

Agency Express



NORTHEAST IOWA
FOOD BANK

Purpose Of This Document

This document describes the Agency Express functionality. It is meant to support and train partner agencies.

Overview

Agency Express is a powerful Web-based tool sponsored by Feeding America and TechBridge that will help shoppers shop for and manage food bank orders online. Shoppers can use Agency Express to search for items, view item details, send orders to the food bank, and review the status of orders, as well as create and report survey's formally known as statistics.

You must have the following items before you can start using Agency Express:

A computer, tablet, or smart phone

Internet Access

Web Browser

Because Agency Express is web based, you can access it from anywhere, at any time, using any device that has internet access and a web browser.



Any of these web browsers will work with Agency Express

Please read thoroughly before actually placing your order. When you are ready, use this guide as an assistant for each step. If you still have questions or concerns about Agency Express, please contact your Partner Capacity Representative.

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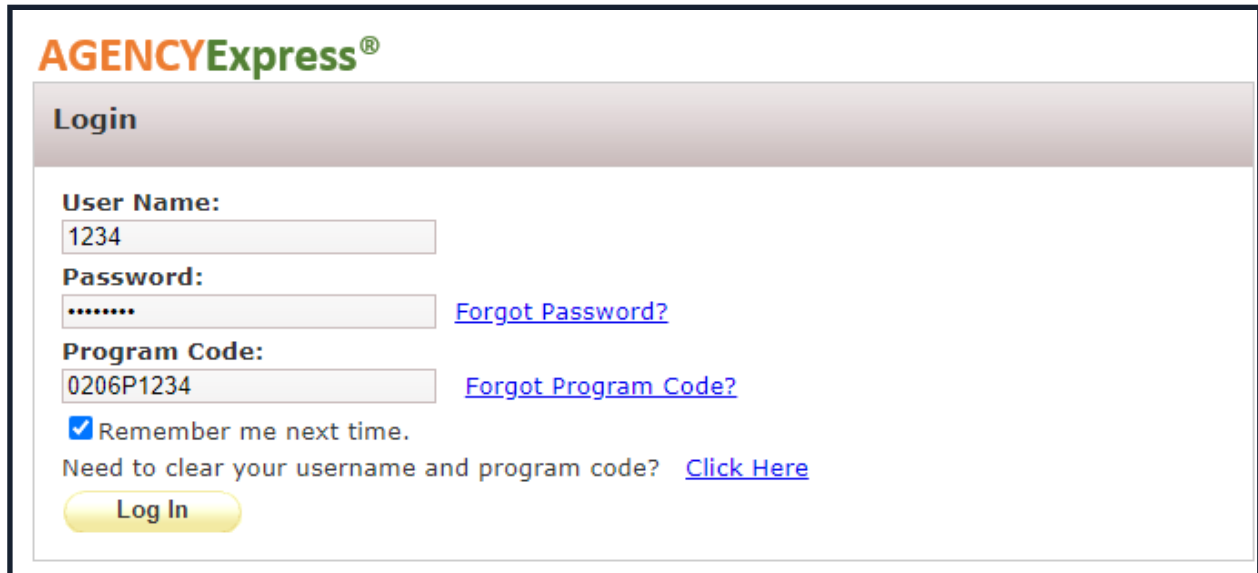
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Getting to Agency Express

Open your favorite web browser, then go to: <https://www.neifb.org/agency-resources> and click Agency Ordering. This will bring you to the Agency Express login page where you can enter your credentials.

The log in page for Agency Express should appear below:



AGENCYExpress®

Login

User Name:
1234

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

Program Code:
0206P1234 [Forgot Program Code?](#)

☒ Remember me next time.

Need to clear your username and program code? [Click Here](#)

Log In

As a user you will enter the following:

Username: Each agency shopper will have a specific User Name. You cannot have more than one shopper with the same User Name in the same agency. User Name is not case sensitive. Please do not allow anyone else to use your user name.

Password: The default password is change12. **This is case sensitive:** all lowercase, no spaces. You may change your password by clicking the **Help** tab and choosing [Forgot Password?](#)

Program Code: The Program Code is always going to be 0206 (the Foodbank's Feeding America 4-digit number) plus the letter **P** plus your four digit agency number (e.g., **0206p1234**). The **P** is case sensitive.

