

AGENCY EXPRESS


A Guide to Online Ordering




CARE AND SHARESM
FOOD BANK FOR SOUTHERN COLORADO

A member of **FEEDING**
AMERICA

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 bottom of the page, which will take you into the agency portal. Click **Agency Express**, and then



Agency Express

Agency Express Online Ordering is for use by authorized Care and Share Food Bank program partners. You can use Agency Express to search for items, view item details, send orders to our team, and review the status of your order.

[GO TO AGENCY EXPRESS](#)

- Or, go straight to: agencyexpress3.org
- A link to the AE online ordering video tutorial is located on the Agency Express page.

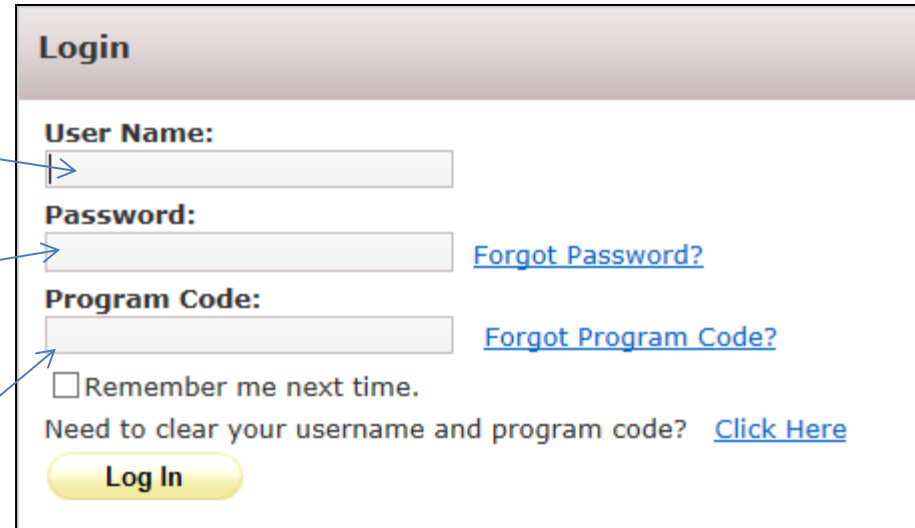
LOG IN TO AGENCY EXPRESS

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., 0019p314FP1)



The screenshot shows a login form titled "Login" with a light blue header. It contains three input fields: "User Name:", "Password:", and "Program Code:". To the right of the Password field is a blue link "Forgot Password?". To the right of the Program Code field is a blue link "Forgot Program Code?". Below the fields is a checkbox labeled "Remember me next time." and a text link "Need to clear your username and program code? [Click Here](#)". At the bottom is a yellow "Log In" button.

- 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.

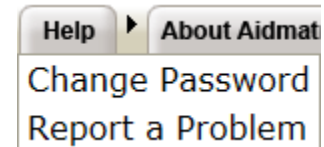
YOU ARE NOW LOGGED ON!



The screenshot displays the CARE AND SHARE Agency Express web application. At the top left is the CARE AND SHARE logo with the tagline 'together we can solve hunger.™'. Below the logo is a navigation menu with buttons for 'Welcome', 'Order Options', 'Report', 'Food Bank Links', 'Help', 'About Aidmatrix', and 'Log Out'. The user is logged in as 'Welcome CSHOPPER1 - 0019PAETEST-COSPU'. A search bar is located on the right side of the page. The main content area features a 'Welcome to Agency Express!' message with a 'Close' button. Below the message is a navigation menu with buttons for 'ABOUT US', 'PROGRAMS', 'AGENCY RELATIONS', 'GET INVOLVED', 'NEWS AND EVENTS', 'DONATE', and 'CONTACT US'. At the bottom of the page, there is a promotional banner for the '8th Annual Springs Beer Fest' with the text: 'Drink Beer and Support Care and Share Food Bank! Don't miss the 8th Annual Springs Beer Fest! This craft beer tasting will be on August 2nd at America the Beautiful Park from 12-4pm. There will be over 50 breweries showcasing their beer, local vendors and live music all afternoon. More information on this great event, [click here.](#)'

