

Food Bank of Eastern Oklahoma

Agency Express Instruction Guide



The Food Bank of Eastern Oklahoma's primary goal is to support your agency's activities in providing access to food for people in need. FBEO is pleased to offer our agencies Agency Express 3.0, an online ordering system that provides 24/7 access to scheduling appointments and ordering our products. Agency Express provides full access through our online shopping list to all available inventory items within minutes of product receipt at FBEO. Additionally, Agency Express is used by agencies to submit monthly service reports.

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Section 1 – Accessing Agency Express

Agency Express Requirements

To access Agency Express you must have access to the internet. If you do not have internet access at your program site, consider some alternatives such as the public library, church office or from your home. In addition to an internet connection, you or your program must have an active email account on file with the Food Bank. The email used for your account is where order notifications will be sent.

To use Agency Express, you will need to use one of the following web browsers:

- Google Chrome (recommended)
- Internet Explorer 6.0 or higher
- Firefox 2.x or higher

Agency Express is not designed to be used on mobile devices so you should always use a computer to access the site. Some features are limited or do not work properly if using a mobile device.

Logging into Agency Express

Agency Express can be accessed by typing www.agencyexpress3.org into your browser's URL bar or by going to the Agency Resource Center at www.okfoodbank.org and navigating to the *Agency Express* menu option.

At the Agency Express login page:

1. Enter your **Username***
2. Enter your **Password** (case-sensitive)
3. Enter your **Program Code** (case-sensitive)**
4. Click the **Log In** button
5. If you click the **Remember Me Next Time** checkbox, this computer will remember your login information and will automatically fill in this information the next time you visit this page. You will still need to enter your password. Please do not use this feature on public computers.
6. If you forget your password, you can click on **Forgot Password?** and follow the directions on the new page and it will be sent to the email on file for your account.

**Only authorized individuals from your agency will be given usernames and these credentials should not be shared with others from your agency.*

***The Program Code is your Agency ID number preceded by the code '0092p' so in full it will look like '0092p10XXX-XX'.*

If you are unable to login, contact your agency services representative:

Caleb Captain ccaptain@okfoodbank.org Lisa Fredeen lfredeeen@okfoodbank.org,

Joe Mercer jmercer@okfoodbank.org Help Desk helpdesk@okfoodbank.org

Agency Express Activity Status

After entering the correct information in the login fields, you should successfully log into Agency Express and be shown an **Activity Status Alert**. This alert will read one of two things:

1. "Program is in good standing and eligible to place orders."
2. "Program is on hold for (reason stated here)."

NOTE: Your account may be placed ON HOLD by the Food Bank. Account holds prevent access to ordering when one or more of the following conditions exist:

- Program's open invoices exceed the established credit limit.
- Program's open invoices are more than 30 days past due.
- Program's monthly report(s) are late.
- Program has not submitted certain forms to the Food Bank
- Program's civil rights training needs to be renewed.
- Program's food handler permit(s) expired.
- Program's account has been closed by either Agency or Food Bank's request.

The activity status alert will provide you the name, phone number and email address of the person at the Food Bank to contact about your status.

Even with a hold on your account, you may close out of the Alert Status and use the monthly report feature to submit your program's report for that current month. However, your agency will not have access to anything under the Order Options tab while on account hold.

Agency Express Welcome Screen

The Agency Express Welcome Screen is displayed when you close out of the Activity Status Alert.

1. **Welcome** – this returns you to the home page.
2. **Order Options** – this contains links to *Scheduler*, *Shopping List*, *Check Out*, and *Order Management*.
3. **Report** – this contains links to *Survey Management* to review previous monthly report submissions.
4. **Food Bank Links** – this contains links to the *Agency Resource Center*, a printable version of this guide, and the links to submit your monthly reports.
5. **Help** – this contains links to *Change Password* and *Report a Problem*.
6. **About TechBridge** – this takes you to the TechBridge.org website.
7. **Logout** – this logs you out of the website.

Section 2 – Order Options

All of the scheduling and ordering activity functions occur within the **Order Options** tab. You can access the function of the Order Options tab by hovering over the tab and choosing one of the options or by clicking the tab and taking you to another page with the options listed. The order you generally want to use the options within the Order Options tab is:

1. **Scheduler**
2. **Shopping List**
3. **Check Out**
4. **Order Management**

Scheduler

Scheduling an Appointment

Agency Express allows users to view available pickup dates and times and to select one of the available appointment times to pick up your order. The system requires that **appointments be scheduled in advance of placing a new order.**

The **Scheduler** page consists of two sections:

1. The top section (labeled Scheduler) is for reserving available appointment dates/times **for an order to be picked up at the Tulsa branch.**

NOTE: Agencies utilizing the Rural Delivery Service do not need to schedule a time to pick up an order because those delivery dates are entered into the system for your agency. If for some reason your delivery dates do not show in the My Appointments section, you can manually reserve your appointment for the designated dates. Please refer to the Rural Delivery Appointments section below and follow the listed steps.

