AGENCY EXPRESS 3.5
a guide to online ordering
KEYS TO SUCCESS

✓ Know your order window. All order windows are:
7:00 am – 3:00 pm TWO business days prior to scheduled pickup/delivery day. For a complete list of online ordering windows, please see the last slide of this manual.

✓ Order within your order window. Food Lifeline will be unable to process orders placed outside of the order window. Reasonable accommodations may be made for order window changes under special circumstances; if this applies to you please contact a member of Agency Relations at (206) 545-6600 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 your 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, Food Lifeline 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 instructions in this manual. Feel free to refer to this manual if you are having trouble ordering – your answer will likely be inside!

✓ Having trouble ordering? Contact a member of Agency Relations.
Agency Relations staff can help with any online ordering need and can be reached at: (206) 545-6600 or AgencyRelations@foodlifeline.org.
1. Open a web browser
   *Internet Explorer 6.0 or higher, Firefox 2.x or higher, or Google Chrome*

2. Go to www.agencyexpress3.org
3. Enter your login information
Each agency has unique login information to access Agency Express 3.5

User Name: A0xxx
(0 is a zero, xxx’s are your unique three digit number)

Password: change12
[unless you’ve changed it from the default]

Program Code: 0081pA0xxx
(0’s are zeros, xxx’s are your unique three digit number)

4. When you’ve entered your login information, click here
Uh oh! Check these items:

- Is your password accurate and spelled correctly?
- Were you using “O” (the letter) instead of “0” (the number zero) in your User Name and/or Program Code?
- Does the login information you used match the format of the login listed here (to the right), with your unique three-digit number substituted for the xxx’s?
- Were you using your email address as your user name? (This allows you to access the Member Section of the Food Lifeline website, but not Agency Express 3.5)
- Still can’t log in? Call a member of Agency Relations at (206) 545-6600

GET THIS MESSAGE?

Great! You’re logged in.

5. Click “Close” and go to the next slide of this manual
WELCOME TAB
Login opens to the “Welcome” Tab
This is the News & Event Page of the Food Lifeline website. You can navigate to other pages within the Food Lifeline website without leaving the Agency Express 3.0 website.

ORDER OPTIONS
Most of the features you use will be under this tab
Click on the tab to access the page with a list of options, or drag your cursor over the tab to view the list of links within (example below). Click on any link within to visit that page.

REPORT
Online reporting tool can be found at the member agency section of the website.

FOOD BANK LINKS
Informational websites, resources for your agency

ABOUT AIDMATRIX
Brings you to the AidMatrix external website

HELP
Change your password or report a problem to Agency Relations

LOG OUT
Logs you out!
SHOPPING
GETTING STARTED

- To browse the available inventory, go to the “Order Options” tab at the top of the page.
- Select *Shopping List* from the “Order Options” menu.

There are a number of different 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”.

<table>
<thead>
<tr>
<th>Item No./Description</th>
<th>Handling Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category</strong></td>
<td><strong>Feature Type</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Handling Requirement</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Food Source</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Favorites</strong></td>
</tr>
</tbody>
</table>
Use the search feature to find specific items quickly. Select a Category from the drop-down menu, and click Search to identify products in that category that are currently available.

Product Categories

- Assorted Non-Food
- Baby Food/Formula
- Beverages
- Bread/Bakery
- Cereal
- Dairy
- Desserts
- Dough, Uncooked
- Dressing
- Fresh Fruits/Vegetables
- Fruit, Canned & Frozen
- Grain
- Health/Beauty Products
- Household Cleaning Products
- Juice – 100% Fruit & Vegetable
- Meal Entrees/Soup
- Meat, Fish & Poultry
- Mixed and Assorted Foods
- Non-Dairy Substitutes
- Nutritional Aids
- Paper Products
- Pasta
- Personal Hygiene Paper Products
- Pet Food/Pet Care
- Prepared Perishable Food
- Protein - Non-meat
- Rice
- Salvage Unsorted
- Snack Foods
- Spaces, Condiments
- Vegetables, Canned & Frozen
SHOPPING
ITEM DETAILS & PHOTOS

Click Item No. to get information about product category and handling requirements.

