shopping List (Item No. Description and the Category drop down shown below).

<table>
<thead>
<tr>
<th>Item No. Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Select a Category -</td>
</tr>
</tbody>
</table>

The shopper can also select the <View Favorites> button to see only the items that the shopper has selected as a favorite. The favorite items are indicated by a ✰ in the Favorite column. To set a favorite, click on the ✰ to remove a favorite, click on the star and it will return to a square.

<table>
<thead>
<tr>
<th>Shopping List</th>
<th>- Sort By -</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tip: Please Add to Cart requested items before leaving page

<table>
<thead>
<tr>
<th>Order Qty</th>
<th>Available Qty</th>
<th>Item No.</th>
<th>Description</th>
<th>Unit Price</th>
<th>VAP Fee</th>
<th>Pack Size</th>
<th>Feature Type</th>
<th>Gross Weight</th>
<th>Favorite</th>
</tr>
</thead>
<tbody>
<tr>
<td>82</td>
<td>2000</td>
<td>ASSORTED CAN GOODS Varies</td>
<td>6.65</td>
<td>0.00</td>
<td>Varies</td>
<td></td>
<td>35</td>
<td>✰</td>
<td></td>
</tr>
<tr>
<td>60</td>
<td>PR169</td>
<td>Baked Beans Boil n Bag 5/4 lb bags</td>
<td>13.84</td>
<td>0.00</td>
<td>5/4 lb bags</td>
<td></td>
<td>21</td>
<td></td>
<td></td>
</tr>
<tr>
<td>52</td>
<td>OSCEROS</td>
<td>Cereal, Crispy Rice 7oz/1 oz</td>
<td>2.85</td>
<td>0.00</td>
<td>Best by 9/04/10</td>
<td>New Item</td>
<td>15</td>
<td>✰</td>
<td></td>
</tr>
</tbody>
</table>

The <Show All> button will display all items available.

Shopping Cart

The Shopping Cart section displays information about the current order and is updated as shopping continues. It displays the following information:

- **Total Line Items** – The total number of unique item numbers that have been ordered
- **Total Due** – The total estimated monies due for this order. This value will increase or decrease as items are added to the open Shopping Cart.
- **Available Credit Limit** – If the food bank is configured to display this, it will show the agency’s current remaining credit limit for an order. This value will increase or decrease as items are added to the open Shopping Cart.
- **Gross Weight** – The current total weight of the items on the order.
### Action Icons

The action icons are used for the following actions:

- **Print** – Displays and prints the current list of items.
- **Clear Cart** – Clears any items that have been added to a cart.
- **Add to Cart** – Adds any selected items from the items list to the current Shopping Cart.
- **Check Out** – Sends the shopper to the Check-Out Screen.

### Shopping List

This section displays the searched items. These items can be sorted by clicking on the column headers or by selecting an item’s value from the drop-down list in the text box.

On each line, the shopper sees an Order Quantity, Available Quantity, Item No, Description, UOM, Unit Price, VAP Fee, Pack Size, Feature Type, and Gross Weight.

**Tip:** Please Add to Cart requested items before leaving page.

<table>
<thead>
<tr>
<th>Order Qty</th>
<th>Available Qty</th>
<th>Item No.</th>
<th>Description</th>
<th>UOM</th>
<th>Unit Price</th>
<th>VAP Fee</th>
<th>Pack Size</th>
<th>Feature Type</th>
<th>Gross Weight</th>
<th>Favorite</th>
</tr>
</thead>
<tbody>
<tr>
<td>82</td>
<td>2000</td>
<td>ASSORTED CAN GOODS Varies</td>
<td>CS</td>
<td>6.65</td>
<td>0.00</td>
<td>Varies</td>
<td>35</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>60</td>
<td>PB169</td>
<td>Baked Beans Bold n Bag 5/4 lb bags</td>
<td>CS</td>
<td>13.84</td>
<td>0.00</td>
<td>5/4 lb bags</td>
<td>21</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>52</td>
<td>05CEROS</td>
<td>Cereal, Crispy Rice 70/.875 oz</td>
<td>CASE</td>
<td>2.85</td>
<td>0.00</td>
<td>Best by 9/04/10</td>
<td>New Item 15</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
- Order Qty – Where the shopper puts the quantity desired of the line item
- Available Qty – The shopper cannot order more than the available quantity for each item
- Item No. - This code is specific to each item
- Description – The description of the item number
- UOM – unit of measure, e.g., case, lbs., etc.
- Unit Price - This is the cost of one unit of the item in U.S. dollars
- VAP Fee – Value added processing fee
- Pack Size - The size of the individual items
- Feature Type – If this line item is a featured item or a special item
- Gross Weight (in lbs.) - The weight of one unit of the item

If shoppers want more detailed information on the item, they can click on the Item No., and it will display a detail information box for that item. All this information comes from and is defined in Ceres.