Extra fields on login window:

[Forgot Password?](#)

[Forgot Program Code?](#)

☒ Remember me next time.

Forgot Password/Program Code

In the event you forget your password, click on [Forgot Password?](#) A new message box will appear on the screen:

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

An email will be sent to the email address on record at the Food Bank. If you need further assistance call your Partner Capacity Representative and they will be able to reset your password.



FEEDING AMERICA

Forgot Your Password?

Enter your User Name to receive your password.

User Name:

Program Code:

If you forget the Program Code, click on [Forgot Program Code?](#) A new window will appear and you will need to scroll down until you see **0206 Northeast Iowa Food Bank.**

Program Code:	
Food Bank Code	Food Bank Name
0141	Weld Food Bank Colorado
0149	Mississippi Food Bank Network
0155	3Square Food Bank
0201	Eastern Illinois Food Bank
0202	North Central Ohio
0206	Northeast Iowa Food Bank

Remember Me Next Time

By clicking on the check box, next to **Remember me next time**, the shopper can avoid having to re-enter all login information each time. This will save both the User Name and Program Code at each login attempt. The shopper must still enter the password each time. We do not recommend using this feature on public computers (e.g. library, friend's house, etc.). If the shopper wants to clear the **Remember me next time** the shopper must uncheck the box. If for any reason the shopper wants to clear the User Name, Password, and Program Code then you can do this by clicking [Click here](#).


AGENCYExpress®


Login

User Name:
1234

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

Program Code:
0206P1234 [Forgot Program Code?](#)

☒ Remember me next time. 

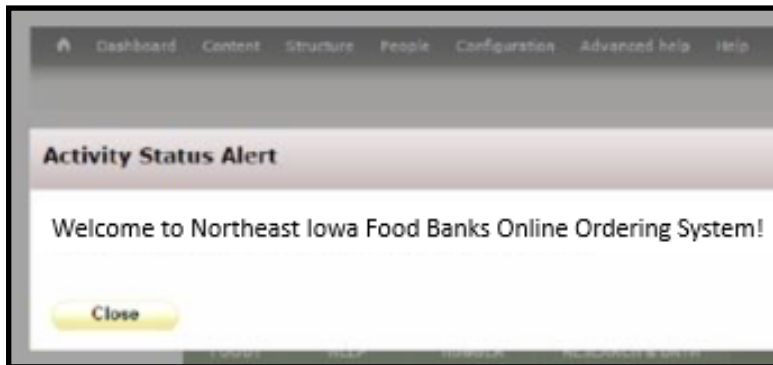
Need to clear your username and program code? [Click Here](#) 

[Log In](#)

