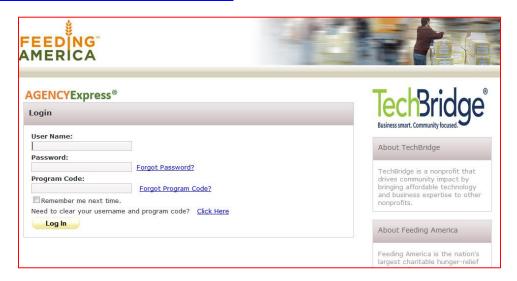


Agency Express – Shopping Basics

First Things First –Link is listed as "Agency Express 3.0 Order System" on SAFB website at http://safoodbank.org/partner-agency-forms/



Logging On -

User Name: Your username will be your Agency Account Number.

Password: The default Password is change 12. This is case sensitive. You can (and SHOULD) change the Password as soon as you log in. This can be re-set if password.

change the Password as soon as you log in. This can be re-set if necessary.

Program Code: The Program Code is always going to be 0076 plus the letter "p" plus the Agency Code (e.g., "0076paccount number").

Remember me next time. Check this box in order to avoid having to re-enter all Login information each time.

Need to clear your username and program code? "Click Here" If you previously chose to have the credentials remembered and need to make a change to something that is being prepopulated, this will allow you to start fresh.

Once you've logged in, you will see the webpage for the San Antonio Food Bank. This is your "Welcome" screen. From here, you can **select the tabs** at the top of the screen to maneuver through the system. Your first stop might be "Order Options" where you can visit "Scheduler", "Shopping List", "Check Out" and "Order Management".

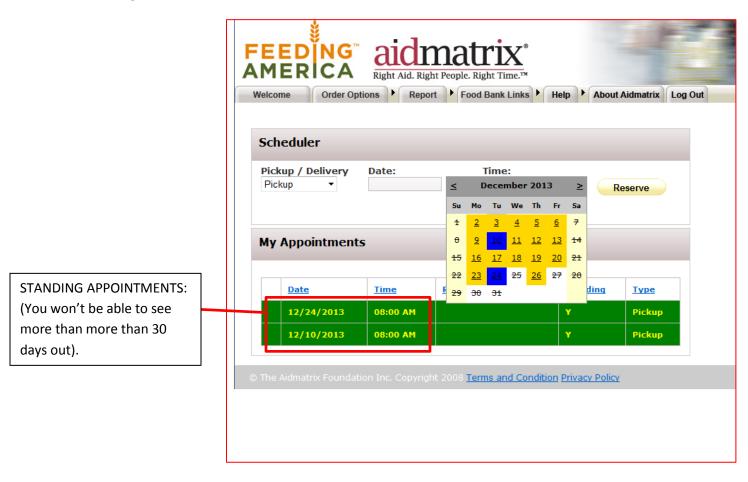


The tabs at the top will also take you to other areas; explore and look around. Make your first stop the "Help" tab so you can change your password!



Step Two – Scheduling An Appointment

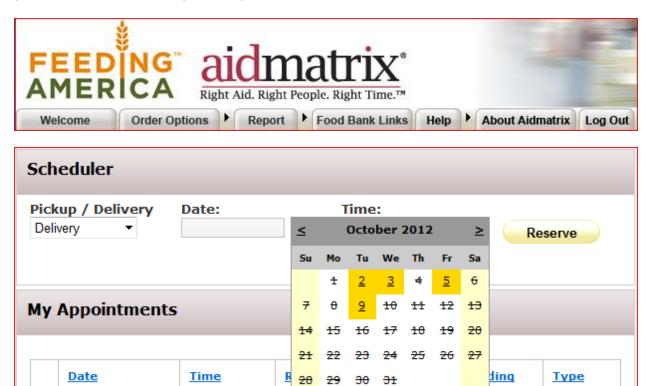
The Shopper needs to go to **Order Options** → **Scheduler**. Once in that screen, you should see any available Standing Appointments, which will be your regularly scheduled pickups or deliveries. Regularly scheduled appointments will show up in the calendar as blue and be listed below in green.



Updated May 15, 2015 Page **3** of **8**

If you need to schedule another pickup or delivery different from your usual schedule you can select an available pickup appointment. This time is subject to SAFB staff approval and may not be accepted.

In order to select an available pickup time, you must select an option from the Pickup / Delivery drop-down (Deliver or Pickup) in order to see dates available in the calendar. Dates available will show in yellow. Dates that are not available will show as crossed out. As soon as you make the selection you can pick a Time, then click on <Reserve>.



