Partner Agency

Online Ordering System Training Manual

Our Vision

A hunger-free Iowa

Our Mission

We provide food for Iowa children, families, seniors and veterans to lead full and active lives, strengthening the communities where they live.

Welcome to the Food Bank of Iowa's online ordering system!

This ordering system allows users to:

- view up-to-the-minute inventory lists
- place an order
- schedule a pick-up
- receive order confirmation
- submit monthly reports
- access agency invoices and statements.

This manual is designed as a step-by-step training tool to be used by both experienced and new users to the online ordering system. There are several key pieces of information that are needed every time a user logs into this system. We encourage you to write that information into this manual and keep this in a safe and convenient location.

Agency log in information, you will need this information every time you wish to log into the system:
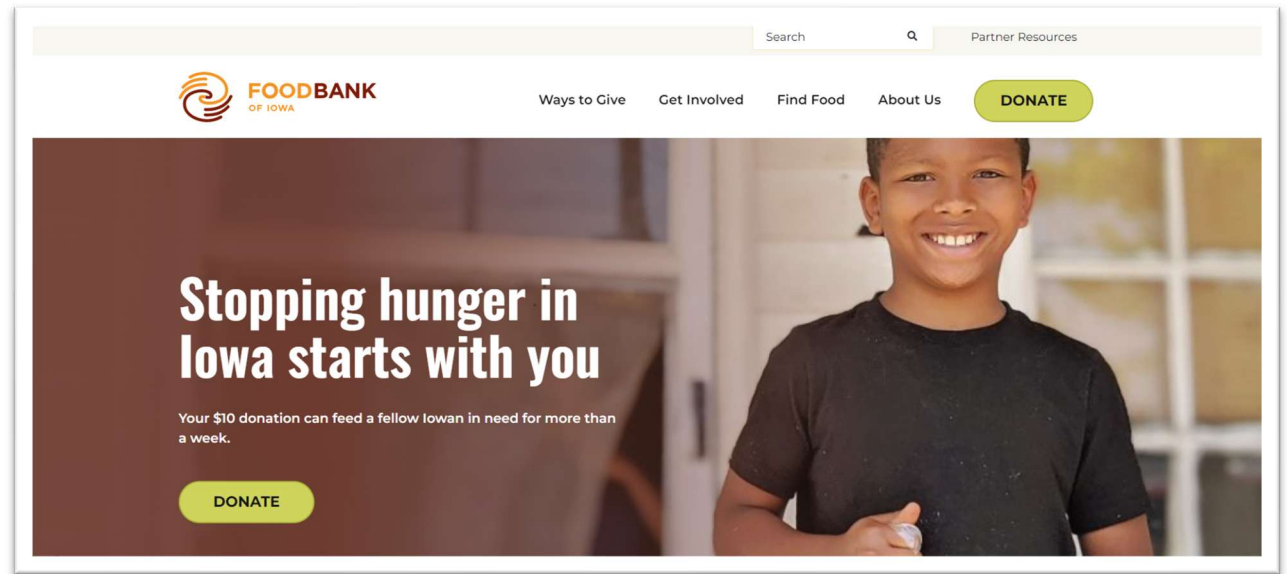
- **Web Address**: www.foodbankiowa.org

- **Agency Ref:** _____

- **Username:** _____

- **Password:** _____
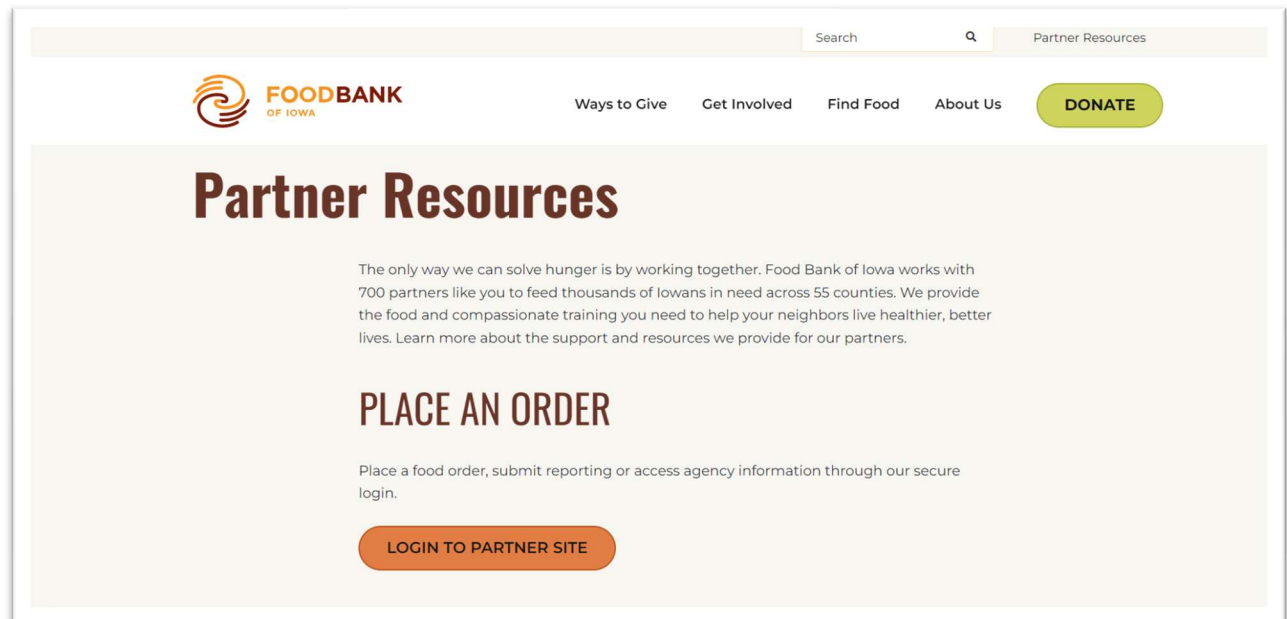
Regional Partnership Coordinator: _____

Logging in

Go to www.foodbankiowa.org and locate and click on **Partner Resources** at the top of the home page.