2. The lower section (labeled My Appointments) displays existing appointments.

All reserved appointments are listed under **My Appointments**, along with the following information:

- **Date** – the scheduled appointment date for a pick up or delivery.
- **Time** – the schedule appointment time for a pick up or delivery.
- **Reference Number** – this is the Purchase Order (PO) number, which is automatically generated and assigned to each web order when it is initially created. The reference number is listed in the My Appointments table ONLY after an order has been associated with the appointment date and time.
- **Standing** – indicates whether an appointment is a regularly scheduled appointment (standing appointment) or a unique appointment chosen by the shopper.
 - **Y** = Yes, this appointment is a standing appointment, or a scheduled RDS delivery.
 - **N** = No, this appointment is not a standing appointment or RDS delivery.

To reserve an appointment to pick up an order in Tulsa:

1. Click on the down arrow in the **Pickup / Delivery** field.
2. On the drop down menu, click **Pickup**.
3. Click on the calendar icon next to the **Date** field.
 - a. A pop-up calendar will be displayed.
 - b. Choose an appointment date by clicking on one of the available pickup days. Days with available pickup times will be highlighted in yellow.
 - c. Orders **MUST** be submitted by 11:00 AM, three business days before a pickup, so the Scheduler only shows dates that are at least two days out.
4. Click on the clock icon next to the **Time** field.
 - a. A pop-up list of that day's available appointment times will be displayed.
 - b. Choose an appointment time by clicking one of the available times.
 - c. Appointments are in 15 minutes increments.
5. Click **Reserve** to reserve your chosen appointment date and time.
 - a. The newly created reservation should now appear under **My Appointments**

NOTE: Any time you enter Pickup, you are expected to pick up the order at the Tulsa branch. If you are intending to pick up the order at a Rural Delivery Service (RDS) site or the McAlester branch, please refer to the Rural Delivery Appointments section below.

Deleting an Appointment

The **My Appointments** section also allows for the users to delete previously set appointments that are NOT already associated with an order (i.e., the Reference Number field for that appointment will be blank). To delete an appointment:

1. Click **Delete** to the left of the appointment.
2. A pop-up window with the message, "Are you sure you want to delete this?" will be displayed.
3. Click **OK**.

Standing Pickup Appointments

For those agencies that have a standing appointment (recurring pickup day/time), the standing appointments for the next 30-day period will be listed under **My Appointments** on the Scheduler page. It is not necessary for agencies with standing appointments to reserve appointments because your standing appointments will already be reserved for you.

NOTE: If you plan to pick up an order on a date/time other than one listed in **My Appointments**, you will need to reserve a new appointment time (see previous section).

Rural Delivery Appointments

Likewise, for agencies that have their order delivered to one of our Rural Delivery Sites, the dates and times for deliveries to your RDS site will already be listed under **My Appointments** so you do not need to reserve a delivery date/time.

It is important to note that your Standing Appointments will match the respective RDS schedule. If for some reason your standing appointment is not showing up, you can manually reserve an appointment on the designated day by following these steps:

1. Check the RDS schedule to determine the dates the RDS truck is coming into town, and make sure to reserve a date that the truck is already scheduled to come to town. The system does not restrict you to only pick a delivery date that matches the RDS schedule – you must do that on your own. As of now, we do not have the capacity to deliver orders outside of our regular RDS schedule.
2. Click on the down arrow in the **Pickup / Delivery** field.
3. On the drop down menu, click **Delivery**
4. Click on the calendar icon next to the **Date** field.
 - a. A pop-up calendar will be displayed.
 - b. Choose the date you previously looked at that matches the RDS schedule.
 - c. Orders **MUST** be submitted by 11:00 AM, three business days before the RDS date, so the Scheduler only shows dates that are at least two days out.
5. Click on the clock icon next to the **Time** field.
 - a. The only available time that will show is the time the truck is scheduled to arrive at an RDS site. Please see the RDS schedule for specific times.
 - b. Click the appointed time.
6. Click **Reserve** to reserve your chosen appointment date and time.

