# Online Ordering System Guide: Ordering Instructions, Profile Management, Statistics Entering

# Contents

## WELCOME

Welcome to River Bend Food Bank'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 handbook 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 needed every time a user logs into this system. We encourage you to write that information into this handbook and keep this in a safe and convenient location.
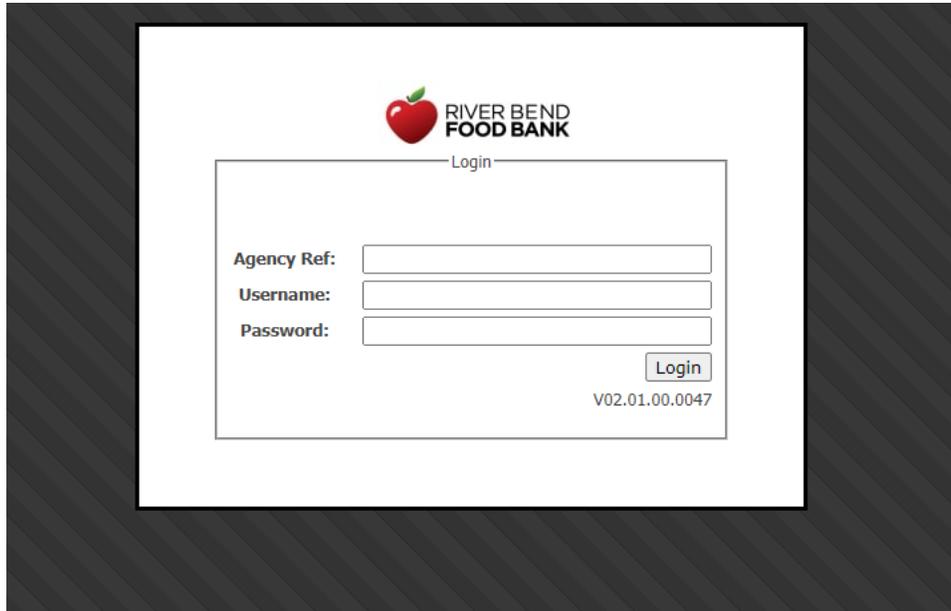
## Online ordering log in information:

You will need this information every time you wish to log into the system:

- **Web Address**: https://orders.riverbendfoodbank.org

- **Agency Ref:** _____

- **Username:** _____

- **Password:** _____

# GETTING STARTED – LOGGING IN

Go to riverbendfoodbank.org and click on **Agencies**.  From there, select **Online Ordering-PWW** to take you to the login screen.



*The login screen as it will appear after clicking the link*

- Enter your **Agency Reference**, **Username** and **Password**. (Your **Agency Reference & Username** are the same (Hint: 5-digit agency number))
- **Agency Reference and Password** are attached on a separate document.
- Should you forget either your **Agency Reference Number** or **Password**, please contact the Agency Partnerships Department:
  - o Danielle Tisor at Dtisor@RiverBendFoodBank.org
  - o Kelli Hoag at KHoag@Riverbendfoodbank.org

Once logged in, you will see your agency home page.  Please check the home page when you log on for messages and notices from River Bend Food Bank.

# ORDER ENTRY

## ALL ORDERS MUST BE PLACED ONLINE.  THE FOOD BANK DOES NOT ACCEPT PHONE, FAX, OR MAIL ORDERS.

From this screen, start an online order by clicking **Order Entry**.
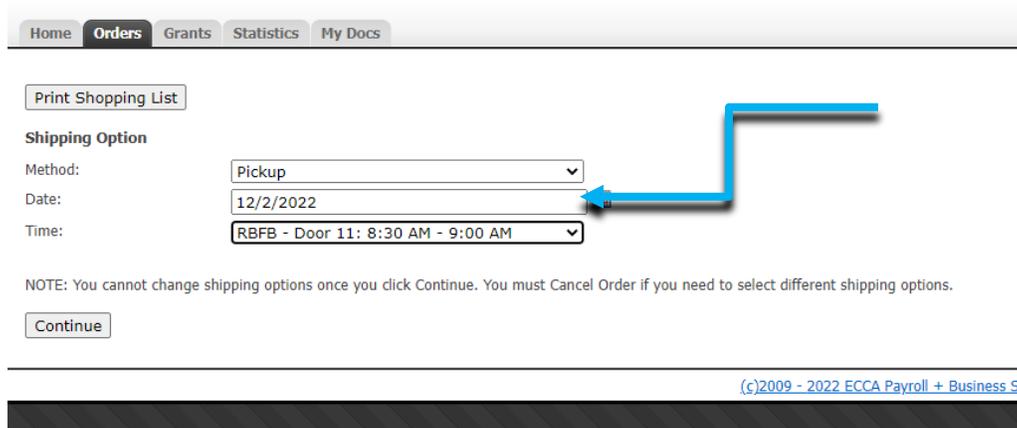


