

Agency Express Training

**Welcome Agency
Partners!**



NORTHEAST IOWA
FOOD BANK

Lessons



LOGGING IN



WELCOME PAGE



SCHEDULING
APPOINTMENTS



ADDING ITEMS
TO CART



SUBMITTING
ORDERS



ORDER
MANAGEMENT

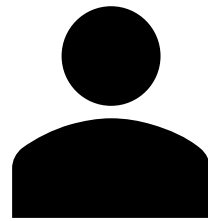


REPORTS
(STATISTICS)



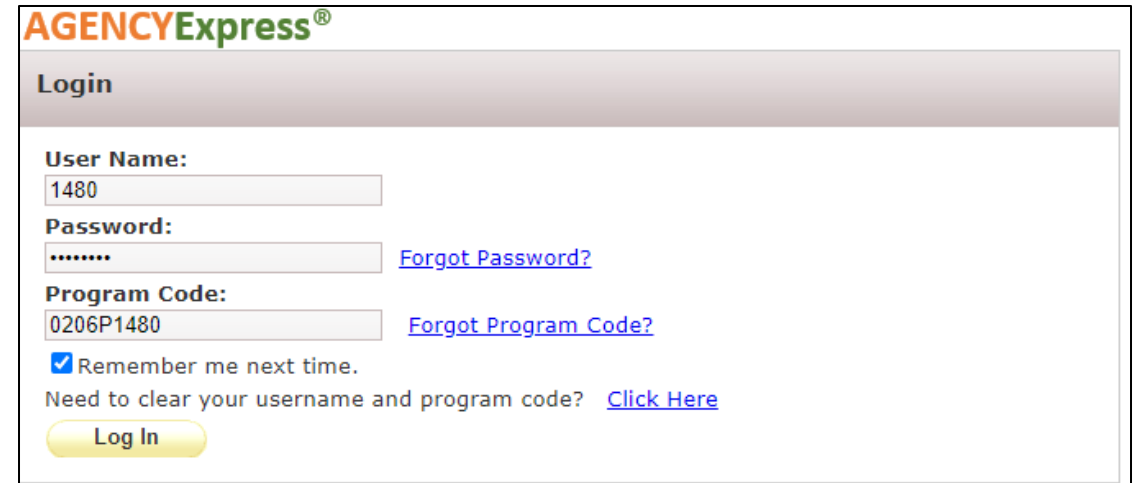
QUESTIONS

LOGGING IN



LOGIN

- You will use the SAME Login link you currently use, but you will see this log in page instead of the one you are used to.
- You must fill out the following:
 - Username: 4-digit agency #
 - Password: change12
 - Program Code: 0206P plus your 4-digit agency number
- When you first log in you will be prompted to change the default password.



The screenshot shows the login interface for AGENCYExpress®. It features a header with the logo and a 'Login' title. Below the title are three input fields: 'User Name' with the value '1480', 'Password' with masked characters '.....', and 'Program Code' with the value '0206P1480'. To the right of the password and program code fields are links for 'Forgot Password?' and 'Forgot Program Code?'. Below these fields is a checkbox labeled 'Remember me next time.' which is checked. At the bottom, there is a text prompt 'Need to clear your username and program code?' with a 'Click Here' link, and a yellow 'Log In' button.

AGENCYExpress®

Login

User Name:
1480

Password:
..... [Forgot Password?](#)

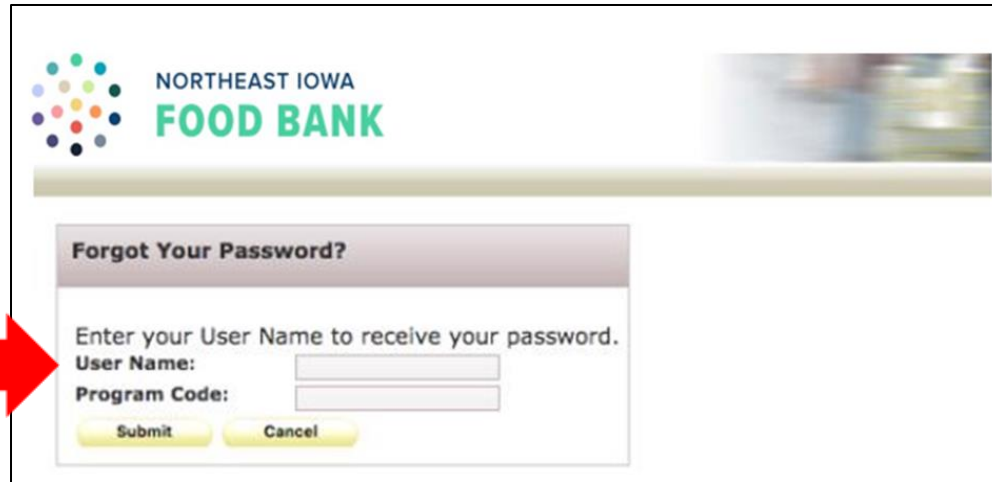
Program Code:
0206P1480 [Forgot Program Code?](#)

☒ Remember me next time.

Need to clear your username and program code? [Click Here](#)

Log In

FORGOT PASSWORD?



The screenshot shows the Northeast Iowa Food Bank website header with a logo of colored dots and the text 'NORTHEAST IOWA FOOD BANK'. Below the header is a form titled 'Forgot Your Password?'. The form contains the instruction 'Enter your User Name to receive your password.' followed by two input fields: 'User Name:' and 'Program Code:'. At the bottom of the form are two buttons: 'Submit' and 'Cancel'. A large red arrow points from the left towards the 'User Name' input field.

- You are now in control of your password
- If you have forgotten your password, click on [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 password from the email to log in using steps 1-2.

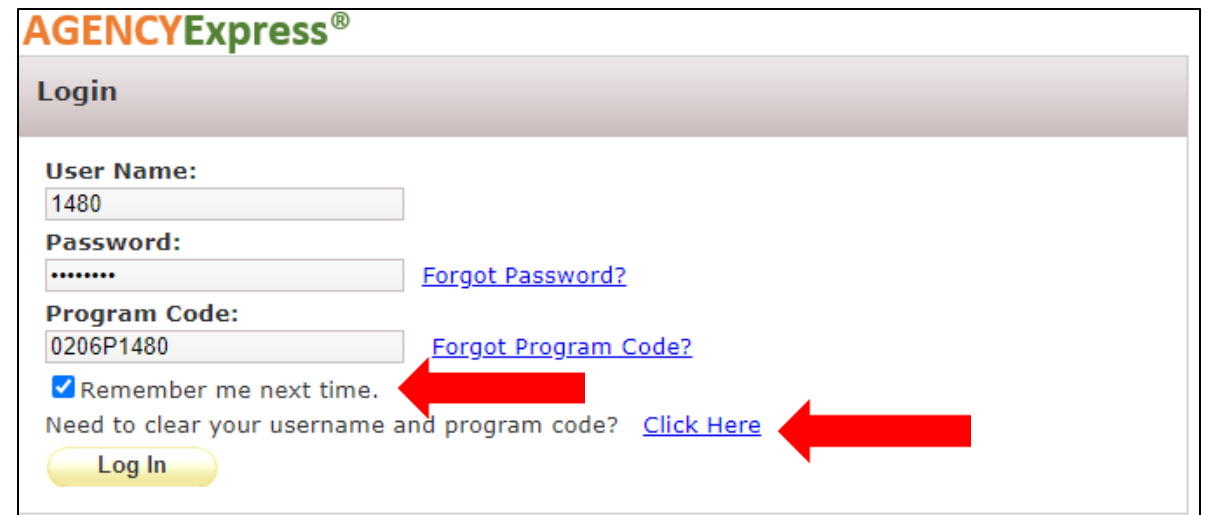
FORGOT PROGRAM CODE?

