AGENCY EXPRESS 3.5

a guide to online ordering

FOOD LIFELINE

HUNGER DOESN'T HAVE TO HAPPEN

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!

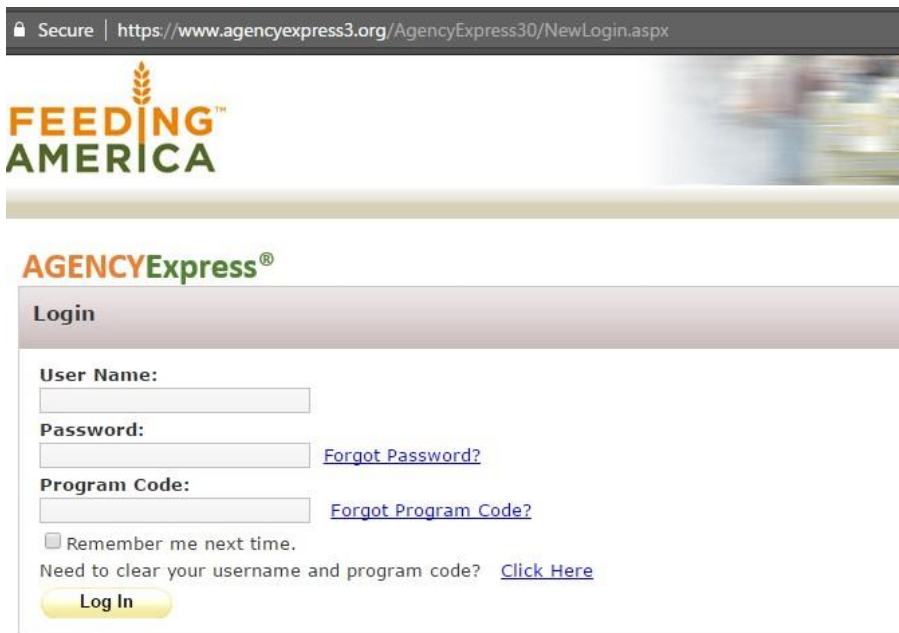✓ **Having trouble ordering? Contact a member of Agency Relations.**
Agency Relations staff can help with any online ordering need and can be reached at:
(206) 545-6600 or AgencyRelations@foodlifeline.org.

GETTING STARTED

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

AGENCY EXPRESS 3.5
ACCESS FOOD LIFELINE'S LIVE INVENTORY

3. **Enter your login information**
Each agency has unique login information to access Agency Express 3.5

FEEDING™ AMERICA

Login

User Name: *

Password: * Forgot Password

Program Code: * Forgot Program

☑ Remember me next time.

Need to clear your username and program code? Click Here

Log In

User Name: Axxxx
(xxx's are your unique agency number)

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

Program Code: 0081pAxxxx
(xxx's are your unique agency number)

4. **When you've entered your login information, click here.**

GET THIS MESSAGE?

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 to the right with your unique three-digit number substituted for the xxx's?

- ✓ Were you using your email address as your user name?

- ✓ 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

Login

Login Failed. Please try again.

User Name:
A0xxx

Password:
••••••••   Forgot Password?

Program Code:
0081pA0xxx   Forgot Program Code?

☑ Remember me next time.

Need to clear your username and program code?   Click Here

Log In

Dashboard   Content   Structure   People   Configuration   Advanced help   Help

Activity Status Alert

Welcome to Food Lifeline's Online Ordering System!

Close

FRONT BURNER BLOG

WELCOME TAB

Login opens to the "Welcome" Tab

This is the page for Agency Express notifications and changes. It has general guidelines about ordering deadlines and item types.

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.

FOOD BANK LINKS

Informational websites, resources for your agency.

ABOUT AIDMATRIX
Brings you to the AidMatrix external website

REPORT

This is sometimes used for online reporting. It's not currently in use by Agency Relations.

HELP
Change your password or report a problem to AR.

LOG OUT
Logs you out!

