AGENCY EXPRESS

A Guide to Online Ordering

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 **Agency Portal** 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.
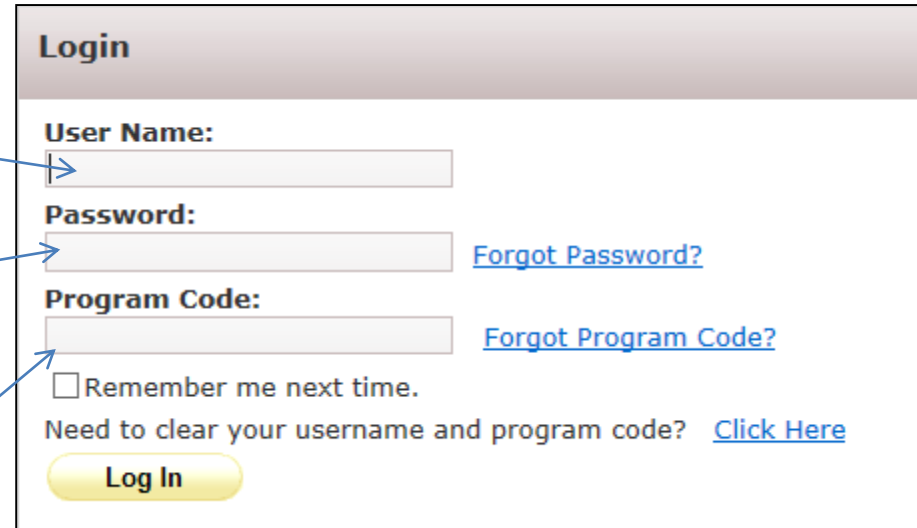
LOG IN TO AGENCY EXPRESS

Your login information consists of three fields:

User Name: Each Agency Shopper has a specific User Name. The first initial of your 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., 0019p**314FP1**)

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

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 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.
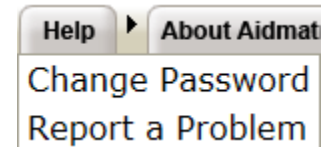
YOU ARE NOW LOGGED ON!

CHANGE PASSWORD

- Hover over **Help** and click **Change Password** →

- This screen will appear next

Help	▶	About Aidmat

Change Password
Report a Problem

Change Password

Old Password: [   ]

New Password: [   ]

Confirm New Password: [   ]

Change Password   **Cancel**

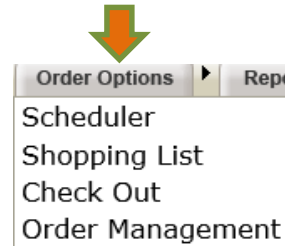- When you have successfully changed your password this screen will appear

Change Password

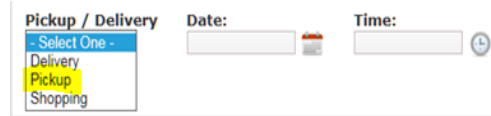Your password has been changed!

Continue

SCHEDULING AN APPOINTMENT:
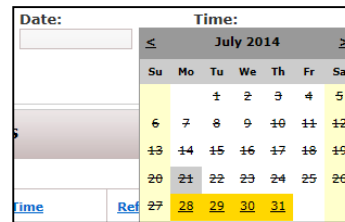
Agencies that pick up from our warehouse

1. Hover over **Order Options** and click **Scheduler.**
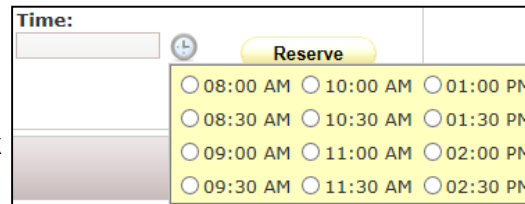   The Scheduler window will appear.
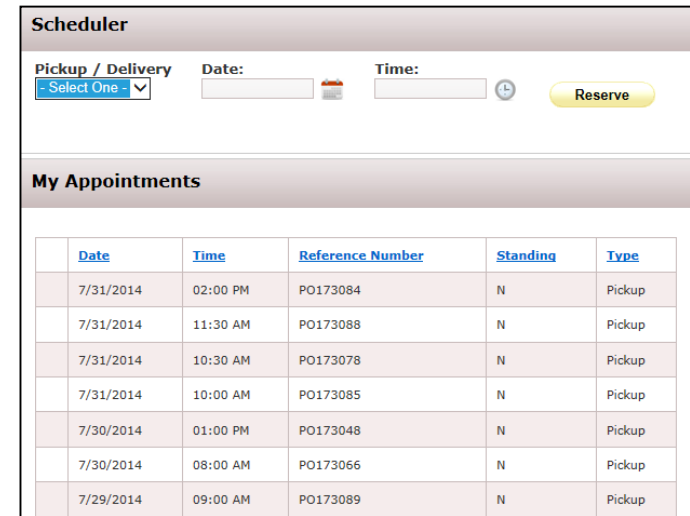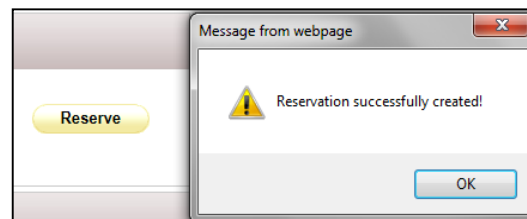
2. From the Pickup/Delivery dropdown, select **Pickup.**