- After clicking on Forgot Program Code? A new screen will appear
- Find Northeast Iowa Food Bank
- The Program Code is always going to be **'0206'** plus the letter P plus the Agency Number (e.g., 0206P1234)

Program Code:	
<u>Food Bank Code</u>	<u>Food Bank Name</u>
0141	Weld Food Bank Colorado
0149	Mississippi Food Bank Network
0155	3Square Food Bank
0156	Gods Pantry Lexington KY
0157	Food Bank of Lincoln (NE)
0160	Southern Wisconsin Food Bank
0161	New Hampshire Food Bank
0177	Channel One Food Bank
0184	Food Bank of Santa Barbara County
0189	Vermont Food Bank
0199	Second Harvest Food Bank of San Joaquin and Stanislaus Counties
0201	Eastern Illinois Food Bank
0202	North Central Ohio
0206	Northeast Iowa Food Bank

REMEMBER ME NEXT TIME

- By clicking on the check box next to ☐ Remember me next time, you will NOT need to enter your User Name and Program code each log in time
- You will still need to enter your password
- We **DO NOT** recommend using this feature on public computers
- If you want to clear *Remember me next time*, click on the “*need to clear your username and program code?*” [Click Here](#)



AGENCYExpress®

Login

User Name:

Password:
 [Forgot Password?](#)

Program Code:
 [Forgot Program Code?](#)

☒ Remember me next time.

Need to clear your username and program code? [Click Here](#)

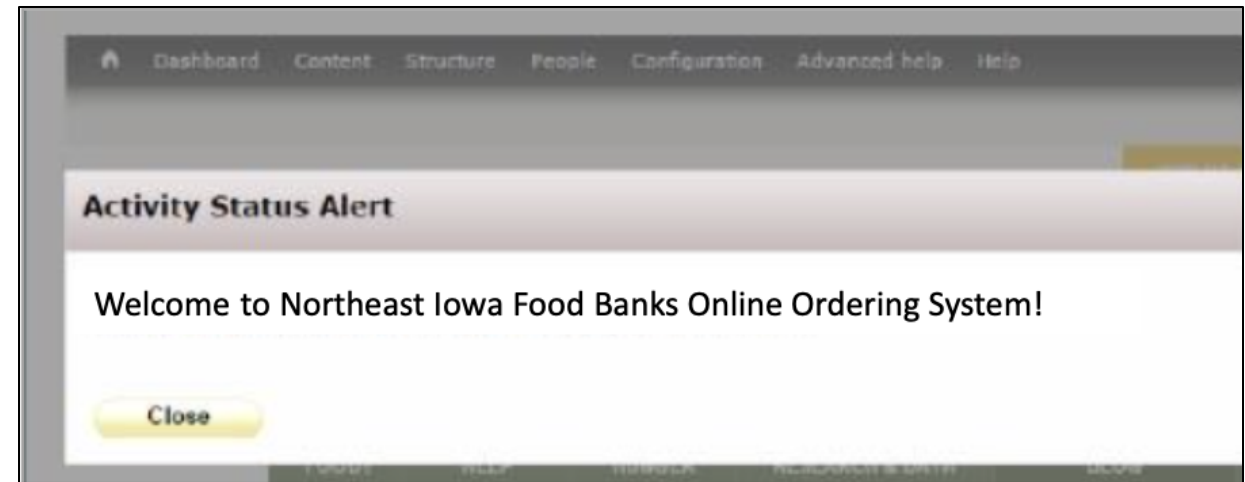
Two red arrows are overlaid on the image: one points to the 'Remember me next time.' checkbox, and the other points to the 'Click Here' link.

WELCOME PAGE



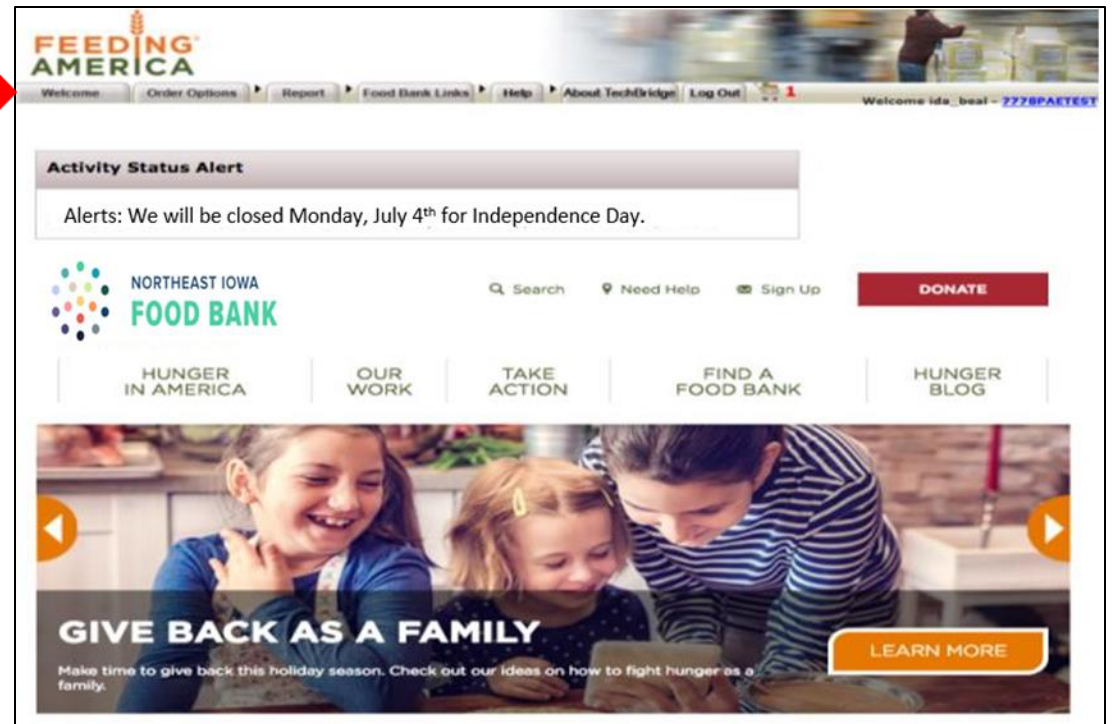
YOU ARE NOW LOGGED IN

- Once you have successfully logged in you will see “Activity Status Alert”
- The alert window is a must read, it will contain important information about closings, trainings, product, etc.
- You must *close* the window before moving on



