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Agency Express™ 3
User Guide

FOOD
BANK
of the Rio Grande Valley, Inc.
Fighting Hunger, Feeding Hope

Updated April 2014

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Agency Express™ User Guide

Welcome to Agency Express™ 3!

Agency Express™ is a powerful Web-based tool sponsored by Feeding America and Aid matrix that will help you shop for and manage your Food Bank RGV orders online. You can use Agency Express™ to search for items, view item details, send orders to the Food Bank RGV, 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 Agency Express™, instructions on using an Internet Browser or connecting to the Internet are beyond the scope of this user guide.

If you have questions regarding Agency Express™, please contact Glenda Reyes at the Food Bank RGV, 956-904-4508 for help.

Thank you!

The Agency Express™ Team

Browser Requirements

To use Agency Express™, you will need:

• Personal Computer

• Internet Access

• Web browser (Internet Explorer 6.0 or higher, OR Firefox 2.x or higher)

Logon to Agency Express™

Once you have received your Agency Express™ User Name, Password, and Program Code, you can log in to the website and shop online. Please practice in the test database. When you feel comfortable with what you are doing, call Glenda Reyes at (956-904-4508) who will enable you to use the live system. Type the following web address into your Internet browser:
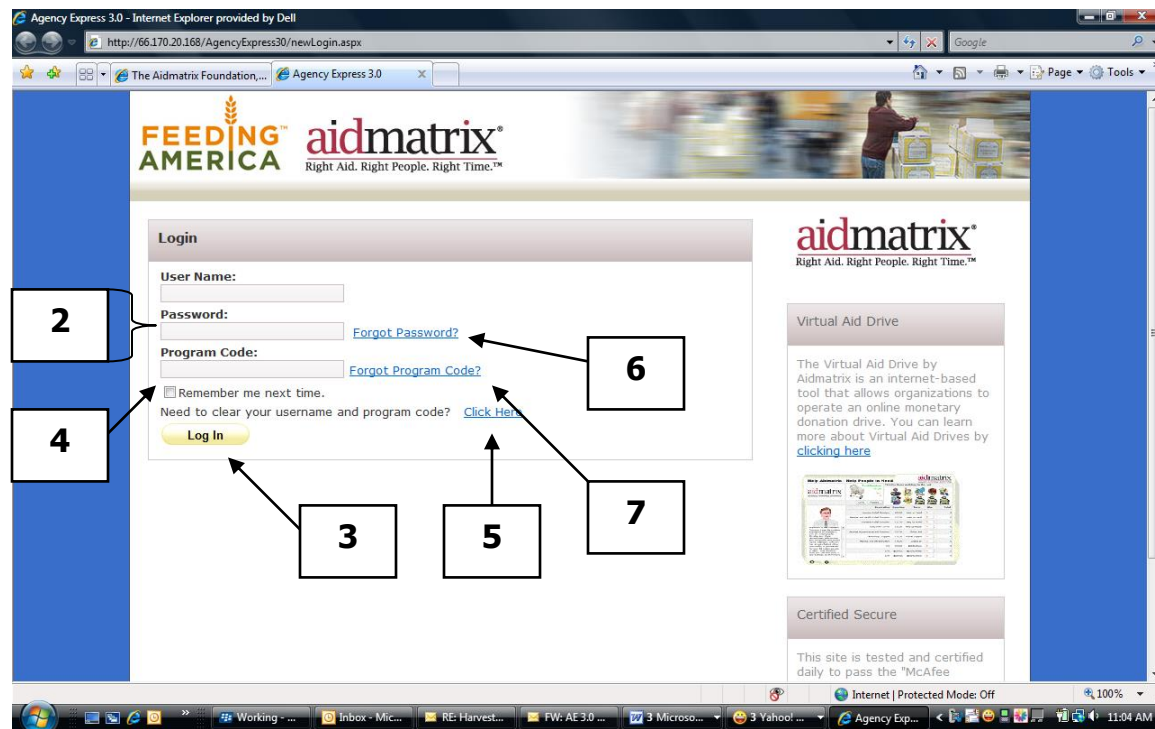
(Test database)
http://sandbox.agencyexpress3.org/AgencyExpress30/NewLogin.aspx

(Live database)
http://agencyexpress3.org/AgencyExpress30/NewLogin.aspx

This action displays a new window shown below, which is the Aidmatrix (Agency Express) Login page.   Do not use http**s**://.

2.   Enter your **User Name**, **Password**, and **Program Code**. Your Password is case sensitive.
3.   Click on **Login**. The first time you use the Agency Express™ system, please change your password. See the Change Password topic (page 29) 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 log in. Your computer will remember these two fields and fill them in for you the 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, page 7.**)

7.   If you have forgotten your program code, click on **Forgot your program code?** (Skip to **Forgot Your Program Code, page 8.**)

8.   A successful login brings you to the Welcome screen. In the example below notice that we now have a pop-up for the Activity Status Alert – click the Close button to make the pop-up banner go away:
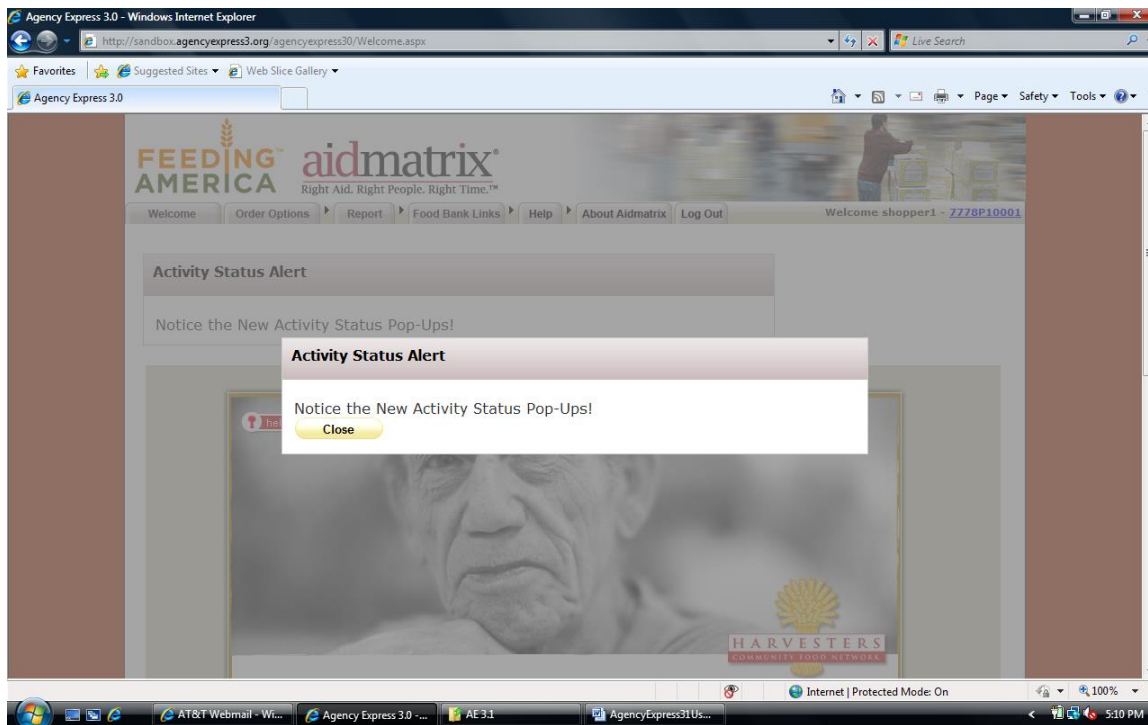

After you first log in, you may get this pop-up screen. If so, remove the "s" from your login address: change https:// to http://

Forgot Your Password?