Scroll down to PLACE AN ORDER and click on Login To Partner Site.

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Enter your **Agency Reference**, **Username** and **Password**.

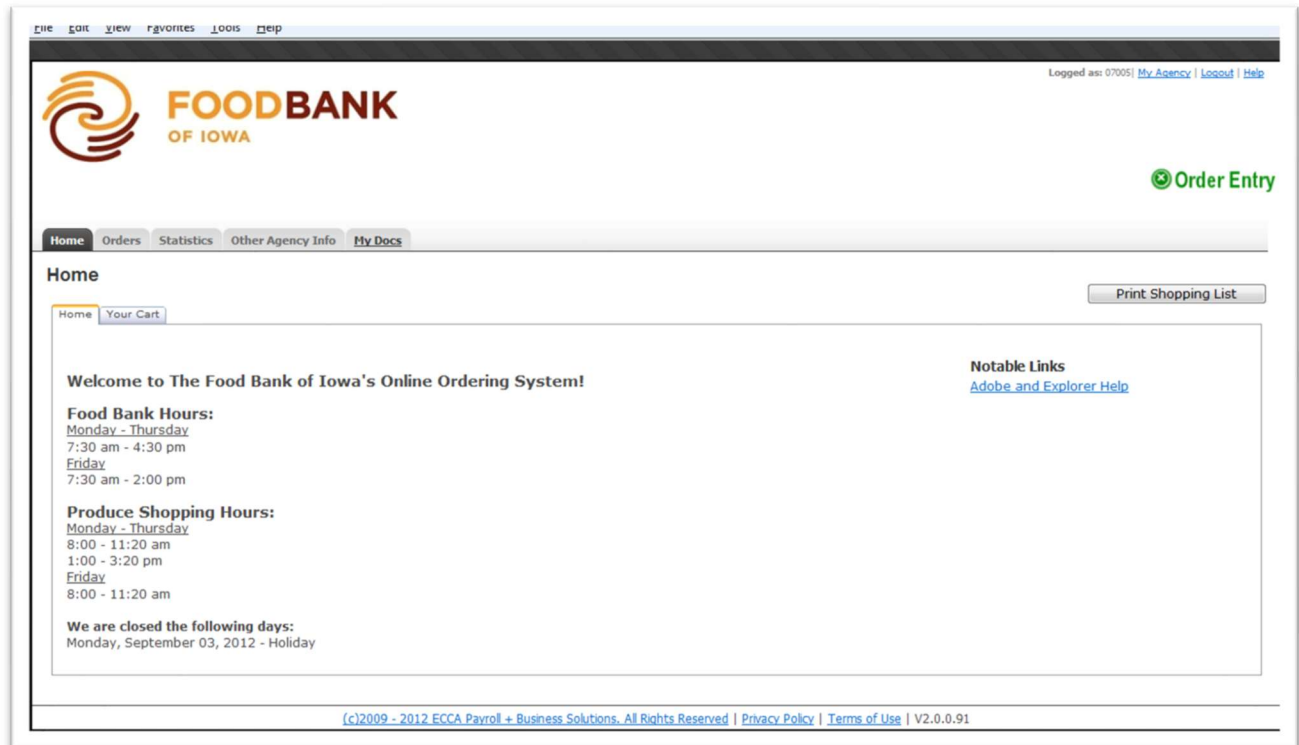The **Agency Reference** must be entered with a zero at the beginning of your four digit agency number.

Your **Username** and **Password** will be emailed to you. Should you forget either your **Username** or **Password**, please contact your Regional Partnership Coordinator.

You will now be logged into your agency home page.

Please check the home page when you log on for messages from the Food Bank of Iowa. From this screen, place an order by clicking **Order Entry** or view the current inventory by clicking **Print Shopping List**.

The shipping option **Method** and **Location** will automatically populate based on your master agency file. If it populates to delivery but you wish to pickup your order, then change the method from the drop down menu.

The system will default to the first available pickup date. To choose another day, click the calendar icon and select your desired pickup date. The date you select should be the day your order will be delivered on, or the day you want to pick up.

PLEASE CHECK YOUR DELIVERY SCHEDULE

 After the data has been selected, you will use the drop down arrow in Time to choose your pickup time. In order to continue placing your order, you are required to select a time.

The time you select for delivery is not the time your order will be delivered

If a pickup date or time is not shown, that time is not available to schedule.

Once your date and time have been selected and you have clicked **Continue** to move off this page, no changes can be made, unless you cancel and start over. If you need to change or correct your pickup date or time, use the **Comment** box as noted on page 9 of this manual. After you have scheduled your pickup appointment, click **Continue** to begin selecting your products. Please note that you can view all of the inventory items on a single page by changing page size to **All.**

A variety of sort options are available when viewing the shopping list. Any column with a star ★ can be sorted by double clicking the column name or clicking the star to get a list of the categories, in this example, **Type.** Once you have selected how you would like to sort, click **apply.**

Please remember that the shopping cart empties out 48 hours after an order has been started if it has not been submitted. You may continue to add product and delete product from the cart within 48 hours of starting the order.