FOOD LIFELINE — FEEDING HOPE FEEDING WESTERN WASHINGT

| Welcome | Order Options | ▶ | Report | ▶ | Food Bank Links | ▶ | Help | ▶ | About Aidmatrix | Log Out |

Shopping List
Check Out
Order Management
Scheduler

Activity S

Welcome to Agency Express 3.

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".

Item No./Description

Handling Requirements

Category

Feature Type

Food Source

Favorites

SHOPPING
SEARCH TIPS

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

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SHOPPING
ITEM DETAILS & PHOTOS

Shopping List   - Sort By - ▼

Tip:Please Add to Cart requested items before leaving page

Order Qty	Available Qty.	Item No.	Description	UOM	Unit Price	VAP Fee	Pack Size	Feature Type
	293	01CUP15	Cups, Plastic, Reusable, 12 oz.	CASE	0.00	0.00	1/24 ct.	
		01LID15	Lids, Plastic	CASE	0.00	0.00	300 ct.	

Tip:Please Add to Cart requested items before leaving page

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

Item Detail : 15TUN20-ORDE

Gross Weight.
20

Item Name
zz_Order Up! Tuna Fish (In Water)

Handling Req.
Dry

Extra Info.
NA

Pack Size
48/5 oz cans

Category
Meat, Fish & Poultry

Price per Unit
32.40

Food Source
PURCHASE

Picture

VAP Fee
0.00

Cube Size
0

Packaging Type

Unit of Measure
CASE

People Served
0

Price per Pound
1.62

Cost per person
NA

Close

SHOPPING
ADDING TO CART

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"

Feature Type Handling Req. Desc. Code **?** **Food Source**

-Select one- ▾   -Select one- ▾   [   ]   -Select one- ▾

[Search]   [Show All]   [View Favorites]

Print   Clear Cart   Add to Cart   Check Out

hopping List   [- Sort By - ▾]

ip:Please Add to Cart requested items before leaving page

| 1 | 2 |

der ty	Available Qty.	Item No.	Description	Unit Price	VAP Fee	Pack Size	Feature Type	Gross Weight	Favorite
4	49	04BAK15-ASST	Assorted Bread/Bakery Max 6 cs	0	0.00	1/15# Average		15	☐
	51	08DES15-ASST	Assorted Desserts Maximum 6 cs	0	0.00	1/15# Average			
2	23	01LOG20-ASST	Assorted Fire Logs/Wood Pellets	0	0.00	1/20# avg			

5. Click to view the next page of inventory

4. Click OK to move on

Handling Req. Desc. Code ? Food Source

Message from webpage   ✕

⚠ Success: Item 04BAK15-ASST added to the cart.
Success: Item 01LOG20-ASST added to the cart.

[OK]

to C

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SHOPPING

6. When you are done shopping, click "Check Out"

Total Due reflects the value of your cart

Gross Weight reflects the total weight of the items in your cart.
Tip: Use this to prepare for the proper amount of transportation.

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

SHOPPING

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.

SHOPPING

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 and storage capacity.
- ✓ In the event that orders need to be cut, Agency Relations will contact your agency to work out a decrease in product. No purposeful changes to your order will be made without prior notification.

When does new product get added?

- ✓ Throughout the day, as deliveries arrive. We stop receiving at 2:00 pm, so no new product will be added after that time. You can always submit your cart well before the 3:00 cutoff.
- ✓ You can technically fill your cart and then come back later to submit it but be aware that some items might not be available later in the day. It's best to submit your cart in between edits.

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. Do not use the "Comment" section
The contents of this box do not get transferred to your order and AR will not see them.

My Appointment

Reference Number: PO1885628

Pickup/Delivery Date: Time:

Delivery ▼

Comment (Please limit comment to 150 characters, no special characters. Anything over 150 characters will be cut off when PO is updated or submitted.)

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REVIEWING YOUR CART

After you have updated "My Appointment", review your order. You can either make adjustments or submit your cart.