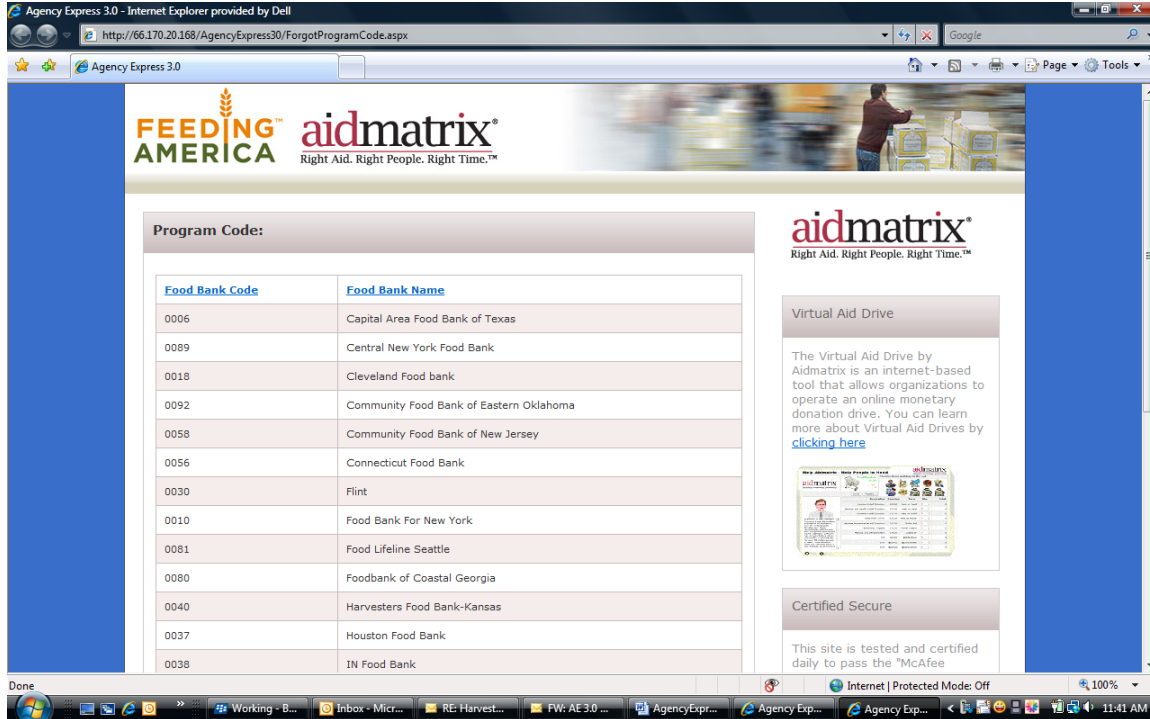After you click on **Forgot your password? ,** a new message box appears on your screen.

1. 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 the Food Bank RGV. This email will contain a reminder of your password. Use the password from the email to login using steps 1-3.
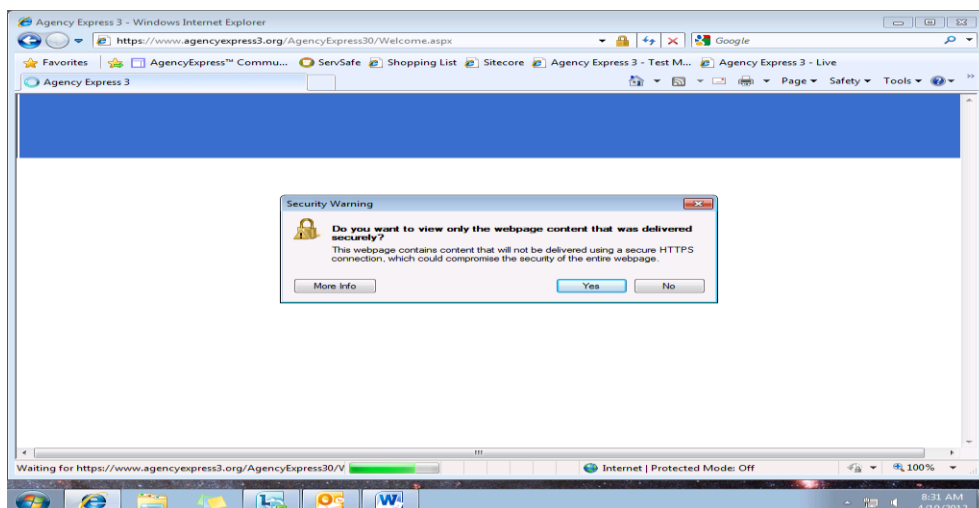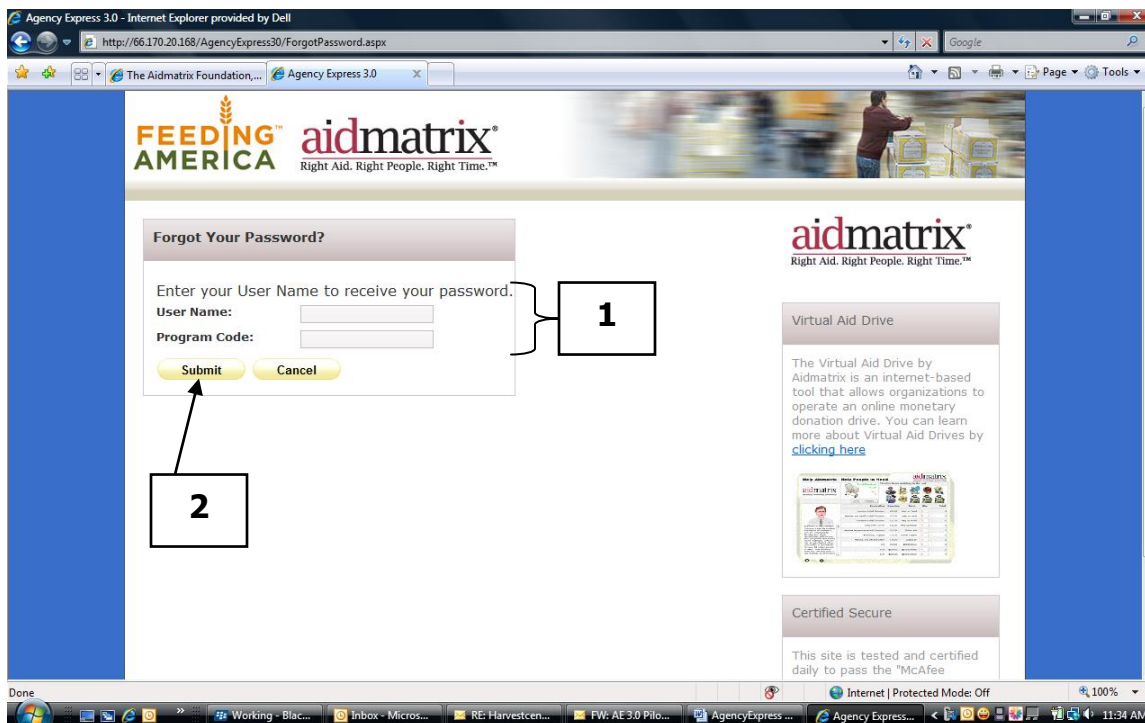
Forgot Your Program Code?

After you click on **Forgot your program code? ,** a new screen will appear listing all the available program codes for you to choose.

Your Program Code for the Food Bank RGV is 0221pXXXXX. Where X equals your agency ID#. If you do not know your ID#, call Glenda Reyes at 956.904.4508.

