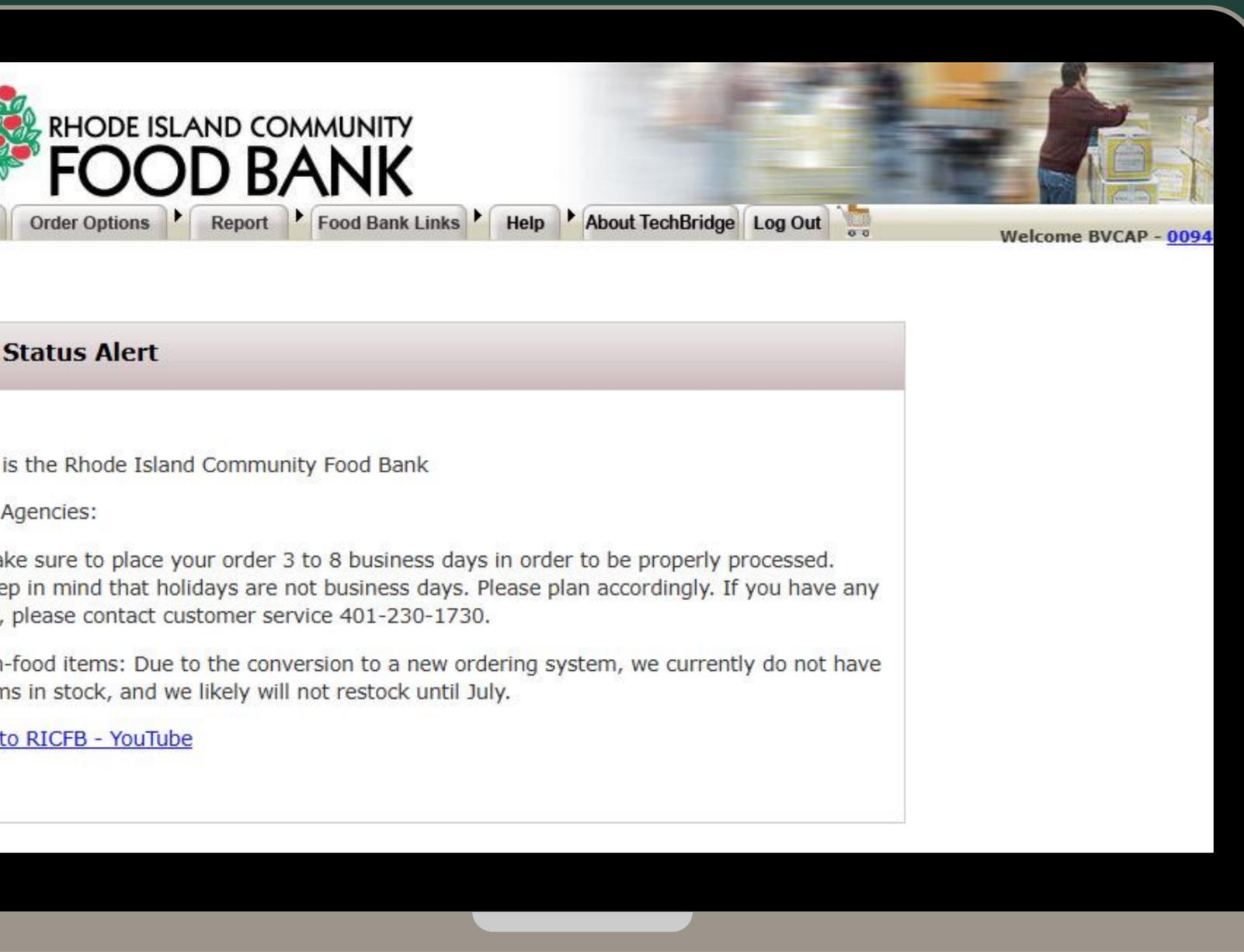


WELCOME TO **AGENCY** EXPRESS !