Order Up! items have pictures as well! When you click on the Picture icon, you will be asked to create a Dropbox Account. You do not need a Dropbox account to see pictures. Click “No thanks, continue to view” at the bottom of the box.
1. Enter the quantity of each product you would like to order on the current page.

2. Next, click the “Add To Cart” button.

3. You will receive a confirmation message every time you add an item (s) to your cart. All items on the current page with quantities listed will be added when you click “Add to Cart.”

4. Click OK to move on.

5. Click to view the next page of inventory.
**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 requested until you “submit cart”**. Food Lifeline 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.
MP Only & Bulk Warning

☑ Products with “MP Only” in the description are restricted to meal programs, for one of three reasons:

1. Because a donor has stated that they will only donate if the product is distributed to only congregate feeding sites.
2. Because the product is in bulk packaging (a distributable unit of 15lbs or higher) and is a product type that is deemed unsafe for repack at the pantry level (such as meat, liquids, dairy products).
3. Because the product has distributable units that are not individually labeled (Note: see the Fair Packaging and Labeling act).

☑ Products with “Bulk Warning” in the description have distributable units of 15 pounds or greater (not including fresh produce), and thus should be ordered by food banks with caution. Please only order if you can safely repack the product into smaller units or if you can distribute as is to larger families.
How much should I order?

- We recommend that you order only enough product for the week’s distribution.
- Please also be mindful of your transportation capacity.
- In the event that orders need to be cut, product will be prioritized in the following order: Purchased product (will not be removed from orders), Refrigerated and Freezer product, Dry product (will be the first to be removed from orders). When deciding which product(s) to cut, we will consider the nutritional value of the items.
CHECKING OUT MY 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 pre-scheduled by Food Lifeline, based on your ongoing pickup/delivery schedule. Click on the available option (in green).

The sequence you will need to follow when completing the “My Appointment” box is:

1. **Select Pickup or Delivery**
   - **PICKUP** If you receive your Food Lifeline order via another party (Solid Ground, South King County Food Coalition, etc.) or at our Seattle Distribution Center you will need to select “Pickup”. This is true for most King County agencies.
   - **DELIVERY** If you receive product via a Food Lifeline delivery truck that goes outside of King County, 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).

3. **Select Time**

4. **Use the “Comment” section to communicate any special instructions to the Distribution Department**
After you have updated “My Appointment”, review your order. You can either make adjustments or submit your cart.

To make adjustments, change the order quantities and click on the “Update Cart” button to update your order.

You can delete an item by clicking the red circle icon.

“Continue Shopping” redirects you to the shopping list without removing items from your cart.

Click “Submit Cart” to submit your order to Food Lifeline
If you do not click this button, your order will not be received and we will not know that an order was created. But wait – you might not be done yet! (see next page of manual)
1. **Click “Submit Cart” to submit 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.

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

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!

✓ Once your order is submitted you may review it in “Order Management”. 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.
✓ By submitting your cart, you are requesting these items. It is only once your order hits the database that it can determine if you got the cases you requested or if another agency already got those items.
ORDER MANAGEMENT
FOUND UNDER THE “ORDER OPTIONS” TAB

1. **Search** for orders or groups of orders by date range or reference number
   ![Search Interface](image)

2. **Print** a copy of your order by clicking the printer icon

3. **Check the status** of your order

4. **Edit an order** that has already been submitted to Food Lifeline.
   *IMPORTANT: see the next page for specific instructions on how to edit an order that has already been created.*

5. **Track the total** number of orders you have placed through Agency Express 3.5, as well as the total weight and cost for those orders

   ![Order Management Table](image)

   You can also edit your order via Order Management during your order window (there is a delay between the time you submit the order and time you can edit the order). See next page.
EDITING AN ORDER IN ORDER MANAGEMENT

Your order is open for editing between 7:00 am-3:00 pm on the order day in which it was placed.