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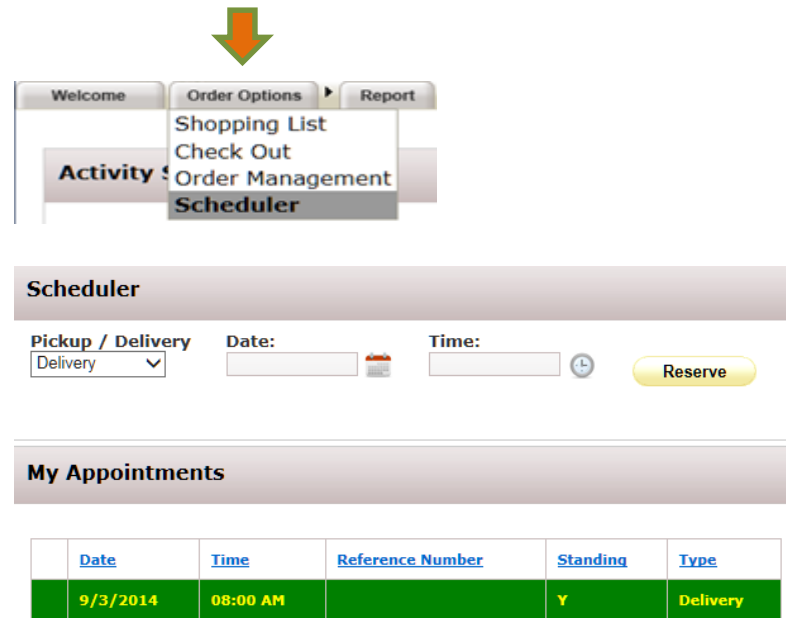
Information Only.
No action is required on your part in this window.

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 <u>estimate</u> only and may change due to weather conditions and other unforeseen problems.
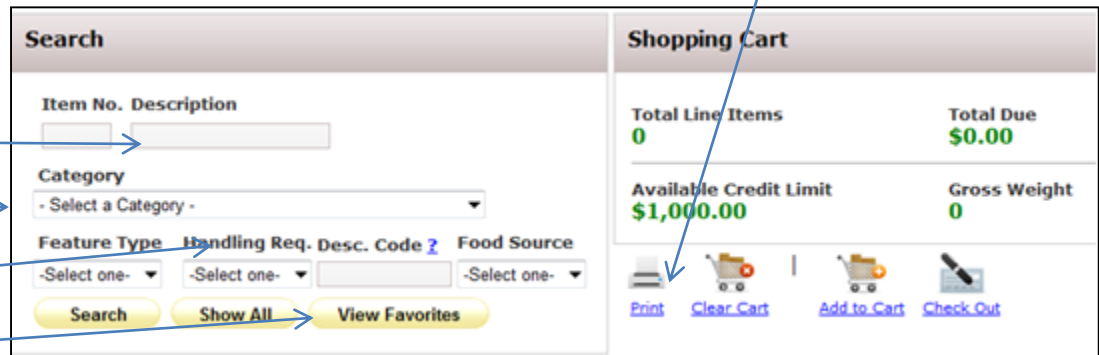
SHOPPING

To browse the available inventory, hover over **Order Options** and click **Shopping List.** Here you can see all available items.
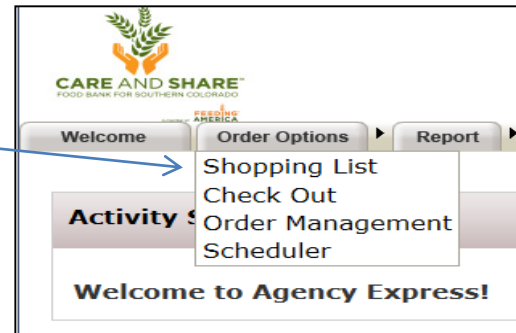
You can search for items by:

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

Item No.

