GETTING TO AGENCY EXPRESS

• Open a web browser, only Internet Explorer 6.0 or higher, Google Chrome, Firefox 2.x or higher will open Agency Express

• Go to www.CareAndShare.org and click the button at the top right of the page, which will take you into the agency portal. Click Agency Express, and then Agency Express Online Ordering

• Or, go straight to: agencyexpress3.org

• A link to the AE online ordering video tutorial is located on the Agency Express page.
Your login information consists of three fields:

**User Name:** Each Agency Shopper has a specific User Name. The first initial of your name and your last 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 needed.

**Program Code:** The Program Code is always going to be ‘0019’ plus the letter p plus the Agency Number (e.g., 0019p314FP1)

- Check “Remember me next time” to save your login information in the web browser.
- **If you forgot your password,** click **Forgot Password?** and fill in your user information and your password will be emailed to you.
- **If your e-mail address changes,** please make sure to notify us by using the Help tab to select “Report A Problem”. Under subject select ‘E-mail address’, enter your new e-mail address in the Comment box.
YOU ARE NOW LOGGED ON!
• Hover over Help and click Change Password
• This screen will appear next

When you have successfully changed your password this screen will appear
SCHEDULING AN APPOINTMENT:
Agencies that pick up from our warehouse

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.
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.

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

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

To view the entire list click on the print icon.
SHOPPING: Adding items to the cart

To add to your shopping cart, enter the quantity of the product you would like to order.*

Then click on the Add To Cart button.

You can set a Favorite item by checking these boxes.

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

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.

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

1. Confirm your order type **Delivery** or **Pickup**

2. Click on the **calendar icon**

3. Choose the previously scheduled appointment.
   - Yellow - Pickup
   - Green - Delivery

4. Click on the **clock icon**

5. Select the appointment time.
CHECKOUT AND EDITING AN ORDER

If needed, make adjustments to the quantity and then click update Cart (this window will appear) or you can...

Comments Box:
For comments relating to your order. Do NOT use special characters they will cause software problems.

Continue Shopping or… Submit Cart
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.

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

### Order Management

You can view a copy of your order by clicking on the printer icon.

**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.
- **Draft** means that the order has been started, but not submitted to the Food Bank.
- **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 Care and Share will contact you.

The summary box tells you the total number of orders you have placed through Agency Express as well as the total weight and cost for those orders.
**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.

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.

**Remember to update and submit the cart!**

**VERY IMPORTANT:** If you reopen your order, you **must** 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.
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 **Cancelling order**.
YOU’RE FINISHED!

- Click Log Out when you are done.

You will be automatically redirected to the homepage of TechBridge who hosts Agency Express.

If you have any further questions please contact
Paul Boyd, (719) 434-4684 or
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Thank you for helping us serve our neighbors in need because well-fed communities are better for us all.