The detail view has all the previous information plus the following:
- Handling Req. – What type of handling is required for this item, i.e. Dry, Refrigerated, Freezer
- Extra Info – This info is set up by the food bank to help describe the item, Descriptors show here
- Price per Unit – The cost of each unit of this pack
- Category – The category of this item
- Picture – If a picture of the item has been uploaded by the food bank, then the camera icon will be displayed. Clicking on the camera icon will display the picture.
- Food Source – Special information to display where this item came from
- Cube Size – A measurement to allow for how much space is required for this item
- Packaging Type – How this item is packaged
- People served – Optional information on how many people this item will serve
- Price per Pound – A calculated value to determine how much per pound this item cost
- Cost per person – A calculated value to determine how much per person this item cost
ENTERING QUANTITIES

The shopper enters the amount he/she needs per item in the Order Quantity field as shown. The shopper can request up to the amount in the Available QTY field. Then, clicks the Add to Cart icon. Unless this action is taken, the items ARE NOT included in the agency order.

Shoppers see a message similar to the following confirming the addition(s) with “Success” or problems with “Error”. Shoppers must see “Success” messages to indicate items are added to the cart.
The shopper corrects any items and then clicks on **Update Cart** icon.

As soon as an item is added to the cart, the number of items is displayed in red next to a shopping cart on the tab line. This indicates there is an order in draft status. It has lines, but is unsubmitted.

**CHECKING OUT**

The **Shopping Cart** screen stores all of the items selected from the **Shopping List**. This is the last screen to complete before submitting an order.

- Click on **Check Out** from the **Shopping List** or from the menu bar on the **Order Options** tab.
SUBMITTING THE CART

After clicking Check Out, the Shopping Cart displays. The Shopping Cart looks similar to the Shopping List. It does have more action icons, appointment information and the PO Reference number assigned to the order.

There are four sections of the Shopping Cart:

- My Appointments
- Shopping Cart Summary
- Shopping Cart
- Action Icons

My Appointments

Food banks use either the Pre-reservation or Open scheduling models. Agencies are trained on only the model used by their food bank.

In the Pre-reservation model a date and time have already been selected and this step serves as a confirmation of an appointment.

In the Open model, this is the point at which the appointment date and time are selected for the first time.

Reference Number – The reference number is below My Appointments heading. Use this number to identify the order later on.

Pickup/Delivery - The Pickup/Delivery list box is used to select what type of order this is:

- A pickup will be picked up from the food bank by the agency.
- Delivery will be delivered to the agency by the food bank.
Click on the Calendar Icon to select a date. A calendar appears where the shopper can select any date that does not have the strike through. For food banks using the Pre-reservation model, these dates will be green, gold or blue. For food banks using the Open model, these dates will be gold.

Click on the Clock Icon to select a time for the pickup or delivery.

Comments

This text box is used to record comments for the order, up to 150 characters. These go to the Delivery Info section in Ceres, and if Ceres is configured, they also print on the agency order document. Special characters can cause problems between Ceres and Agency Express – only . , : ' ! ? / & # @ ( ) are acceptable.

Special characters in Comments are limited because they can cause problems.

Shopping Cart Summary

The Shopping Cart Summary section will display the following information:

- Total Due – The total estimated monies due for this order. This value will increase or decrease as items are added to the open Shopping Cart.
- Total Line Items – The total number of unique item numbers that have been ordered.
- Gross Weight – The current total weight of the items on the order.
- Total Cube Size – The total area needed for this order.
- Available Credit Limit – If the food bank is configured to display this, it will show the agencies current remaining credit limit. This value will increase or decrease as items are added to the open Shopping Cart.
- Estimated Delivery Fee - If the food bank is configured to display this, it will show the order’s estimated delivery fee. This value could increase or decrease as items are added to the open Shopping Cart.

Action Icons

The action icons will be used for the following actions:

- Print – prints the currently displayed list of items.
- Clear Cart – clears any items that have been added to a cart.
- Continue Shopping – returns the shopper to the Shopping List page.
- Update Cart – updates any selected items from the items list to the current Shopping Cart.
• Submit Cart – submits this order to the food bank.

SHOPPING CART ACTIONS

From the Shopping Cart screen, the shopper can edit quantities, delete items, and “Continue Shopping” to add other items to the cart.

• If the shopper edits a quantity or deletes an item, he/she MUST “Update the Cart” before submitting the cart.
• If the shopper chooses “Continue Shopping”, he/she is directed back to the Shopping List.

