AGENCY EXPRESS 3.0

A Guide to Online Ordering



ACCESSING AGENCY **EXPRESS**



- Open a web browser, only Internet Explorer 6.0 or higher, Google Chrome, or Firefox 2.x or higher will open Agency Express
- Go to <u>www.CareAndShare.org</u> and click the botton at the bottom of the page, which will take you to the shopping list, then click **Agency Express Online Ordering**



• Or, go straight to: <u>agencyexpress3.org</u>

LOG IN TO AGENCY EXPRESS



Your login information consists of three fields:

User Name: Each Agency Shopper has a specific User Name. The first initial of your	Login			
name and your last name.	User Name:			
Password: The default Password is change12. Once you change the Password, we do not know what it is – although it can be re-set if necessary. Program Code: The Program Code is always going to be '0019' plus the letter p plus the Agency Number (e.g., 0019p314FP1)	Password: Forgot Password? Program Code: Forgot Program Code? Remember me next time. Remember me next time. Need to clear your username and program code? Click Here Log In Log In			

• Check **Remember me next time** to save your login information in the web browser.

If you forgot your password, click Forgot Password and fill out the subsequent information to have your password emailed to you. If do not receive an e-mail with your new password, then Care and Share does not have your correct e-mail address. If this happens, please contact Paul Boyd, (719) 434-4684 or Paul@careandshare.org.

Anytime your e-mail address changes, you can notify us by using the Help tab and selecting Report a Problem. Under subject, select Change E-mail Address and in the Comment box enter your new email address. This will be sent to Care and Share to be updated.

YOU ARE NOW LOGGED ON!



Activity Status /	Alert				
Welcome to Age	Activity Sta	atus Alert	 		
CARE AND SHA	Close	the gap between h	dance.	Sear	ch

CHANGE PASSWORD



- Hover over Help and click Change Password ightarrow



• This screen will appear next

Change Password	
Old Password:	
New Password:	
Confirm New Password:	
Change Password	Cancel

• When you have successfully changed your password this screen will appear

Change Password	
Your password has been changed!	Continue

SCHEDULING AN **APPOINTMENT**:

Agencies that pick up from our warehouse

- 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.**

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	up / Delive	ery	Da	ate:			1		Pickup / Deliv - Select One - V	ery Date
Picku Shop	ery Jp						100		My Appoint	nents
Date:	:		Т	ime	e:				Date	Time
		<		Ju	ly 20	14		≥	7/31/2014	02:00 P
		Su	Мо	Tu t	We 2	Th Ə	Fr 4	Sa 5	7/31/2014	11:30 A
		6	7	8	9	10	11	12	7/31/2014	10:30 A
		13 20	14 21	15 22	16 23	17 24	18 25	19 26	7/31/2014	10:00 A
lime	Ref		<u>21</u>	<u>22</u>	<u>30</u>		25	20	7/30/2014	01:00 P
Time:									7/30/2014	08:00 A
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		0	08: 09:	30 00	AM AM	0	10: 11:	30 / 00 /	M 001:00 PM M 001:30 PM M 002:00 PM M 002:30 PM	
Rese	erve		Messa	ige f			-	succe	sfully created!	

Scheduler				
Pickup / Delivery - Select One -	Date:	Time:	(B) Re	serve
My Appointmen	ts			
Date	Time	Reference Number	Standing	Туре
7/31/2014	02:00 PM	PO173084	N	Pickup
7/31/2014	11:30 AM	P0173088	N	Pickup
7/31/2014	10:30 AM	P0173078	N	Pickup
7/31/2014	10:00 AM	P0173085	N	Pickup
7/30/2014	01:00 PM	P0173048	N	Pickup
7/30/2014	08:00 AM	P0173066	N	Pickup
7/29/2014	09:00 AM	PO173089	N	Pickup





SCHEDULING AN **APPOINTMENT**: Agencies that receive deliveries

Information Only. No action is required on your part in this window.

Hover over **Order Options** and click **Scheduler**. The Scheduler window will appear. Your scheduled delivery date and time will be displayed in green under My Appointments.

Welcome	Order Options	Report		
	Shopping List	t		
	Check Out			
Activity 9	Order Manag	ement		
	Scheduler			
Scheduler				
Pickup / Delive	ery Date:	Time:		
Delivery V		1000	_ 🕒 🔄	Reserve
	_			
My Appointn	nents			
Date	Time	Reference Number	<u>Standing</u>	Туре

Note: The delivery time displayed is an <u>estimate</u> only and may change due to weather conditions and other unforeseen problems.

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.	Search	Shopping Cart	
nem no.	Item No. Description		
Description		Total Line Items 0	Total Due \$0.00
Category>	Category - Select a Category - Feature Type Handling Req. Desc. Code ? Food Source	Available Credit Limit \$1,000.00	Gross Weight O
Handling Requirements	-Select one- ▼ -Select one- ▼ -Select one- ▼ -Select one- ▼	Print Clear Cart Add to Cart Ch	heck Out
Favorites			







15.70

0.00

*You can order multiple items per page and then click on **Add to Cart** before moving to the next page.