WELCOME PAGE

- **Welcome:** To return to this Welcome screen at any time, click **Welcome** located at the top left-hand corner



EXTRA TABS ON THE WELCOME PAGE



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, formally known as monthly statistics



Food Bank Links: This section contains links that were set up the Food Bank. These could be FAQ's, documentation, surveys, and links to other applications



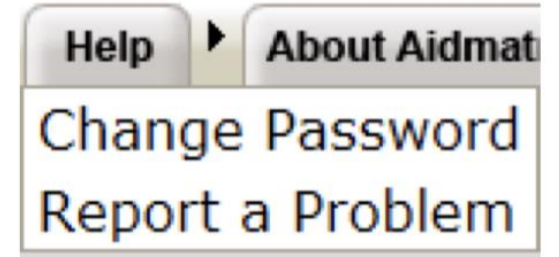
Help: This section contains the **Change Password** and **Contact Us**



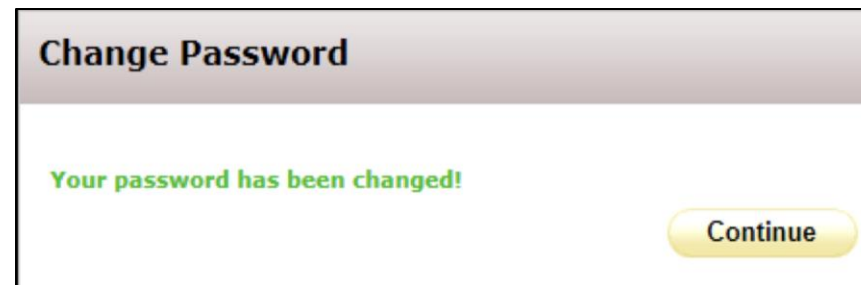
Log Out: Logs the shopper off the system

CHANGE PASSWORD

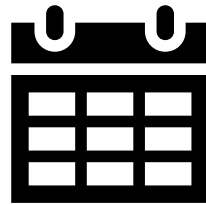
- Hover over Help and click Change Password
- This screen will appear next

A screenshot of a 'Change Password' dialog box. It has a title bar with the text 'Change Password'. Below the title bar, there are three input fields: 'Old Password:', 'New Password:', and 'Confirm New Password:'. At the bottom of the dialog box, there are two buttons: 'Change Password' and 'Cancel'.

- When you have successfully changed your password, this screen will appear

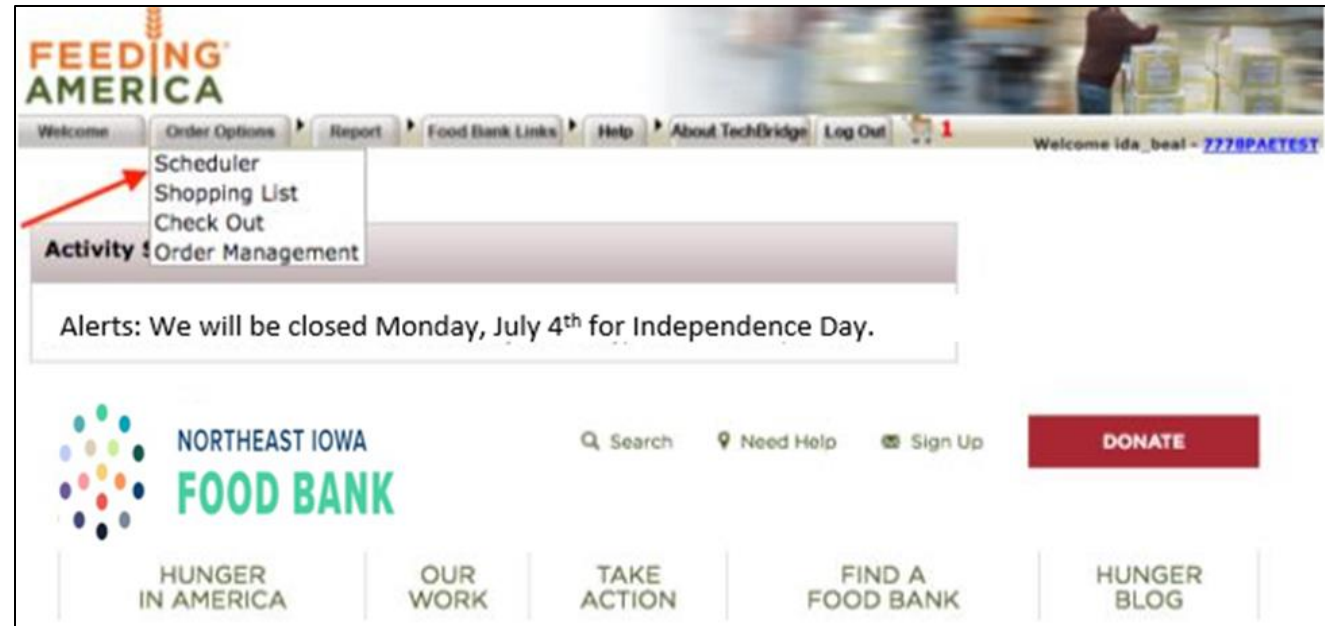


SCHEDULING APPOINTMENTS



Scheduler

- Under **Order Options** tab you will find **Scheduler**
- Once in this screen you will be able to see any available appointments



AGENCIES THAT PICKUP



1. Hover over **Order Options** and click **Scheduler**.
The **Scheduler** window will appear.



2. From the **Pickup/Delivery** dropdown, select Pickup.



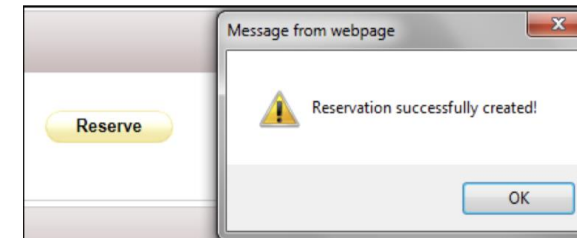
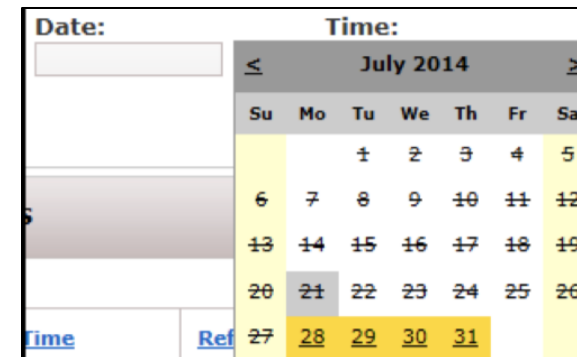
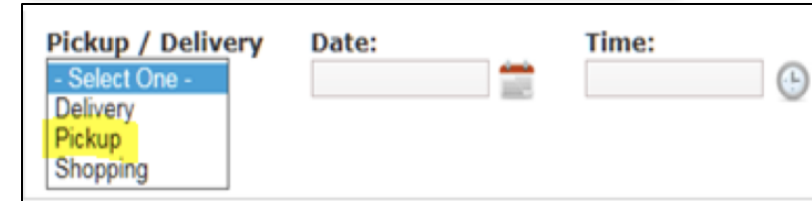
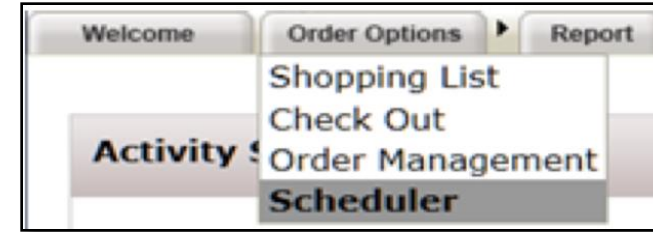
3. To select a date, click the calendar icon.