The reference/PO # assigned to the order appears in the upper left under My Appointment.

This section displays the items that have been added to the Shopping Cart.

There can be up to three Top Off buttons that will alert the food bank that it can “top off” this order with extra products that the food bank makes available to the agencies. The item appears on the order as a quantity of 1.

On each line, the shopper will see the following information:
• Order Qty – The initial value is the quantity ordered. If this quantity needs to change then the shopper updates the quantity input box and clicks on the Update Cart action icon. The icon deletes the line item, and the value in the ( ) is the maximum quantity available to the agency.
• Item No – This code is specific to each item. If this code is clicked on then the complete details of the item will be displayed.
• **Description** – The description of the line item.
• **Quantity** – The quantity of the item that has been ordered.
• **UOM** – Unit of measure.
• **Gross Weight (in lbs)** – The weight of one unit of the item.
• **Unit Price** - This is the cost of one unit of the item in U.S. dollars.
• **Packaging Type** - The type of packaging that the item has.
• **Pack size** – The size of the packaging.
• **Handling Requirements** – What type of handling this item needs, i.e. Dry, Refrigerated, Freezer.
• **VAP Fee** – Value added processing fee.
• **Special** – If this line item is a featured item or a special item.

Before choosing **Submit Cart**, the shopper needs to schedule or confirm the appointment, including “Pickup/Delivery”, “Date”, and “Time”.

---

**REVIEW THE ORDER**

Once the order data meets the agency requirements, submit the cart by clicking on the **Submit Cart** icon. The items are still in the cart until the shopper clicks **Submit Cart**.

The shopper can still edit the order before clicking **Submit Cart**, but must submit the cart to have it sent to the food bank for processing.

After clicking **Submit Cart**, the pop up below asks the shopper to confirm the action. The shopper clicks **OK**.
A pop up box confirms that the order was successfully submitted. The shopper clicks OK.

After clicking OK, the shopper is immediately taken to the Order Management screen. As an example,

Order PO168239 now appears as a New Order. To view order detail, click on the printer icon. To delete the order, click the .
Orders are Tentative

At this point orders are tentative until Acknowledged by the food bank admin. The admin may have to change quantities or reject orders.

Advance Ship Notices (ASNs)/Notifications

Each food bank chooses one of three options to notify agencies via email regarding its order. The choices are:

- *On Accepted*: ASN will be generated when the order is accepted (either manually or via the auto-accept functionality)
- *On Processing*: ASN will be generated when the order has been moved to the “Food Bank Only” order modifications status by clicking the “Process” button on the order header.
- *On Release*: ASN will be generated when the order is released to the warehouse.

The agency receives only ONE notification.
REVIEW THE STATUS OF ORDERS

The status of an order can be reviewed at any time once it has been submitted to the food bank. The food bank may alter the details of the order.

- Click Order Management from the tab on the top of the screen.

VIEWING A SPECIFIC ORDER

The shopper can search for a specific order by:
- Typing the reference number in the Reference Number text box and clicking the <Search> button, or
• Selecting a **From Date** and a **To Date** (this is order create date) and then clicking on the **<Search>** button.
• Selecting the **<Show All>** displays all orders.

Under the **Status** column, the order number will be displayed as one of the following statuses:

• **Draft** – Orders that have started but not submitted.

• **New Order** – The order has been recently submitted but not yet sent to the food bank, i.e. not in Ceres yet.

• **Sent to Food Bank** – The order has been sent to the food bank admin and is awaiting approval and release.

• **Acknowledged** – The food bank admin has approved the order and made any necessary changes to it. An email will be sent to the shopper notifying him/her that 1) the order has been accepted/received by the food bank 2) the order is being processed by the food bank or 3) the order has been released for picking.

• **Released** – This order is being fulfilled by the food bank and cannot be changed.

• **Invoiced** – The order has been picked up by the agency and has been billed.

• **Allocated** – The food bank admin has created the order for the agency. Note: If the food bank allows editing, the agency can reduce the quantity or cancel the order. The agency cannot increase the quantity

• **Canceled** – This order was canceled by the agency.

• **Rejected** – The order has been rejected by the food bank admin. None of the items will be available.

• **Editing** – the order has been Acknowledged (at least once) and is being edited by the shopper. It is locked from being edited by the admin.

• **Admin Editing** – The order has been Acknowledged, and the admin accesses the order for editing; it is locked from being edited by the shopper.

• **Non-Web Order** – This order has been entered by the food bank admin. This type of order is typically received by fax or telephone order.