You are now at the Food Bank RGV Agency Express Welcome Screen.
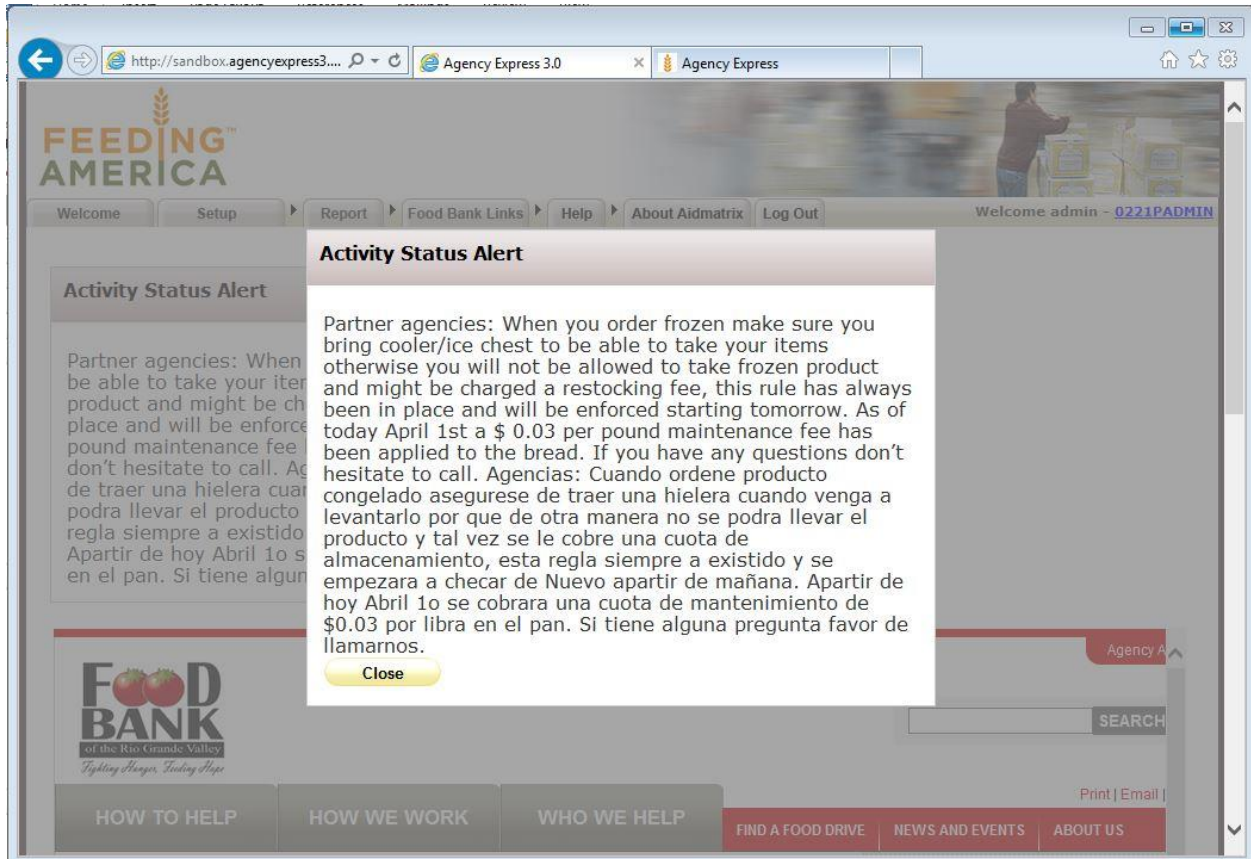
The Agency Express™ Welcome Screen is displayed each time you log in.
The content of this screen may vary, but the tabs will not.
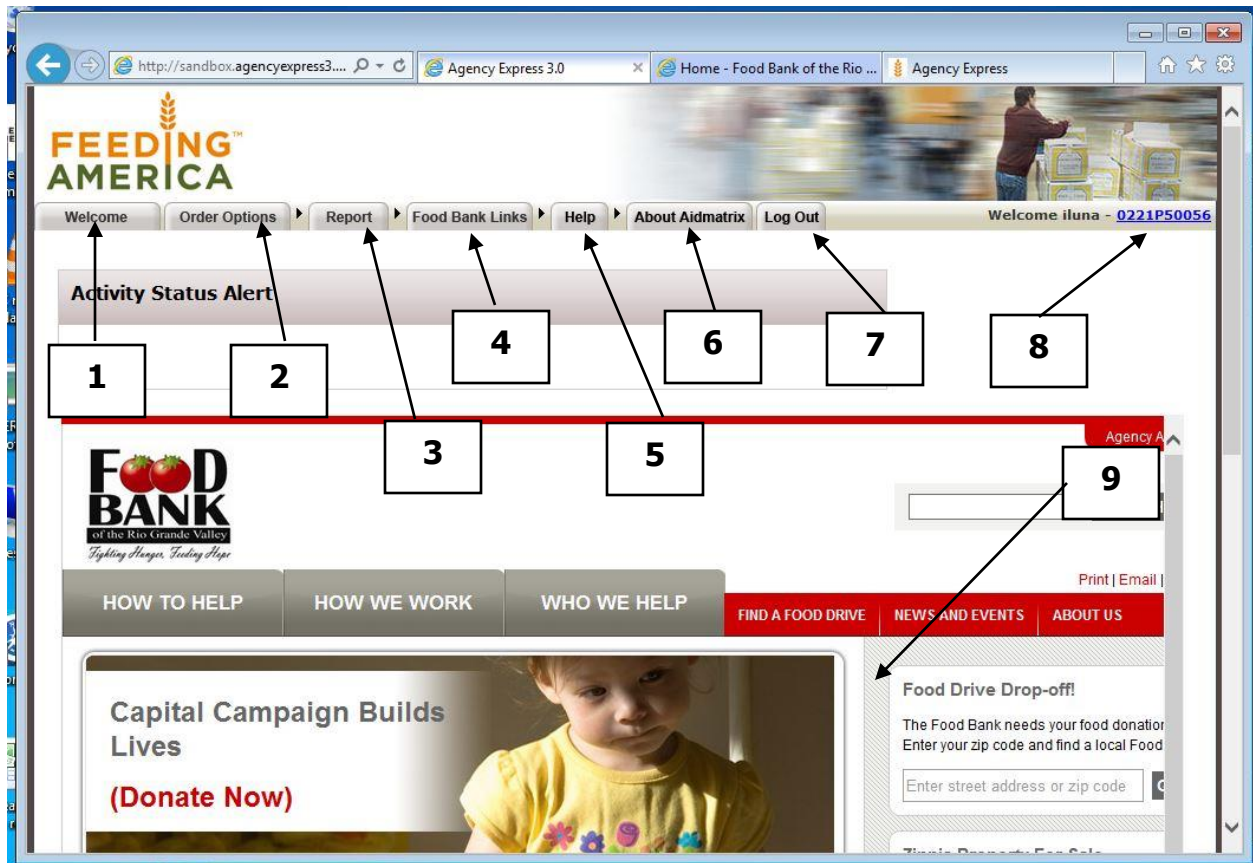
1. Welcome - To return to this Welcome screen at any time, Click on
   Welcome.
2. Order Options – Contains links to "Shopping List, Check Out, and Order
   Management."
3. Reports – Contains links to your Statements (a future enhancement) and
   Survey Responses (active, but no surveys available at this time).
4. Food Bank RGV links – Contains links that are set up by the Food Bank
   RGV. These could be FAQs, documentation, surveys, and links to other
   applications that the Food Bank RGV wants the agency to access. This
   information is controlled by the Agency Express administrator at the Food
   Bank RGV.
5. Help – Contains "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 Food Bank RGV.