Just remember that you need to submit your order by noon on your order due date on your delivery schedule.

Additional product detail information can be found for

an inventory item by clicking on the reference number (**REF).**

The **Search** box can be used to find specific products, such as cereal, in inventory by typing "cereal" in the **Search** box.

When you are ready to place your order, simply enter the number of desired cases in the **Qty** box. Please remember that this is a live inventory system. Once you input the number of cases you wish to order, click outside of the qty box and wait until the system catches up with you before inputting the next desired item.

USDA Allocations:

The amount of USDA product listed as available is specific to your agency and is based on a calendar month.
If the available amount is 10, you can get all 10 at one time or get a partial amount with one order and the remainder with another, within the same calendar month. If you place an order for partial amount, the available amount will be reduced accordingly.
USDA allocations will reset on the 1st of each month. USDA allocations do not carry over. As you enter items the total weight and total cost automatically adjust, giving you an instant snapshot of how much your order is.

To finalize your order, click the **View Cart** button.

Other options explained
- The print shopping list button will give you a PDF of our current shopping list
- The print cart button will you give you a PDF of what is in your cart
- The cancel order button will cancel your order like it never happened
- In order to move your order forward you must click the view cart button

Local	$0.28	$0.00	Each	2	7688		✖
Local	$0.00	$0.00	Case	29	44		✖
Local	$2.10	$0.00	Case	15	24	12	✖
Purchase Plus	$42.00	$0.00	Case	5	1		✖
Purchased	$1.96	$0.00	Case	14	111		✖
Purchased	$1.82	$0.00	Case	13	7		✖
Purchased	$1.82	$0.00	Case	13	846		✖
Purchased	$3.64	$0.00	Case	26	10		✖
USDA	$0.76	$0.00	Case	19	6		✖
USDA	$1.48	$0.00	Case	37	6		✖
USDA	$0.52	$0.00	Case	13	6		✖
USDA	$0.56	$0.00	Case	14	6		✖
USDA	$1.52	$0.00	Case	38	6		✖

< Prev **1** 2 3 Next > | Page 1 of 3

Cancel Order   Print Shopping List   Print Cart   View Cart

On this page you will be required to enter **your name**, **your telephone number and your email address**, <u>**NOT the agency information**</u>.

We want the details of the specific person who placed the order in case we have any questions. Add any instructions specific to your order or notes to change/correct your pickup appointment in the **Comments** field, for example: Pallet & Wrap, Hand Load, or which delivery you are on. If you find you need to add to this order **BEFORE** submitting, click **Shopping List** to return to your order detail. When you are satisfied with your final order, click **Checkout** to submit.

<u>You must click Checkout or your order will NOT be submitted to the Food Bank of Iowa.</u>

After clicking **Checkout**, the message below will appear.

If you do not receive this message, your order has NOT been submitted to the Food Bank of Iowa for review.
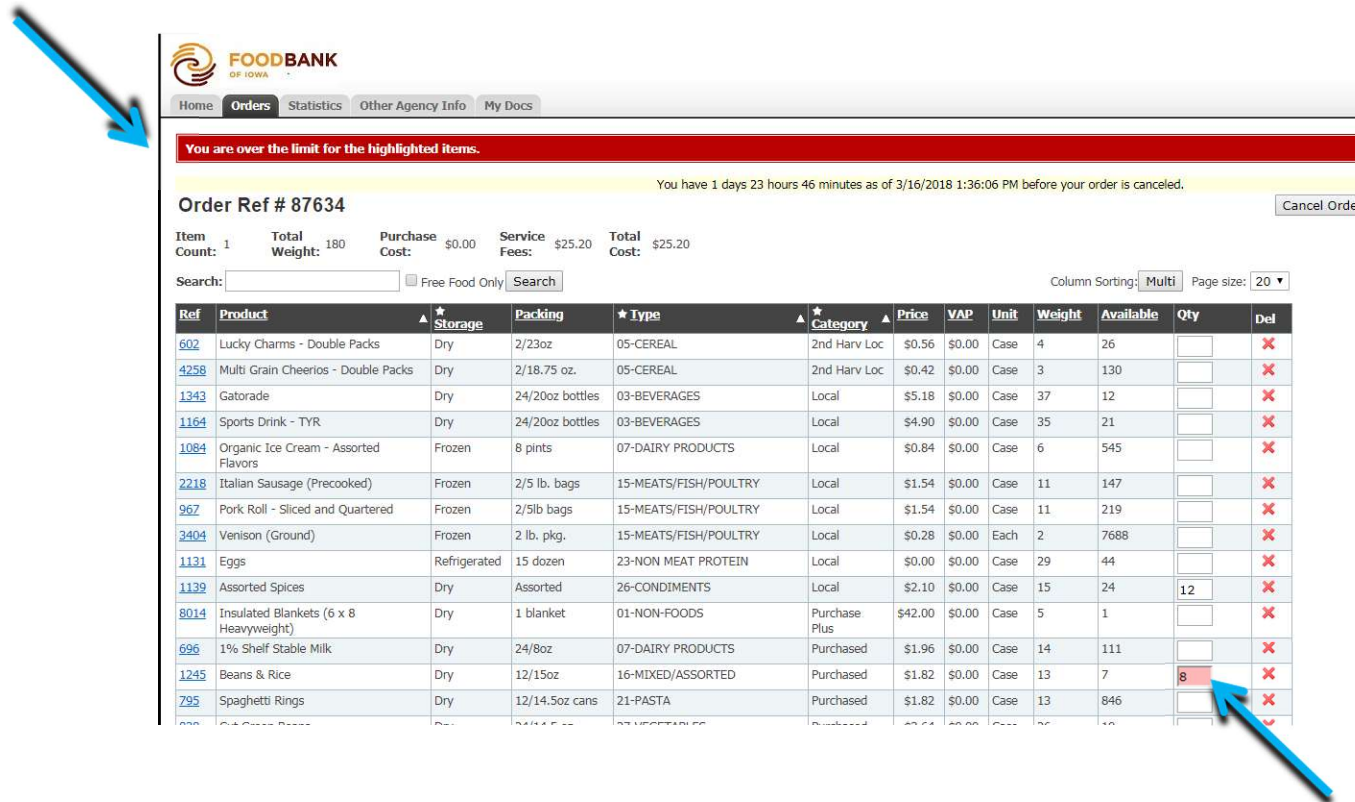
This example shows a quantity placed that exceeded the available amount. There were only **7** available and when **8** was entered, the box became **pink** indicating an error. If the error is not corrected, this message will appear when an attempt is made to move to another page or view your cart. You will not be able to continue until the correction is made.