# Schedule Pick Up

### Step 1:
Choose your **Shipping Option Method**. Be sure to select the correct location (the Branch closest to you).

### Step 2:
Choose your **Date.** The system will default to the first available pick-up date.  To choose another day, click the calendar icon to view what is available and select your desired pick-up date.

Weekday holidays (Monday through Friday) will push the "Order Day" to the next Food Bank business day.

If you choose a date **before** the earliest pick-up day provided in the matrix below, your order will <u>not</u> be available.

| Order Day (by Noon) | Earliest Pick-up Day |
|---|---|
| Friday | Wednesday |
| Saturday/Sunday | Wednesday |
| Monday | Wednesday |
| Tuesday | Monday |
| Wednesday | Monday |
| Thursday | Monday |

## Step 3:

Use the drop-down arrow in **Time** to choose your pick-up time. Only available pick-up dates and time slots will appear as options. If a pick-up date or time is not showing up, that means that time is not available to schedule.

Once you click "Continue," no changes can be made. If you need to change or correct your pick-up date or time, please email [orders@riverbendfoodbank.org](mailto:orders@riverbendfoodbank.org)

## Step 4:

Click **Continue** to begin selecting your products.

# Choosing Products

When viewing the shopping list, you may sort products in a variety of ways. 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 the example below, **Type**. Use the **Search** box to find specific products, such as cereal, by typing the keyword in the **Search** box. When you are ready to place your order, simply enter the number of desired cases in the **Quantity (Qty)** box.



# Viewing Product Details

Clicking on the "Ref" number in the first column of the shopping list will bring up the details of that product. You can see the cost, weight, and quantity included in an order of "1."

## Viewing Cart Information

As you select and add items to your "cart," the total weight and total cost adjusts to give you a snapshot of your order details. You can view your cart using the **View Cart** button.



This screen also has an option available to print the entire inventory by clicking **Print Shopping List**. **NOTE:** The shopping list is tied to our inventory and updates with each order submitted. A printed copy will only be accurate only until the next order is submitted by an agency.

## Order Entry Errors



- Selecting a quantity for an item that is higher than the available amount will cause the **Qty** box to turn **pink**. If the error is not corrected, an error message will appear when you try to move to the next step or view your cart. You will not be able to continue until the correction is made.
- Moving too quickly between items and not hitting "ENTER" when ordering quantities will result in the items not being placed in your cart. Be sure the quantity you want to order shows up in the **Qty** column before moving to the next item.
- The shopping cart **empties out 12 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 12 hours of starting the order.

# Finalizing Your Order

## Step 1:

- Click **View Cart.** Enter **your** name, **telephone number** and **email address, NOT the agency information** (*Note: if you incorrectly enter the email address, no confirmation will be sent*).
- Add any instructions specific to your order in the **Comments** field. If you find you need to add to this order **BEFORE** submitting, click **Shopping List** to return to your order detail.

## Step 2:

When you are satisfied with your final order, click **Checkout** to submit.

### You must click Checkout, or your order will NOT be submitted



After clicking **Checkout**, this message will appear:



<u>If you do not receive this message, your order has **NOT** been submitted to River Bend Food Bank for review.</u>

Once your order has been reviewed by River Bend Food Bank, you'll receive an email confirmation to the email address you entered during the ordering process. The confirmation message will include your scheduled pick-up date and time.

**Warning: If you do not receive an email message, please review the steps and email orders@riverbendfoodbank.org to be sure your order has been submitted.**

# ACCESSING PREVIOUS ORDERS

## Reviewing Previous Orders

- Click **Orders** tab at the top of the page to show all orders that have been placed.
- In the **Reviewed** column, a "**Yes**" indicates that your order has been received and reviewed by the River Bend Food Bank. A "**No**" means your order has not yet been reviewed.