Description

Category

Handling Requirements

Favorites

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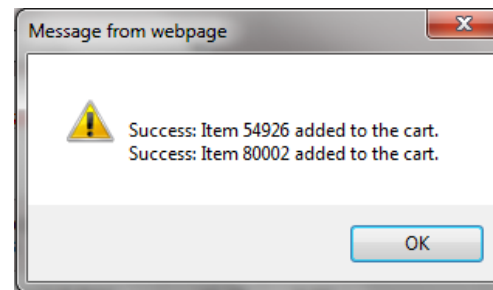
Each time you click **Add to Cart** you will receive a confirmation message. Click **OK**

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

CHECKING OUT

My Appointment

Reference Number: PO922854
Pickup/Delivery Date: Time:
Pickup ▼
-Select-
Delivery
Pickup

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

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

2. Click on the **calendar icon**

Date:

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

Time:

4. Click on the clock icon

○ 09:00 AM

5. Select the appointment time.

July 2014

Su	Mo	Tu	We	Th	Fr	Sa
		1	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	29	30	31		

July 2014

Su	Mo	Tu	We	Th	Fr	Sa
		1	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	29	30	31		

CHECKOUT AND EDITING AN ORDER

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

Message from webpage
⚠ Update was successful. Please remember to ***SUBMIT CART*** for the order to be processed.
OK

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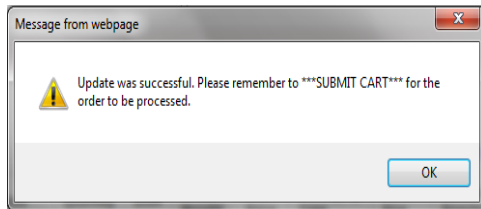
Shopping Cart

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
❌ 4 Available Qty. [6841]	00201	BREAD ASSORTED Order by pounds	4	LB	4	0.00	Bag		Dry	0.00	
❌ 6 Available Qty. [144]	54924	BTTRMLK RANCH DRESSING 6/12 OZ BTL	6	CASE	54	1.71	Bottle Plastic	6/12 OZ BTL	Dry	0.00	
❌ 1 Available Qty. [2017]	54926	BANANA THIN COOKIES 8/8.75 OZ BAG	1	CASE	6	1.14	Bag	8/8.75 OZ BAG	Dry	0.00	
❌ 2 Available Qty. [628]	80002	BEANS PINTO 24/1LB BAG 24/1LB BAG	2	CASE	54	15.70	Bag		Dry	0.00	

Continue Shopping or…   **Submit Cart**

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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.
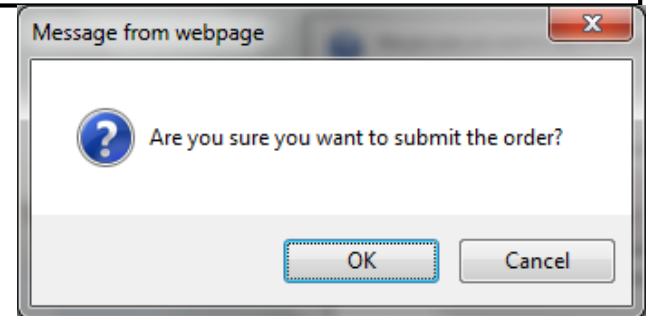
You will then see a message stating that your order was submitted successfully.
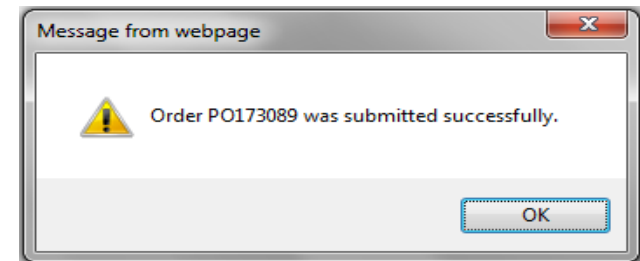
You will then be re-directed to **Order Management** page, where you can review, edit, and print your orders.

It can take up to 15 minutes for the order to be acknowledged, so be patient!