Use the red X to remove items, backspacing will not delete the product from your cart.

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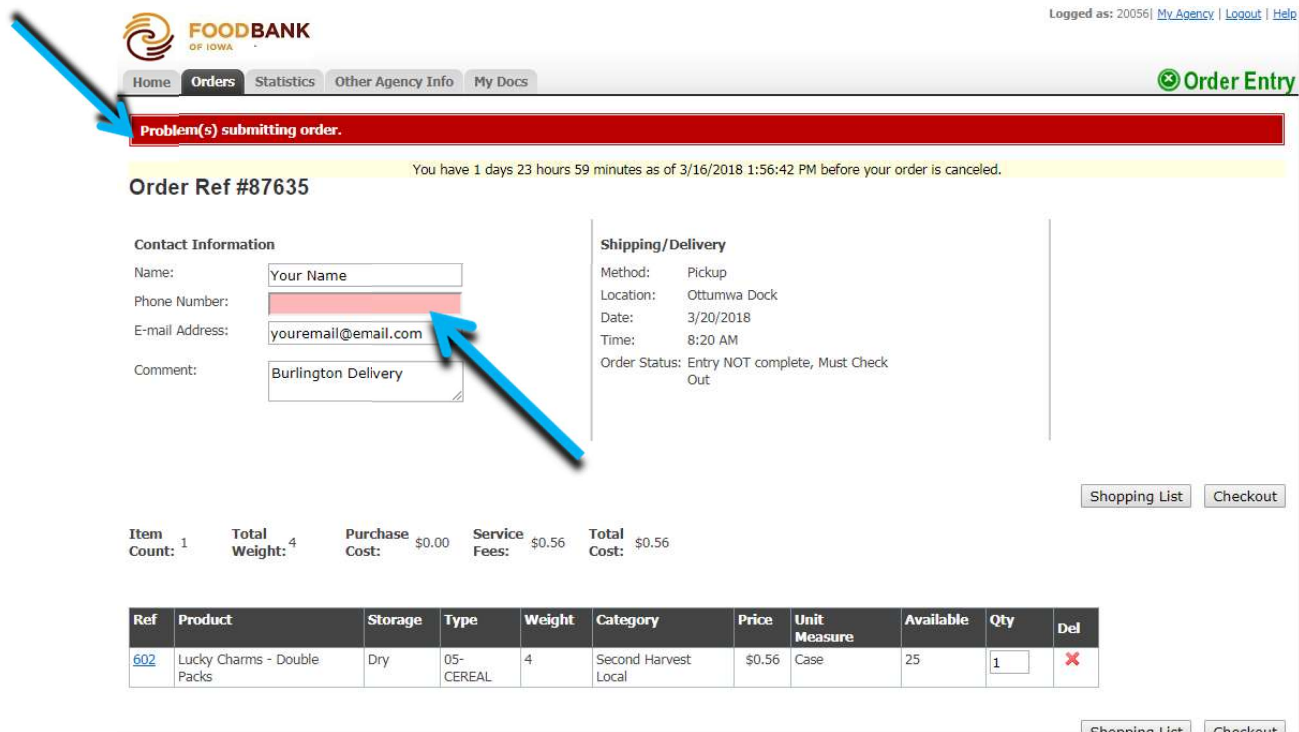
Moving too quickly between items when ordering quantities will result in the items not being placed in your cart. Primarius will prompt you to **'Wait...'** before adding a new item. Be sure to check that the quantity ordered shows up in the **Qty** column before moving to the next item.

If you get the message **'problem(s) submitting order'** look for the red highlighted boxes to find what you need to fix. For example, this order is missing a phone number.