CHANGE PASSWORD

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



Change Password

Old Password:

New Password:

Confirm New Password:

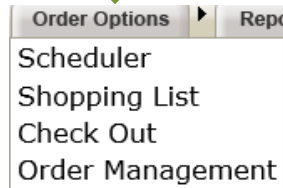
- When you have successfully changed your password this screen will appear

Change Password

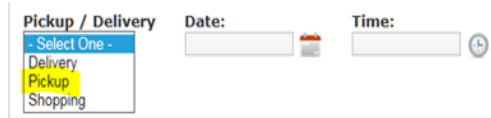
Your password has been changed!

SCHEDULING AN APPOINTMENT:

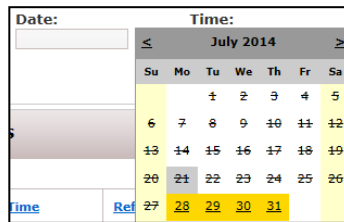
Agencies that pick up from our warehouse



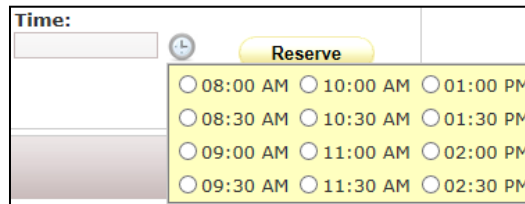
1. Hover over **Order Options** and click **Scheduler**.
The Scheduler window will appear.



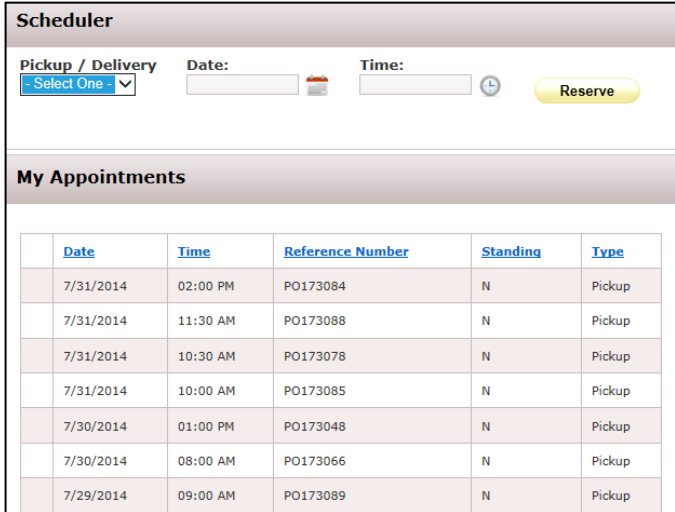
2. From the Pickup/Delivery dropdown, select **Pickup**.



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

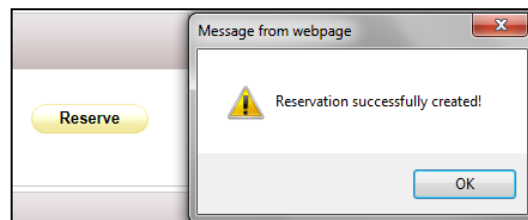


4. Then select a **time**. Click the **clock icon**.



	Date	Time	Reference Number	Standing	Type
	7/31/2014	02:00 PM	PO173084	N	Pickup
	7/31/2014	11:30 AM	PO173088	N	Pickup
	7/31/2014	10:30 AM	PO173078	N	Pickup
	7/31/2014	10:00 AM	PO173085	N	Pickup
	7/30/2014	01:00 PM	PO173048	N	Pickup
	7/30/2014	08:00 AM	PO173066	N	Pickup
	7/29/2014	09:00 AM	PO173089	N	Pickup

5. Then click **Reserve**.



SCHEDULING AN APPOINTMENT:

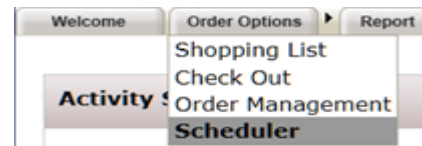
Agencies that receive deliveries

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.