Shopping

The user can access the shopping pages by selecting "Shopping List" from the Order Options tab.
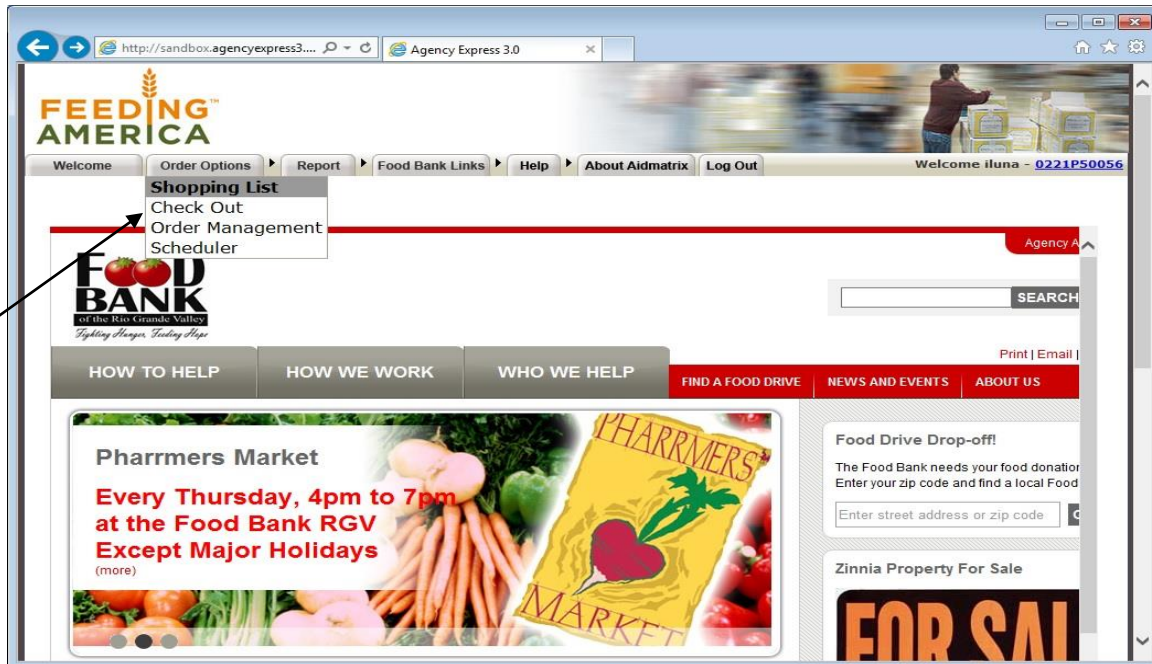
Or by selecting "Shopping List" from the Order Options PAGE.
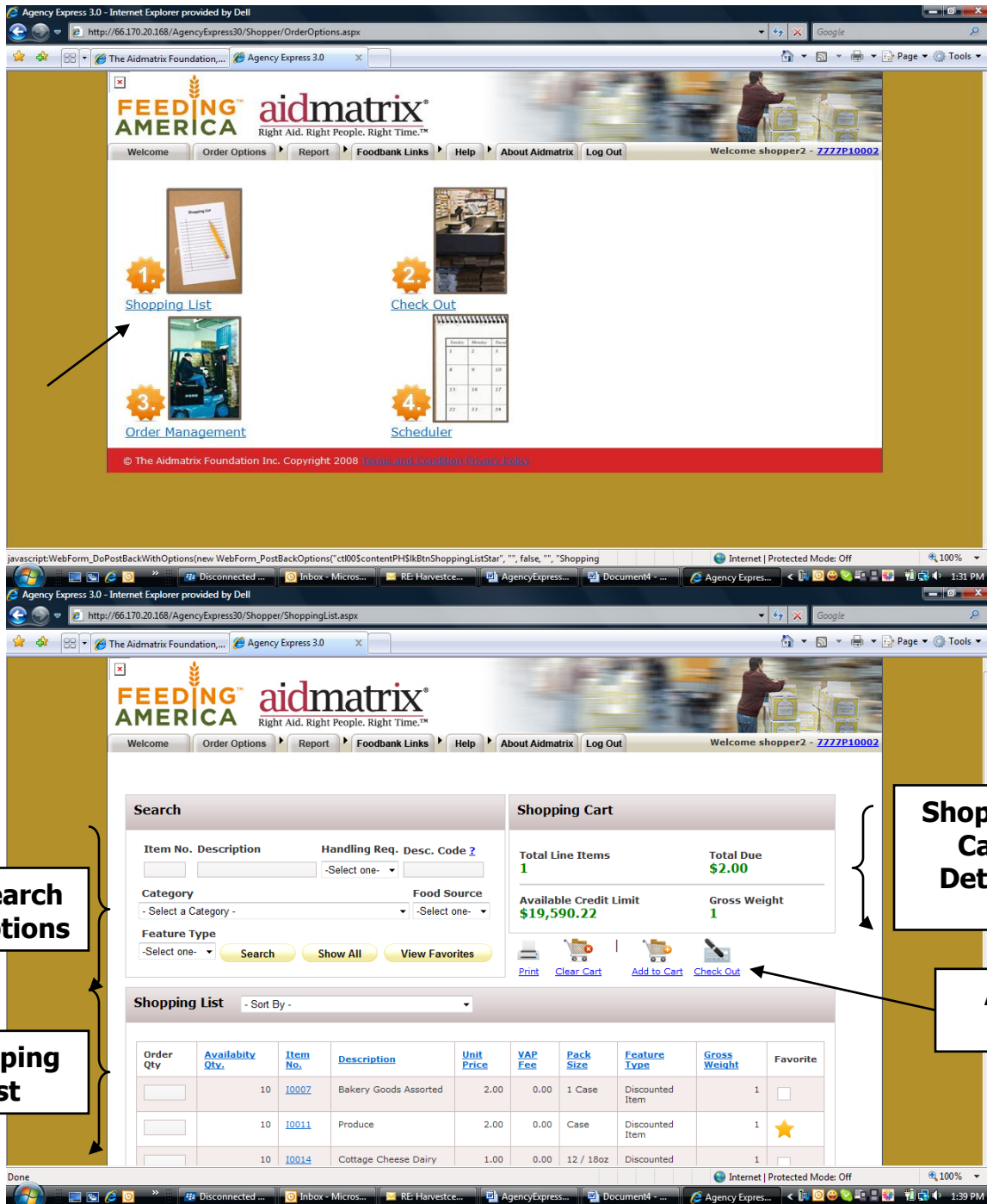
Search Options

When the Shopping List is first displayed, it will include all the products that are available for the shopper. It does not have headings like the website shopping list, and the items are not sorted the same. You will need to experiment search options to find the products you want. Using the **Favorites** button for items you order repeatedly will save a lot of time on

future orders. The shopper can limit the items displayed by using the drop-down feature of the text boxes listed below or filling in the text box where a drop-down is not available and selecting the **Search** button:

- Item No.
- Description
- Handling Req.
- Desc. Code (Not Used)
- 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. This is a real time-saver.

The **Show All** button displays all items available in alphabetical order.

Shopping Cart Details

The Shopping Cart Details section displays 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 increases or decreases as items are added to or deleted from the open shopping cart.
- Available Credit Limit – This is an optional item that will show the agency's current remaining credit limit (if the agency has a line of credit at the Food Bank RGV). If your agency does not have an approved credit limit, this field displays as a zero. This value increases or decreases as items are added to or deleted from the open shopping cart.
- Gross Weight – The current total weight of the items on the order.

Action Icons

The action icons are used for the following actions:

- Print – Prints the currently displayed list of items.
- Clear Cart – Clears any items that have been added to a cart.
- Add to Cart – Adds any selected items from the items list to the current shopping cart. You must "Add to Cart" before leaving a page of the shopping list or items will not be included in your order.
- Check Out – Sends 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 item's 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 desired quantity of the line item. Do not hit return as this will erase your entry.
2. **Available Quantity**: You cannot order more than the available quantity for each item.
3. **Item No**: This code is specific to each item.

4. **Description** – Description of the line item.
5. **Unit Price -** The cost of one unit of the item in U.S. dollars.
6. **VAP Fee –** Value added processing fee.
7. **Pack Size -** 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 information about the item, click on the "Item No." This will display a detailed information box for that item.
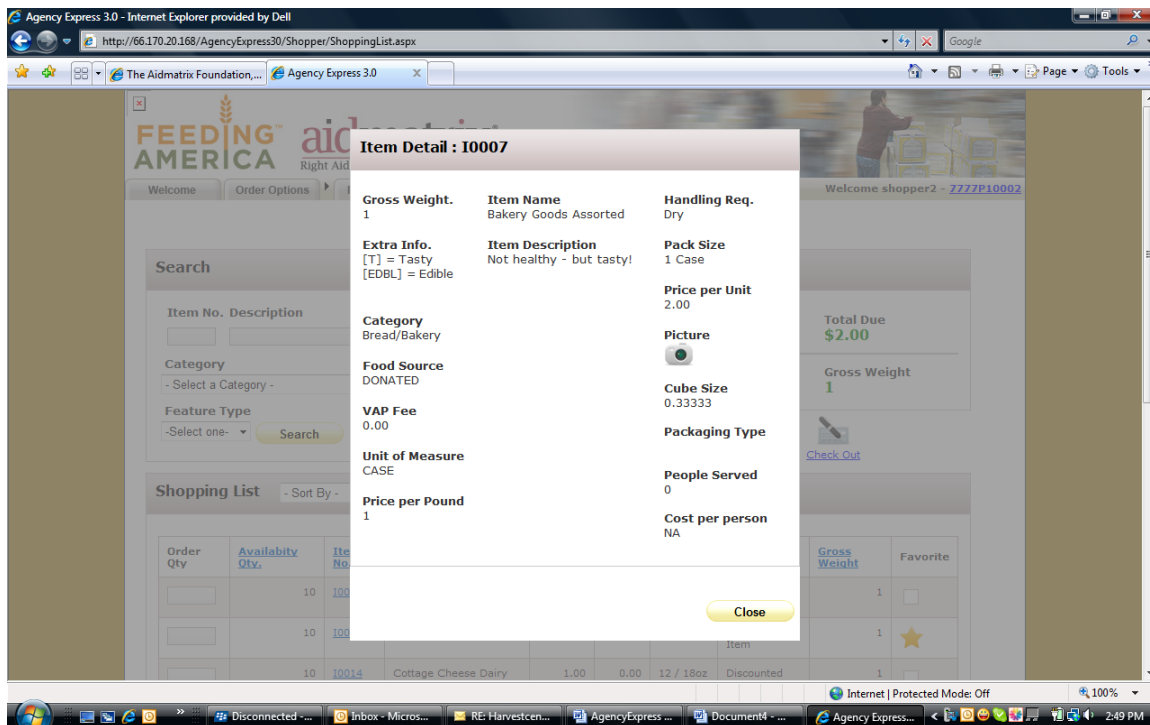
The detail view has all the previous information plus the following:

1. Handling Req. – Type of handling required for this item.
2. Extra Info – Not available at this time.
3. Price per Unit – Cost of each unit of this pack.
4. Category – 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 RGV, 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 – Calculated value to determine how much per pound this item costs.
11. Cost per person – Calculated value to determine how much per person this item costs.