## Printing a Previous Order

- From the **Orders** tab, clicking on any order number will bring up a summary screen. On this page you can review details of your order or print a copy of your order if needed.

# ENTERING MONTHLY AGENCY STATISTICS

All monthly agency reports <u>must</u> be submitted through the online ordering system. Partner agency contracts require that agency reports be up to date every month. **If your agency is missing reports, you will not be allowed to place an order.**

## Entering Monthly Statistics

**Step 1:**

- From the **Statistics** tab in the online ordering system, click **Enter Statistics**.



**Step 2:**

- Click on the **month** and **year** for which you are reporting. For example, to report October statistics for 2016, you would select October and 2016 from the respective drop-down menus next to "Effective Date."

### Step 3:

Report the data that applies to your agency:

**Meal Sites** are meals served and consumed onsite at a soup kitchen, shelter, residential facility, day care, senior meal site, rehabilitation center, camp, etc. Meal Sites are required to complete the data for line 4 - "**Total number of Meals served**."

**Food pantries** are required to report the number of pantry households <u>and</u> pantry individuals served for the month – lines 1 (a & b), 2 (a & b), 3 (a, b, & c), and 5. Enter the values for each line under **Quantity.** It is not necessary for pantries to complete line 4 (this applies to Meal Sites only).

### Step 4:

Click **Submit Statistics** when your monthly entry is complete. If any statistics have been entered incorrectly, you will need to email Danielle Tisor at DTisor@riverbendfoodbank.org or Kelli Hoag at KHoag@riverbendfoodbank.org to correct or change them.

## ACCESSING AGENCY DOCUMENTS/INFO

The **My Docs** tab has 2 sub-tabs.  One contains your monthly statements; the other, invoices.
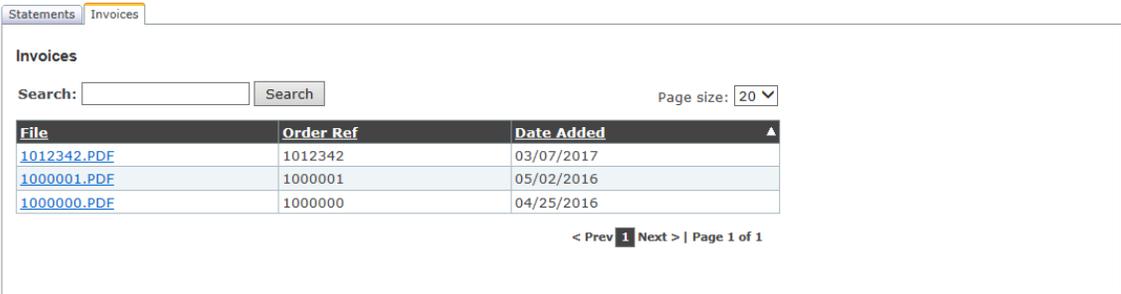
| Statements | Invoices | | |
|---|---|---|---|

**Invoices**

Search: [            ]  [ Search ]                    Page size: 20 ▾

| File | Order Ref | Date Added ▲ |
|---|---|---|
| 1012342.PDF | 1012342 | 03/07/2017 |
| 1000001.PDF | 1000001 | 05/02/2016 |
| 1000000.PDF | 1000000 | 04/25/2016 |

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## Accessing Documents

Double clicking any invoice listed will bring up a copy that can be viewed or printed. Invoices are available back to the year the account was created.

# Accessing Agency Information

From the main **Home** page, you are able to access information specific to your agency by clicking on **My Agency**. (*See screenshots below for examples of how information is displayed on some of the tabs*)

**Note**: the information in these tabs <u>cannot be changed</u> online. The information is imported from the master agency file. If any information on these tabs needs to be corrected or changed, please contact Danielle Tisor at <u>DTisor@riverbendfoodbank.org</u> or Kelli Hoag at <u>KHoag@riverbendfoodbank.org</u>.