Scheduler

Pickup / Delivery: Delivery Date: Time: Reserve

My Appointments

Date	Time	Reference Number	Standing	Type
9/3/2014	08:00 AM		Y	Delivery

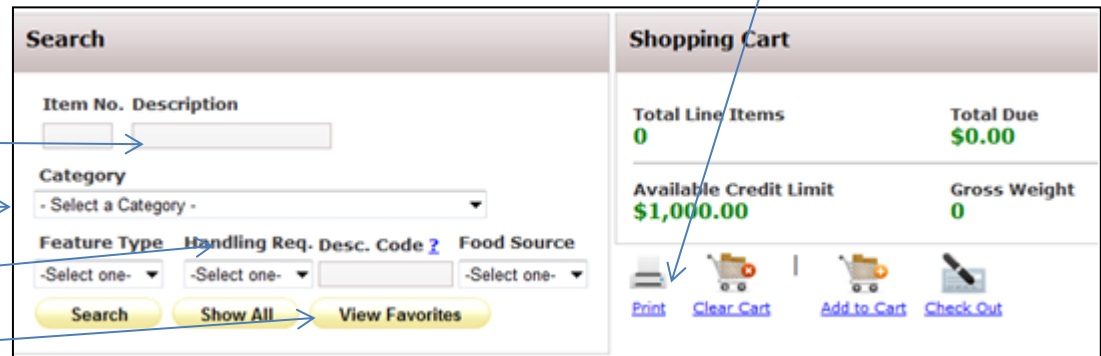
SHOPPING

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:

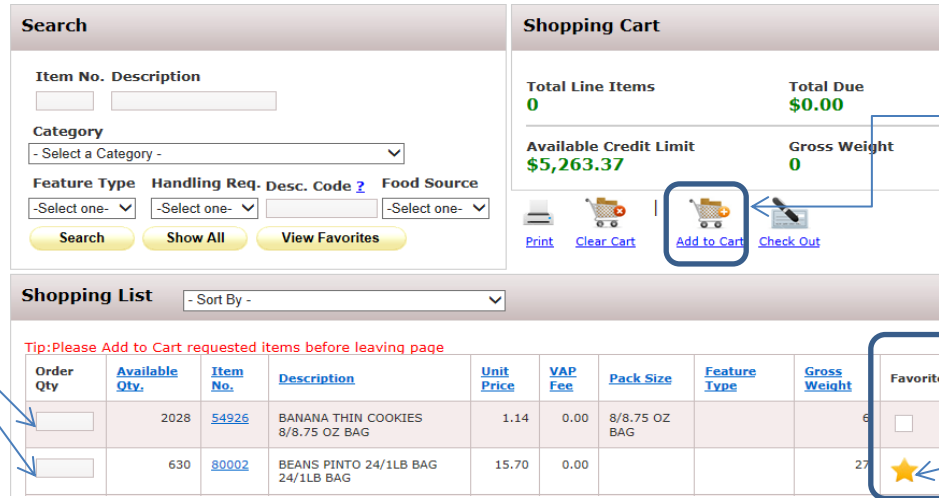
- Item No.
- Description
- Category
- Handling Requirements
- Favorites



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



The screenshot shows a web interface with a 'Search' section on the left and a 'Shopping Cart' section on the right. The 'Search' section includes fields for 'Item No.', 'Description', 'Category', 'Feature Type', 'Handling Req.', 'Desc. Code', and 'Food Source', along with 'Search', 'Show All', and 'View Favorites' buttons. The 'Shopping Cart' section displays 'Total Line Items: 0', 'Total Due: \$0.00', and 'Available Credit Limit: \$5,263.37'. Below this are 'Print', 'Clear Cart', 'Add to Cart', and 'Check Out' buttons. A 'Shopping List' table is also visible at the bottom.

