AgencyExpress 3.0
User Guide
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Welcome to AgencyExpress 3.0!

AgencyExpress is a powerful Web-based tool sponsored by Feeding America and Aidmatrix that will help you shop for and manage your Food Bank orders online. You can use AgencyExpress to search for items, view item details, send orders to the Food Bank and review the status of your orders.

This handbook assumes the user is familiar with the use of an Internet browser, and has access to the Internet. Except in situations specific to the use of AgencyExpress, instructions on using an Internet Browser or connecting to the Internet are beyond the scope of this user guide.

If you have questions regarding AgencyExpress, please contact your local Food Bank.

Thank you!

The AgencyExpress Team
Browser Requirements

To use AgencyExpress, you will need:

• Personal Computer

• Internet Access

• Web browser (Internet Explorer 6.0 or higher, and Firefox 2.x or higher)
Logon to AgencyExpress

Once you have received your AgencyExpress User ID, Password, and Program, you can login to the website and shop online. Type the following web address into your Internet browser:

http://agencyexpress3.org/agencyexpress30/

This action will display a new window shown below. This is the Agency Express home page.

1.

2. Enter your **User ID**, **Password**, and **Program**. Your Password is case sensitive.
3. Click on **Login**. (Note: The first time you use the AgencyExpress system, you will be prompted to change your password. Please see the Change Password topic for more details.)
4. By clicking on the check box, next to **Remember me next time**, you will not need to enter your User Name and Program Code each time you login. Your computer will remember these two fields, and fill them in for you next time you use the system. You will still need to enter your password. Please do not use this feature on public computers (i.e. library, friend’s house, etc.).

5. If you want to clear the Remember me next time, click on the “need to clear your username and program code? **Click here**”

6. If you have forgotten your password, click on **Forgot your password?** (Skip to **Forgot your password**)

7. If you have forgotten your program code, click on **Forgot your program code?** (Skip to **Forgot your program code**)

8. A successful login will bring you to the welcome screen.
Forgot Your Password

After you have clicked on **Forgot your password?** A new message box will appear on your screen.

1. You will need to enter your **User Name** and **Program Code** to retrieve your password.
2. Click on **Submit**.

An email will be sent to the email address on record at your Food Bank. This email will contain a reminder of your password. Use the password from the email to login using steps 1-3.
Forgot Your Program Code

After you have clicked on **Forgot your program code**, a new screen will appear. This will list all the available program codes for you to choose from.
AgencyExpress Welcome Screen

The AgencyExpress Welcome Screen is displayed each time you login.

1. Welcome - To return to this Welcome screen at anytime, Click on Welcome.
2. Order Options – This section will contain links to “Shopping List, Check Out, Order Management, and optionally Scheduling”.
3. Reports – This section will contain links to your Statements.
4. Foodbank links – This section will contain links that were set up by the food bank. These could be FAQ’s, documentation, and links to other applications that the food bank would want the agency to have access to. This information is controlled by the Admin at the Food bank.
5. Help – This section contains the “Change Password and Report a Problem”.
6. About Aidmatrix – Link to Aidmatrix.org website
7. Logout – Logs the user off the system.
8. Display of the user information of the person who has logged in.
9. Content Area – Custom content can be displayed in this area. The content is determined by the Admin from the Food Bank.
Shopping

The user can access the shopping pages by selecting the “Shopping List” from the Order Options tab.

Or by selecting the “Shopping List” from the “Order Options Page”.

Search Options

When the Shopping List is first displayed it will display all the products that are available for the shopper. The shopper can limit the items
displayed by filling out one of the below listed text boxes and selecting the Search button:

- Item No.
- Description
- Handling Req.
- Desc. Code
- Category
- Food Source
- Feature Type

The shopper can also select the Favorites button to see only the items that the shopper has selected as a favorite. The favorite items are indicated by a STAR in the Favorite column.

The Show All button will display all items available.
Shopping Cart Details

The shopping Cart Details section will display the following information:

- **Total Line Items** – The total number of unique item numbers that have been ordered
- **Total due** – The total estimated monies due for this order. This value will increase or decrease as items are added to the open shopping cart.
- **Available Credit Limit** – This is an optional item that will show the agencies current remaining credit limit. This value will increase or decrease as items are added to the open shopping cart.
- **Gross Weight** – The current total weight of the items on the order.

Action Icons

The action icons will be used for the following actions:

- **Print** – Will print the currently displayed list of items.
- **Clear Cart** – Will clear any items that have been added to a cart.
- **Add to Cart** – Will add any selected items from the items list to the current shopping cart.
- **Check Out** – Will send the shopper to the Check Out Screen.

Shopping List

This section displays the items that have been searched for. These items can be sorted by clicking on the column headers or by selecting an items value from the drop down list in the text box.

On each line the user will see an Order Quantity, Available Quantity, Item No, Description, Unit Price, VAP Fee, Pack Size, Feature Type, and Gross Weight.