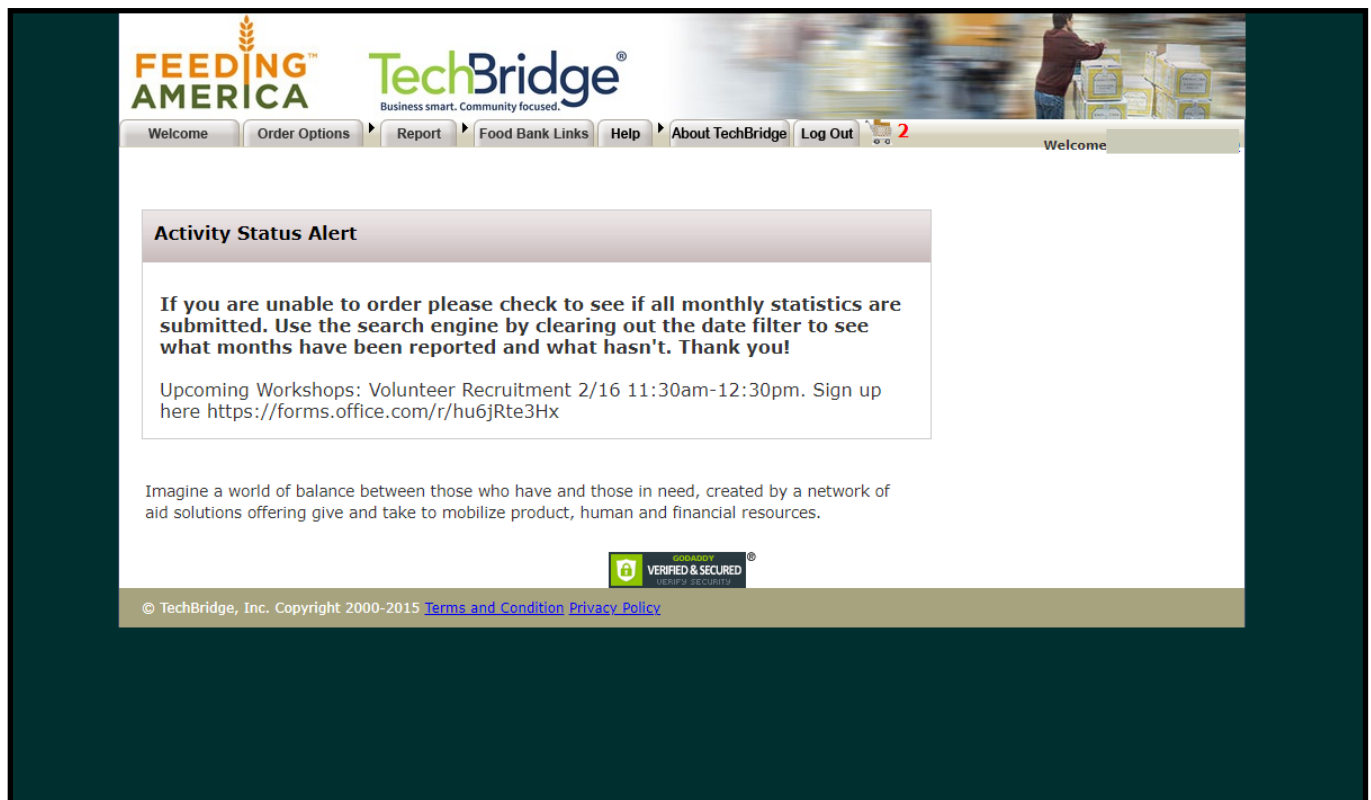
Welcome Page

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

If you have logged in successfully a box will appear, “Activity Status Alert”. This alert will provide important information about your account, closings, trainings, etc. Once you have thoroughly read the alert you can click the Close button to make the Pop-up message go away.



The **Welcome** screen is displayed each time the shopper logs in; however, the contents of this screen will vary. This is the News & Events Page for Partner Agencies. To return to this Welcome screen at any time, click Welcome located at the top left-hand corner of the page.



Welcome Page Links

On the Welcome Page the shopper will have access to multiple functions.

Order Options contains links to the scheduler, shopping list, check out and order management. Most of the features you will likely use will be found under this tab. Click on the tab to access the page with a list of options, or drag your cursor over the tab to view the list of links and it will redirect you to another page.

Report, formally known as statistics will be the online reporting tool. All reports are due by the 15th of each month. If reports are not received by the 15th of each month, the agency will be placed on product hold until all reports are submitted.

Food Bank Links this will redirect you to informational websites, resources for your agency, FAQs, etc.

Help contains links to change password or report a problem to the Northeast Iowa Food Bank.

About TechBridge will populate a new window to TechBridge's website.

Log Out logs the shopper out of Agency Express.



Order Options Tab

All of the scheduling and ordering activity functions occur within the **Orders Options** tab.

1. **Scheduler**
2. **Shopping List**
3. **Check Out**
4. **Order Management**

Agency Express allows users to view available dates and times for delivery and pickups. The system requires that appointments be scheduled in advance of placing a new order. The schedule page consists of three sections.

The top section contains the following:

1. Reserving available appointment dates/times for an order to be picked up at the Northeast Iowa Food Bank.

The lower section contains the following:

3. My appointments (existing appointments)

- Date- the scheduled appointment date for delivery, pickup, or shopping.
- Time- the schedule appointment time will vary depending on the route.
- Reference Number- This is the order number and automatically generated and assigned to each web order when it is initially created. The reference number is listed in the My Appointments table ONLY after an order has been associated with the appointment date and time.
- Standing- indicates whether an appointment is a regularly scheduled appointment or a unique appointment chosen by the shopper.
 - Y = Yes, this appointment is a standing appointment.
 - N = No, this appointment is not a standing appointment.