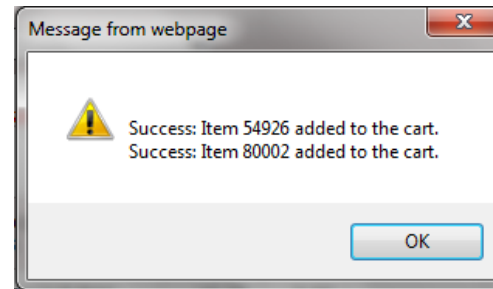
Order Qty	Available Qty.	Item No.	Description	Unit Price	VAP Fee	Pack Size	Feature Type	Gross Weight	Favorite
<input type="text"/>		2028	54926 BANANA THIN COOKIES 8/8.75 OZ BAG	1.14	0.00	8/8.75 OZ BAG		6	<input type="checkbox"/>
<input type="text"/>		630	80002 BEANS PINTO 24/1LB BAG 24/1LB BAG	15.70	0.00			27	<input checked="" type="checkbox"/>

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: **P0922854**

Pickup/Delivery Date: Time:

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

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		

2. Click on the **calendar icon**

Date:

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

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		

4. Click on the **clock icon**

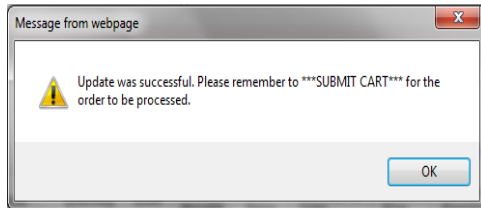
Time:

09:00 AM

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...



Shopping Cart											
Order Qty	Item No.	Description	Quantity	UOM	Gross Weight	Unit Price	Packaging Type	Pack Size	Handling Requirements	VAP Fee	Special
<input type="text" value="4"/> Available Qty. [6641]	00201	BREAD ASSORTED Order by pounds	4	LB	4	0.00	Bag		Dry	0.00	
<input type="text" value="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	
<input type="text" value="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	
<input type="text" value="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

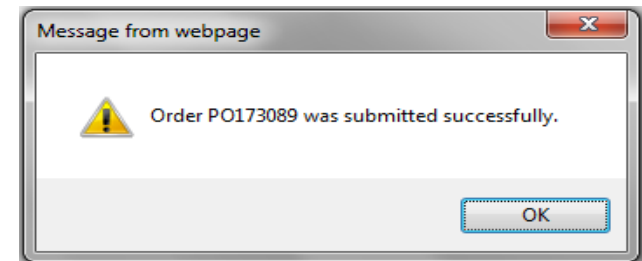
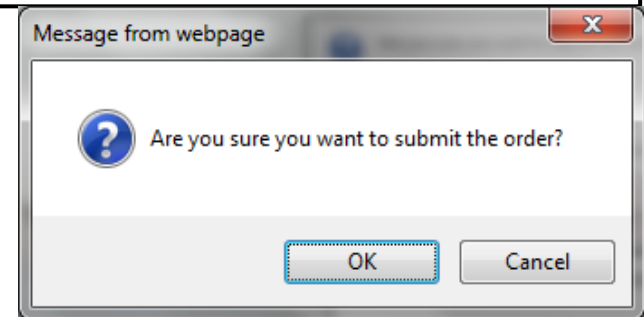
SUBMIT CART

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.

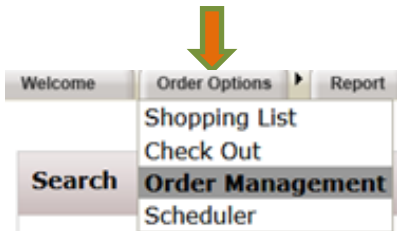


You will then be re-directed to **Order Management** page, where you can review, edit, and print your orders.