4. Then select a time. Click the clock icon.



5. Then click Reserve



AGENCIES THAT RECEIVE DELIVERIES



1. Go to **Scheduler** to view upcoming deliveries



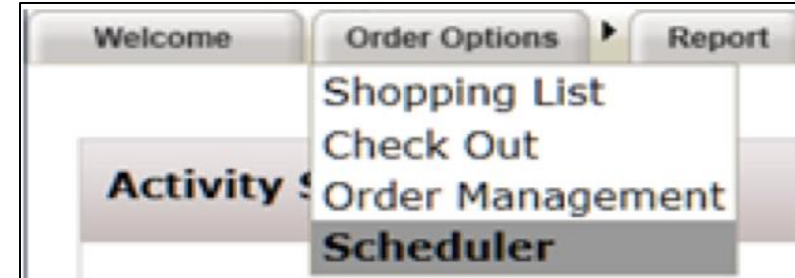
2. See under **My Appointments** to view upcoming deliveries. No action is required on your part in this window.



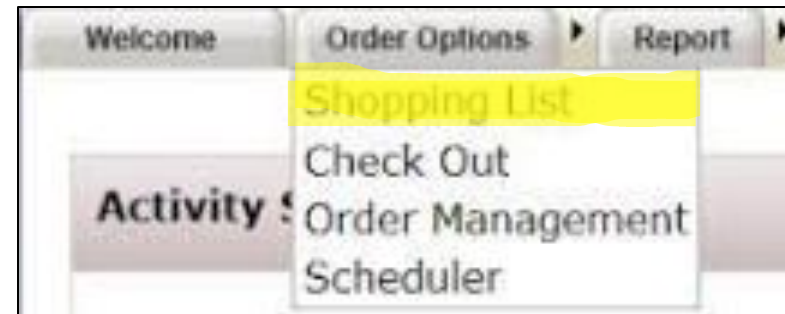
3. Then go to the **Order Options** tab and click **Shopping List**



4. Note: The delivery time displayed is set at 8 AM and does not mean you will receive your delivery at this time.



My Appointments					
	<u>Date</u>	<u>Time</u>	<u>Reference Number</u>	<u>Standing</u>	<u>Type</u>
	9/26/2022	08:00 AM		Y	Delivery
	9/19/2022	08:00 AM		Y	Delivery



<u>Date</u>	<u>Time</u>
9/21/2022	08:00 AM
9/16/2022	08:00 AM

Appointment Types & Color

Scheduler

Pickup / Delivery: Date: Time: Reserve

(* Required)

My Appointments

Date	Time	Ref	Type
9/26/2022	08:00 AM		Delivery
9/19/2022	08:00 AM		Delivery
9/12/2022	08:00 AM		Delivery

- **Gold**: Open appointments, these are available for the agency
- **Strikethrough**: these dates are NOT available
- **Green**: Standing Appointments, these are available for the agency

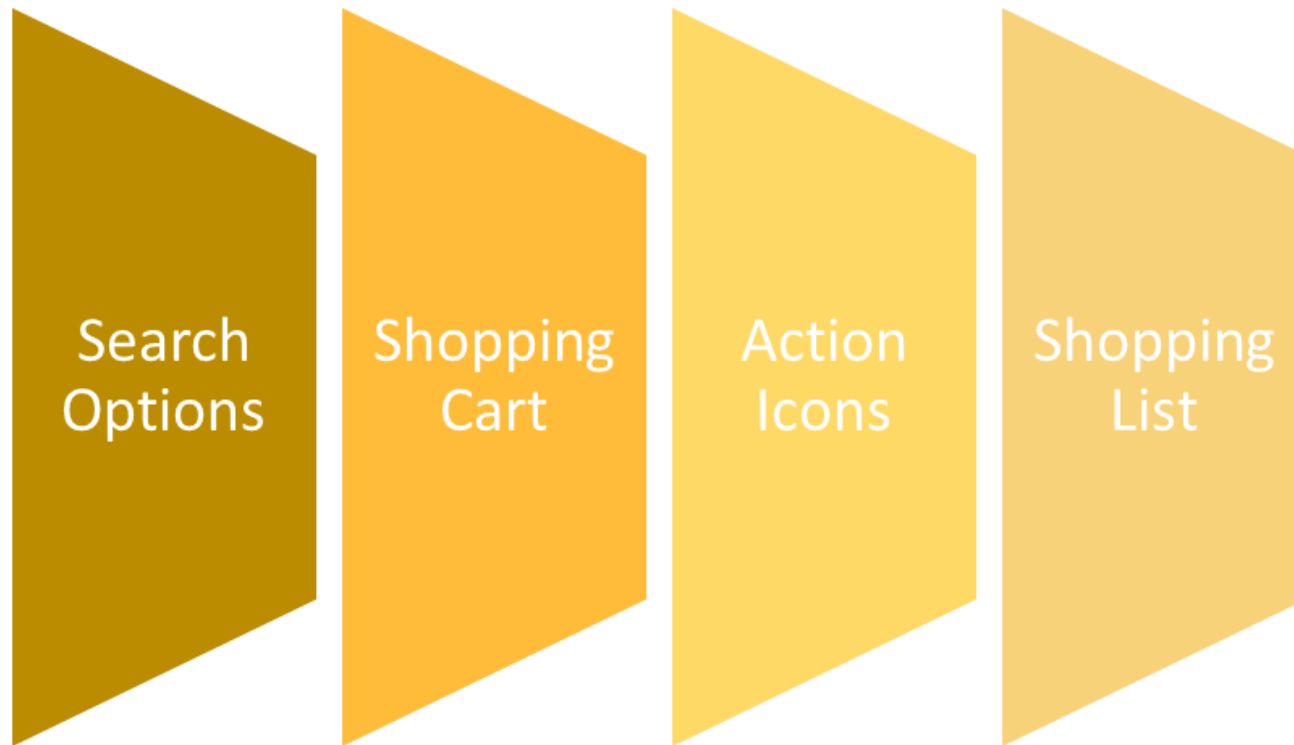
Once the appointment has been reserved, the shopper can access the shopping pages.

ADDING ITEMS TO THE CART



SELECTING ITEMS

- This is where shoppers can search for, gather information, and select items for their orders.















SHOPPING

- To browse the available inventory, hover over **Order Options** and click **Shopping List**. Here you can see all available items.

You can search for items by:

To view the entire list click on the **print icon**.