Must Order By

All orders must be submitted 4 business days prior to your scheduled delivery/pickup date. If you go beyond the submission date the system will now allow you to submit the order and all the dates will be crossed off. If you want to order ahead you can up to 10 days prior to your selected delivery/pickup date (includes weekdays and weekends). Please see the **Submit Order By** chart below for more clarification.

Scheduler
Missed Submission Date

Pickup / Delivery

Delivery
▼

Date:

(* Required)

Time:

My Appointments

≤

February 2023

≥

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				

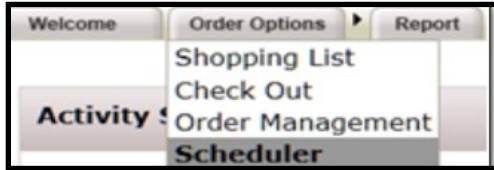
Reserve

Delivery Day	Pick Up Day	Submit Order By
Monday	Monday	Tuesday by midnight
Tuesday		Wednesday by midnight
Wednesday	Wednesday	Thursday by midnight
Thursday	Thursday	Friday by midnight
Friday		Monday by midnight

Agency Pick-Up

If you are picking up an order you will need to do the following steps:

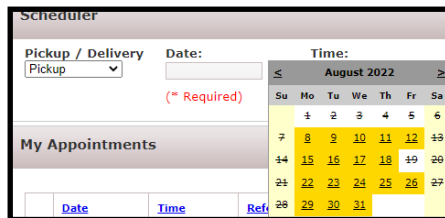
1. Hover over the **Order Options** and click **Scheduler**. The **Scheduler** window will appear.



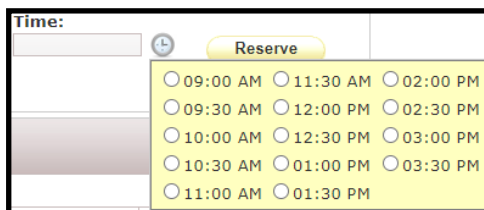
2. From the **Pickup/Delivery** dropdown select Pickup.



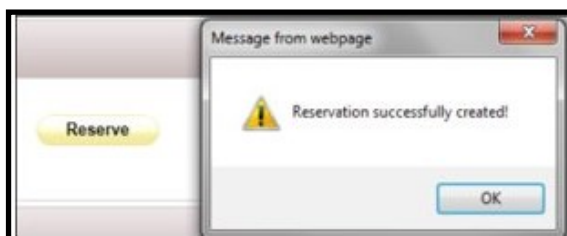
3. To select a date, click the calendar icon.