*Our New Online
Ordering
System!*

AGENDA

- *Essential Information Before Processing an Order*
- *Step 1: Logging In*
- *Step 2: Scheduling your Order*
- *Step 3: Shopping List*
- *Step 4: Submitting your Order*
- *Step 5: Order Management*
- *What do the Order Statuses Mean?*
- *Navigating Agency Express*
- *How to Submit Monthly Statistics to the Food Bank*

ESSENTIAL INFORMATION BEFORE PROCESSING AN ORDER

If you want to receive your order on:	You must place your order <u>by 12 PM</u> on the previous:
Monday	Wednesday
Tuesday	Thursday
Wednesday	Friday
Thursday	Monday
Friday	Tuesday



You may start your order as early as 8 business days in advance and no less than 3 business days by 12pm before your chosen pickup or delivery date.



Holiday closures and days when the Food Bank is closed do NOT count as business days and should be considered when planning when to complete your order. You may need to submit your order earlier than you normally do in those instances. For questions about holiday closures, please contact Customer Service or refer to the Agency Portal.

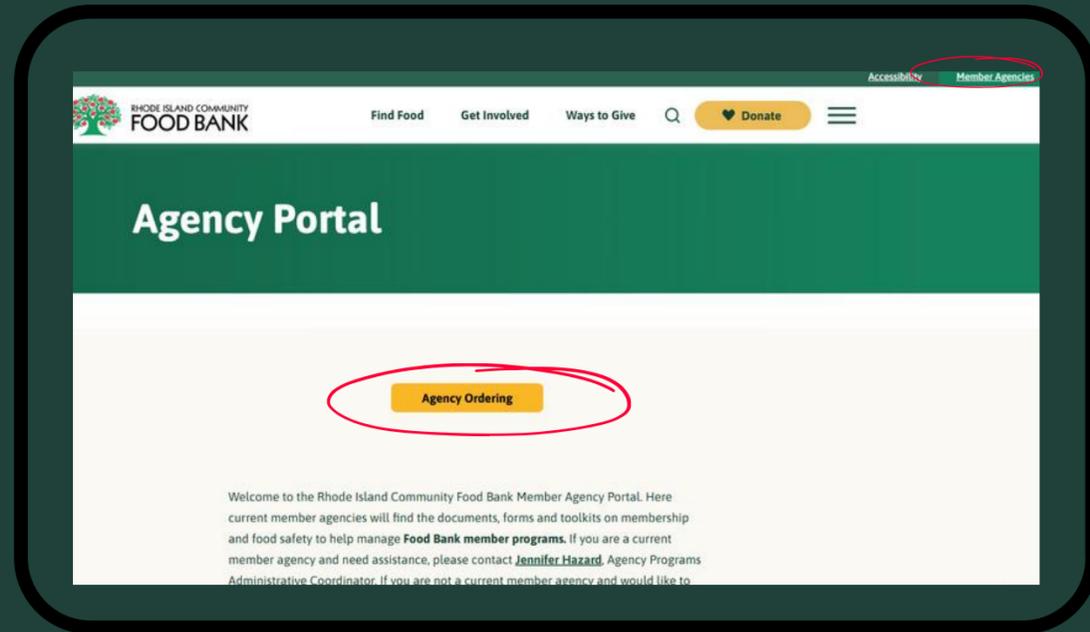


The cut off time to update and add items to your order is 12 PM, 3 business days before your scheduled pickup-up or delivery time.