ORDER MANAGEMENT

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

| Welcome | Order Options ▸ | Report |

Order Options menu:
- Shopping List
- Check Out
- **Order Management**
- Scheduler

Search

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

Search

| From Date: | To Date: | Reference Number: |

[Search] [Show All]

Summary

| Total Orders: | Total Weight. |
| 14 | 1991 lbs. |

Total Amount:
$485.35

Track order status here.

Order Management

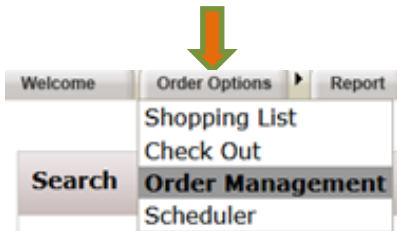|	Reference Number	Status	Gross Weight	Total Price	Pickup/Delivery Date
🖨 ❌	PO173096	New Order	60.00	$22.15	07/31/2014
🖨 ❌ ✏	PO173088	Acknowledged	5.00		
🖨	PO173085	Rejected	0.00		
🖨	PO173084	Released	66.00	$6.84	07/31/2014

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.

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 then Food Bank.
- **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.
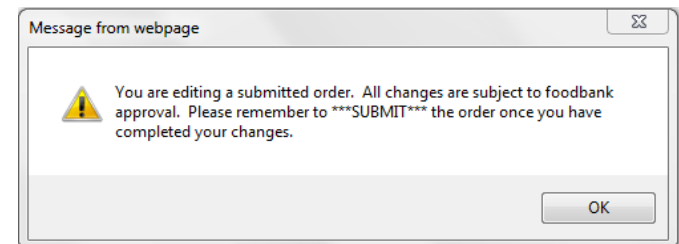
Click to **cancel** the order.

Click to **view** a copy of your order.

	Reference Number	Status	Gross Weight	Total Price	Pickup/Delivery Date
🖨 ✖ ✏	PO173088	Acknowledged	5.00	$0.00	07/31/2014

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!

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.
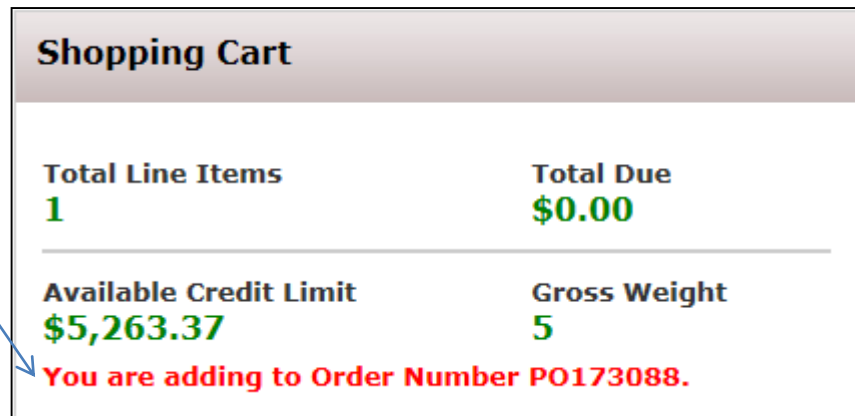
OK

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.

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.

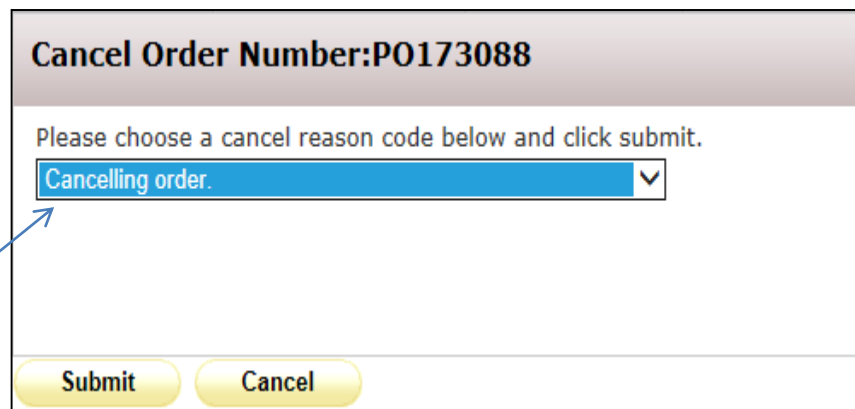If you do not submit the cart, order your order will not be sent to the Food Bank.

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:PO173088

Please choose a cancel reason code below and click submit.

Cancelling order. ▼

Submit   Cancel

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
Paul@careandshare.org**

**Thank you for helping us serve our neighbors in need because well-fed
communities are better for us all.**