4. Then select a time. Click the clock icon.

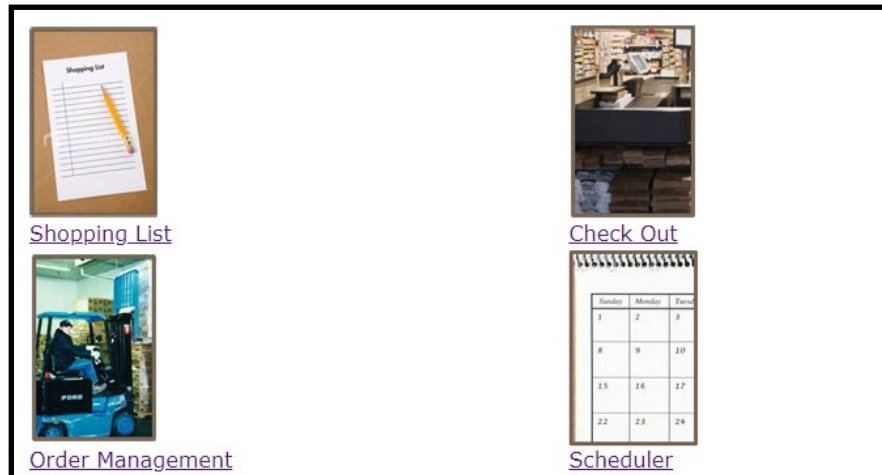


5. Then click reserve.



Agency Pick-Up Continued

6. After clicking reserved you can go directly to the **Shopping List** and begin shopping



7. This will redirect you to the shopping cart

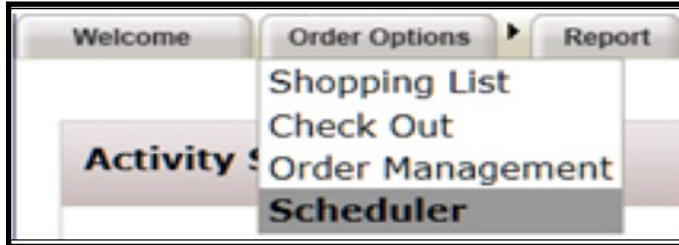
Search		Shopping Cart	
<p>Item No. Description</p> <p><input type="text"/> <input type="text"/></p> <p>Category</p> <p>- Select a Category -</p> <p>Feature Handling Req. Desc. Code ? Food Source</p> <p>Type</p> <p>-Select one- -Select one- <input type="text"/> -Select one-</p> <p>Search Show All View Favorites</p>		<p>Total Line Items</p> <p>0</p> <p>Total Due</p> <p>\$0.00</p> <hr/> <p>Available Credit Limit</p> <p>\$2,260.04</p> <p>Gross Weight</p> <p>0</p> <p>Print Clear Cart Add to Cart Check Out</p>	

8. To complete the shopping process follow pages 15-21 for further instructions.

Agency Delivery

If you are an agency that receives a delivery you will need to do the following steps:

1. Hover over the **Order Options** and click **Scheduler**.

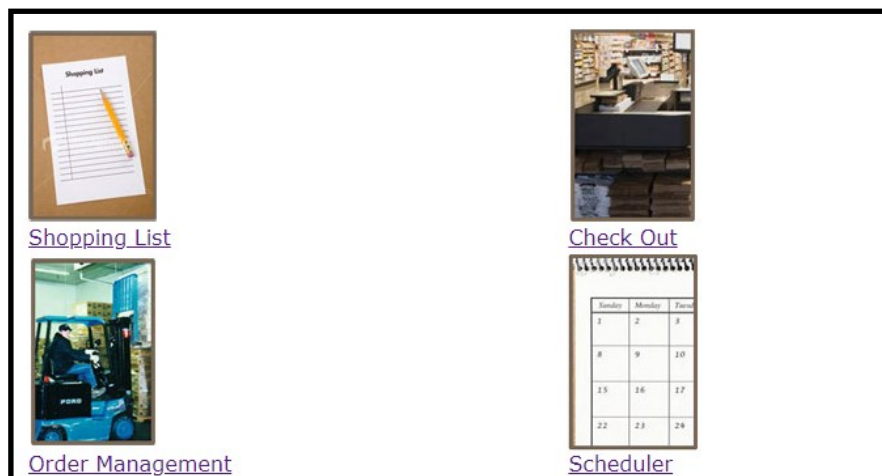


2. The **Scheduler** window will appear with **My Appointments**. This is for you to just verify that your delivery is accurate. You do not need to select any dates at this point since it is already reserved. If it is not accurate please call the Northeast Iowa Food Bank.

My Appointments					
	Date	Time	Reference Number	Standing	Type
	9/30/2022	08:00 AM		Y	Delivery
	9/23/2022	08:00 AM		Y	Delivery

(Note: Deliveries will vary depending on the schedule. Agencies will always be weekly, 1st and 3rd week or 2nd and 4th week unless changed by the Northeast Iowa Foodbank)

3. You now have the ability to go to the **Shopping List** and begin shopping. To complete the process follow pages 15-21 for further instructions.



NOTE: the delivery time displayed is an estimate only and may change due to weather conditions, order size, or other unforeseen problems. If you need the driver to call ahead before arriving please request this through your Agency Representative.

Shopping List


The Shopping List is a menu of available inventory that can be sorted, printed, and/or added to your cart. There are three sections to the Shopping List:

- **Search**– can be used to search for items that meet specific criteria.
- **Shopping Cart**– displays the total number of items, weight, available credit limit and charges for the items in the cart.
- **Shopping List**– displays the list of items that are available to your agency to select to order.