Y

Υ

09:45 AM

09:45 AM

09:45 AM

09:45 AM

10/30/2012

10/23/2012

10/16/2012

10/9/2012

Pickup

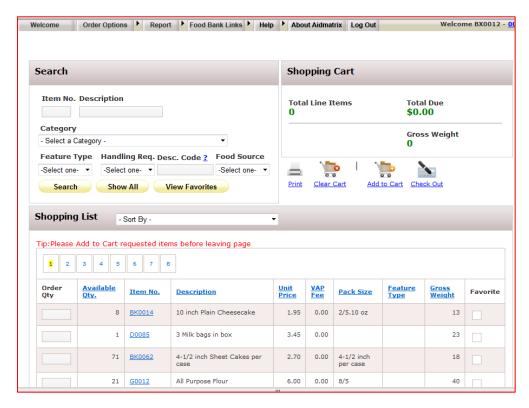
Pickup

Pickup

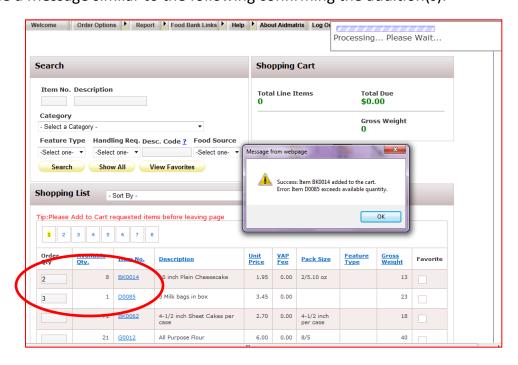
Pickup

Step Three - Now It's Official

Once an appointment has been scheduled, the Shopper can visit the Shopping List (Order Options -> Shopping List) to select Items. It is essential that you not only input the Order Quantity but also click on Add to Cart.

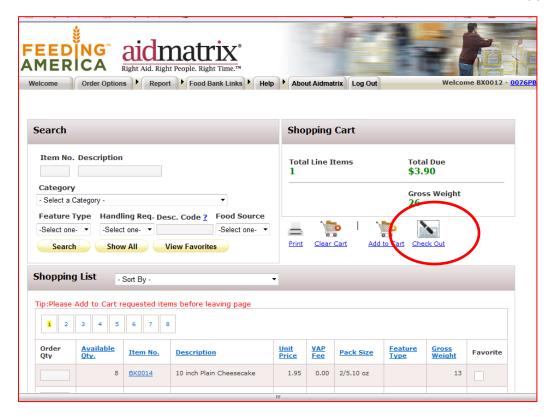


You will see a Message similar to the following confirming the addition(s).



The Home Stretch - Check It Out!

Once finished shopping the Shopper must click on <Check Out> to determine which appointment will be associated with this order and confirm the contents of the Shopping Cart.



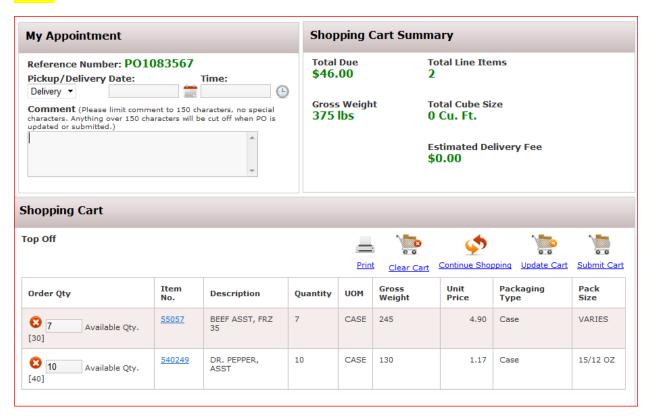
Again, if no appointments are set up via the Scheduler, the Shopper will not see any available dates in the calendar. In the example below, you have Pickup Dates set up but did not set up Delivery Dates.



Note that although the Date has been selected, the Shopping Cart has Items, and a Reference PO Number is assigned, the order will not be processed unless the Shopper clicks on <Submit

Cart>. This is absolutely essential.