## Agency Info tab:
Displays general information regarding your agency, including your balance and the last paid date.

## Locations tab:
Displays all the locations currently associated with your organization and their type.

## Contacts tab:
Displays all the agency contacts on record and their permissions/access to the system.
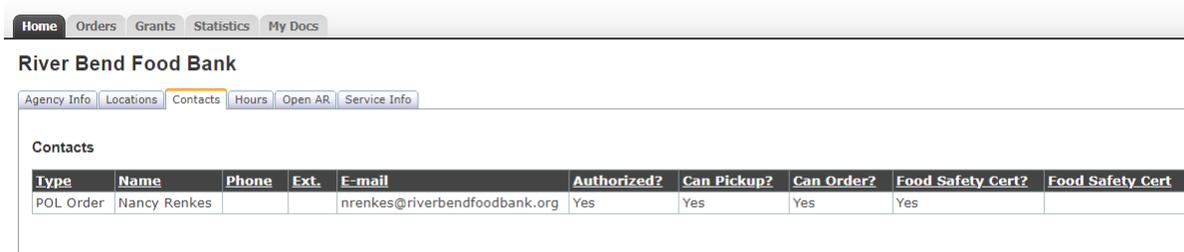
**Hours tab:**
Displays the hours River Bend Food Bank has on file for your agency and its locations.

**Open AR (Accounts Receivable) tab:**
Displays any orders with a balance greater than or less than $0. To view the details of an order, click the respective row.

**Service Info tab:**
Displays your agency's statistics in charts. The charts display information based on categories of the food ordered as well as the monthly statistics submitted.
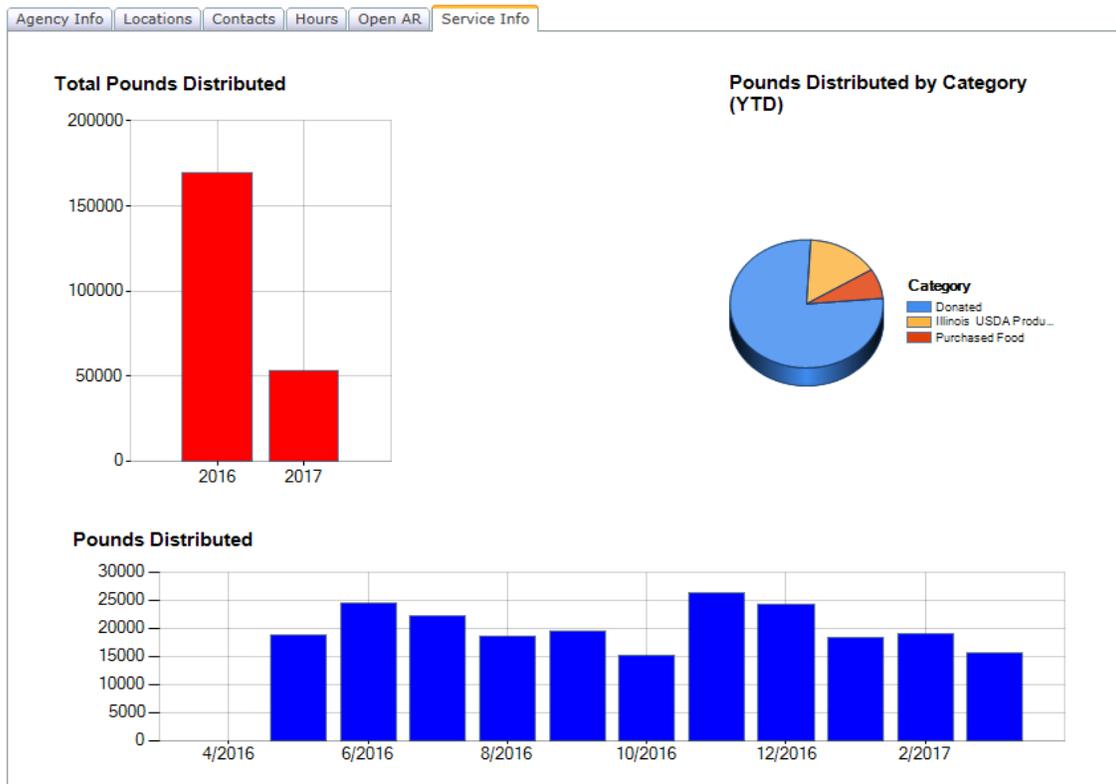


This tab can provide a great snapshot of your agency's statistics with easy-to-read graphs. Use as a tool for reporting to your board, organization members, or donors.

# TEFAP PARTNER AGENCIES

Partner Agencies who participate in TEFAP (The Emergency Food Assistance Program) are eligible to receive delivery of a TEFAP product order once per month. IL and IA TEFAP are commodities allocated to counties at the federal level and provided to River Bend Food Bank by the respective state.