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**.
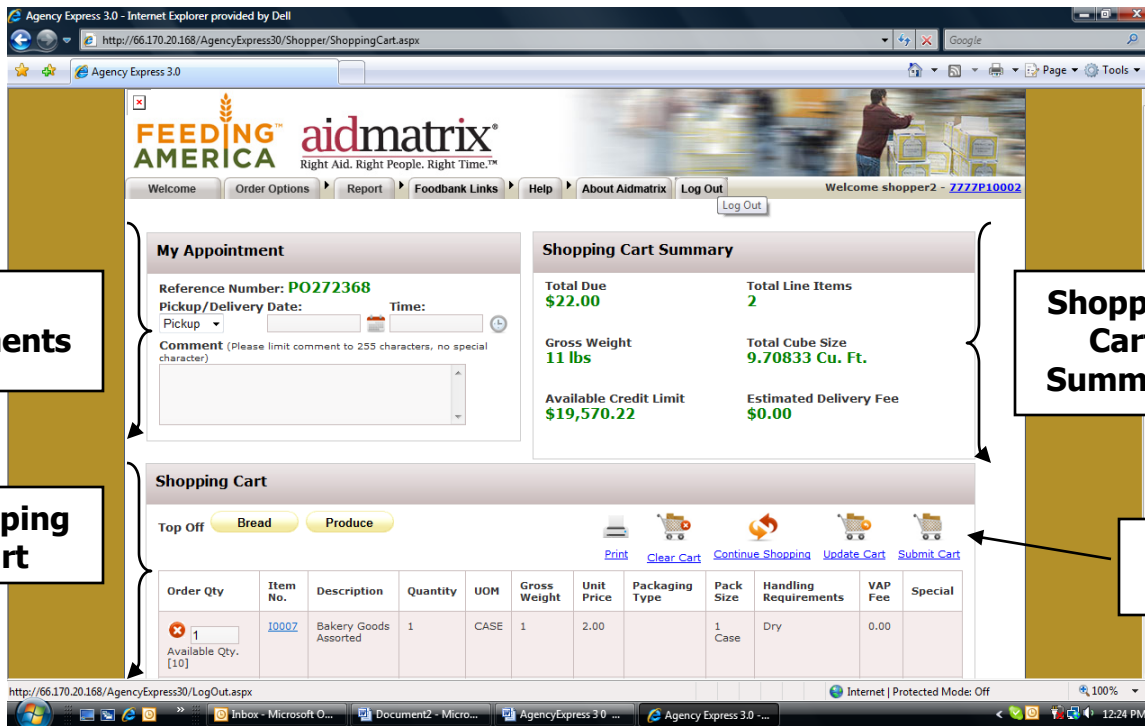
My Appointments

Reference Number

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

Pickup/Delivery

In order to complete your shopping experience, you must know your appointment:

1. Click on the **Calendar Icon**, which brings up a calendar. Select your next appointment date.
2. Click on the **Clock Icon.** A time slot appears. Select the time of your pick up appointment.

Delivery to Agency Site

1. If your order is delivered, please check the delivery schedule to determine the date your order will be delivered. Click on the **Calendar Icon** and select the date the order is scheduled to be delivered.
2. Click on the **Clock Icon**. A time slot appears. **ALWAYS** choose **8 AM** for this step in the process even though the actual time of delivery is variable.

Comments

This text box is used to record any comments for this order. Every order will be looked at before it is released to the warehouse. Comments are important; so, if there is something the Food Bank RGV needs to know about this order, please indicate it here.

Shopping Cart Summary

The Shopping Cart Summary section displays the following information:

- Total due – Total estimated monies due for this order. This value increases or decreases as items are added to or deleted from the Open shopping cart.
- Total Line Items – Total number of unique item numbers that have been ordered.
- Gross Weight – Current total weight of the items on the order.
- Total Cube Size – Total area needed for this order.
- Available Credit Limit – If an agency has an established credit limit, this item shows the current remaining credit limit. This value increases or decreases as items are added to or deleted from the open shopping cart.
- Estimated Delivery Fee - An optional item that shows the order's estimated delivery fee.

Action Icons

The action icons are used for the following actions:

- Print – Prints the currently displayed list of items.
- Clear Cart – Clears any items that have been added to the cart.
- Continue Shopping – Returns the shopper to the Shopping List page.
- Update Cart – Updates any selected items from the items list to the current shopping cart.

- Submit Cart – Submits this order to the Food Bank RGV. Once you "Submit Cart" you cannot change your order.

Shopping Cart

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

On each line the user will see the following information:

1. **Order Qty** – The initial value is the quantity ordered. If this quantity needs to change, then the shopper can 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 maximum 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 are displayed.
3. **Description** – Description of the line item.
4. **Quantity** – Quantity of the item that has been ordered.
5. **UOM** – Unit of measure.
6. **Gross Weight (in lbs)** - Weight of one unit of the item.
7. **Unit Price -** Cost of one unit of the item in U.S. dollars.
8. **Packaging Type -** Type of packaging that the item has.
9. **Pack size –** Size of the packaging.
10. **Handling Requirements –** 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.

Last Step – "Submit Cart" – if you forget to do this you will not have an order in the work flow.
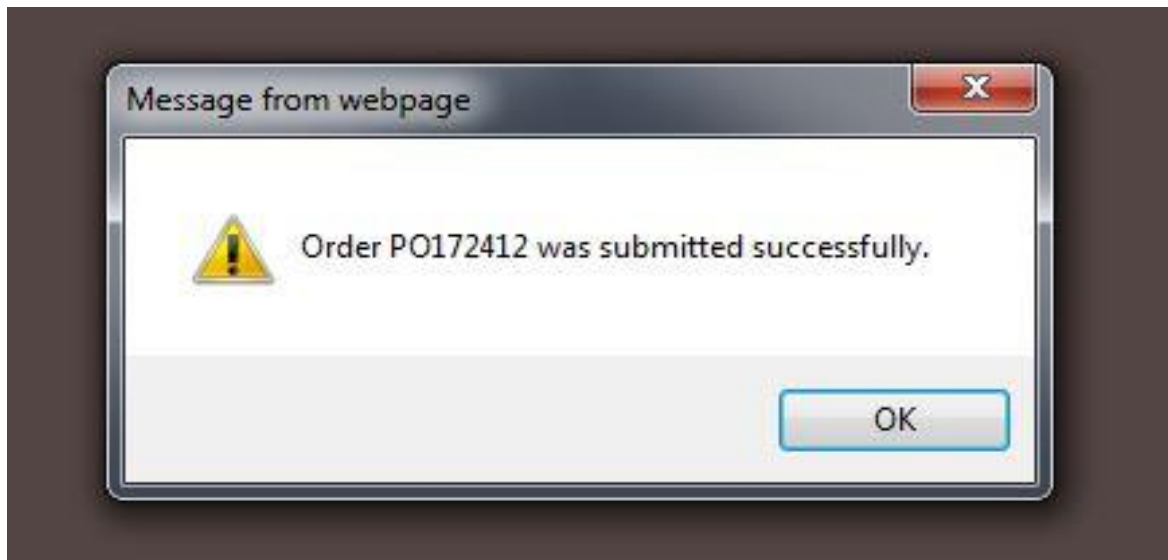
Orders are Tentative

Please keep in mind that your order is tentative until released by the Food Bank RGV: quantities may have to be changed and orders may be rejected. Please check your Order Management screen periodically to make sure your order has been "Released." You should receive an email when your order is released; however, you will not receive one if your order is rejected, or if it has not progressed to the point of being released. See next page for details on Order Management.