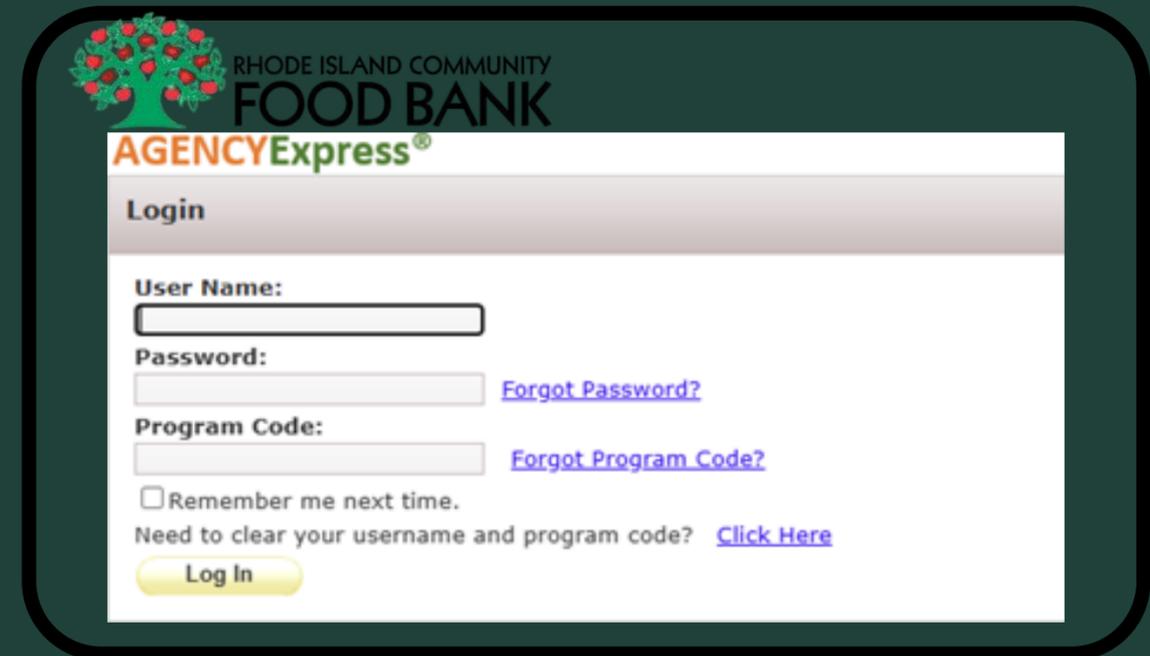
If you'd like to schedule a produce-only shopping appointment or need help with your order, call Customer Service at 401-230-1730.

Step 1: Logging in



Where can you find Agency Express?

The online ordering system can be accessed by going to the RI Food Bank website (www.rifoodbank.org), clicking on the Member Agencies button at the top right of the screen, and then clicking the yellow Agency Ordering button.



What credentials will you need?

Username = Each Shopper will have a specific username.

Password = The default password will be Change12 (You will be prompted to change your password).

Program Code = The program code will be **0094 + P + your Agency number.**
Ex. 0094P1234

READY TO SHOP?

Click or hover over Order Options to begin!

You will see the follow options to select from!



Scheduler

Where you pre-reserve your pickup appointment for your order. *Delivery orders would skip this step.



Checkout

Where you complete your order and submit to the Food Bank. This is also when your items get reserved.



Shopping List

Where you can select the product.



Order Management

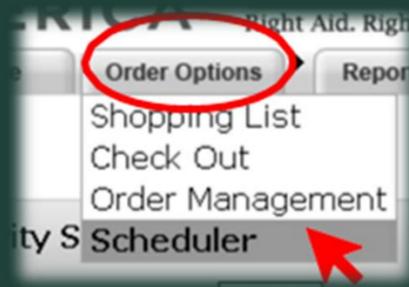
Where you can view your current/past orders and edit your order to add or remove items.

The screenshot shows the Rhode Island Community Food Bank website. At the top, there is a navigation menu with links: Welcome, Order Options, Report, Food Bank Links, Help, About TechBridge, and Log Out. A user is logged in as BVCAP with ID 0094P100600A. Below the navigation is an 'Activity Status Alert' box with the following text: 'Hello this is the Rhode Island Community Food Bank', 'Attention Agencies: Please make sure to place your order 3 to 8 business days in order to be properly processed. Please keep in mind that holidays are not business days. Please plan accordingly. If you have any questions, please contact customer service 401-230-1730.', and 'COOP non-food items: Due to the conversion to a new ordering system, we currently do not have COOP items in stock, and we likely will not restock until July.' There is a link for 'Welcome to RICFB - YouTube'. On the right side, there is a dropdown menu for 'Order Options' with sub-items: Shopping List, Check Out, Order Management, and Scheduler. Below the alert is a green bar with 'Accessibility' and 'Member Agencies' links. The main header features the Rhode Island Community Food Bank logo, a search icon, a 'Donate' button, and a menu icon. Below the header are three tabs: 'Find Food', 'Get Involved', and 'Ways to Give'. The main content area has a heading 'More than Just Food' and a sub-heading 'Food Bank programs and services provide a lifeline to those in need.' There is a 'Watch the Video' button and a photo of five people standing together.

