



Agency Express Training Guide

We are excited to finally offer online ordering through Agency Express. Please read ALL instructions before attempting to log in. The Shopping Basics is a step by step guide and should be able to answer most questions. Please refer to this guide before calling Tri-State Food Bank for assistance.

Ordering:

You may order up to 7 days in advance.

You still must submit your order AT LEAST 2 business days prior to pick up/delivery.

DO NOT hit **Enter** after entering Order Qty. This will erase the numbers on that page.

You **MUST** click **Add to Cart** icon  for your quantity to be accepted.

Checkout:

Total Due and Gross Weight may not be what is actually invoiced since poundage may be adjusted when order is pulled. (This process has not changed)

Once you click **Check Out** you **MUST** click on the **Submit Cart** icon for your order to be submitted to TSFB.

Agency Express – Shopping Basics

Logging On

Please use the following web address: <https://www.agencyexpress3.org/AgencyExpress30/NewLogin.aspx>



Login

User Name:

Password:
 [Forgot Password?](#)

Program Code:
 [Forgot Program Code?](#)

Remember me next time.
Need to clear your username and program code? [Click Here](#)

User Name: Designated shopper's first initial and last name (such as tberry).

Password: The default password is change12. The first time the shopper uses the Agency Express system, he/she is prompted to change the default password.

Program Code: This will always be 0126p plus your Agency ID as seen on your invoices and statements (P-xxxx).

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 the Shopper previously chose to have the credentials remembered and needs to make a change to something that is being pre-populated; this will allow them to start fresh.

Login

User Name:
tberry

Password:
●●●●●● [Forgot Password?](#)

Program Code:
0126pp-1234 [Forgot Program Code?](#)

Remember me next time.
Need to clear your username and program code? [Click Here](#)

Click **Log In** to continue.

A successful login will bring the shopper to the **Welcome** screen.

Scheduling an Appointment

The Shopper needs to go to **Order Options** → **Scheduler**. Once in that screen, they should see any assigned Standing Appointments for their agency.





Standing Appointments are listed in rows in green. Open Appointments show on the calendar in gold. If there are both Standing and Open Appointments on the same day, the date on the calendar will be blue.

Scheduler

Pickup / Delivery: Date: Time:

My Appointments

Date	Time	Reference Number	Standing	Type
4/26/2022	08:40 AM		Y	Pickup
4/19/2022	08:40 AM		Y	Pickup
4/12/2022	08:40 AM		Y	Pickup
4/5/2022	08:40 AM		Y	Pickup
3/29/2022	08:40 AM		Y	Pickup

If you want to select a Standing Appointment for this order, continue to Shopping List. To select another Pickup / Delivery time, first click the down arrow and select Delivery or Pickup. Select an available appointment Date by clicking the , and select the date (below). Then click the  and select an available time (below). Then click **<Reserve>**.

Date: Time:

(* Required)

April 2022						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Time:

Time:

02:00 PM

Once successfully completed, the **reserved** date and time will appear on the **My Appointments** grid.

Once the appointment has been reserved, the shopper can access the shopping pages by selecting **Order Options** → **Shopping List**.

Shopping List




Search				Shopping Cart	
Item No. Description		<input type="text"/>		Total Line Items	Total Due
Category		- Select a Category -		1	\$0.00
Feature Type	Handling Req. Desc. Code ?	Food Source		Available Credit Limit	Gross Weight
-Select one-	-Select one-	-Select one-		\$756.80	60
<input type="button" value="Search"/>	<input type="button" value="Show All"/>	<input type="button" value="View Favorites"/>		<input type="button" value="Print"/> <input type="button" value="Clear Cart"/> <input type="button" value="Add to Cart"/> <input type="button" value="Check Out"/>	

Shopping List - Sort By -



Tip: Please Add to Cart requested items before leaving page


Order Qty	Available Qty.	Item No.	Description	UOM	Unit Price	VAP Fee	Pack Size	Feature Type	Gross Weight	Favorite
<input type="text"/>	1	30347	Apples Chopped	CASE	1.90	0.00	24 / 9.6 oz bags		19	★
<input type="text"/>	40	46125	Baby Food Pear Yougurt Blend	CASE	0.00	0.00	24 / 3.5 oz cups		5	★
<input type="text"/>	214	17520	Cookies Heads or Tails Oreos	CASE	0.80	0.00	12 / 10.1 oz packs		8	<input type="checkbox"/>

When the **Shopping List** is first displayed it will show all the products that are available for the shopper. To sort the list