Once an online order has been received and reviewed by the Food Bank of Iowa, you will receive a confirmation message to the email address listed as the POL Contact in your agency file. The order has been scheduled and will be available for pickup/delivery on the date in the email message. Bring this email with you when picking up your orders.
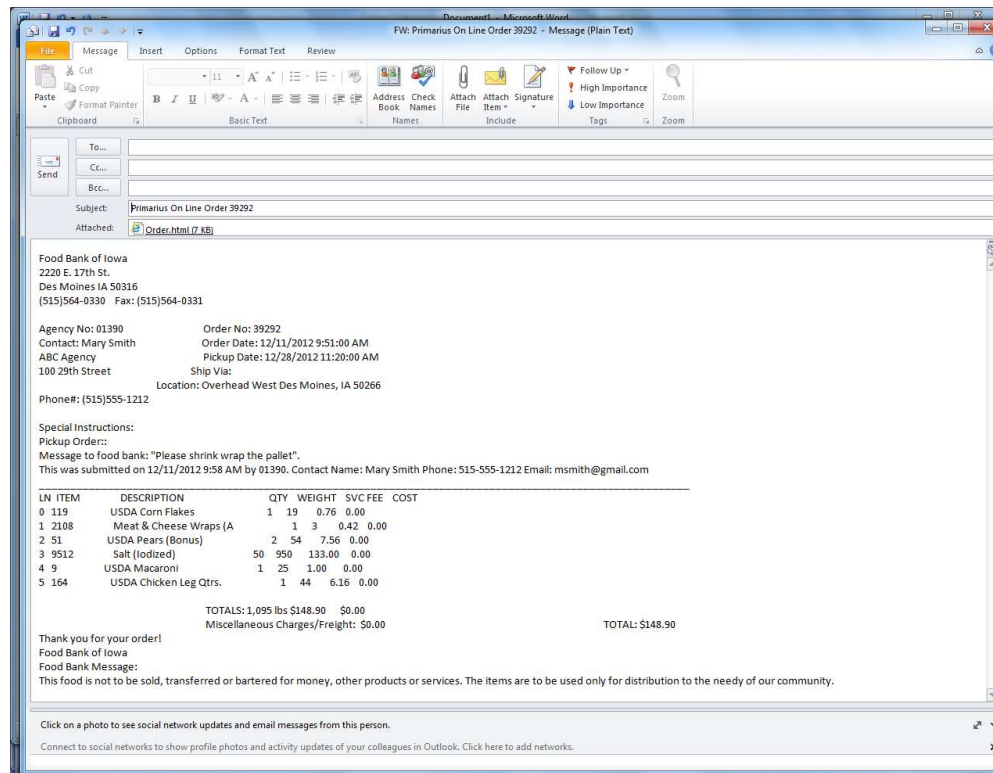
Warning: If you do not receive this email message within 24 hours of submitting the order, please call the Food Bank to check that your order has been submitted.

The **Orders** tab at the top of the page shows all orders that have been placed. A **'Yes'**, in the **Reviewed** column indicates that your order has been received and reviewed by the Food Bank of Iowa.

A **'No'** in the confirmed column indicates that your order hasn't been closed out yet, if you can see your most recent order on this screen, it has definitely been submitted in the system.

You can click on an open order to view the details of the order.

You can print a copy of the order from the **'Print Order'** button.

Order #84373

Order Date:	1/5/2018	**Order Status:**	Confirmed 1/10/2018	
Weight:	541	**Warehouse:**	Food Bank of Iowa	
Total Cost:	$40.64	**Shipping Method:**	Pickup	
Payments:	$40.64	**Delivered/Picked Up:**	1/10/2018 8:00 AM	
Applied Grants:	$0.00	**Picked Up By:**	lauren	
Balance:	$0.00	**Delivery/Pick-up Location:**	Overhead	

Order Notes: Pickup Order:: Location:: Overhead Message to food bank: . This was submitted on 1/5/2018 10:43 AM by 01508. Contact Name: Robin Brooks Phone: 515-508-1585 Email: brooksrobin61@yahoo.com CASH AND CARRY-MUST COME TO OFFICE TO PAY BILL PALLET AND WRAP Pick up at FBOI
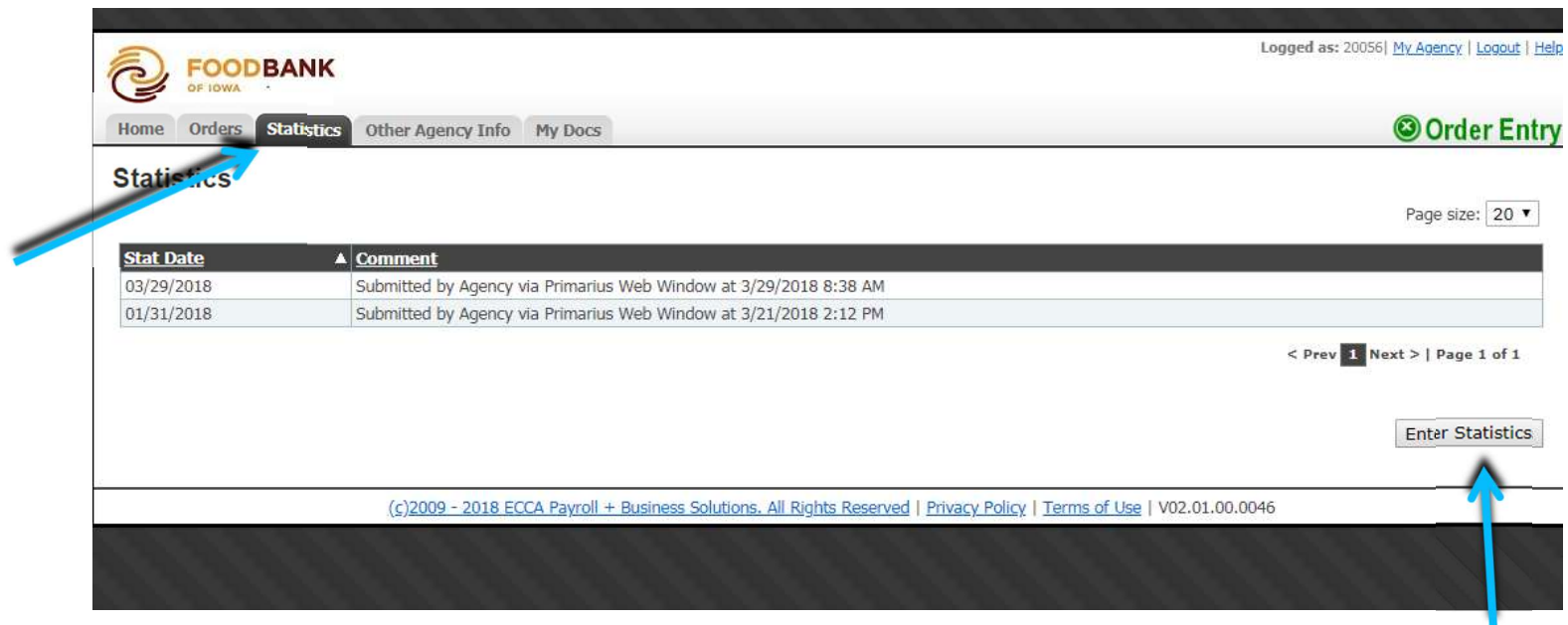
Products