Step 2: Scheduling your order

**Note – For Delivery orders, your upcoming scheduled delivery dates and times will already be listed below the Scheduler under My Appointments. For Delivery orders, skip to step 3.*

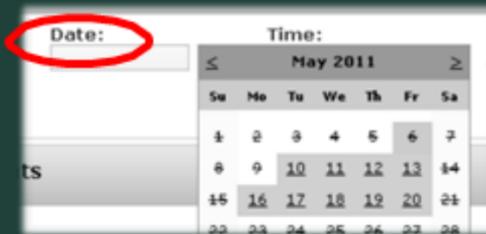
I Place your cursor on the Order Options tab. Click on Scheduler.



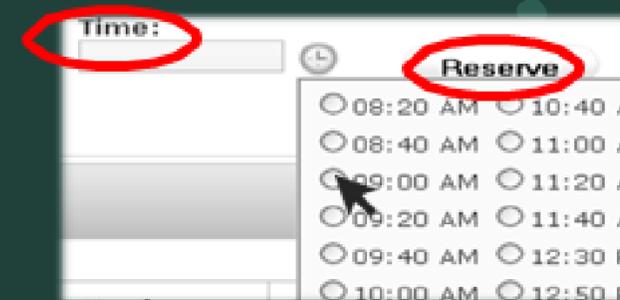
II Under Pickup/Delivery, click the drop-down menu. For Pickup orders, click on Pickup*.



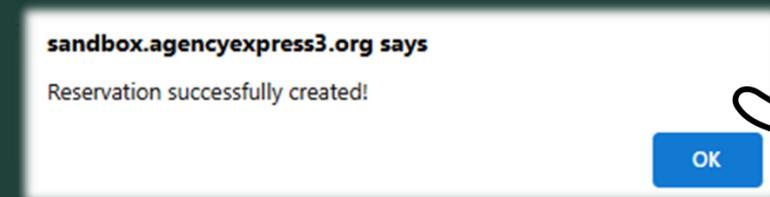
III Click the calendar icon next to the Date space. Available dates will be highlighted in dark yellow.



IV Click the clock icon next to the time space. Click on the circle to the left of the time you wish to select.

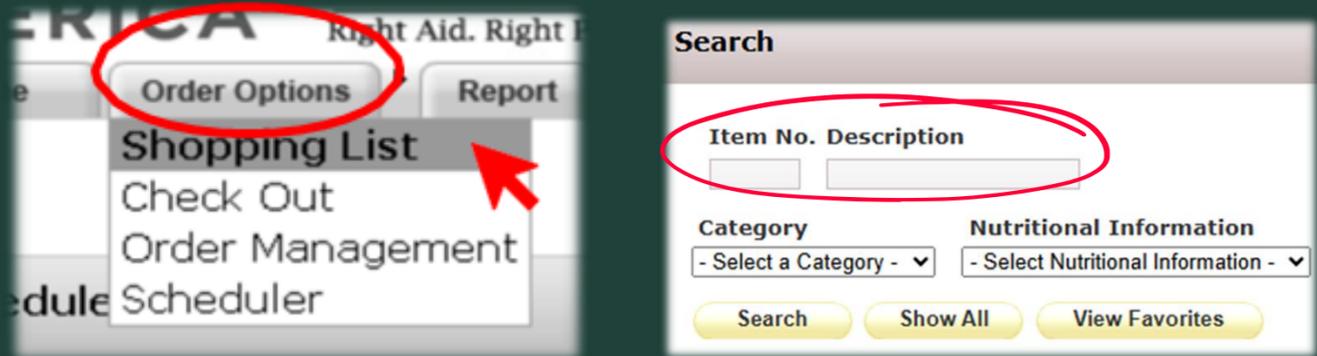


VI Click the Reserve button. A pop-up box will tell you your reservation was successfully created.