**VIEW ORDER DETAILS**

• Click on the printer to see a copy of the order details.
ORDER DETAILS

The **Order Detail** screen will show the following:

- **Appointment Details** – All the information about the appointment for this order including pickup/delivery as well as any comments on this order.
• **Shopping Cart Summary** – All the information about this order including Gross Weight, Cube Size and Total Due.

• **Shopping Cart** – Displays all the line details for this order.

**CANCELING AN ORDER**

To cancel an order the shopper will click on the Icon.

```
Order Management
```

```
<table>
<thead>
<tr>
<th>Reference Number</th>
<th>Created By</th>
<th>Status</th>
<th>Gross Weight</th>
<th>Total Price</th>
<th>Pickup/Delivery Date</th>
<th>Admin Edited</th>
<th>Modified Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO174717</td>
<td>Ida_Beal</td>
<td>Sent To Foodbank</td>
<td>7.00</td>
<td>$0.70</td>
<td>02/19/2015</td>
<td></td>
<td>02/18/2015</td>
</tr>
<tr>
<td>PO174716</td>
<td>Ida_beal2</td>
<td>Draft</td>
<td>1,000.00</td>
<td>$0.00</td>
<td>02/09/2015</td>
<td></td>
<td>01/29/2015</td>
</tr>
</tbody>
</table>
```

**EDITING AN ORDER**

To edit an order the shopper clicks on the Icon.

```
Order Management
```

```
<table>
<thead>
<tr>
<th>Reference Number</th>
<th>Created By</th>
<th>Status</th>
<th>Gross Weight</th>
<th>Total Price</th>
<th>Pickup/Delivery Date</th>
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<td>$0.70</td>
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<td></td>
<td>02/18/2015</td>
</tr>
<tr>
<td>PO174716</td>
<td>Ida_beal2</td>
<td>Draft</td>
<td>1,000.00</td>
<td>$0.00</td>
<td>02/09/2015</td>
<td></td>
<td>01/29/2015</td>
</tr>
</tbody>
</table>
```

This will take you to the **Shopping Cart** where you can edit the order as if it were a new order.

**DELETING A LINE FROM AN ACKNOWLEDGED ORDER**

If editing is permitted, it is possible to delete a line from an Acknowledged order. Agency Express sends updated information to Ceres on the lines deleted. The PO still shows on the Agency Express Order Management screen even if all lines on the PO have been deleted.
When editing an acknowledged order the shopper will receive this message:

**sandbox.agencyexpress3.org says:**

You are editing a submitted order. All changes are subject to food bank approval. Please remember to ***SUBMIT*** the order one you have completed your changes.

After the line item has been deleted, click “Update Cart”, then click “OK” again.

**sandbox.agencyexpress3.org says:**

Update was successful. Please remember to ***SUBMIT CART*** for the order to be processed.

Next click the “Submit Cart” and Click “OK” on the pop up screen. The deleted line no longer shows in the Shopping Cart.

On **Order Management**, once the edited order is submitted, it appears as a new order.

<table>
<thead>
<tr>
<th>Reference Number</th>
<th>Status</th>
<th>Gross Weight</th>
<th>Total Price</th>
<th>Pickup/Delivery Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO156821</td>
<td>New Order</td>
<td>63.00</td>
<td>$41.52</td>
<td>06/22/2011</td>
</tr>
<tr>
<td>PO156903</td>
<td>Sent To Foodbank</td>
<td>190.00</td>
<td>$141.19</td>
<td>06/21/2011</td>
</tr>
<tr>
<td>PO156903</td>
<td>Sent To Foodbank</td>
<td>40.00</td>
<td>$6.38</td>
<td>06/20/2011</td>
</tr>
</tbody>
</table>

To view the order, click on 

The deleted line remains on the order with an **Order Qty**. of 0.
DRAFT ORDER HANDLING

As a customer service measure, there are several features in Agency Express to help eliminate the number of orders left in “draft” status by the shopper.

Cart Graphic

When the shopper logs in, if they see a Cart Icon with a red number, it indicates a Draft order, and the number of lines on that order. In the example below, there is a Draft order, and it has three lines.

Clicking on the cart icon, takes the shopper directly to Check-Out, where they can complete and submit the order.
New Status to Track Orders

“Draft” in a status column in an Agency Express™ screen, indicates that the order has not been submitted. From Order Management, it is possible to click on the pencil icon and continue processing the order. It can also be viewed and cancelled from here. It is possible to have a Draft order with no lines. Only Draft orders with lines are visible on Order Management. If a Draft order is cancelled, the status changes to Delete and it is no longer visible on Order Management.