## Viewing TEFAP Orders Online

- TEFAP commodities orders are available to view through the online ordering system after the **25th** of each month. If the 25th falls on a weekend, the orders will be available to view by the following Monday.
- If you review your orders and see an order you did not place, it is likely your monthly TEFAP order.
- If commodities shipments are delayed, when TEFAP product(s) become available we may add them to your order. Depending on timing, these additional products may not appear in the details of the online ordering system.

### Step 1:

- Log in, then click on the "**Orders**" tab in the upper left corner.
- Look for an "open" order and click on the number.

| Home | Orders | Statistics | My Docs | | | | | | Order Entry |
|---|---|---|---|---|---|---|---|---|---|

**Orders**

Search: [            ] [Search]                                   Page size: 20

| Order | Status | Entered | Del/Pickup | Method | Reviewed? | Released | Picked | Confirmed? | Location |
|---|---|---|---|---|---|---|---|---|---|
| 1013102 | Open | 03/26/2017 | 03/29/2017 | Pickup | Yes | | | No | RBFB - Door 10 |
| 1012342 | Closed | 03/07/2017 | 03/07/2017 | Agency Pickup | Yes | 03/07/2017 | 03/07/2017 | Yes | No Del/PU Location |
| 1000001 | Closed | 05/02/2016 | 05/02/2016 | **NONE** | Yes | 05/02/2016 | 05/02/2016 | Yes | No Del/PU Location |

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### Step 2:

- Clicking on an "open" order will bring up the details of that order, where you will be able to see the items allocated and the delivery date and time. NOTE: these items are pre-set and cannot be changed.

| Home | Orders | Statistics | My Docs | | Order Entry |
|---|---|---|---|---|---|

**Order #1013113**

| Order Date: | 3/27/2017 | | Order Status: | Waiting to be Released |
|---|---|---|---|---|
| Weight: | 1808 | | Warehouse: | River Bend Foodbank |
| Total Cost: | $0.00 | | Shipping Method: | Delivery |
| Payments: | $0.00 | | Delivered/Picked Up: | 4/5/2017 9:15 AM |
| Applied Grants: | $0.00 | | Picked Up By: | |
| Balance: | $0.00 | | Delivery/Pick-up Location: | Delivery |

Order Notes:

**Products**

| Product | Name | Type | Category | Weight | Quantity | Total Cost |
|---|---|---|---|---|---|---|
| IL100777 | Beans Blackeye | 23 - Protein (non-meat) | Illinois USDA Product | 140 | 5 | $0.00 |
| IL100776 | Canberry Juice Concentrate | 14 - Juices | Illinois USDA Product | 372 | 31 | $0.00 |
| IL100184 | Chicken Quarters | 15 - Meats/Fish/Poultry | Illinois USDA Product | 160 | 4 | $0.00 |
| IL100629 | Orange Juice | 14 - Juices | Illinois USDA Product | 288 | 9 | $0.00 |
| IL100457 | Potatoes Fresh | 28 - Produce | Illinois USDA Product | 350 | 7 | $0.00 |
| IL100759 | TANIF Chicken Noodle Soup | 06 - Complete Meals/Entrees, Soups | Illinois TANF Product | 192 | 16 | $0.00 |
| IL100760 | TANIF Spaghetti & Meatballs | 06 - Complete Meals/Entrees, Soups | Illinois TANF Product | 252 | 9 | $0.00 |
| IL100763 | Tuna | 15 - Meats/Fish/Poultry | Illinois USDA Product | 54 | 3 | $0.00 |

## Delivery of Orders

Delivery of orders is currently only available to TEFAP-participating agencies. Deliveries are scheduled by the Operations department for once per month. You can see your delivery date and details of TEFAP orders by following the steps above. TEFAP orders are delivered on the same day and time every month.

# TROUBLESHOOTING/QUESTIONS

## Errors or Issues with Orders

Orders are reviewed, processed, picked, and prepared by the Operations department. For questions about placing an order, or for issues with existing orders, please contact: Orders@riverbendfoodbank.org

## Agency Profile/Info Changes

To correct or change any information in an agency profile, please contact the Agency Partnerships Department.

**Agency Partnerships Coordinators:**

Danielle Tisor **DTisor@riverbendfoodbank.org** |563-345-6490, ext. 2050

Kelli Hoag **KHoag@riverbendfoodbank.org** |563-345-6490, ext. 2080