The newly created reservation should now appear under **My Appointments**

NOTE: If you plan to pick up an order at the Food Bank Tulsa branch you will need to reserve a new appointment time (see previous section). If you want to pick up and order at a different RDS site, you need to contact the Order Office (918-936-4517) to add that delivery site to **My Appointments**.

Shopping List

The **Shopping List** is a menu of available inventory that can be sorted, printed, and/or added to your cart. The Shopping List consists of three sections:

1. **Search** – can be used to search for items that meet specified criteria, but is not recommended.
2. **Shopping Cart** – displays the total number of items, weight, available credit limit and charges for the items in the cart.
3. **Shopping List** – displays the list of items that are available to your agency to shop.

The Shopping List displays the items that are available for your agency to order. The default view of this list is sorted alphabetically by **Description**, but the list can be sorted by clicking any of the list headings (i.e. **Available Qty.** or **Unit Price**).

Each line of the Shopping List displays the following information about an item:

- **Order Quantity** – an input field where the shopper enters the desired quantity of an item.
- **Available Quantity** – the maximum quantity of this item that your agency may request.
- **Item No.** – unique identifying code of an item.
- **Description** – the description or name of an item.
- **Unit Price** – the cost of one unit of the item in U.S. dollars.
- **VAP Fee** – Value Added Processing fee for expenses incurred making item more client-usable (fee is already included in Unit Price) Please disregard this column.
- **Pack Size** – the size and number of items included in each unit.
- **Feature Type** – notes whether this item is a **New**, **Discounted** or **Free** item.
- **Gross Weight** – the weight (pounds) of one unit of the item.
- **Favorites** – this field allows shoppers to designate an item as a favorite.

To get more details information of an item, click on the **Item No** to display a more-detailed information box for that item.

Add Items to Cart

To add items to your cart:

1. Enter the desired quantity of an item or multiple items in the **Order Qty.** field (e.g., 10 cases of Item A and 2 cases of Item B)
2. You **MUST** click **Add to Cart** at the bottom or top of the page to add the items to your cart before you navigate away from this page.
 - a. If you do not click **Add to Cart** before navigating away from this page, Agency Express will not add them to your cart and will clear the entered desired quantity for that item.
3. A pop-up window with the words “Success: Item added to the cart” will be displayed, confirming the addition of the item(s) to your cart.
4. Continue to the next inventory pages to view additional available items and add desired items to your cart as described above.
5. Once you have finished shopping, you need to review the items in your cart, make any changes, enter a reserved appointment date and then submit your cart by clicking **Check Out**.

Check Out

The **Check Out** function is used when you have finished adding product to a new order or you have finished editing an existing order. It is from this page that orders are submitted to the Food Bank.

The **Check Out** screen consists of three sections:

1. **My Appointment** – located in the upper left-hand side of the page.
2. **Shopping Cart Summary** – located in the upper right-hand side of the page.
3. **Shopping Cart** – located in the lower portion of the page.

My Appointment

The **My Appointment** section is where you assign your order to the pre-reserved appointment time (either pickup or delivery). If you plan to pick up the order at the Food Bank Tulsa Branch, the date/time you select must have been an appointment time that you already reserved using the **Scheduler**. If you have a standing pickup appointment or have your order delivered to an RDS site, you can choose one of the existing appointments.

NOTE: The appointment date and time that you plan to use for pickup / delivery of this order **MUST** have been reserved and is displayed in the **My Appointments** section on the **Scheduler** page.

In the **Pickup/Delivery** field:

1. Click the drop-down arrow to the right of the field and select either **Pickup** or **Delivery**
 - a. **Pickup** – refers to appointments scheduled for order pickups in Tulsa.
 - b. **Delivery** – refers to appointments scheduled for order pickups at an RDS site.
2. Click the calendar icon next to **Date** and choose the reserved (highlighted) date you wish to obtain your order.
 - a. Only reserved dates will show up on the pop-up calendar. All other dates will be marked through.
3. Click the clock icon next to **Time** and choose the reserved time slot for the chosen date.
4. If you would like, you can type in any special instructions or extra information concerning your order in the **Comments** field.

Shopping Cart Summary

The **Shopping Cart Summary** section displays the following statistics of the current order:

- **Total Due** – total product fees that will be charged to your agency for this order.
- **Gross Weight** – total gross weight of all items on this order.
- **Total Line Items** – total number of unique item numbers on this order.
- **Total Cube Size** – total volume (cubic feet) of this order.
- **Estimated Delivery Fee** – estimate of the total delivery fees for this order (applicable only to orders delivered on RDS trucks).