Please Note:

✓ There is a delay of up to 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 via the pencil icon when editing an order. If you create a new order without following this process, both orders will be lost.

1. 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.
2. After you click the pencil icon you will receive this message. Click “OK” and you will be redirected to your shopping cart.

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, Food Lifeline will not receive your original order or the edited order.

6. When your order is submitted successfully, you will receive this message. Click OK. **See also, page 16 step 3b**
WHEN YOU ARE DONE...

Click on the Log Out tab
FREQUENTLY ASKED QUESTIONS

Q: **Why didn’t I receive what I ordered?**
A: This can happen for several reasons:

- 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.

- 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.

- 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.

- Occasionally, inventory in the warehouse has been miscounted and the amount listed online did not accurately reflect the number in the warehouse.

- If the agencies sharing your truck collectively ordered more than the truck’s capacity to deliver, we will cut items from each agency’s order, beginning with the least nutritious.

Q: **When can I view a list of the actual items I will receive on my order?**
A: Orders are processed after the close of the order windows at 3:00 pm each day. Your order, including any adjustments, will be posted by 12:00 pm the following day (one day prior to your pickup or delivery). For agencies within King County: TEFAP, Bulk Buy, and other allocated products are not viewable in this screen until they have been invoiced, after pickup.

Q: **I am going out of town and am not sure if I will have internet access. How will I place my order?**
A: Contact a member of Agency Relations at (206) 545-6600 and we can assist you in placing your order over the phone.
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 17 of this manual.

Q: Why do we have order windows and how do they work?
A: Order windows allow Food Lifeline to manage the volume of orders and product packing so we can best distribute food to our nearly 300 member agencies. A given number of agencies order each day between 7:00 am – 3:00 pm, based on pickup/delivery days. When the order window closes, a member of our Distribution Staff processes each order and makes any necessary adjustments. He/she prepares and prints the “pick tickets” for all of the orders placed during the order window, as well as the “master pick” for orders going outside of King County (the master pick is created in order to maximize the amount of product that can be shipped on our delivery run). This staff person makes sure all of the orders are ready for our warehouse staff to pick the following morning beginning at 5:00 am. In the day prior to your pickup/delivery, our warehouse staff packages all of the orders to be shipped out on your pickup/delivery day.

Q: What should I do if I missed my order window?
A: We are unable to process orders placed outside of the order window in time for your regularly scheduled pickup or delivery; however, we understand that everyone gets busy and forgets occasionally. Contact a member of Agency Relations, and we will make reasonable accommodations to reschedule a new pickup day at our Seattle Distribution Center, or put together some items to tide you over until your next order. We will do this to the best of our ability, but please be aware that we may not always be able to accommodate these requests.
Q: How do I know what items are in an assorted case?
A: The chart below describes some of the common items in assorted cases.