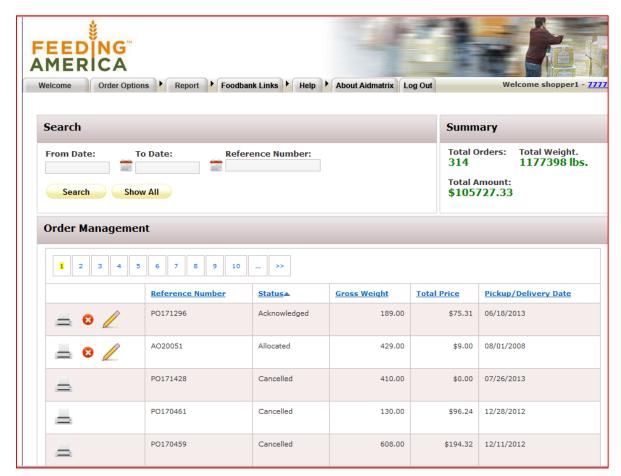
<Clear Cart> will empty the contents of the Cart (although this will not be visibly empty until you update the cart). <Continue Shopping> will take you back to the Shopping List. <Update Cart> will accept any changes to quantity made from this screen. Only <Submit Cart> processes the actual order and sends it to the inventory system at the San Antonio Food Bank.



Agency Express and Ceres are set to synchronize every 10 minutes. **The Shopper will receive a confirmation email AFTER the order is released to the Warehouse.** You will not receive an email immediately when you submit your order, but only after SAFB staff has accepted the order and sent to warehouse.

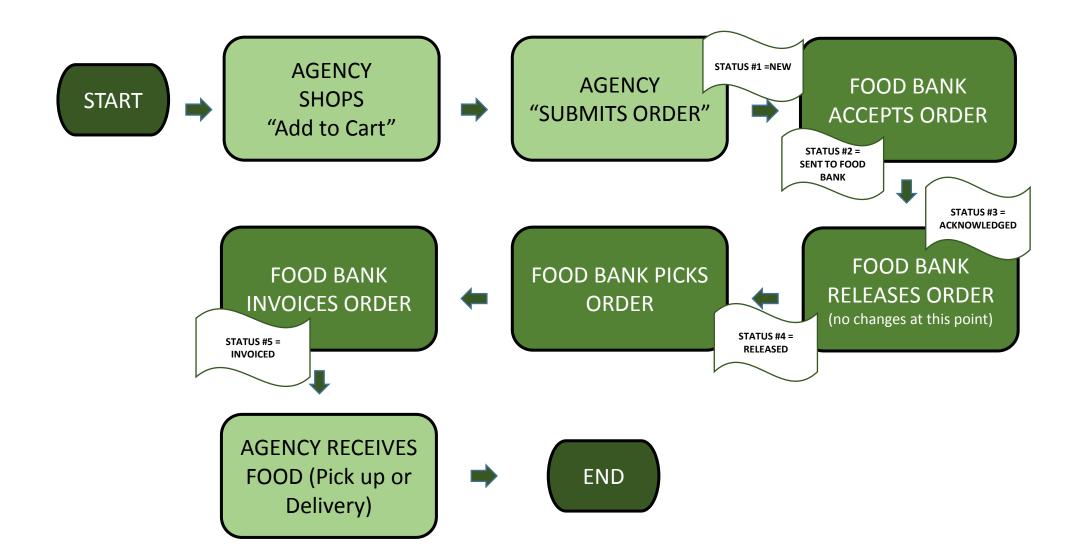
i.e. "Thank you for submitting your order to the San Antonio Food Bank. Your order is now with the warehouse staff and is no longer available for edits."

If the Shopper needs to verify the status of their existing orders you can simply visit the Order Options → Order Management screen. The icons to the left of the PO/Reference Number allow you to Print, Delete, or Edit this order at this stage. Once it is released to the Warehouse, only the option to Print will be available. In the example below, for PO171296 you could print, delete or edit. But once the order is submitted or invoiced, like AO20051, you can only see the option to print the order.



THE END

Agency Express MOrder Process - Simple





Order Timetable

UPDATED December 26, 2014 http://agencyexpress3.org/AgencyExpress30/newLogin.aspx

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
For Monday pickup, place order by 3pm Wednesday	For Tuesday pickup, place order by 3pm Thursday	For Wednesday pickup, place order by 3pm Friday	For Thursday pickup, place order by 3pm Monday	For Friday pickup, place order by 3pm Tuesday

*NOTE: Add an extra day to the order timeline if the San Antonio Food Bank is closed for holiday or other reason.

DAY 1 SUBMIT ORDER BY 3 PM

SAFB STAFF CREATES SCHEDULE OF PICKUPS AND DELIVERIES

STOP

No add-ons or changes once warehouse receives order.

DAY 2
WAREHOUSE
STAFF RECEIVES
ORDERS TO
START PULLING
FROM RACKS

ORDERS ARE STAGED FOR PICKUP NEXT MORNING DAY 3

AGENCY PICKS UP ORDER AND CONFIRMS ACCURACY