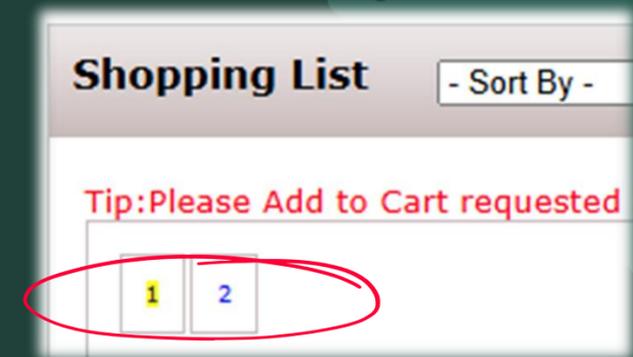


Step 3: Shopping List

I Place the cursor on the Order Options tab. Then click on Shopping List. Use the Search Box to search for certain items. Select the category you would like to sort and search accordingly.



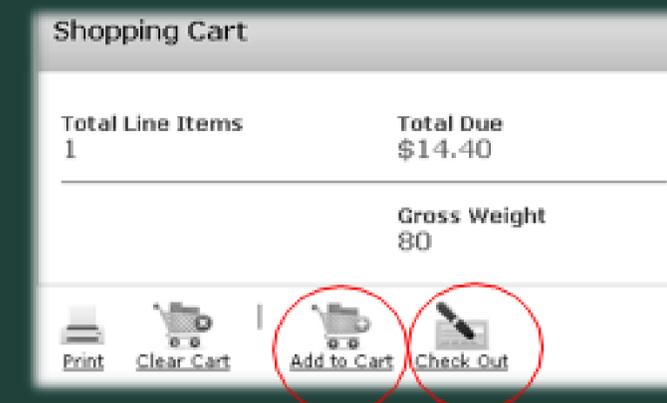
II The shopping list may contain multiple pages. Change pages by clicking on the number boxes (1, 2, 3, etc.) in the upper or lower left corner. Scroll down each page to find the item you wish to order. You can click on the item number for a more detailed description.



III Click on the Order Qty box for the item, and type in a quantity equal to or less than the Available Qty. Do NOT hit the Enter key at this time.



IV Click Add to Cart in the upper right of the page. *The item is not placed in the shopping cart unless you do this.* When all items have been added to the cart, click on Check Out.



New Process to Ensure your items have been reserved!

Items will not be reserved or taken out of our inventory until you submit your order on Step 4. We recommend adding and deleting items after your order has been submitted. Refer to Step 5 for more information on how to make changes to edit your order.

Step 4: Submitting your Order

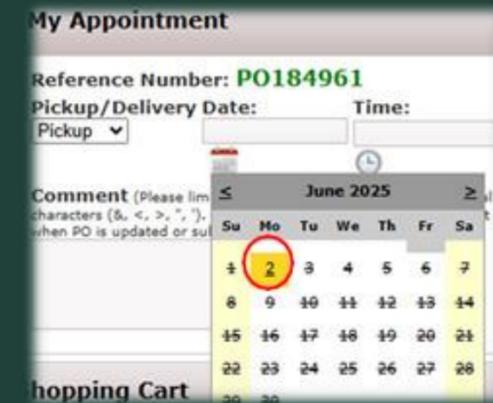
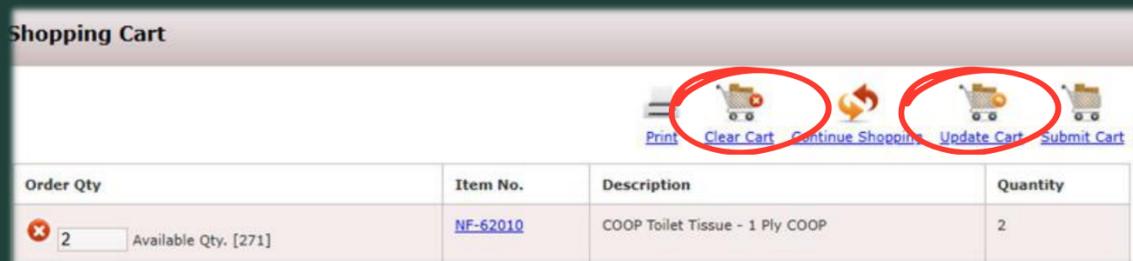
I You can review your order at this time. A line item can be deleted by clicking on the  icon next to Order Qty.