Shopping Cart

The **Shopping Cart** section on the **Check Out** page displays the following information about the current order:

- **Line Items** – listing of unique items requested by the shopper.
- **Delete Icon** – clicking this icon will delete the line item from the cart.
- **Order Quantity** – input field where shopper may enter/change the desired quantity of the item.
- **Item No.** – unique identifying code of an item.
- **Description** – name or description of the item.
- **Quantity** – amount of an this item currently on the order

Action icons include:

- **Print** – clicking this icon will print the currently displayed order, but printing is not recommended until order quantities are approved.
- **Clear Cart** – clicking this icon will clear all items in the current cart.
- **Continue Shopping** – clicking this icon will return the shopper to the **Shopping List** page.
- **Update Cart** – clicking this icon will update any quantity changes made to the current cart.
- **Submit Cart** – clicking this icon will submit this order to the Food Bank.

NOTE: After successfully submitted an order, Agency Express will automatically take you to the **Order Management** page.

Order Management

From the **Order Management** page, a user has the ability to manage existing orders and view past orders. From this page, a user can:

- Check the status of an existing order.
- Open and edit an existing order (which included adding items to an existing order).
- Change the scheduled order date to a new appointment date.
- Print pending and invoiced orders.
- Cancel/Delete an existing order.

Order Status

There are several statuses that an order will go through during the order-processing cycle. Each order will go through the following cycle:

1. **Draft** – indicates that the order has been newly created but has not yet been submitted to the Food Bank.
2. **New Order** – indicates that the order has been submitted through the Agency Express system and entered our inventory software system.
3. **Sent to Food Bank** – indicates that the order has synchronized from the web site to our inventory software system, confirming items on order to available inventory on hand.

4. **Acknowledged** – indicates that the order has been processed by our inventory software system and returned to the web site with information on which order items are available for fulfillment.
 - a. **NOTE:** At this point you are able to edit your order, which starts the order-processing cycle over at **Draft**
5. **Released** – indicates that your order has now been released to our warehouse staff for order preparation and your order is no longer open on Agency Express for editing or changes.
 - a. Orders to be picked up in Tulsa will change to **Released** within 3 business days of the appointment date/time.
 - b. Orders to be picked up at an RDS site will change to **Released** within 3 business days of the delivery date.
6. **Invoiced** – indicates that the order has been picked up by your agency and invoiced to your billing address.

Editing Existing Orders

Agencies have the ability to open and edit existing orders when they are in the **Acknowledged** status. While orders are in this status, a **Pencil Icon** will appear next to the **Reference Number** column. Clicking this icon will reopen the order and allow the shopper to add, delete, and/or change quantities of items on the order. To edit an order:

1. Click the **Pencil Icon** and click **OK** when prompted with the message reminding you to resubmit your order.
2. The order will open in the **Check Out** page with the same functionality as previously described.
 - a. Modify quantities of existing order items.
 - b. **Delete** existing order items.
 - c. **Continue Shopping** to add new items to this order.
3. If you make any changes to the order, click **Submit Cart**.
 - a. **NOTE:** If you don't re-submit your cart, the order will remain in **Draft** status
4. If you decide you do not want to make any changes to this order, click **Cancel Edit**.
5. After you re-submit an edited order, the order status will change back to **New Order** and go through the normal order-processing cycle.

NOTE: When you edit an order, Agency Express releases the product that was reserved for your agency before your reopened it back into the inventory system, which means other agencies have the ability to order those items if they submit their cart before you resubmit your order. To minimize the risk of losing reserved items, look through the **Shopping List** and identify desired items before clicking the **Pencil Icon**.

Changing Appointment Date

Agencies have the ability to change the appointment date/time of an order while that order is in the **Acknowledged** status. The process to change an appointment date will be different depending on if the order is scheduled for pickup or for delivery.

For agencies picking up orders in Tulsa:

1. Reserve a new **Pickup** appointment on the **Scheduler** page.
 - a. If your agency has a **Standing Appointment** already scheduled and wants to move the order to that appointment, disregard this step.
2. Go to **Order Management** and open the order by clicking the **Pencil Icon**.
3. Once the order is open, go to the **My Appointments** section on the **Check Out** page and select the new appointment date you reserved.
4. Click **Submit Cart**.

For agencies picking up orders at a delivery site:

1. Go to **Order Management** and open the order by clicking the **Pencil Icon**.
2. Once the order is open, go to the **My Appointments** section and select **Delivery**, select a new delivery date for your area (highlighted in green), and select the appointed time for the delivery.
3. Click **Submit Cart**.

Printing an Order

Agencies may print their order at any stage in the order-processing cycle, but it is recommended to wait until the order status changes to **Released** before printing because the order is finalized at that point.