Product	Name	Type	Category	Weight	Quantity	Total Cost
1072	Eggs	23-NON MEAT PROTEIN	Local	75	3	$0.00
955	Liquid Fry Oil - BULK	16-MIXED/ASSORTED	Local	108	3	$15.12
424	Pineapple Chunks in Light Syrup	10-FRUITS CANNED/FROZEN	Purchased	42	3	$5.88
805	Precooked Sausage Patties - BULK	15-MEATS/FISH/POULTRY	Local	22	2	$3.08
4459	Strawberry Spread	26-CONDIMENTS	Purchased	48	3	$6.72
235	USDA Dehydrated Potatoes	27-VEGETABLES CANNED/FROZEN	USDA	70	5	$2.80
55	USDA Peanut Butter	23-NON MEAT PROTEIN	USDA	64	4	$2.56
31	USDA Refried Beans	27-VEGETABLES CANNED/FROZEN	USDA	112	4	$4.48

Print Order

ENTERING MONTHLY AGENCY STATISTICS

All monthly agency statistics **must** be reported through the online ordering system. The **Statistics** tab is where you will submit your statistics. Current policy requires agency statistics to be up to date. If your agency is missing statistics for the previous month, the system will lock you out of ordering until these are entered.

Click **Enter Statistics** to begin entering your monthly agency statistics.

First select the **Month** you are reporting for and the current **Year**. Please enter stats for the whole month.

Statistic Categories

- Onsite meals are meals served and consumed onsite at a soup kitchen, shelter, residential facility, day care, senior meal site, rehabilitation center, camp, etc. If you are a meal site providing a community meal and do not track who attends the meal, please just report the total number of meals per month.
- Food pantries report the number of
  - pantry households
  - pantry individuals
  - the age breakouts of those individuals in the households
  - number of households receiving SNAP
- Residential facility, shelter, or are an agency where meals are consumed onsite and intake is kept for all residents living onsite, please report the total number of meals served <u>and</u> the ages of those residents living at the facility.

Complete all three categories **only** if your agency is multi-service, meaning it has an onsite meal program and a food pantry program, otherwise complete the categories that apply to your agency.

Click **Submit Statistics** when your monthly entry is complete. If any statistics have been entered incorrectly, please call your Regional Partnership Coordinator to correct or change them.

Accurate reporting helps us gain better access to funding and grants, as well as ensuring that pantry allocations are adequate.

Once you hit submit statistics, you should see the message below. That's it!
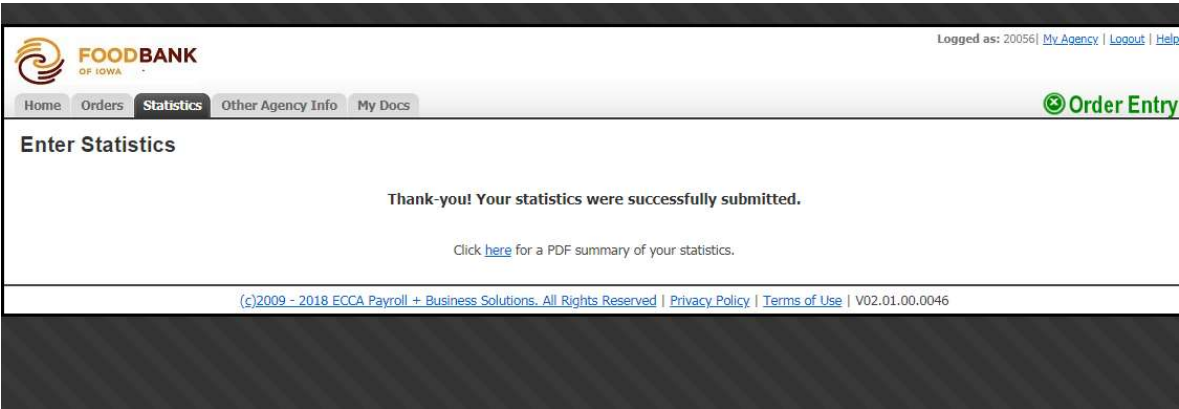
The **My Docs** tab has 2 sub-tabs. One contains your monthly statements; the other one contains all invoices

- Double clicking any invoice or statement listed will bring up a copy of that invoice. **We do not mail invoices or statements.** This option allows agencies to quickly access and print invoices and statements at any time.
- When paying your balance, we recommend paying from the **statements**, as they will show any credits that are on your account, as well as any overdue balances.
- Orders are required to be paid within 60 days of the pickup date.
- Checks should have the agency reference number and the invoice numbers that you are paying for included.
- Payments can only be made via check drawn on a partner agency 501(c)3 account. No personal checks or credit cards will be accepted.
- Mail checks to: **PO Box 1517, Des Moines, IA 50305**