Item No. →
Description →
Category →
Handling Requirements →
Favorites →

Search				Shopping Cart																															
<table><tr><td>Item No.</td><td>Description</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td colspan="2">Category</td></tr><tr><td colspan="2">- Select a Category -</td></tr><tr><td>Feature Type</td><td>Handling Req.</td><td>Desc. Code ?</td><td>Food Source</td></tr><tr><td>-Select one-</td><td>-Select one-</td><td><input type="text"/></td><td>-Select one-</td></tr><tr><td colspan="2">Search</td><td>Show All</td><td>View Favorites</td></tr></table>				Item No.	Description	<input type="text"/>	<input type="text"/>	Category		- Select a Category -		Feature Type	Handling Req.	Desc. Code ?	Food Source	-Select one-	-Select one-	<input type="text"/>	-Select one-	Search		Show All	View Favorites	<table><tr><td>Total Line Items</td><td>Total Due</td></tr><tr><td>0</td><td>\$0.00</td></tr><tr><td>Available Credit Limit</td><td>Gross Weight</td></tr><tr><td>\$1,000.00</td><td>0</td></tr><tr><td colspan="2"><div> Print  Clear Cart  Add to Cart  Check Out</div></td></tr></table>		Total Line Items	Total Due	0	\$0.00	Available Credit Limit	Gross Weight	\$1,000.00	0	<div> Print  Clear Cart  Add to Cart  Check Out</div>	
Item No.	Description																																		
<input type="text"/>	<input type="text"/>																																		
Category																																			
- Select a Category -																																			
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-Select one-	-Select one-	<input type="text"/>	-Select one-																																
Search		Show All	View Favorites																																
Total Line Items	Total Due																																		
0	\$0.00																																		
Available Credit Limit	Gross Weight																																		
\$1,000.00	0																																		
<div> Print  Clear Cart  Add to Cart  Check Out</div>																																			

SEARCH OPTIONS



- This section will show all products that are available to the shopper
- Can be sorted by clicking on the column headers or by selecting an item's value from the drop-down list
- You can limit items that are displayed by choosing:
 - Category
 - Handling Requirements
 - Item No
 - Description-Product Description
 - Category-Product category examples




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

COLUMN HEADERS

- On each line the shopper will see the following headers:





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	Gross Weight	Favorite
<input type="text"/>	82	2000	ASSORTED CAN GOODS Varies	CS	6.65	0.00	Varies		35	
<input type="text"/>	60	PR169	Baked Beans Boil n Bag 5/4 lb bags	CS	13.84	0.00	5/4 lb bags		21	<input type="checkbox"/>
<input type="text"/>	52	05CEB05	Cereal, Crispy Rice	CASE	2.85	0.00	Best by	New Item	15	

ENTER QUANTITIES

- The shopper enters the amount they need per item in the Order Quantity field as shown
- You can request up to the amount in the Available QTY field
- For assorted product please round up by 5-10 lbs. to ensure you receive minimum requested
- Click Add to Cart icon 
 - You must do this every time before going to the next page of the shopping list

Shopping List - Sort By -									
Tip: Please Add to Cart requested items before leaving page									
Order Qty	Available Qty.	Item No.	Description	Unit Price	VAP Fee	Pack Size	Feature Type	Gross Weight	Favorite
<input type="text"/>	50	01BRE140	*Breadsticks 12/11 oz	2.68	0.00	12/11 oz	New Item	10	<input checked="" type="checkbox"/>
<input type="text"/>	42	05CER05	Cereal, Crispy Rice 70/.875 oz	2.85	0.00	Best by 9/04/10	New Item	15	<input checked="" type="checkbox"/>
<input type="text"/>	25	01BBQ1	Chips, Country BBQ 60/1.375	0	0.00		Free Item	7	<input type="checkbox"/>
<input type="text"/>	30	05CON10	Connies Sugar Beets	2.85	0.00			15	<input type="checkbox"/>

FAVORITES

- You can select <**View Favorite**> button to see only items that you have selected as a favorite. This is indicated by a  in the favorite column
- To create a favorite, click on the square 
- To undo a favorite, click on the star  and it will return to a square 

Welcome | Order Options | Report | Food Bank Links | Help | About TechBridge | Log Out | 1 | Welcome ida_beal - 7778PAETEST

Search

Item No. Description

Category

Feature Type Handling Req. Desc. Code ? Food Source

Search Show All View Favorites

Shopping Cart

Total Line Items: 1
Total Due: \$0.00








Available Credit Limit: \$756.80
Gross Weight: 60

Print Clear Cart Add to Cart Check Out

Shopping List

- Sort By -

Tip: Please Add to Cart requested items before leaving page

Order Qty	Available Qty	Item No.	Description	UDM	Unit Price	VAP Fee	Pack Size	Feature Type	Gross Weight	Favorite
<input type="text"/>	1	30347	Apples Chopped	CASE	1.90	0.00	24 / 9.6 oz bags		19	
<input type="text"/>	40	46125	Baby Food Pear Yogurt Blend	CASE	0.00	0.00	24 / 3.5 oz cups		5	
<input type="text"/>	214	17520	Cookies Heads or Tails Oreos	CASE	0.80	0.00	12 / 10.1 oz packs		8	<input type="checkbox"/>
<input type="text"/>	446	46536	Cooking Oil	CASE	2.70	0.00	9 / 48 oz bottles		27	
<input type="text"/>	422	45767	Corn Meal Yellow	CASE	1.80	0.00	12 / 24 oz packs		18	
<input type="text"/>	800	15391	Crackers Wheat Thins	CASE	0.70	0.00	6 / 20 oz packs		7	
<input type="text"/>	999	46234	Creamer Assorted Flavor Single Serve Size Powder	CASE	0.90	0.00	1 / 1000 ct case		9	
<input type="text"/>	594	10339	Diapers Size 4	CASE	0.80	0.00	104 ct		8	<input type="checkbox"/>
<input type="text"/>	25	68103	Elbow Macaroni Bulk Pasta	UNIT	0.00	0.00	1 / 1000 lb tote		1000	<input type="checkbox"/>
<input type="text"/>	447	15816	Evaporated Milk 24 / 12 OZ	CASE	2.20	0.00	Case		22	
<input type="text"/>	23	10939	Frozen Entree Vegetable Lasagna	CASE	1.50	0.00	8 / 30 oz packs		15	<input type="checkbox"/>

SUCCESS OR ERROR ITEM

The screenshot displays a web application interface for a shopping cart. It includes a search section with fields for Item No., Description, Category, Feature Type, and Handling Req. Desc. Code, along with buttons for Search, Show All, and View Favorites. A shopping list table is visible below the search section. A modal message box is overlaid on the cart, displaying a success message for item 2000 and an error message for item 018BQ1.