Navigation Warnings

If a Draft order exists when the shopper tries to either log out or close their browser from ANY Agency Express screen, they will receive a warning.

Logging Out
The shopper clicks OK, to continue logging out OR Cancel to stay on the screen.

Closing Browsers
If there is an order in Draft status, and the shopper attempts to exit, a warning message displays. The text of the warning depends on the browser.

Firefox

This page is asking you to confirm that you want to leave - data you have entered may not be saved.

Leave Page  Stay on Page
Shopper Draft Warning Emails

The food bank has the option to configure a warning email that is sent to the shopper if an order has been in Draft status too long.

- Shopper Email Schedule – This will schedule the Shopper notification email. A job runs every hour. An email is sent x number of hours after a PO goes to Draft status.
- Example:
  - PO goes to Draft status at 3:30 PM
  - The Number of Hours After PO Created is 1
  - At 4:00 PM, 1 hour has not passed, at 5:00 PM it has
  - The email is sent in the 5:00 PM schedule

The Shopper Warning Email

- Has configurable text – see below
- Includes PO details, such as number, schedule and line items
Dear Shopper,

Please review your DRAFT orders. You have an order that is more than one hour old.

If the order is not submitted today, it will be cancelled.

We appreciate your understanding in this matter.

Sincerely,

The Food Bank Staff

The following PO(s) have not been submitted to your Food Bank.

<table>
<thead>
<tr>
<th>PO</th>
<th>Create Date</th>
<th>Pick-Up/Delivery Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO172987</td>
<td>07/10/14</td>
<td>09/02/14</td>
<td>10:15 AM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Quantity</th>
<th>UOM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cookies</td>
<td>1</td>
<td>CASE</td>
</tr>
</tbody>
</table>

SHOPPING TEMPORARILY DISABLED

There are two ways a shopper may be blocked from ordering:

Activity Status Alert which disallows shopping. In this case the shopper can login but the Alert doesn't allow them to go further.
If the shopper tabs on **Order Options** – he/she will also see that **Shopping List** and **Check Out** are temporarily not available:

Shopping will resume when the admin reopens the function.

- Online Ordering Turned Off. In this case no shopper can log in, they receive the customized message set by the food bank admin.

**SURVEYS**

Agency Express supports shopper surveys. If surveys have been deployed for shoppers to enter – the surveys will be listed when the shopper clicks on the Foodbank Links tab:
Select the survey, enter responses and submit:

To review survey responses – under the Report tab → Survey Management:
The shopper can see each response for each survey listed. The **Ref #** and **Title** columns display which survey the response is for.

Click on **View Your Responses** to see an individual response:
To edit answers, if allowable – simply make the required changes and click the <Submit> button:

If the survey is closed, the response can be viewed but not changed.

Some surveys only allow one response; some allow multiple responses.

**Change Password**

Use the **Change Password** feature to update the password.

- Click on **Change Password** from the **Help** tab at the top of the screen.
• Type in **Old password**, **New Password** and **Confirmed New Password**.
• Click on **<Change Password>** to save changes.

• Look for **Your password has been changed** to appear on the screen. Click **<Continue>**. The next time the shopper logs in he/she will need to use the new password.

**CONTACT US**

To contact the food bank about Agency Express, fill out this form to send an email to food bank staff.
Click on **Contact Us** from the **Help** tab at the top of the screen.

- Select a subject from the drop-down list.
- Enter comments in the text box to be sent to food bank staff.
- Click on **<Submit>**. This action will send an email to the food bank.
LOG OUT OF AGENCY EXPRESS

Click Log Out at the top of the screen.
This takes the user back to the login Screen
AGENCY EXPRESS FREQUENTLY ASKED QUESTIONS (FAQ)

1. How do I know if my order has changed from the quantities I originally ordered?
   a. 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 acknowledged by the food bank. Please allow 15 minutes from the time you
submit the order.

2. What do I do if I am unable to select a date and time to attach to my order?
   a. If there no dates on the calendar at Check Out, contact your food bank.

3. What do I do if I submitted an order, but it does not show up in Order Management?
   a. Check to see if it is there, but in DRAFT status, if so, resubmit
   b. Otherwise, contact your food bank.

4. While on the shopping list, how can I see what is in my cart?
   a. Click the View/Print printer icon, and your order will display with your

5. How can I change my order after I’ve submitted it?
   a. An order can be canceled or edited only if the food bank permits editing.
   b. An order can never be edited once it is in Released status
   c. On 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.

6. 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.

7. How do I update my email address for Agency Express?
   a. Call your local food bank and provide the correct email address for your username and
program code.

8. I forgot my password, what should I do?
   a. Contact your food bank, they will reset your password to change12