The Shopping List displays the items that are available for your agency to order. The default view of this list is sorted alphabetically by Description, but the list can be sorted by clicking any of the list headings (i.e. Available Qty. or Unit Price)

Each line of the Shopping List displays the following information about an item:

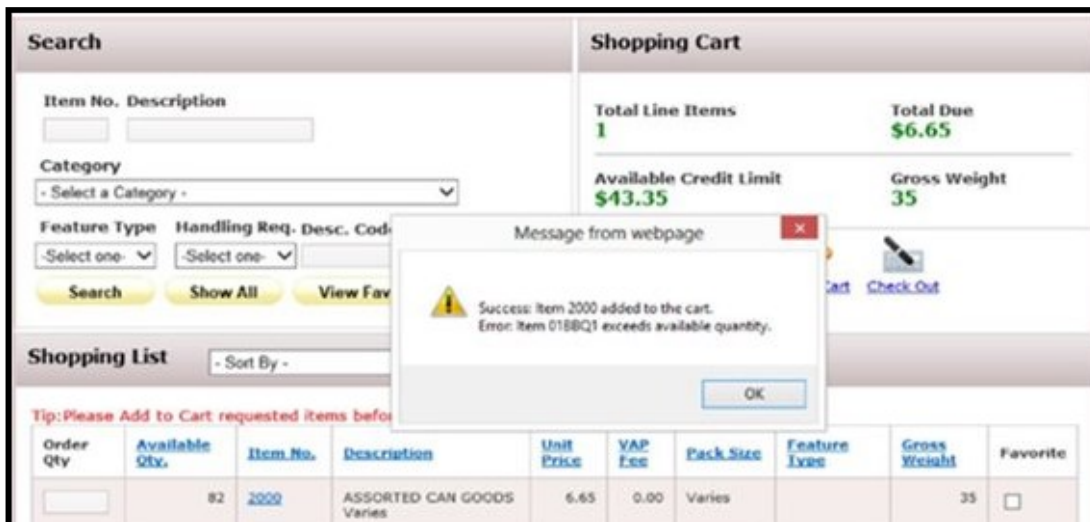
- **Order Quantity**- the quantity of the item that has been ordered
- **Available Quantity**- the maximum quantity of this item that your agency may request
- **Item No.**- this code is specific to each item. If this code is clicked on then the complete details of the item will be displayed
- **Description**- the description or name of an item
- **UOM**- unit of measure
- **Unit Price**- this is the cost of one unit of the item
- **VAP Fee**- value added processing fee
- **Pack Size**- the size and number of items included in each unit
- **Gross Weight**- (in pounds) The weight of one unit of the item
- **Favorite**- this field allows shoppers to designate an item as a favorite

Shopping List - Sort By -										
Tip: Please Add to Cart requested items before leaving page										
<div>12</div>										
Order Qty	Available Qty.	Item No.	Description	UOM	Unit Price	VAP Fee	Pack Size	Feature Type	Gross Weight	Favorite
<input type="text"/>	311	120246PO	Applesauce Squeezers (exp 8-31-	CASE	21.89	0.00	48 - 3.2 oz pouches		10	

Add Items to Cart

To add items to your cart:

1. Enter the desired quantity of an item or multiple items in the Order Qty. field (e.g., 10 cases of Item A and 2 cases of Item B)
2. You **MUST** click **Add to Cart** at the bottom or top of the page to add the items to your cart before you navigate away from this page. If you do not click **Add to Cart** before navigating away from this page, Agency Express will not add them to your cart and will clear the entered desired quantity for that item.
3. A pop-up window with the words “Success: Item added to the cart” will be displayed, confirming the addition of the item(s) to your cart. If “Error” appears that means you attempted to order more than the available quantity and it will not be added to your current order.



4. Continue to the next inventory page(s) to view additional available items and add desired items to your cart as described above.


NOTE: 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. This number also indicates there is an order in **draft status**. It has items in the cart, but is not submitted to the Food Bank.



Item Details

If the shopper wants more information about the item, click on the “Item No.” This will display a detailed information box for that specific item. If an area is left blank and you have further questions please contact your Agency Representative.

Item Detail : 15TUN20-ORDE

Gross Weight. 20	Item Name zz_Order Up! Tuna Fish (In Water)	Handling Req. Dry
Extra Info. NA		Pack Size 48/5 oz cans
Category Meat, Fish & Poultry		Price per Unit 32.40
Food Source PURCHASE		Picture 
VAP Fee 0.00		Cube Size 0
Unit of Measure CASE		Packaging Type
Price per Pound 1.62		People Served 0
		Cost per person NA

Close

PLEASE NOTE: It is critical that the shopper clicks **Add to Cart** *before* going to the next page of the shopping list. If you go to the next page without adding to the cart, the system will not place those items in your cart.