Search

Item No. Description
Category
Feature Type Handling Req. Desc. Code
Search Show All View Favorites

Shopping List

Tip: Please Add to Cart requested items before

Order Qty	Available Qty	Item No.	Description	Unit Price	VAP Fee	Pack Size	Feature Type	Gross Weight	Favorite
	82	2000	ASSORTED CAN GOODS Varies	6.65	0.00	Varies		35	<input type="checkbox"/>
	63	PR169	Baked Beans Boil n Bag 5/4 lb bags	13.84	0.00	5/4 lb bags		21	<input type="checkbox"/>


Shopping Cart

Total Line Items: 1
Total Due: \$6.65
Available Credit Limit: \$43.35
Gross Weight: 35

Message from webpage

Success: Item 2000 added to the cart.
Error: Item 018BQ1 exceeds available quantity.

OK

- You must see a message that shows “Success”, this indicates items are added to the cart
- If you see a message that shows “Error” this indicates this product is no longer available
- If “Error” appears, correct items and click on **Update Cart** icon 



DRAFT STATUS

- 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 items in the cart, but is not submitted to the Food Bank

ACTION ICONS

- The action icons are used for the following:



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**.



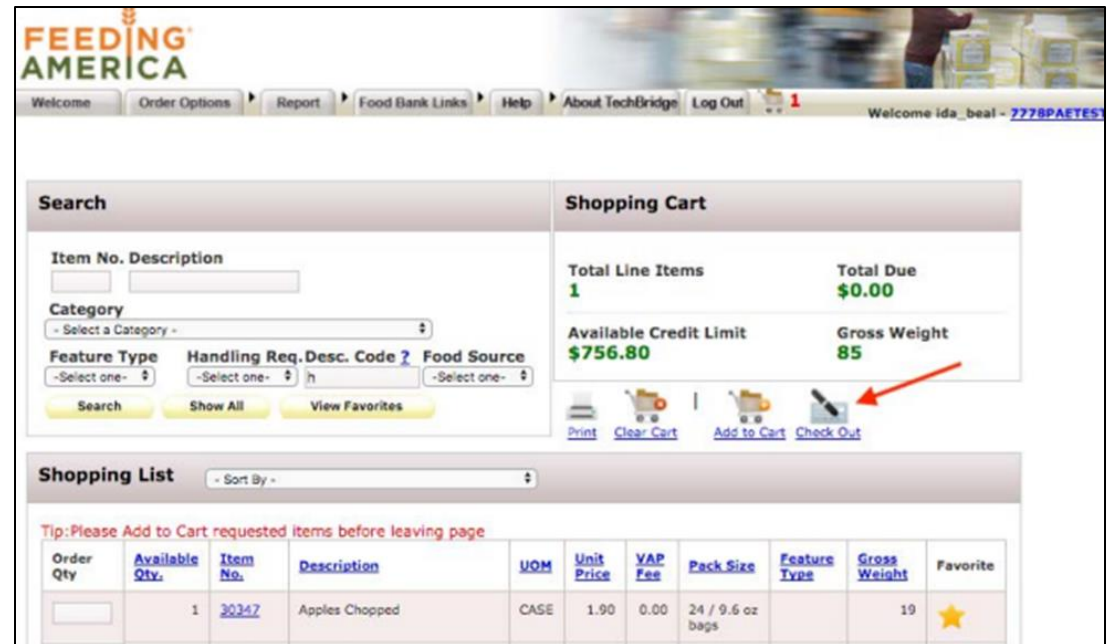
Check Out – Sends the shopper to the Check-Out Screen.

SUBMITTING ORDERS



SHOPPING CART SCREEN

- 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
- You must update **Pickup** and **Delivery** with the date & time again before submitting cart
- Click on **Check Out** from the Shopping List or from the menu bar on the **Order Options** tab



FEEDING AMERICA

Welcome | Order Options | Report | Food Bank Links | Help | About TechBridge | Log Out | 1 | Welcome ida_beal - 7778PAETEST

Search

Item No. Description

Category

Feature Type

Handling Req. Desc. Code ?

Food Source

Search

Show All

View Favorites

Shopping Cart

Total Line Items
1

Total Due
\$0.00

Available Credit Limit
\$756.80

Gross Weight
85

Print

Clear Cart

Add to Cart








Check Out

Shopping List | - Sort By -

Tip: Please Add to Cart requested items before leaving page

Order Qty	Available Qty.	Item No.	Description	UOM	Unit Price	VAP Fee	Pack Size	Feature Type	Gross Weight	Favorite
	1	30347	Apples Chopped	CASE	1.90	0.00	24 / 9.6 oz bags		19	★

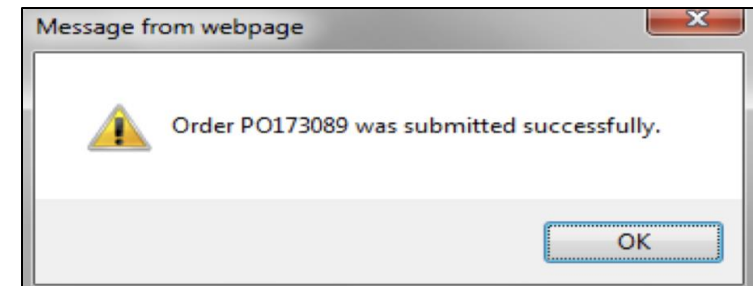
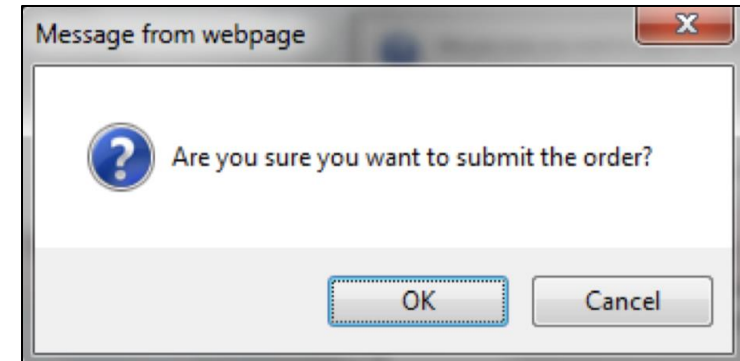
COMMENT BOX

My Appointment		Shopping Cart Summary	
Reference Number: PO4308995		Total Due	Total Line Items
Pickup/Delivery Date: <input type="text"/> Time: <input type="text"/>		\$0.00	5
Delivery <input type="button" value="v"/>		Gross Weight	Total Cube Size
 		459 lbs	16.36476 Cu. Ft.
Comment (Please limit comment to 150 characters, no special characters (&, <, >, *, "). Anything over 150 characters will be cut off when PO is updated or submitted.) <div><div></div></div>			
Shopping Cart			
<div> Print  Clear Cart  Continue Shopping  Update Cart  Submit Cart</div>			

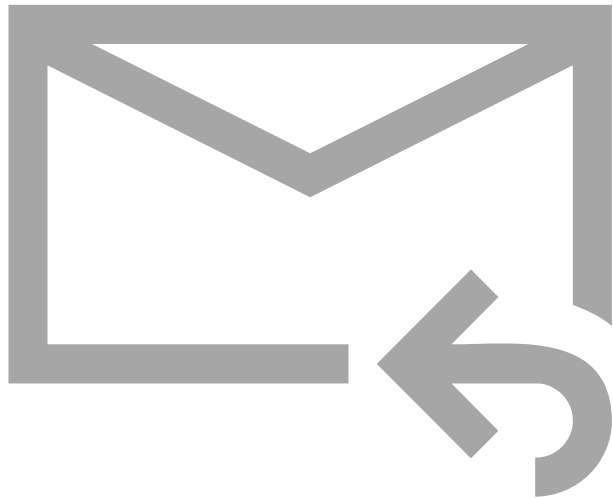
- Just as in Primarius, add your request for any additional perishable product or instructions for the driver in the Comment box
- Add your comment just before you submit
- The comment will need to be re-entered if you make adjustments to the cart before you submit

SUBMIT CART

- **VERY IMPORTANT!** You must submit the cart.
- After you click Submit Cart, you will be asked if you are sure you want to submit the order, please click on the OK button to confirm otherwise an order will not be submitted to the Food Bank
- You will then see a message stating that your order was submitted successfully.
- You will then be re-directed to Order Management page, where you can review, edit, and print your orders.
- It can take up to 15 mins to be acknowledged, so please be patient!