630 80002

BEANS PINTO 24/1LB BAG

24/1LB BAG

If you do not click Add to Cart before moving to the next page, the items will not be added to your order.



Each time you click Add to Cart you will receive a confirmation message. Click OK

boxes.



When you are done adding items, click on the **Check Out** button.

CHECKING OUT

My Appointment





Reference Number: PO922854 Pickup/Delivery Date: Time: Pickup 2. Click on the **calendar icon** limit comment to 150 characters, no special Please Delivery nything over 150 characters will be cut off when PO is Pickup ubmitted.) 3. Choose the previously Date: scheduled appointment. Yellow - Pickup Green - Delivery Time: 4. Click on the clock icon



5. Select the appointment time.

<u><</u>		≥				
Su	Мо	Tu	We	Th	Fr	Sa
		÷	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	<u>29</u>	30	31		





CHECKOUT AND EDITING AN ORDER

will cause software

problems.

If needed, make adjustments to the Shopping Cart quantity and then click 0 0 update Cart (this Submit Cart Print Continue Shopping Update Cart Clear Cart Λ Item Unit Packaging Pack Handling VAP window will appear) or $\overline{}$ Gross Order Otv Special Description Ouantity UOM Weight Fee No. Price Type Size 7 Requirements you can... 00201 BREAD 4 LB 4 0.00 Bag Drv 0.00 **3** ASSORTED Order by Available Qty. [6871] pounds X Message from webpage 54924 BTTRMLK 6 CASE 54 1.71 Bottle 6/12 Drv 0.00 🕴 6 RANCH Plastic OZ BTL DRESSING 6/12 Update was successful. Please remember to ***SUBMIT CART*** for the Available Qty. OZ BTL order to be processed. [144] CASE 6 54926 BANANA THIN 1 1.14 Bag 8/8.75 Drv 0.00 01 COOKIES ΟZ OK Available Otv. 8/8.75 OZ BAG BAG [2017] Bag CASE 15.70 80002 BEANS PINTO 2 54 Dry d.00 2 24/1LB BAG 24/1LB BAG Available Qty. [628] **Comments Box:** For comments relating to Submit Cart your order. Do NOT use Continue Shopping or... special characters they





x

VERY IMPORTANT

The order is **NOT** sent to Care and Share Food Bank and items are **NOT** reserved until you have **submitted your shopping 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.

You will then see a message stating that your order was submitted successfully.

OK Cancel
Message from webpage
Order P0173089 was submitted successfully.
OK

Are you sure you want to submit the order?

Message from webpage

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 minutes for the order to be acknowledged, so be patient!

ORDER MANAGEMENT



You can search for orders by date range, or reference number, and you can check the status of your order.

	_	•	Search						Summary	
Welcome	Order Options Report	[From Date: To	Date: Refere	ence Number:			Tota 14	l Orders: Total Weight. 1991 lbs.	
Trencome	Shopping List Check Out		Search Show All Track order					Total Amount: \$485.35		
Search	Order Management Scheduler	•	Order Management	ı L	status here.					
				Reference Number	¥ <u>Status</u>	Gross Weight	Tota	l Price	Pickup/Delivery Date	
	an view a copy of		⊒ 0	PO173096	New Order	60.00	ſ	\$22.15	07/31/2014	
	order by clicking the printer icon.		= 8 🥢	PO173088	Acknowledged	5.00		total nu	mmary box tells you the umber of orders you have	
L				PO173085	Rejected	0.00		•	l through Agency Express I as the total weight and	
			_	P0173084	Released	66.00		C	ost for those orders.	

Status Definitions:

- 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 <u>must</u> be submitted before it will 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 Care and Share will contact you.

EDITING OR ADDING TO AN ORDER



Orders in AgencyExpress can be re-opened, after they have been submitted, to add items, remove items, or cancel an order. Go to the **Order Options** tab and select **Order Management**. To change your existing web order, the status must be **Acknowledged**. Please be patient, it may take up to 15 minutes for order status to change to Acknowledged. You will also receive an email acknowledging your order.

Click to cancel						
the order.		Reference Number	<u>Status</u>	Gross Weight	Total Price	Pickup/Delivery Date
Click to view a copy of your	= 8 /	PO173088	Acknowledged	5.00	\$0.00	07/31/2014
order.						

To **edit** to your existing web order click on 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.

Message fro	om webpage
<u>^</u>	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.
	ОК

Remember to update and submit the cart!

VERY IMPORTANT: If you reopen your order, you <u>must</u> click **Submit** Cart again. If you made no changes click **Cancel Edit**. If you do not resubmit the cart, the order will remain in the Edit status and will not be processed.

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 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 **Cancelling order**.

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

Cancel Order Number:P0173088		
Please choose a cancel reason code below and click submit.		
Cancelling order.		
7		
Submit Cancel		
Called Sales		

YOU'RE FINISHED!



• Click **Log Out** when you are done.



who hosts Agency Express 3.

If you have any further questions please contact Paul Boyd, (719) 434-4684 or Paul@careandshare.org

An Agency Express training video is also available on YouTube: http://youtu.be/IU2MEV_5ASI

Thank you for helping us bridge the gap between hunger and abundance