II The order quantity can be changed by clicking on the Order Qty box and highlighting the quantity, entering a new quantity, and clicking on Update Cart. * Make sure that the new entered QTY matches the number on the far-right column.



III To remove all line items from the cart, click on Clear Cart, then click on Update Cart and the cart will be emptied.

IV When you have finished reviewing the order, click the  icon below the Date space. The date you scheduled earlier will be highlighted in yellow (green for delivery). Click on the date to select it.



Step 4: Continued....

V Click the  icon next to the Time space.
Click on the circle to the left of the time to select it.



VI You may type comments into the space provided.

- Agencies can request produce by the pallet or ½ pallet (assorted selection of what we have in house).
- Agencies may identify items that are not wanted. For example: no carrots, or no carrots and onions.

IV Click on Submit Cart to place the order. *Your order will not be transmitted to the Food Bank until you do this, and your items will not be reserved.*

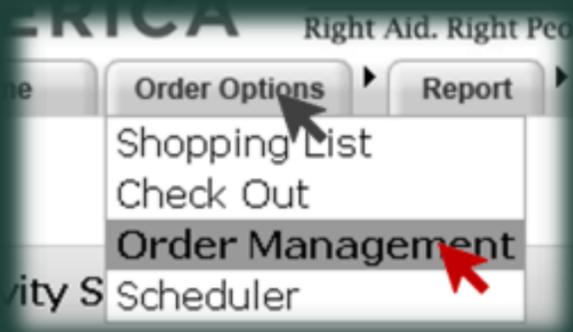


Step 5: Order Management

You should receive a confirmation email within a few hours of submitting your order (during normal business hours). If you do not receive the email, please contact Customer Service to confirm that your order has been received.

I

Place the cursor on the Order Options tab. Click on Order Management.



II

A summary of your orders that were previously submitted can be viewed on the Order Management screen. The order detail can be viewed and/or printed by clicking the printer icon in the left column. Please contact Customer Service immediately if you need to cancel an order that has been submitted.



	Reference Number	Status	Gross Weight	Total Price	Pickup/Delivery Date
	PO168512	Acknowledged	6.00	\$1.08	05/11/2011
	PO168503	Invoiced	120.00	\$2.16	04/27/2011

Step 5: Continued

III You can now edit your order!

- Click on the pencil  icon (keep in mind that this icon takes time to load and you will not be able to edit your order once the order has been released).
- You can add to your shopping cart by clicking the Continue Shopping icon . You can also delete items and edit quantities here. **Make sure to update the cart using the update cart icon  to effectively make changes to your shopping cart.*
- Click on the Submit Cart icon  after adjusting your items.
- After making changes to your order, the status will be listed as a new order so that food bank staff can review and approve.

Order Management					
	Reference Number	Status	Gross Weight	Total Price	Pickup/Delivery Date
  	PO168512	Acknowledged	6.00	\$1.08	05/11/2011
	PO168503	Invoiced	120.00	\$2.16	04/27/2011



WHAT DO THE ORDER STATUSES MEAN?

Once you have submitted your order, you will see the following statuses in Order Management.

Order Status	Description
New Order	Order has been recently submitted and not yet sent to RICFB
Sent to the Food Bank	Order has been sent to food bank admin and is awaiting approval and release
Acknowledged	Food bank admin has approved the order and made any necessary changes to it
Released	Order is being fulfilled by the food bank and cannot be changed
Invoiced	Order has been picked up by the agency and has been billed
Allocated	Food bank admin has created the order for the agency
Canceled	Order canceled by the agency
Rejected	Order has been rejected by food bank admin
Non-web Order	Order entered by the food bank admin, typically received via phone

How to Submit your Monthly Statistics to the Food Bank!