CONFIRMATION EMAIL



- An email of your accepted order will be sent to the email address of the person that placed this order. (It takes about 15 minutes for the email to be sent.)
- Be sure to open the attached order confirmation to know what items were released to your agency and what to expect at time of pick-up or delivery
- This attachment contains your Agency Order (AO) Number
- Please save for your files and forward to anyone in your organization that needs to be aware of this order


ORDER MANAGEMENT



ORDER MANAGEMENT

- You can search for orders by date range, or reference number, and you can check the status of your order.
- You can view a copy of your order by clicking on the printer icon.
- The summary box tells you the total number of orders you have placed through Agency Express as well as the total weight and the cost of those orders.

Summary	
Total Orders:	Total Weight.
14	1991 lbs.
Total Amount:	
\$485.35	



STATUS DEFINITIONS

Draft Order has been started but not submitted.

New Order means that you have successfully created a new order.

Sent to Food Bank means the order has been submitted to the food bank.

Acknowledged means the order has been received by the food bank and is now available to be edited.

Editing means the order has been opened for editing and must be submitted before it will be processed.

Cancelled means the order was cancelled by the shopper.

Released means the order is being fulfilled and can no longer be changed.





Invoiced means the order has been delivered or picked-up.

Rejected means the order has been rejected and the NEIFB will contact you.

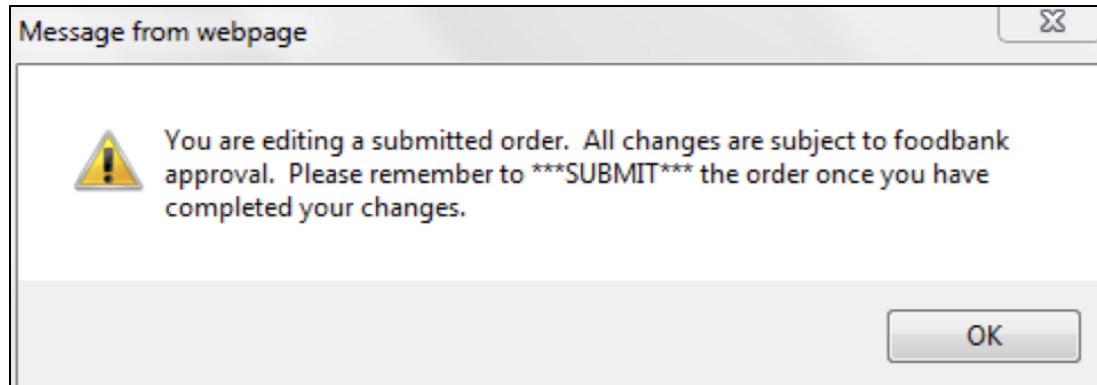
Editing an Order with Caution



- Using the Reference Number, select the order you want to review or edit
- Open orders will show three icons:
 - The print icon is available for any order placed. Use it to print or view older invoices
 - The pencil icon will open your order and allow you to change quantities. With each edit, a new email will be sent
 - The Red X will can cancel entire order

Order Management		
<div>1 2</div>		
	<u>Reference Number</u>	<u>Order Status</u>
	PO174717	I
  	PO174716	I

EDITING OR ADDING TO ORDER



- Orders can be re-opened, after they have been submitted. Status must be "**Acknowledged**"
- To add items or remove items you must wait 15 minutes after submitting your order before the pencil icon will appear
- **You must update and resubmit the cart again**
- Cancelling an order can be done immediately by selecting

EDITING OR CANCELLING AN ORDER

- When editing an existing order, this is what you will see in your shopping cart.
- Once you have made the edits, you must click Submit Cart to update your order.
- If you do not submit the cart your order will not be sent to the Food Bank.
- If you choose to cancel your order, then this window will appear, and you must choose Cancelled by Agency

Shopping Cart

Total Line Items	Total Due
1	\$0.00
<hr/>	
Available Credit Limit	Gross Weight
\$5,263.37	5
You are adding to Order Number PO173088.	

Cancel Order Number:PO181924

Please choose a cancel reason code below and click submit.

Cancelled by Agency

SubmitCancel

REPORTS (STATISTICS)

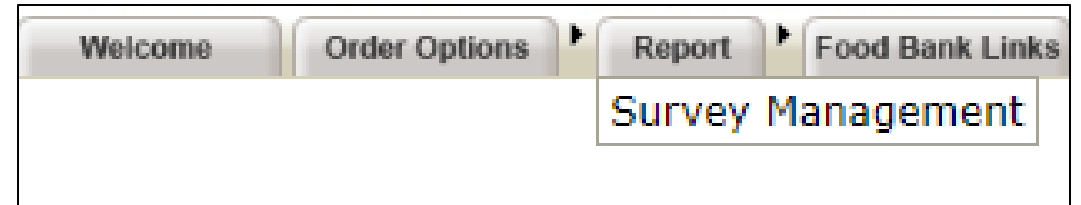


REPORTS (STATISTICS)

1. Hover over **Report** and click **Survey Management**

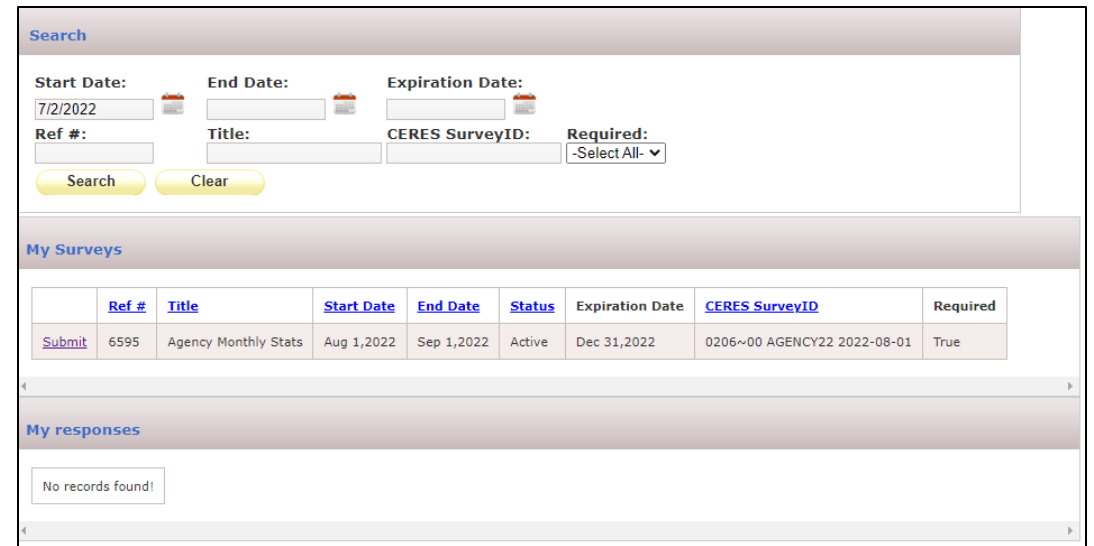
2. This will redirect you to My Surveys and Responses page