Sample Invoice: For agency use only, this is not a "confirmation"

Ottumwa Warehouse
750 W Main St
Ottumwa, IA 52501
Tel: Fax:
Email:

FOODBANK
OF IOWA

Agency No:	20056		Phone#:					
	Contact:					Invoice No:	86649	
	American Home Finding Daycare					Order Date:	02/26/2018	
						Pickup Date:	02/26/2018	
	P.O Box 656					Pickup Time:	11:20 am	
	Ottumwa IA 52501							

Special Instructions: Ship Via: AGENCY'S VEHICLE
Tuesday Pick-Up

Product Reference	Description	Storage	Quantity	Weight Unit	Weight Total	Shared Maintenance /Lb	Shared Maintenance Total	Cost Unit	Cost Total
2nd Har. Nat									
1258	Fruit by the Foot	Dry	1	3	3	$0.14	$0.42	$0.00	$0.00
			1		3		$0.42		$0.00
2nd Harv Loc									
1279	'All' Laundry Soap	Dry	1	21	21	$0.14	$2.94	$0.00	$0.00
602	Lucky Charms - Double Packs	Dry	1	4	4	$0.14	$0.56	$0.00	$0.00
			2		25		$3.50		$0.00
Local									
1182	Fudge Stripe Cookies	Dry	1	6	6	$0.14	$0.84	$0.00	$0.00
850	Oyster Crackers	Dry	1	11	11	$0.14	$1.54	$0.00	$0.00
			2		17		$2.38		$0.00
Purchase Plus									
1242	Mandarin Oranges	Dry	1	28	28	$0.00	$0.00	$0.00	$0.00
			1		28		$0.00		$0.00
Purchased									
838	Cut Green Beans	Dry	1	26	26	$0.14	$3.64	$0.00	$0.00
			1		26		$3.64		$0.00
	Invoice Totals:		7		99		$9.94		$0.00

TOTAL CHARGES: $9.94

Amount Owed: $9.94

Invoice Message:
This food is not to be sold, transferred or bartered for money, other products or services. The items are to be used only for distribution to the ill, the needy and infants (minor children).

Sample agency statement

Food Bank of Iowa
PO Box 1517
Des Moines IA 50305
(515)564-0330

STATEMENT

Page 1 of 1

PERIOD ENDING
01/31/2018

Thursday, February 01, 2018

20056

American Home Finding Daycare

P.O Box 656
Ottumwa IA 52501

REMIT TO:
Food Bank of Iowa
PO Box 1517
Des Moines IA 50305
(515)564-0330

ORDERS			PAYMENTS AND CREDITS					GRANTS	INVOICE BALANCE
Date	Reference	Amount	Date	Check #		Discount	Applied	Total Applied	
01/04/2018	84165	$34.42	1/23/18	28911			($34.42)		$0.00
01/29/2018	85289	$90.38							$90.38
Total Balance:									$90.38

| CURRENT	OVER 30	OVER 60	OVER 90	OVER 120	TOTAL DUE
$90.38	$.00	$.00	$.00	$0.00	$90.38

From the main **Home** page you are able to access information specific to your agency by clicking on **My Agency**.

Agency Info tab

This is your agency information. It is important to note that the information in these tabs cannot be changed by your agency. The information is imported from the master agency file. Any changes or corrections will need to be communicated to your regional partnership coordinator or by filling out a Partner Agency Update form, located on the Food Bank of Iowa website.

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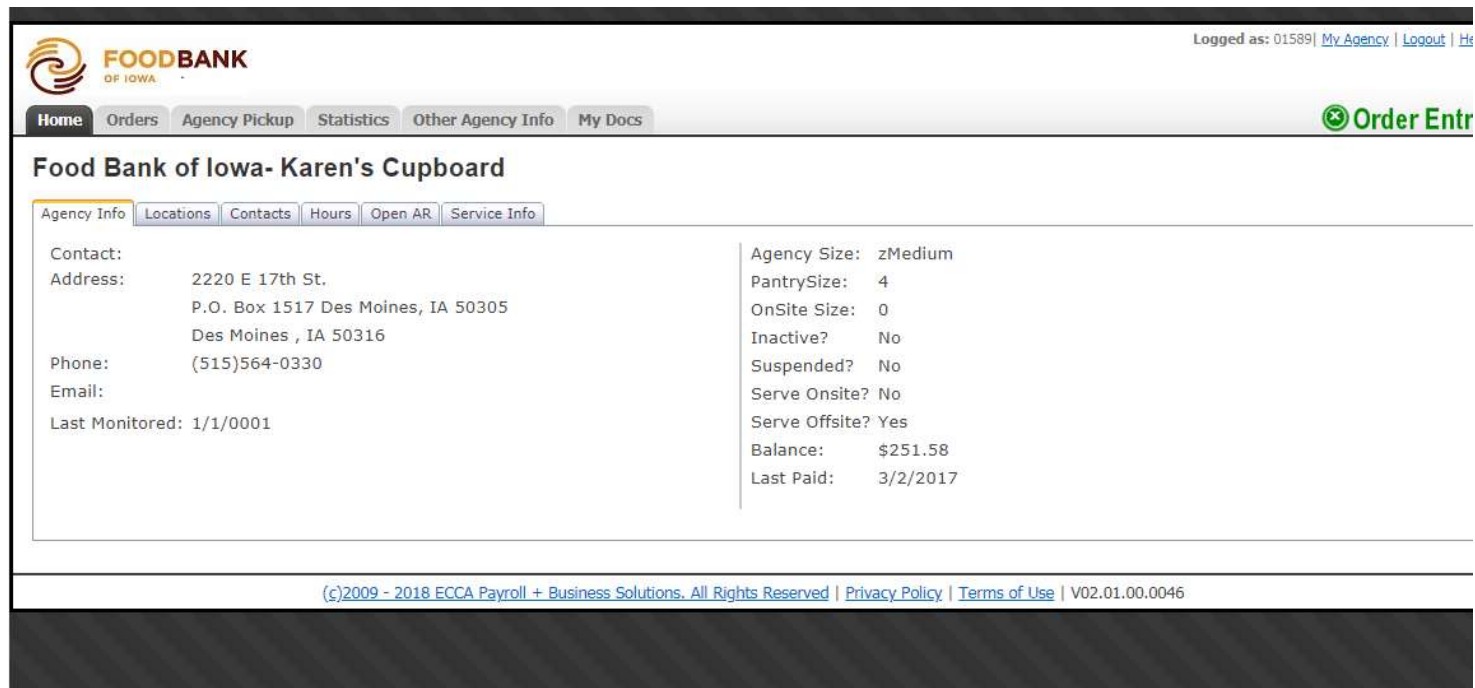
Locations tab