➤ Continue to collect the same data you have been submitting to the food bank.

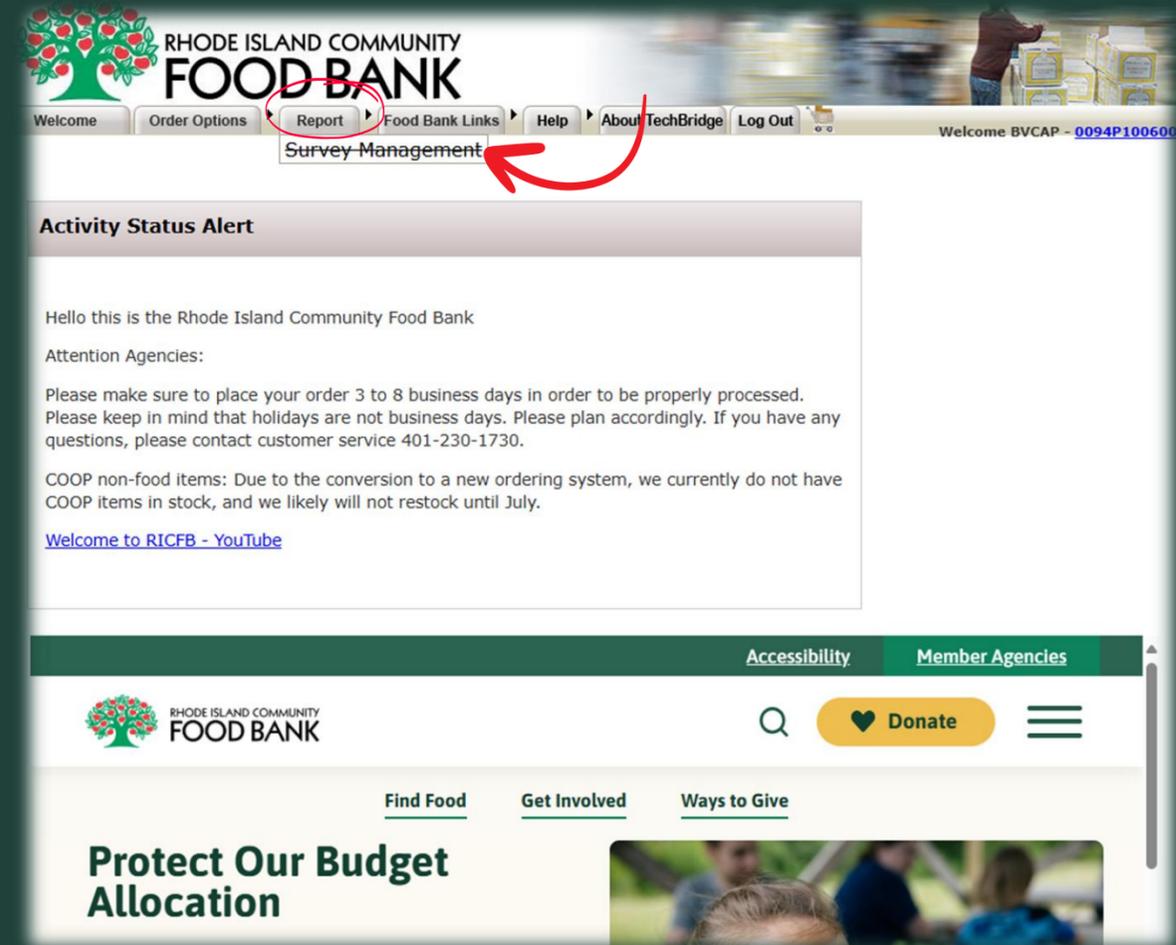
ex. Total # of Households, Total # Individuals, Total # of Visits, New Families (optional)

➤ Place your cursor on the Report tab.

➤ Click on Survey Management.

➤ Fill in the same fields as you would in Primarius.

➤ You are now able to edit your Statistics once submitted. (Please note that all edits and/or submissions need to be done by the 10th of each month.



Time to Navigate **Agency** Express!

Visit : www.rifoodbank.org

QUESTIONS?