3. Select the correct date you are reporting for and fill out the monthly questionnaires



Welcome Order Options Report Food Bank Links

Survey Management



Search

Start Date: 7/2/2022 End Date: Expiration Date:

Ref #: Title: CERES SurveyID: Required: -Select All-

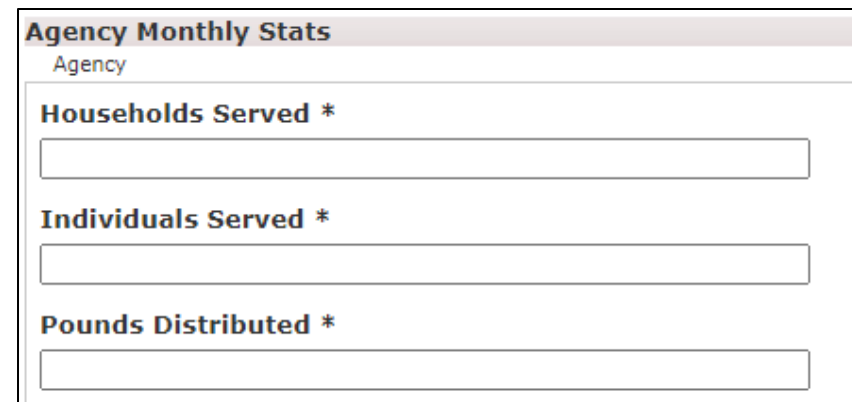
Search Clear

My Surveys

	Ref #	Title	Start Date	End Date	Status	Expiration Date	CERES SurveyID	Required
Submit	6595	Agency Monthly Stats	Aug 1, 2022	Sep 1, 2022	Active	Dec 31, 2022	0206~00 AGENCY22 2022-08-01	True

My responses

No records found!



Agency Monthly Stats

Agency

Households Served *

Individuals Served *

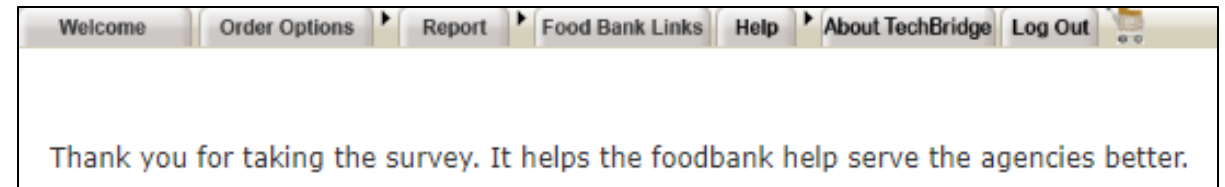
Pounds Distributed *

COMPLETED REPORTS (STATISTICS)

1. Once Survey has been completed you must Submit your response.

2. A new window will appear with "Thank You!"

3. To view your **Reports** go back **Survey Management** and view under **My Responses**



My responses						
	Ref #	Title	Start Date	End Date	My Response #	Submitted to Ceres
View Your Responses	6595	Agency Monthly Stats	8/1/2022 12:00:00 AM	9/1/2022 12:00:00 AM	1	Successful

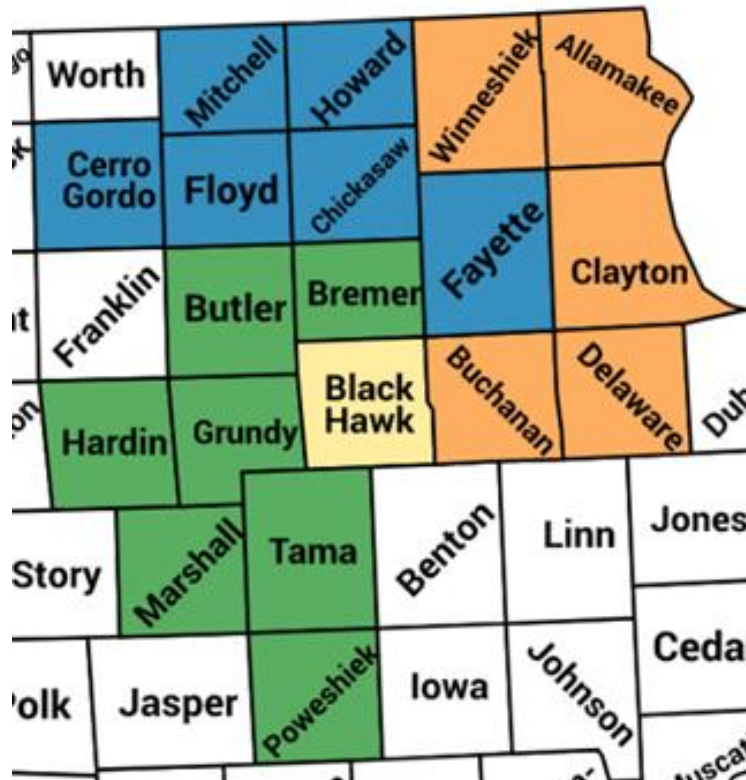
REPORTS ARE DUE

- Reports are to be received by the Northeast Iowa Food Bank **no later than the 15th of following month**
- Even if you did not serve anyone in the month, please fill in zeroes on the monthly report so we know you are still active
- If you miss the deadline your account will be automatically suspended
- Monthly reports will allow the Northeast Iowa Food Bank to be more responsive to changing needs in communities as we identify seasonal trends and economic changes impacting agencies.

QUESTIONS?



FOR FURTHER ASSISTANCE CALL YOUR REGIONAL PARTNER CAPACITY REPRESENTATIVE



Region 1: Black Hawk, Cerro Gordo, Chickasaw, Fayette, Floyd, Howard, Mitchell

Region 2: Allamakee, Black Hawk, Buchanan, Clayton, Delaware, Winneshiek

Region 3: Bremer, Butler, Grundy, Hardin, Marshall, Poweshiek, Tama

Region 1: Dan Hofer, dhofer@neifb.org,
319-235-0507 ext. 127

Region 2: Kelsey Mumm, kmumm@neifb.org,
319-235-0507 ext. 144

Region 3: Tia Gutierrez, tgutierrez@neifb.org,
319-235-0507 ext. 128