"**Continue Shopping**" redirects you to the shopping list without removing items from your cart

Shopping Cart

Print   Clear Cart   Continue Shopping   Update Cart   Submit Cart

Order Qty	Item No.	Description	Quantity	UOM	Gross Weight	Unit Price	Packaging Type	Pack Size	Handling Requirements	VAP Fee	Special
❌ 1 Available Qty. [13]	I4960	Purchase: Pinto Beans	1	CASE	25	10.76	Case	24/1lb. bags	Dry	0.00	

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

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

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)

SUBMITTING YOUR ORDER

Shopping Cart

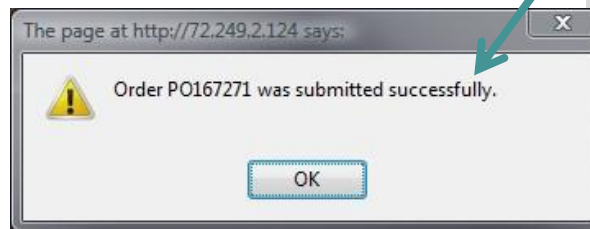Print   Clear Cart   Continue Shopping   Update Cart   Submit Cart

Order Qty	Item No.	Description	Quantity	UOM	Gross Weight	Unit Price	Packaging Type	Pack Size	Handling Requirements	VAP Fee	Special
❌ 1 Available Qty. [33]	I4960	Purchase: Pinto Beans	1	CASE	25	10.76	Case	24/1lb. bags	Dry	0.00	

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 quantity ordered exceeds the quantity available. Once you have done this, click "Submit Cart" again!

The page at http://72.249.2.124 says:

Are you sure you want to submit the order?

OK   Cancel

The page at http://72.249.2.124 says:

⚠ Order PO167271 was submitted successfully.

OK
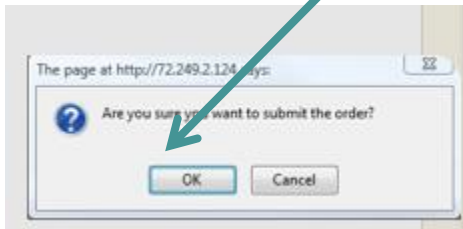
✓Once your order is submitted you may review it in "Order Management". This is also a good place to check to be sure your cart was submitted; an order will appear here once the cart is submitted.
✓By submitting your cart, you are **requesting** these items. It is only once your order hits the database that it can determine if you got the cases you requested or if another agency already got those items.

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ORDER MANAGEMENT
FOUND UNDER THE "ORDER OPTIONS" TAB

1. Search for orders or groups of orders by date range or reference number.

2. Print a copy of your order by clicking on 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.

Search

From Date:	To Date:	Reference Number:

Search   Show All

Summary

Total Orders:	Total Weight.
21	2694 lbs.

Total Amount:
$18.10

Order Management

	Reference Number	Created By	Status	Gross Weight	Total Price	Pickup/Delivery Date	Admin Edited	Modified Date
🖶	PO1347031	Test Shopper 4	Rejected	0.00	$0.00	10/14/2014		10/10/2014
🖶	PO1319193	Test Shopper 4	Rejected	0.00	$0.00	11/07/2013		11/05/2013
🖶	PO1306757	Test Shopper 4	Rejected	0.00	$0.00	10/08/2013		10/01/2013

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

✓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.
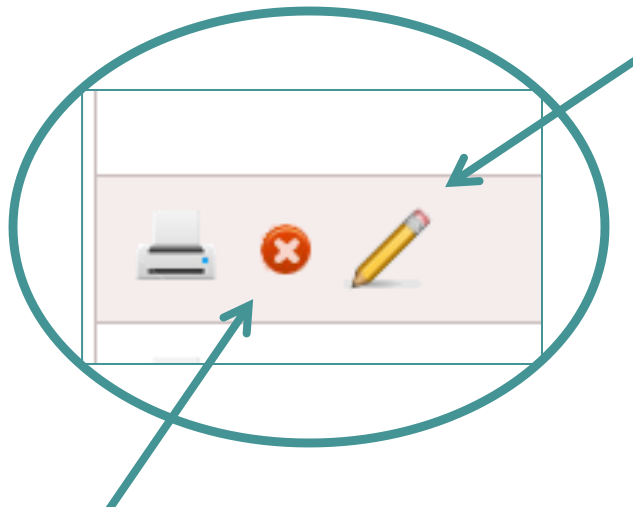
EDITING AN ORDER
IN ORDER MANAGEMENT

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 <u>via the pencil icon</u> 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.