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.



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

Search

From Date: To Date: Reference Number:

Summary

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

Total Amount: **\$485.35**

Order Management

Track order status here.

	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 must 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.

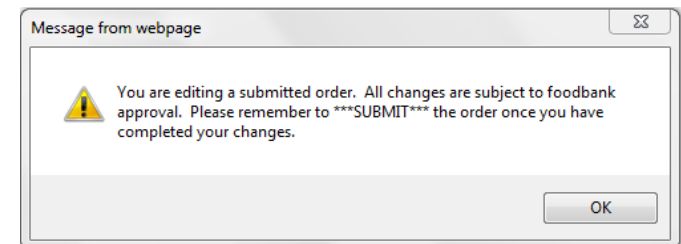
Click to **cancel** the order.

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

	Reference Number	Status	Gross Weight	Total Price	Pickup/Delivery Date
  	P0173088	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!



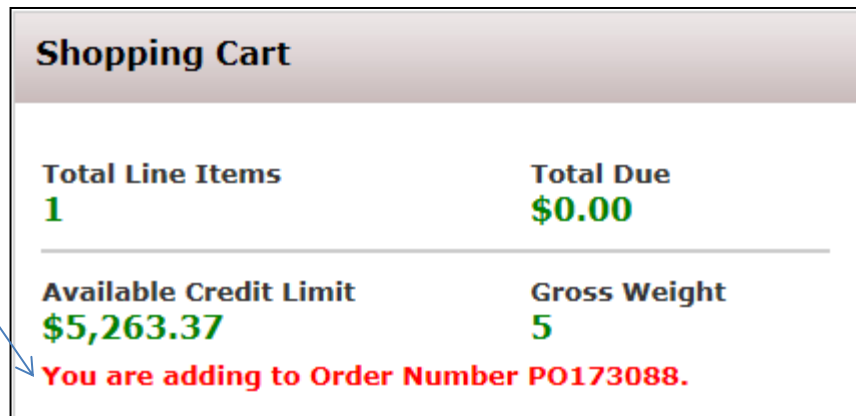
VERY IMPORTANT: If you reopen your order, you **must** click **Submit Cart** again. If you made no changes click **Cancel Edit**. If you do not resubmit the cart, the order will remain in the Edit status and will not be processed.

EDITING OR CANCELLING AN ORDER

When editing an existing order, this is what you will see in your shopping cart.

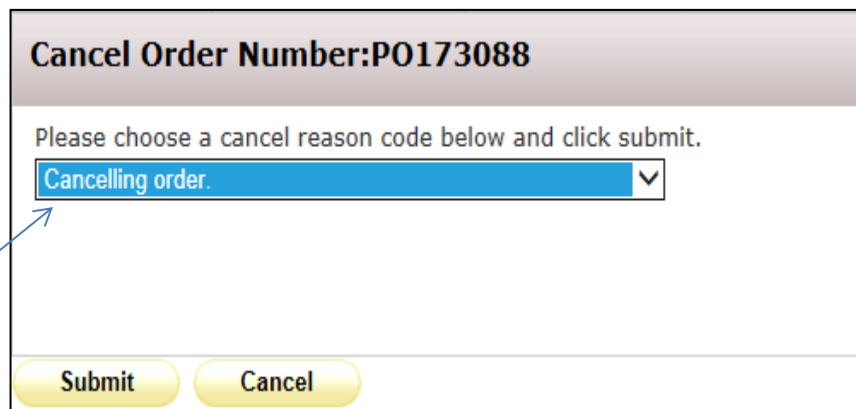
Once you have made the edits, you must click **Submit Cart** to update your order.

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



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

If you choose to cancel your order, then this window will appear and you must choose **Cancelling order.**



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
Quality Assurance, (719) 937-4547 or
Agencies@careandshare.org**

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