Favorites

The shopper has the ability to select and save Favorites. The favorite items are indicated by a STAR in the Favorite column. This can be a real time saver for those that order the same products each time. If you would like to add favorites to your shopping list please follow the steps below:

1. To create a favorite, click on the square ☐ under the column "Favorite" to the far right.

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"/>	82	2000	ASSORTED CAN GOODS Varies	CS	6.65	0.00	Varies		35	★
<input type="text"/>	60	PR169	Baked Beans Boil n Bag 5/4 lb bags	CS	13.84	0.00	5/4 lb bags		21	<input type="checkbox"/>

2. To undo a favorite, click on the 

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"/>	82	2000	ASSORTED CAN GOODS Varies	CS	6.65	0.00	Varies		35	★
<input type="text"/>	60	PR169	Baked Beans Boil n Bag 5/4 lb bags	CS	13.84	0.00	5/4 lb bags		21	<input type="checkbox"/>

3. You can select <View Favorite> button to see only items that you have selected as a favorite. This is indicated by a star in the favorite column. The Show All button displays all items available in alphabetical order.

Checking Out

Once you have finished shopping, you need to review the items in your cart, make any changes, enter a reserved appointment date (Delivery or Pickup) and then submit your cart by clicking **Check Out**. This function is used when you have finished adding product to a new order or you have finished editing an existing order. It is from this page that orders are submitted to the Food Bank.

The Check Out screen consists of three sections:

1. My Appointment– located in the upper left-hand side of the page
2. Shopping Cart Summary– located in the upper right-hand side of the page
3. Shopping Cart– located in the lower portion of the page

My Appointment					Shopping Cart Summary																															
Reference Number: PO181869 Pickup/Delivery Date: <input type="text"/> Time: <input type="text"/> <input type="button" value="Delivery"/> <input type="button" value="Pickup"/> Comment (Please limit comment to 150 characters, no special characters (&, <, >, ", '). Anything over 150 characters will be cut off when PO is updated or submitted.) <input type="text"/>					Total Due \$43.78 Total Line Items 1 Gross Weight 20 lbs Total Cube Size 0 Cu. Ft. Available Credit Limit \$7,395.31																															
Shopping Cart																																				
<div style="text-align: center;"> </div> <div style="text-align: center;"> Print Clear Cart Continue Shopping Update Cart Submit Cart </div> <table border="1"> <thead> <tr> <th>Order Qty</th> <th>Item No.</th> <th>Description</th> <th>Quantity</th> <th>UOM</th> <th>Gross Weight</th> <th>Unit Price</th> <th>Packaging Type</th> <th>Pack Size</th> <th>Handling Requirements</th> <th>VAP Fee</th> <th>Special</th> </tr> </thead> <tbody> <tr> <td> <input type="button" value="x"/> <input type="text" value="2"/> Available Qty. [311] </td> <td>120246PO</td> <td>Applesauce Squeezers (exp 8-31-22)</td> <td>2</td> <td>CASE</td> <td>20</td> <td>21.89</td> <td>Case</td> <td>48 - 3.2 oz pouches</td> <td>Dry</td> <td>0.00</td> <td></td> </tr> </tbody> </table>													Order Qty	Item No.	Description	Quantity	UOM	Gross Weight	Unit Price	Packaging Type	Pack Size	Handling Requirements	VAP Fee	Special	<input type="button" value="x"/> <input type="text" value="2"/> Available Qty. [311]	120246PO	Applesauce Squeezers (exp 8-31-22)	2	CASE	20	21.89	Case	48 - 3.2 oz pouches	Dry	0.00	
Order Qty	Item No.	Description	Quantity	UOM	Gross Weight	Unit Price	Packaging Type	Pack Size	Handling Requirements	VAP Fee	Special																									
<input type="button" value="x"/> <input type="text" value="2"/> Available Qty. [311]	120246PO	Applesauce Squeezers (exp 8-31-22)	2	CASE	20	21.89	Case	48 - 3.2 oz pouches	Dry	0.00																										

The **My Appointment** section is where you assign your order to the pre-reserved appointment time (either pickup or delivery). If you plan to pick up the order at the Food Bank, the date/time you select must have been an appointment time that you already reserved using the Scheduler.