ORDER MANAGEMENT

Review the Status of Your Orders

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

1.   Click **Order Managemen**t from the Order Options tab at the top of your screen.
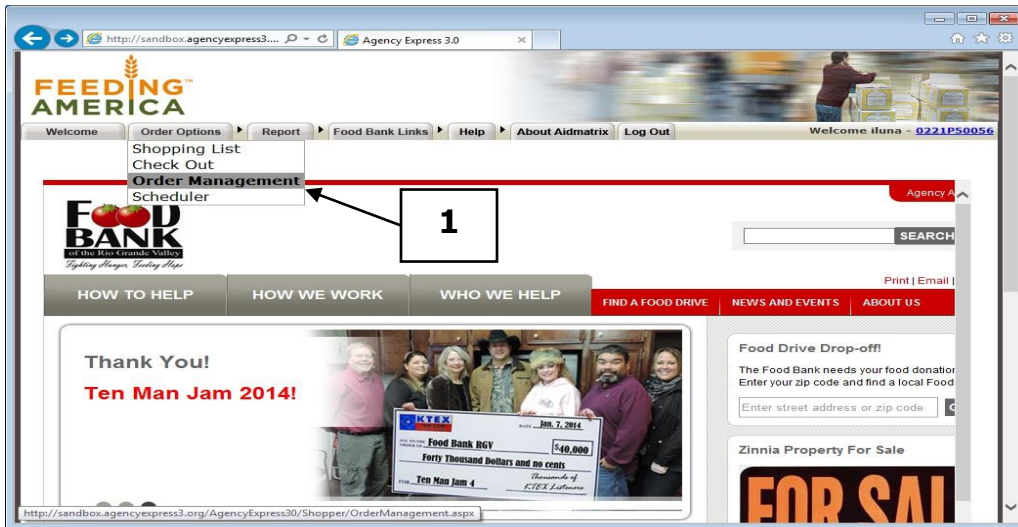
All of your orders will be displayed, sorted by Order Date.

You can click on any heading to sort by that column.
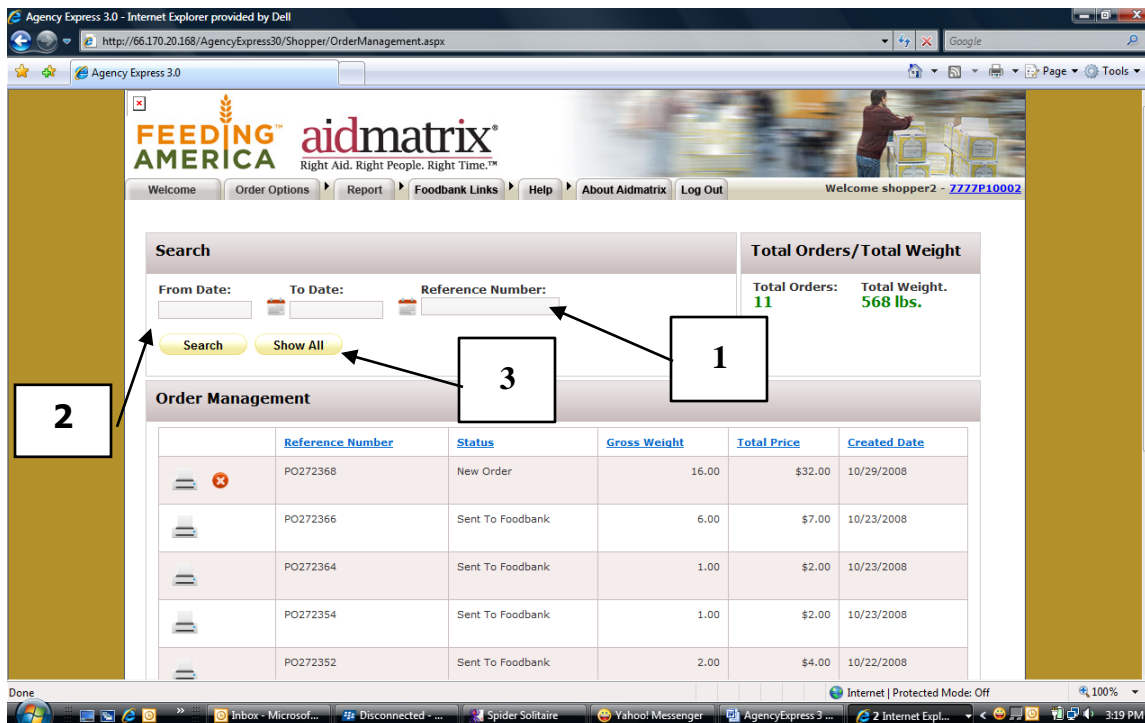
Viewing a Specific Order

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 to display all orders.

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

- Non-Web Order – This Order has been entered by the Food Bank RGV. This type of order is typically from a fax or telephone order. No changes can be made.

- New Order – Your Order has been recently submitted and not yet sent to the Food Bank RGV. If you know you just did an order and it does not show up here as "New Order" you probably forgot to "Submit Cart". Go back to Order Options and click on Shopping List as if you were going to enter another order. The recent order that you started and did not finish will display.

- Sent to Food Bank RGV – Your Order has been sent to the Food Bank RGV and is awaiting receipt confirmation.

- Acknowledged.-Your order has been received by the Food Bank RGV

- Released – Your Order has been accepted and processed by the Food Bank RGV.

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

- Rejected – Your Order was rejected by the Food Bank RGV. There are several reasons why an order is rejected by the Food Bank RGV. Once rejected, that order cannot be retrieved and modified by the shopper. You will need to create an entirely new order.

View Order Details

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

Order Details

The Order Detail screen shows 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 about this order.

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

3. **Shopping Cart** – All the line details for this order.

Canceling an Order

1. To cancel an order the shopper will click on the ⊗ Icon.

Editing an Order

2. To edit an order the shopper clicks on the ✏ Icon.

This will take you to the Shopping Cart where you can edit the order as if it was a new order.

Shopping Temporarily Disabled

The Agency Express™ Welcome Screen may display <u>Activity Status Alerts</u> and <u>Pop-Up</u> messages on login which state that Shopping has been disabled (e.g. for inventory) – you may see a message similar to this in the Pop-Up Message:
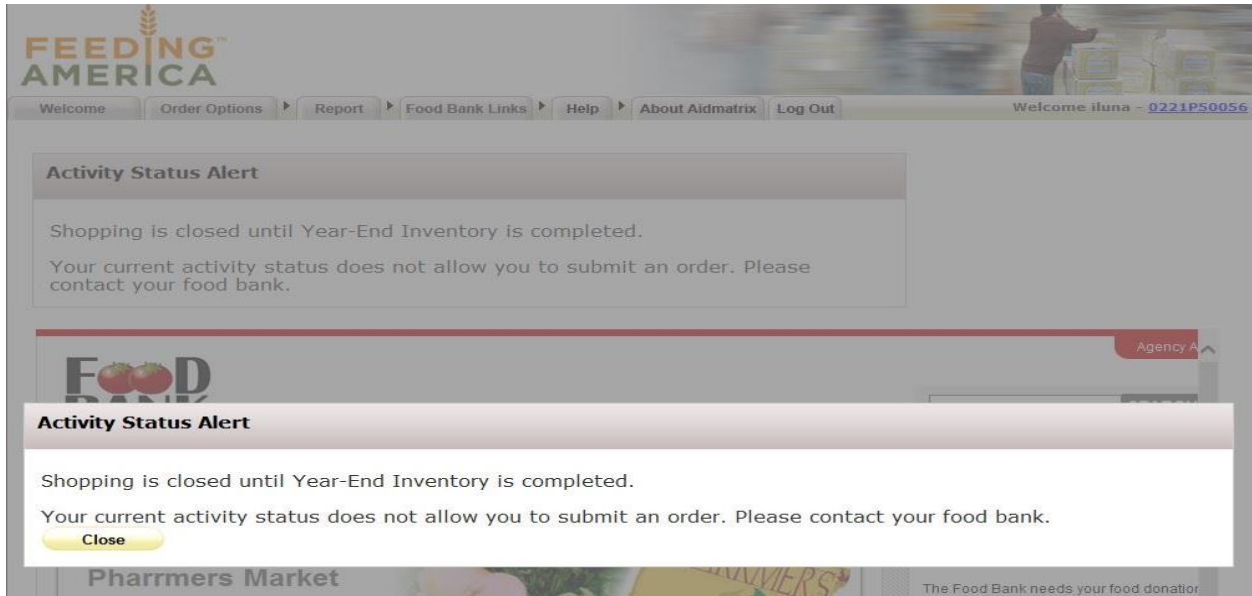
If you tab on Order Options – you will also see that Shopping List and Check Out are temporarily not available:
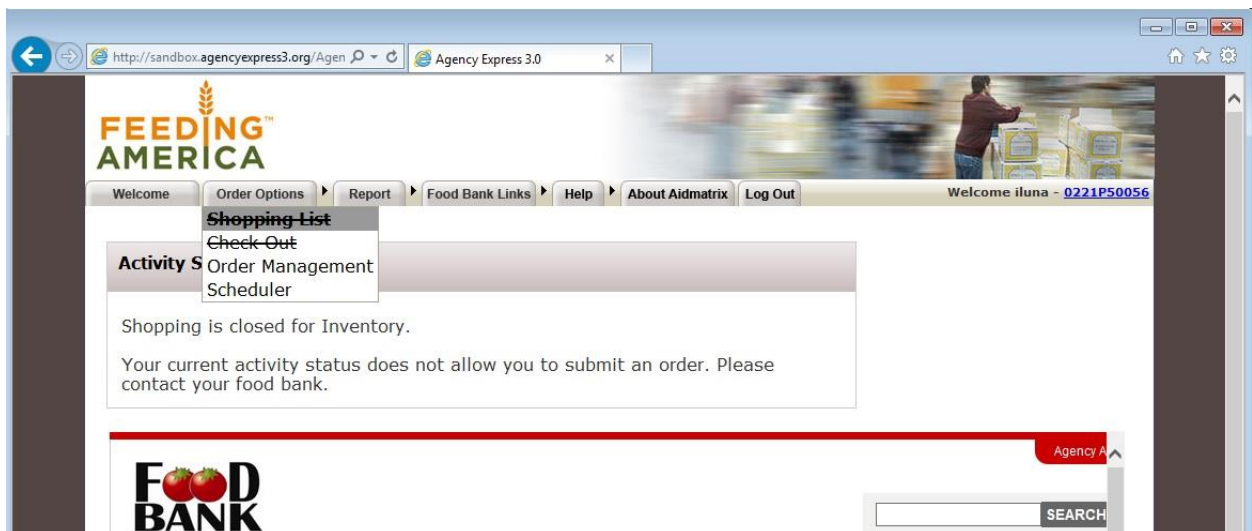
Shopping will resume when the administrator reopens the function.