1. **Order Quantity** – Where the shopper puts the quantity desired of the line item.
2. **Available Quantity**: You will not be able to order more than the available quantity for each item.
3. **Item No**: This code is specific to each item.
4. **Description** – The description of the line item.
5. **Unit Price** - This is the cost of one unit of the item in U.S. dollars
6. **VAP Fee** – Value added processing fee.
7. **Pack Size** - The size of the individual items.
8. **Feature Type** – If this line item is a featured item or a special item.
9. **Gross Weight (in lbs)** - The weight of one unit of the item
If the shopper wants more detailed information of the item, then the shopper will need to click on the “Item No” and it will display a detail information box for that item.

The detail view has all the previous information plus the following:

1. Handling Req. – What type of handling is required for this item.
2. Extra Info – This info is set up by the food bank to help describe the item.
3. Price per Unit – The cost of each unit of this pack.
4. Category – The category of this item.
5. Picture – If you click on this icon and a picture of this item has been uploaded by the food bank then the picture will be displayed.
6. Food Source – Special information to display where this item came from.
7. Cube Size – A measurement to allow for how much space is required for this item.
8. Packaging Type – How this item is packaged.
9. People served – Optional information on how many people this item will serve
10. Price per Pound – A calculated value to determine how much per pound this item cost.
11. Cost per person – A calculated value to determine how much per person this item cost.
Submit Orders from Your Shopping Cart

The shopping cart screen stores all of the items that you selected from the shopping list. This is the last screen to complete before submitting your order.

1. Click on **Check Out** from the shopping list or from the menu bar on the Order Options Tab.

There are four sections of the Shopping Cart: **My Appointments**, **Shopping Cart Summary**, **Action Icons** and the **Shopping Cart**.
My Appointments

Reference Number

You will see a reference number at the top of the header. Use this number to identify your order later on.

Pickup/Delivery

The Pickup/Delivery list box is used to select what type of order this is:
- A pickup will be picked up from the Food Bank by the agency.
- Delivery will be delivered to the Agency by the Food Bank.

Click on the Calendar Icon to select a new date. A Calendar will appear where you can click on a Date to set the date. This will be a date that the shopper has previously reserved or a date that is available depending on the Food Bank.

Click on the Clock Icon to select a time for the pickup or delivery. The time slot chosen will be either 8 am or 12 pm (which reflects morning and afternoon). The Food Bank Transportation department will determine the delivery time based on availability. You will be contacted with your scheduled delivery time.
Comments

This text box is used to record any comments for this order.

Shopping Cart Summary

The shopping Cart Summary section will display the following information:

- Total due – The total estimated monies due for this order. This value will increase or decrease as items are added to the open shopping cart.
- Total Line Items – The total number of unique item numbers that have been ordered
- Gross Weight – The current total weight of the items on the order.
- Total Cube Size – The total area needed for this order.
- Available Credit Limit – This is an optional item that will show the agencies current remaining credit limit. This value will increase or decrease as items are added to the open shopping cart.
- Estimated Delivery Fee - This is an optional item that will show the orders estimated delivery fee. This value could increase or decrease as items are added to the open shopping cart.

Action Icons

The action icons will be used for the following actions:

- Print – Will print the currently displayed list of items.
- Clear Cart – Will clear any items that have been added to a cart.
- Continue Shopping – Will return the shopper to the Shopping List page.
- Update Cart – Will update any selected items from the items list to the current shopping cart.
- Submit Cart – Will submit this order to the Food Bank.

Shopping List

This section displays the items that have been added to the shopping cart

There can be up to three Top Off buttons that will alert the Food Bank to “Top Off” this order with extra products that the food bank makes available to the agencies.

On each line the user will see the following information:

1. **Order Qty** – The initial value will be quantity that was ordered. If this quantity needs to change then the shopper would update the quantity text box and then click on the Update Cart action icon. The X icon will delete this line item, and the value in the ( ) is the max quantity available to the agency.
2. **Item No:** This code is specific to each item. If this code is clicked on then the complete details of the item will be displayed.

3. **Description** – The description of the line item.

4. **Quantity** – The quantity of the item that has been ordered.

5. **UOM** – Unit of measure.

6. **Gross Weight (in lbs)** - The weight of one unit of the item

7. **Unit Price** - This is the cost of one unit of the item in U.S. dollars

8. **Packaging Type** - The type of packaging that the item has.

9. **Pack size** – the size of the packaging.

10. **Handling Requirements** – what type of handling this item needs.

11. **VAP Fee** – Value added processing fee.

12. **Special** – If this line item is a featured item or a special item.

**Orders are Tentative**

Please keep in mind that your order is tentative until acknowledged by the Food Bank Administrator. The Administrator may have to change quantities or reject orders.
Review the Status of Your Orders

You can review the status of your order once it has been submitted to the Food Bank. The Food Bank may alter the details of your order.