Lists the addresses we have on file for your agency.

FOODBANK OF IOWA

Home   Orders   Agency Pickup   Statistics   My Docs

Order Entry

DEMO-Food Bank of Iowa- Karen's Cupboard

Agency Info | Locations | Contacts | Hours | Open AR | Service Info

Addresses

Type	Name	Address	Address 2	City	State	Zip
Admin	Food Bank of Iowa	2220 E 17th St.	P.O. Box 1517 Des Moines, IA 50305	Des Moines	IA	50316

Contacts tab

Lists all the contacts on file for your agency.

FOODBANK OF IOWA

Home   Orders   Agency Pickup   Statistics   My Docs

Order Entry

DEMO-Food Bank of Iowa- Karen's Cupboard

Agency Info | Locations | Contacts | Hours | Open AR | Service Info

Contacts

Type	Name	Phone	Ext.	E-mail	Authorized?	Can Pickup?	Can Order?	Food Safety Cert?	Food Safety Cert
POL Order	Marie Peterson	515-564-0330		mpeterson@foodbankiowa.org	Yes	Yes	Yes	Yes	
Contact	Marie Peterson	515-564-0330		mpeterson@foodbankiowa.org	No	No	No	No	
Bill To	Marie Peterson	515-564-0330		mpeterson@foodbankiowa.org	No	No	No	No	

Hours tab

Lists hours of operation, if these are not accurate, please contact your regional partnership coordinator.

Open AR (Accounts Receivable) tab

This shows all of the invoices that still have a balance that needs to be paid.

Service Info tab

A great snapshot of your agency's service with easy to read graphs. This is an excellent tool for reporting to board members, etc. It is also a good tool for fundraising requests.
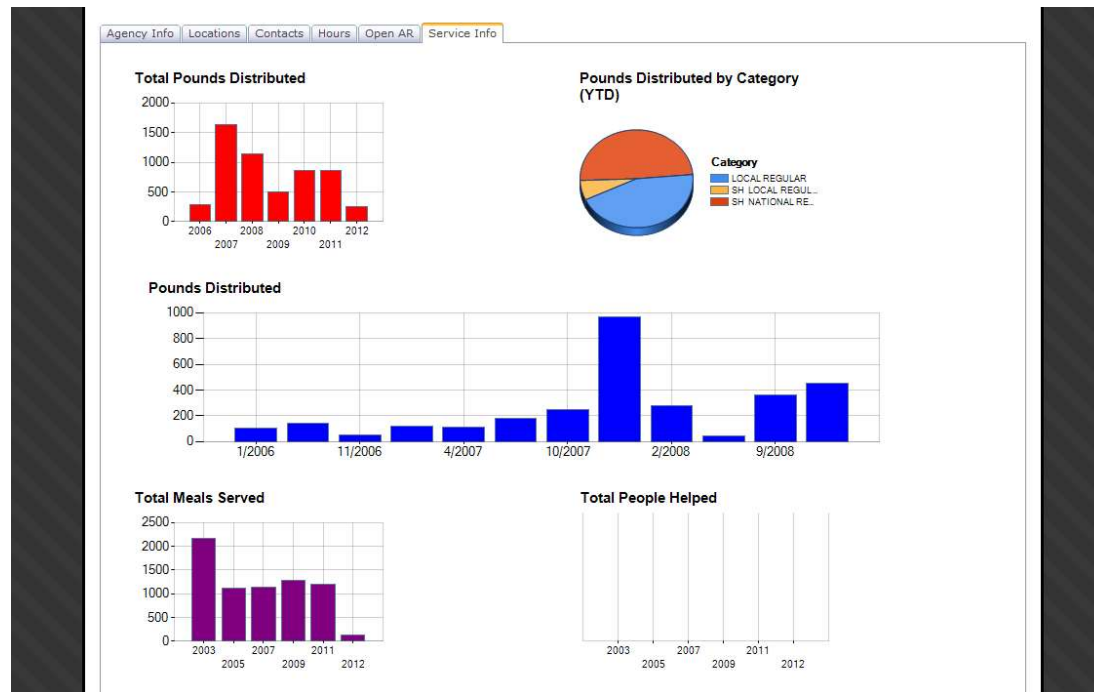
We hope you will find the online ordering system to be an efficient and effective tool for your agency, and should you have any questions or comments, please do not hesitate to contact your regional partnership coordinator.