To print an order:

1. On the **Order Management** page, identify the order you wish to print.
2. Click the **Print Icon** located on the left side of the order line.

NOTE: When an order status changes to **Acknowledged**, you can click the **Print Icon** to view the items and quantity you were approved to receive.

Section 3 – Monthly Reports

All agencies are required to submit a monthly service report to the Food Bank for each program they have partnered with the Food Bank. These reports must be submitted using Agency Express by the 10th of each month for the previous month (e.g., the December service report is due January 10th). Two tabs on Agency Express are used for submitting and managing submitted reports—**Food Bank Links** and **Reports**, respectively.

Submitting Monthly Reports

The links to submit monthly reports are open from around the 25th of the reporting month to the 10th of the following month. Agencies should be logged in for the program for which they are submitting a report (i.e. an agency that has a pantry and backpack account with the Food Bank, should log into each account separately to submit each account's service report for that month).

To submit a monthly report:

1. Hover over the **Food Bank Links** tab and select the appropriate report.
 - a. 20XX (Month) Pantry Report
 - b. 20XX (Month) Onsite Report
 - c. 20XX (Month) Backpack Report
 - d. 20XX (Month) Kids' Café Report
2. Complete the report making sure to read each question carefully to know how the information should be entered
 - a. Agency Express will sometimes not accept reports if information is entered in an incorrect format.
3. When all of the information is entered correctly, click **Submit**.
 - a. **NOTE:** After pressing **Submit**, wait for a "Thank You" screen to appear. If you are not shown this screen, the report was not submitted successfully and you need to resubmit your report.

After the 10th of month, the link to submit your monthly report using Agency Express disappears and you will be required to submit your report by email or fax using a template that will be sent to you with a message stating that your agency has been placed on hold.

Verifying Report Submission

Even if Agency Express displays a "Thank You" screen after submitting your report, it is recommended that you verifying the submission of your report. To verifying your report submission:

1. Hover over the **Report** tab and select **Survey Management**.
2. Change the automatic date filter applied to the **Survey Management**, if necessary to view your submitted reports.
3. If that month's report does not show up on this page, the report has not been submitted and you will need to go to **Food Bank Links** and submit your report.

Section 4 – Troubleshooting

Log In FAQs

Why can't I login? There are a few reasons you could be having difficulty logging into Agency Express. Make sure the credentials you are using to login are being entered correctly. The most common error is users forgetting to include '0092p' at the beginning of the **Program Code** field. Additionally, it is possible that your agency made changes to its Authorized Agency Express Users list and your Username was deactivated. The program contact for your agency will have to reauthorize you before it will work.

Ordering FAQs

Why are there no available order pick-up dates when I go to the Checkout page? You must schedule a pick-up or delivery date from the "Scheduler" page before you start adding to your shopping cart. Then, the date you scheduled on that page will be the only date you can choose at the Checkout page.

Why are the items I added to my cart not showing up on the Checkout page? The most likely possibility is that you did not click "Add to Cart" before going to the next page of the order list. If you do not click "Add to Cart" before you move to the next page, Agency Express clears the quantities you entered. Another possibility is that you entered a quantity that exceeds the case limit we have set for that item. Agency Express will not add an item to your shopping cart if your request exceeds the set limit.

Why is it taking so long for my order status to change to 'Acknowledged'? It is possible that a blockage in our inventory system has occurred and isn't processing orders as normal. If it takes longer than 30 minutes, please notify the Food Bank because we do not know about it until someone notifies us.

Why wasn't I approved for the full quantity of an item I requested? There could be a few reasons for this. The simplest answer is that our inventory count was off and after making the adjustment in our system we had to reduce the amount of product on your order.

Why did I lose a previously approved item from my order after I edited and resubmitted my order? When you edit an order that has been **Acknowledged** it releases those items back into our system for everyone else to access. If another agency requests the same item you had been approved for, but the other agency submits their order before you resubmit your order, you could lose that product. Only edit an order if you already know what you would like to add and you can resubmit the order quickly.

How many orders can I place at a time? Agencies may only have two open orders at one time. Your agency will have to pick up one of its open orders before you are able to place another order.

Reporting FAQs

Where is the link to submit my monthly report? The links for monthly reports are only open from around the 25th of the reporting month to the 10th of the next month.

Why can I not find a past report on the Survey Management page? If you are looking for the current month's report and cannot find it here, your agency still needs to submit that report. If you cannot locate a report for a previous month, it is most likely that your agency did not submit that report on time and had to submit it by email or fax. Reports submitted after the deadline are not saved in Agency Express.