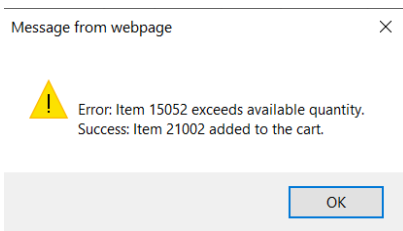
numerically, click on the words **Item No.** To print the shopping list, click the **Print** icon . The shopper can limit the items displayed by choosing the Item No. or Description field listed and entering pertinent data or selecting from one of the drop downs below and then clicking the **<Search>** button:

- Item No. – Item detail information
- Description – Product description
- Category – Product category examples

The shopper can also select the <View Favorites> button to see only the items that the shopper has selected as a favorite. The favorite items are indicated by a  in the Favorite column. To set a favorite, click on the ; to remove a favorite, click on the star and it will return to a square.

The shopper enters the amount he/she needs **per item** in the **Order Quantity** field as shown. (Do not hit Enter or the Qty will be erased. This will also happen if you refresh the page.) The shopper can request up to the amount in the **Available QTY** field. Then, click the **Add to Cart** icon . **Unless this action is taken, the items ARE NOT included in the agency order.**

Shoppers see a message similar to the following confirming the addition(s) with “Success” or problems with “Error”. Shoppers must see “Success” messages to indicate items are added to the cart.



As soon as an item is added to the cart, the number of items is displayed in red next to a shopping cart on the tab line at the top of the page. This indicates there is an order in draft status. It has lines, but it has not been submitted yet.

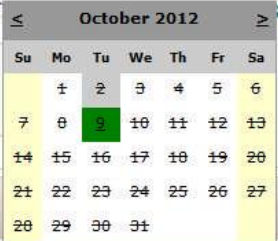


Check Out

The **Shopping Cart** screen stores all of the items selected from the **Shopping List**. This is the last screen to complete before submitting an order. Click on **Check Out** from the **Shopping List** or from the menu bar on the **Order Options** tab.



My Appointment		Shopping Cart Summary	
Reference Number: PO1083567		Total Due \$46.00	Total Line Items 2
Pickup/Delivery Date:	Time:	Gross Weight 75 lbs	Total Cube Size 0 Cu. Ft.
<input type="text"/> <input type="text"/>		Estimated Delivery Fee \$0.00	
Comment (Please limit comment to 150 characters. Anything over 150 characters will be truncated.) <input type="text"/>			
Shopping Cart			



Before choosing **Submit Cart**, the shopper needs to schedule or confirm the appointment, including “Pickup/Delivery”, “Date”, and “Time”. To delete an item from your Shopping Cart, click the . Changes in Order Qty can be made as long it does not exceed the Available Qty. Once the order data meets the agency requirements, submit the cart by clicking on the **Submit Cart** icon. The items are still in the cart until the shopper clicks **Submit Cart**. After clicking **Submit Cart**, the pop up below asks the shopper to confirm the action. The shopper clicks **OK**.

sandbox.agencyexpress3.org says:

Are you sure you want submit the order?

A pop up box confirms that the order was successfully submitted. The shopper clicks **OK**.

sandbox.agencyexpress3.org says:

Order PO178297 was submitted successfully.

After clicking **OK**, the shopper is immediately taken to the **Order Management** screen. As an example, Order PO168239 now appears as a **New Order**. To view order detail, click on the **printer** icon. To delete the order, click the .

Order Management								
<input type="button" value="1"/> <input type="button" value="2"/>								
	Reference Number	Created By	Status	Gross Weight	Total Price	Pickup/Delivery Date	Admin Edited	Modified Date
	PO174717	Ida_Beal	New Order	7.00	\$0.70	02/19/2015		02/18/2015

Order Management

The status of an order can be reviewed at any time once it has been submitted to the food bank. The food bank may alter the details of the order. Click **Order Options** → **Order Management** from the tab on the top of the screen.

All of the agency’s orders will be displayed, initially sorted by Pickup/Delivery Date. Additionally, columns with blue underlined headers can be sorted A-Z.

Click on the printer to see a copy of the order details.

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

To edit an order the shopper clicks on the  Icon.

Forgot Password

If the shopper has forgotten his/her password, click on **Forgot Password?** on the login page.

After having clicked on **Forgot Password?** a new message box will appear on the screen:

- Enter **User Name** and **Program Code** to retrieve the password.
- Click on <**Submit**>.

An email will be sent to the email address on record at the food bank. This email will contain a reminder of the shopper's password. Use the password from the email to log in using steps 1-2.