Statements

A future enhancement not available at this time.

Surveys

Agency Express™ now supports user surveys. If surveys have been deployed for you to enter – you will see them listed when you click on the Links tab:

Select the survey, enter your responses and submit:

Surveys (cont'd):

To review your survey responses – under Reports – select Survey
Management:
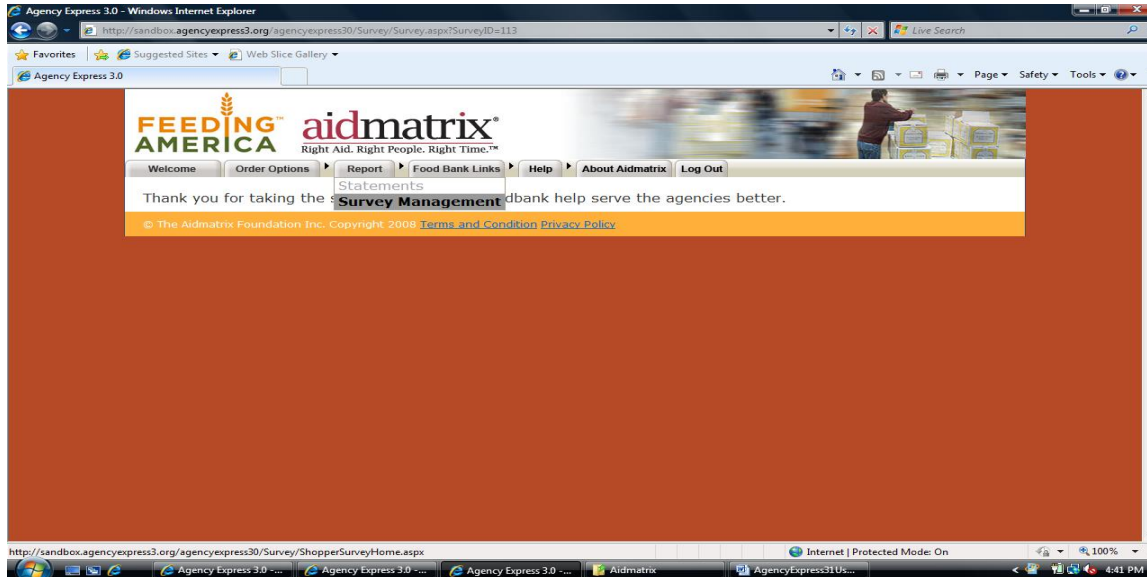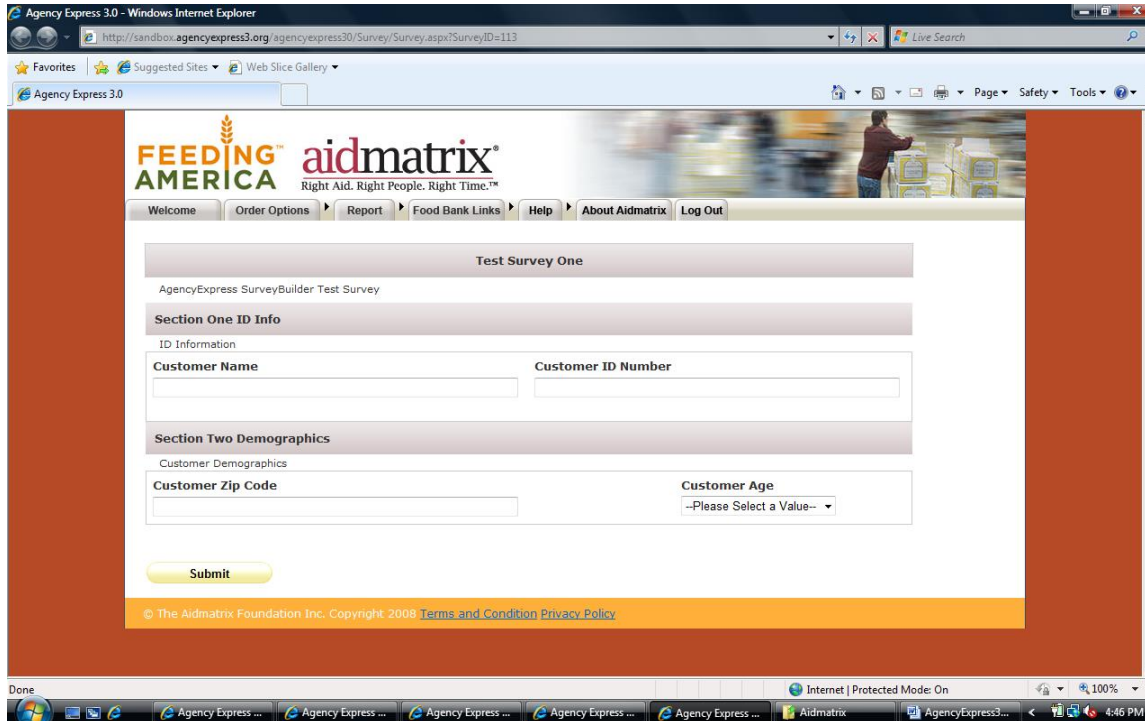
You can see each response for each survey listed – click on View Your
Responses to see an individual response:
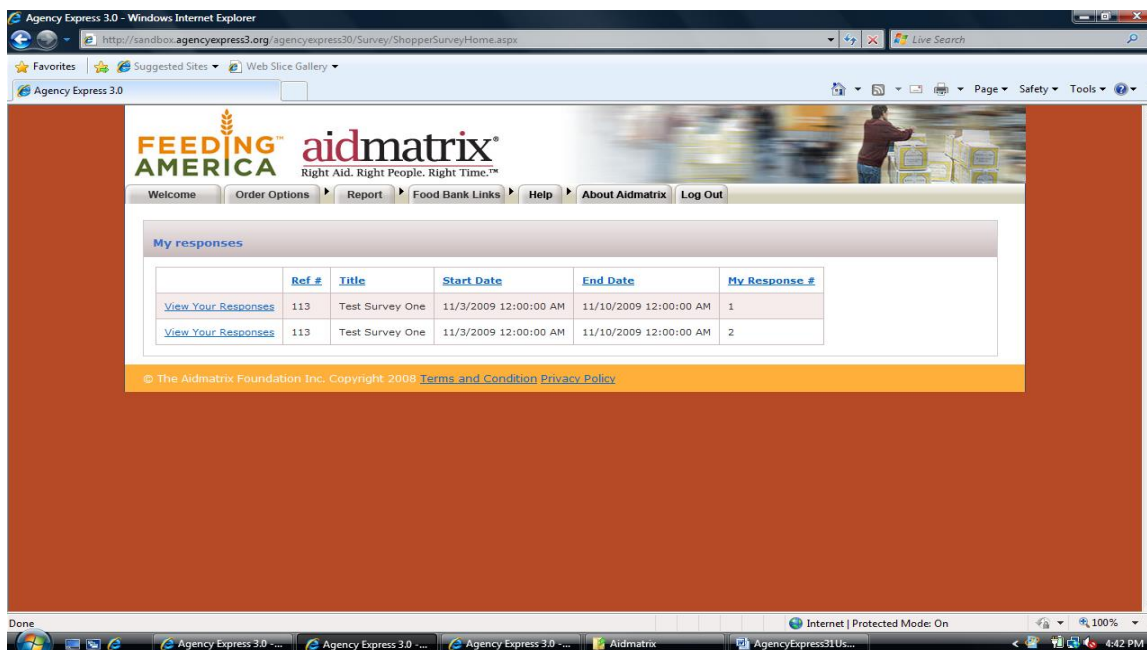
Surveys (cont'd):

To edit or change your answers, simply make the required changes and click the **Submit** button:

NOTE:

If the survey is closed, you can view your response but not change it.