Order Management

| 1 | 2 | 3 |

	Reference Number	
🖶 ✕ ✏	PO525309	
🖶	PO517897	
🖶	PO515771	
🖶	PO510702	

EDITING AN ORDER

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

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

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

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

Shopping Cart

Print   Clear Cart   Continue Shopping   Update Cart   Submit Cart

Order Qty	Item No.	Description	Quantity	UOM	Gross Weight	Unit Price	Packaging Type	Pack Size	Handling Requirements	VAP Fee	Special
❌ 1 Available Qty. [33]	I4960	Purchase: Pinto Beans	1	CASE	25	10.76	Case	24/1lb. bags	Dry	0.00	

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.

Message from webpage

⚠ Order PO526004 was submitted successfully.

OK

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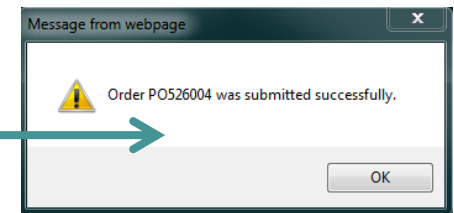
WHEN YOU ARE DONE...

Click on the Log Out tab.

✓ *Note: We recommend always checking "Order Management" to verify that your current order has been submitted **before** logging out for the day.*

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 might have to cut items to fit capacity. You will be notified before this happens.

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

A: Orders are posted for warehouse fulfillment by 10:00 am the day after they are placed. You will be notified by email if any items cannot be put on your order. If you would like an updated order confirmation then, please email or call Agency Relations.

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) 492-5530 and we can assist you in placing your order over the phone.

FREQUENTLY ASKED QUESTIONS

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 400 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. They prepare and print 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 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 orders to be shipped out on your pickup/delivery day. Your order window is deliberately planned to match 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.

FREQUENTLY ASKED QUESTIONS

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.

Misc. Non-Food	Health & Beauty	Personal Paper Products	Beverages / Flavored Water
Plastic Forks, Spoons	Hair Products	Diapers (All Types)	Juice Pouches
Plastic Cups	Bath Soaps	Baby Wipes	Canned Juice
Paper/Plastic Plates	Hand Soaps	Sanitary Napkins/Tampons	**Nutritional Beverages -**
Office Supplies	Hand Sanitizers		Ensure, Slimfast, Glucerna
Kitchen Utensils	Shaving Products		Choice, Store Brands, etc.
Toys	Lotions		Juice Boxes
Tools	Toothpaste/Mouth Wash		
Utensils	Razors - unopened		

Household Paper Products	Medicines	Canned Food - Cans, Glass/Plastic Jars	Dry Food
Tissue Paper (Kleenex)	**Not expired**	Salad Dressing	Including:
Toilet Paper	**Not opened**	Condiments	Ground Coffee
Paper Towels	**No: Ephedrine /**	Spreads & oils	Whole Bean Coffee
	Pseudoephedrine	Individual ize Pudding	K-Cups Coffee
		Non-Stick Spray	Cocoa Mix
		Soup	Dry Coffee Creamer
		Peanut Butter	
		Tuna Fish Packs	
		Non-Perishable: Milk, Soy Milk, Almond Milk	

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.

QUESTIONS?
CONTACT FOOD LIFELINE

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

PICKUP/DELIVERY DAY	ORDER WINDOW 7:00 AM – 3:00 PM
MONDAY	THURSDAY
TUESDAY	FRIDAY
WEDNESDAY	MONDAY
THURSDAY	TUESDAY
FRIDAY	WEDNESDAY