<table>
<thead>
<tr>
<th>Misc. Non-Food</th>
<th>Health &amp; Beauty</th>
<th>Personal Paper Products</th>
<th>Beverages / Flavored Water</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plastic Forks, Spoons</td>
<td>Hair Products</td>
<td>Diapers (All Types)</td>
<td>Juice Pouches</td>
</tr>
<tr>
<td>Plastic Cups</td>
<td>Bath Soaps</td>
<td>Baby Wipes</td>
<td>Canned Juice</td>
</tr>
<tr>
<td>Paper/Plastic Plates</td>
<td>Hand Soaps</td>
<td>Sanitary Napkins/Tampons</td>
<td>Nutritional Beverages -</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>Hand Sanitizers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kitchen Utensils</td>
<td>Shaving Products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Toys</td>
<td>Lotion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tools</td>
<td>Toothpaste/Mouth Wash</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utensils</td>
<td>Razors - unopened</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Household Paper Products</strong></td>
<td><strong>Medicines</strong></td>
<td><strong>Canned Food - Cans, Glass/Plastic Jars</strong></td>
<td><strong>Dry Food</strong></td>
</tr>
<tr>
<td>Tissue Paper (Kleenex)</td>
<td>Not expired</td>
<td>Salad Dressing</td>
<td>Including:</td>
</tr>
<tr>
<td>Toilet Paper</td>
<td>Not opened</td>
<td>Condiments</td>
<td>Ground Coffee</td>
</tr>
<tr>
<td>Paper Towels</td>
<td>No: Ephedrine /</td>
<td>Spreads &amp; oils</td>
<td>Whole Bean Coffee</td>
</tr>
<tr>
<td></td>
<td><strong>Pseudoephedrine</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Individual Pudding</td>
<td></td>
<td>K-Cups Coffee</td>
</tr>
<tr>
<td></td>
<td>Non-Stick Spray</td>
<td></td>
<td>Cocoa Mix</td>
</tr>
<tr>
<td></td>
<td>Soup</td>
<td></td>
<td>Dry Coffee Creamer</td>
</tr>
<tr>
<td></td>
<td>Peanut Butter</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tuna Fish Packs</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Non-Perishable: Milk, Soy Milk, Almond Milk</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
GLOSSARY OF ITEM 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 lbs):** 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.
Please **direct all online ordering related calls to Agency Relations** so we can best serve you!

**CONTACT AGENCY RELATIONS**

- ✓ Dial (206) 545-6600 and ask to speak with a member of Agency Relations.
- ✓ Email AgencyRelations@foodlifeline.org *(if your need is not urgent)*
- ✓ If your call is urgent and you were unable to reach a member of Agency Relations, call our reception desk at 206-545-6600 and ask for Agency Relations to be paged
MY LOGIN INFORMATION
ENTER YOUR LOGIN INFORMATION HERE FOR FUTURE REFERENCE

www.agencyexpress3.org

User Name: ______________________
Password: ______________________
Program Code: __________________
## ORDER WINDOWS

**SEE BELOW FOR SPECIFIC INFORMATION**

<table>
<thead>
<tr>
<th>PICKUP/DELIVERY DAY</th>
<th>ORDER WINDOW 7:00 AM – 3:00 PM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MONDAY</strong></td>
<td></td>
</tr>
<tr>
<td>Whatcom County</td>
<td></td>
</tr>
<tr>
<td>King County Agencies with Monday Pickups</td>
<td></td>
</tr>
<tr>
<td><strong>TUESDAY</strong></td>
<td></td>
</tr>
<tr>
<td>Clallam, Jefferson, Kitsap &amp; Mason Counties</td>
<td></td>
</tr>
<tr>
<td>King County Agencies with Tuesday Pickups</td>
<td></td>
</tr>
<tr>
<td><strong>WEDNESDAY</strong></td>
<td></td>
</tr>
<tr>
<td>Grays Harbor, Pacific &amp; Thurston Counties</td>
<td></td>
</tr>
<tr>
<td>King County Agencies with Wednesday Pickups</td>
<td></td>
</tr>
<tr>
<td><strong>THURSDAY</strong></td>
<td></td>
</tr>
<tr>
<td>Cowlitz, Lewis, Pierce, &amp; Wahkiakum Counties</td>
<td></td>
</tr>
<tr>
<td>King County Agencies with Thursday Pickups</td>
<td></td>
</tr>
<tr>
<td><strong>FRIDAY</strong></td>
<td></td>
</tr>
<tr>
<td>Skagit &amp; Snohomish Counties</td>
<td></td>
</tr>
<tr>
<td>King County Agencies with Friday pickups</td>
<td></td>
</tr>
</tbody>
</table>