Some surveys only allow one response; some allow multiple responses.

The Ref # and Title columns display which survey your response is for.
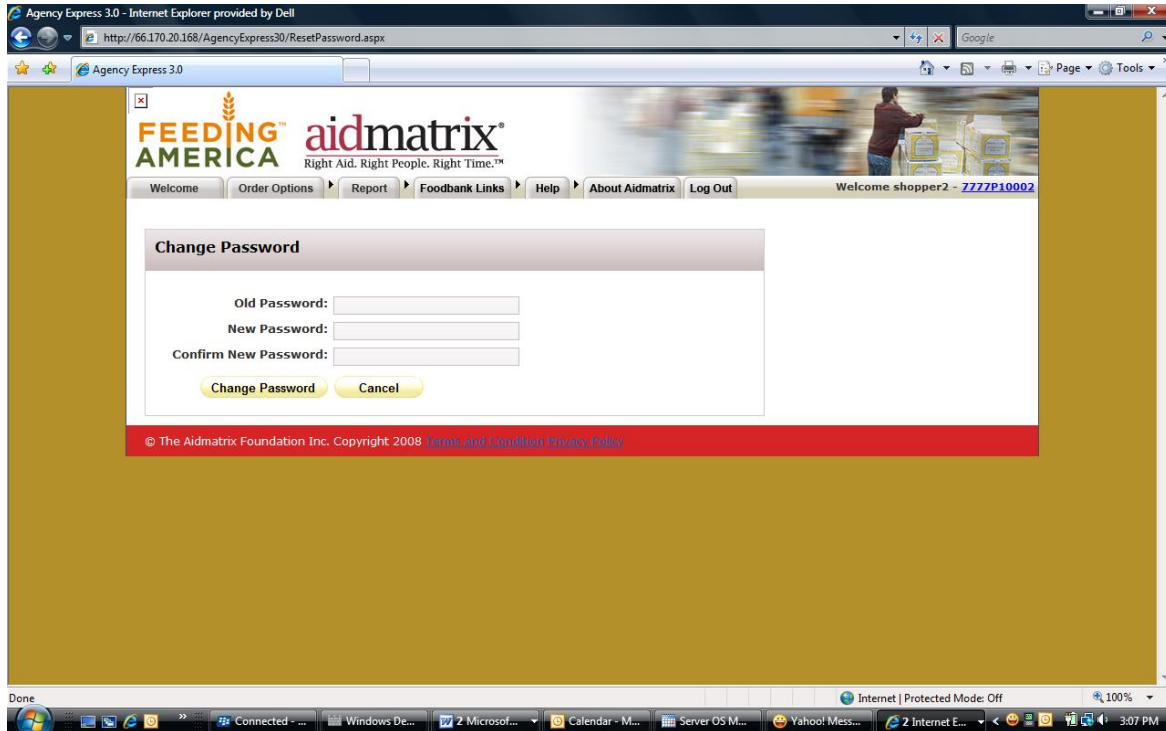
Change Password

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.
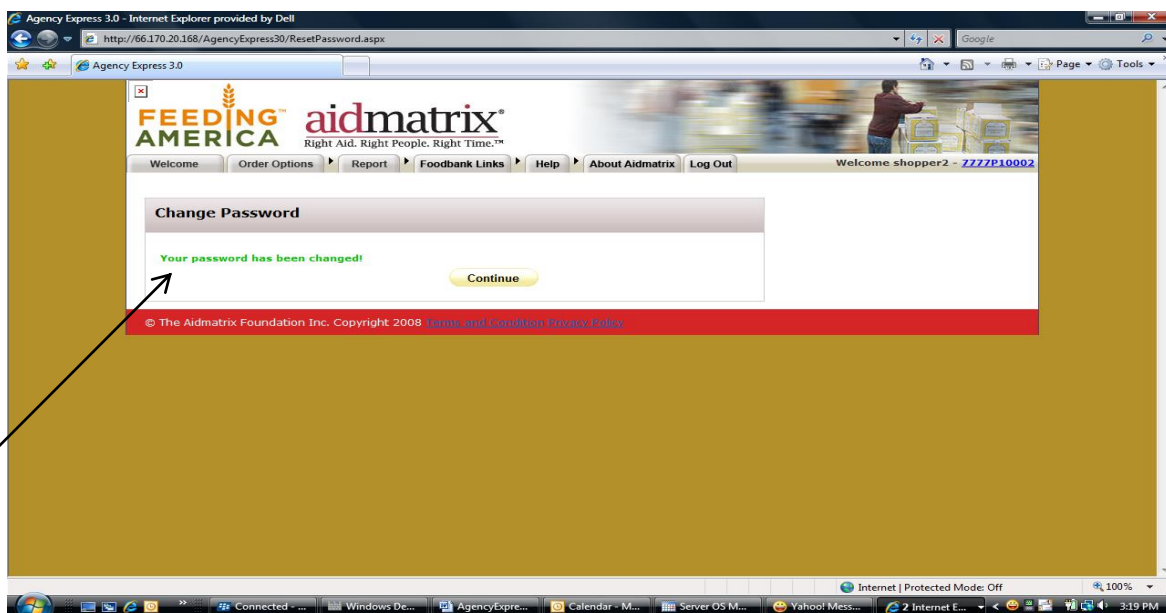
Report a Problem

If you have a question or need to report a problem with Agency Express™, fill out this form and an email will be sent to the Food Bank.

1. Click on **Report a Problem** from the Help tab at the top of your screen.

2. Select from the drop-down list the subject of the problem.

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

4. Click on **Submit**.   This will send this email to the Food Bank RGV.

Log Out of Agency Express™

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?
Email glreyes@Food Bank RGVrgv.com or call Glenda Reyes at 956-904-4508.

How do I get a username, password, and program code?
Email glreyes@Food Bank RGVrgv.com or call Glenda Reyes at 956-904-4508.

What do I do if I forgot my username, password, and program code?
If you have forgotten only your password and/or program code, refer to the respective sections of this manual. Otherwise, call Glenda Reyes at 956-904-4508 or email her at glreyes@Food Bank RGVrgv.com

What steps need to be taken if an Agency Express user leaves our agency? Call Glenda Reyes at 956-904-4508 and give her the User Name that is no longer applicable. She will need to deactivate the user from the Online Shopping System on behalf of your program and set up the new person in the system.

How do I update my email address for Agency Express?
Call Glenda Reyes at 956-904-4508. and give her the correct email address for your username and program code. **This is very important** because your password is tied to your email address.

I'm not receiving emails when my order is ready to be picked up at the Food Bank RGV. What do I do?
First verify that the order has reached the Released stage 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 Internet connection is working.
d) Have you changed your email and failed to notify us?
e) Call or email Glenda Reyes. 956-904-4508, glreyes@Food Bank RGVrgv.com

**What day and time am I supposed to pick up my order from the
Food Bank RGV now that I order online?** You made an appointment with the
Food Bank RGV for pickup before you began shopping. That date and time will be
used before you **Submit Cart**. If your order will be delivered, choose the date the
order will be delivered and 8:00 am. Unless you are notified otherwise, that is your
pick-up date and time. That **delivery** date and time is for online purposes only; For
deliveries to agencies, check the Delivery Schedule that is sent to you and choose
8:00 am for ordering, but the actual time of the delivery will be variable.

**Once I have submitted my order, how will I know when it has been
confirmed by the Food Bank RGV?** Check your Order Management screen to track
your order through the system. The progression is: "New Order," "Acknowledged,"
"Released" (the order is okay and a pick ticket has been sent to the warehouse), and
"Invoiced." There could also be "Rejected" (by the Food Bank RGV). A Rejected
order cannot be retrieved; an entirely new order will have to be created to replace it.

**How do I know if my order has changed from the quantities I
originally ordered?** You can confirm the quantities of your order by
looking under the Accepted Quantity column in Order Management.
(Refer to the "Review the Status of Your Order" section.)

**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.