1. Click **Order Management** from the tab on the top of your screen.

All of your orders will be displayed, sorted by Order Date.
Viewing a Specific Order

The shopper can search for a specific order by:

1. Typing the Reference number in the Reference number text box and clicking the Search button.
2. Selecting a From Date and a To Date and then clicking on the Search button.
3. Selecting the Show All will display all orders.

Under the Status column your Order Number will fall under one of the following statuses.

- **Non-Web Order** – This Order has been entered by the Food Bank Administrator. This type of order is typically from a fax or telephone order.

- **New Order** – Your Order has been recently submitted and not yet sent to the Food Bank Administrator.

- **Sent to Food Bank** – Your Order has been sent to the Food Bank Administrator and is awaiting their approval and release.

- **Allocated** – This is an allocated order from the Food Bank.
• **Canceled** – This order was canceled by the Agency.

• **Released** – This order is being fulfilled by the Food Bank and cannot be changed.

• **Acknowledged** – The Food Bank Administrator has approved your Order and made any necessary changes to it. You will receive an email notifying you that your Order has been acknowledged.

• **Invoiced** – Your Order has been picked up by your agency and has been billed.

• **Rejected** – Your Order was not rejected by The Food Bank Administrator. None of the items will be available.

**View Order Details**

1. Click on a **Printer Icon** to see a copy of the order details.
Order Details

The Order Detail screen will show the following:

1. Appointment Details – All the information for the Appointment for this order to be delivered or picked up, as well as any comments on this order.

2. Shopping Cart Summary – All the information about cost of this order as well as Gross Weight, Cube Size and Total due.

3. Shopping Cart – Has all the line details for this order.
Deleting an Order

1. To delete an order the shopper will click on the X Icon.
Editing an Order

1. To edit an order the shopper will click on the pencil icon.

This will take you to the Shopping Cart where you would edit the order as if it were a new order.
Statements

1. A shopper can review any statements that the food bank would like to make available to it by clicking on the Statements drop down from the Report tab at the top of the page.
This will bring up a list of types of statements that the Food Bank is making available to the Shopper.

2. Click on the Folder to see the contents of that folder
3. Click on the statement to view it.

The statement selected will come up in this window.
4. To view another statement click on the Back arrow to have the list of statements displayed again.
Change Password

You will use the Change Password feature to update your password.

1. Click on Change Password from the Help tab at the top of the screen.
2 Type in your **Old password**, **New Password** and **Confirmed New Password**.

3 Click on **Change Password** to save your changes.
4 Look for **Your password has been changed** to appear on your screen. Click **Continue**. The next time you login you will need to use the new password you just changed to.
Report a Problem

If you have a question or need to report a problem with AgencyExpress, fill out this form to have an email sent to your Food Bank Administrator.

1. Click on **Report a Problem** from the Help tab at the top of your screen.
2. Select the subject of the problem you are having from the drop down list.

3. Enter any extra information that you want sent with your email in the text box.

4. Click on Submit. This will send this email to your Food Bank Administrator.
Logout of AgencyExpress

1. Click **Logout** at the top of your screen.
Frequently Asked Questions

I need HELP beyond the information given in the user guide. What do I do? Call your local Food Bank.

A. Username/Password/Email Questions

How do I get a username, password, and program code? Call your local Food Bank.

What do I do if I forgot my username, password, and program code? Call your local Food Bank if you do not know your username and/or program code. If you have forgotten only your password, refer to the Forgot Your Password section of this manual.

What steps need to be taken if an Aidmatrix user leaves our agency? Call your local Food Bank and give them the User ID that is no longer applicable. They will need to deactivate the user from using the Online Shopping System on behalf of your program.

How do I update my email address for Aidmatrix? Call your local Food Bank and give them the correct email address for your username and program code.

I'm not receiving emails when my order is ready to be picked up at the Food Bank. What do I do?

First look that the order has reached the Acknowledged state in Order Management. See View Order Details portion of this manual. If you see the order, yet have not received the email check the following:

a) Check to see if your email memory space is too full. You may need to delete some of your old mail to free up space.

b) Has your email account been inactive for a length of time? You may need to reactivate it.

c) Verify that your organization’s email server is working.

d) Verify that your Internet connection is working.

B. Food Bank Questions

What day and time am I supposed to pickup my order from the Food Bank now that I order online?

Unless you designate otherwise when you place your online order, your pickup date and time with the Food Bank will remain the same.
Frequently Asked Questions (cont’d)

Once I have submitted my order, how will I know when it has been confirmed by the Food Bank? You will receive an Order Confirmation via email from your local Food Bank.

How do I know if my order has changed from the quantities I originally ordered? Review the confirmation email that you receive once your order has been approved by the Food Bank. Also you can confirm the quantities of your order by looking under the Accepted Quantity column under Order Management. (Refer to the “Review the Status of Your Order” section.)

C. Downloads

How do I download Internet Explorer Version 5.5 or 6 if I don’t have it?

Type http://www.microsoft.com/ie in your Internet browser. Then click on the application you want to download for free. Follow the instructions.