NOTE: The appointment date and time that you plan to use for pickup / delivery of this order **MUST** have been reserved and is displayed in the **My Appointments** section on the **Scheduler** page.

Shopping Cart Summary

The **Shopping Cart Summary** section displays the following statistics of the current order:

- **Total Due**— total product fees that will be charged to your agency for this order
- **Gross Weight**- total gross weight of all items on this order
- **Available Credit Limit**— displays the agency's current remaining credit limit. This value will increase or decrease as items are added to the open shopping cart.
- **Total Line Items**- total number of unique item numbers on this order
- **Total Cube Size**— total volume of this order

The **Shopping Cart** section on the **Check Out** page displays the following information about the current order:

- **Quantity Order**
- **Item No.**
- **Description**
- **Quantity**
- **UOM**
- **Gross Weight**
- **Unit Price**
- **Packaging Type**
- **Pace Size**
- **Handling Requirements**
- **VAP Fee**
- **Special**

Action Icons and Comment Box

The Action Icons will be displayed each time. The following will allow the shopper to:



Print – Displays and prints the current 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**.



Check Out – Sends the shopper to the Check-Out Screen.

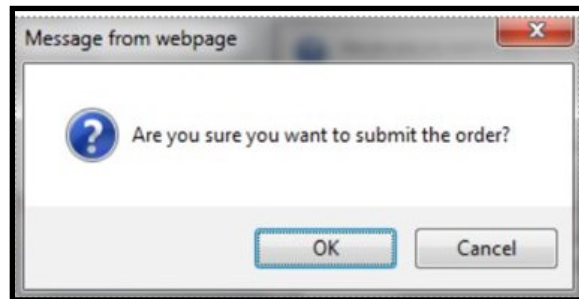
As a shopper you have the option of adding additional requests for the NEIFB to know about your order in the **Comment Box**. The comment will need to be re-entered if you happen to make adjustments to the cart before you submit. Notes such as a request to call before delivery, if you would like bakery items added to your order, etc.

My Appointment	Shopping Cart Summary	
Reference Number: PO4308995	Total Due \$0.00	Total Line Items 5
Pickup/Delivery Date: <input type="text"/> Time: <input type="text"/>	Gross Weight 459 lbs	Total Cube Size 16.36476 Cu. Ft.
<input type="text" value="Delivery"/>		
Comment (Please limit comment to 150 characters, no special characters (&, <, >, ", ')). Anything over 150 characters will be cut off when PO is updated or submitted.)		
<input type="text"/>		
Shopping Cart		
<div> </div> <div>Print Clear Cart Continue Shopping Update Cart Submit Cart</div>		

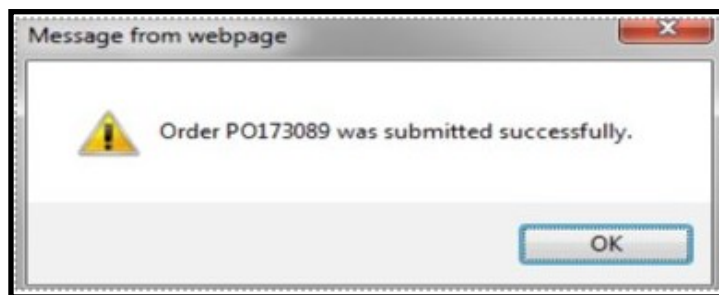
Successfully Checked Out

Once the order is reviewed and finalized you are able to submit the order.

1. After you click Submit Cart, you will be asked if you are sure want to submit the order, please click on the OK button to confirm.



2. You will then see a message stating that your order was submitted successfully.



The Shopper will receive a confirmation email after your order has been acknowledged by the Foodbank. This typically takes about 15 minutes for the email to be sent. Be sure to open the attached order confirmation to know what items were released to your agency and what to expect at time of pick-up or delivery. Please save for your files and forward to anyone in your organization that needs to be aware of this order

The email will read:




"Thank you for your order. Please go to the order management screen to make any changes to your order."

Order Management

Once your order is placed, you will be re-directed to **Order Management** page, where it lists current and past orders. **Order Management** should be used only as a recap of what items you have selected NOT as an invoice.

REMEMBER: it will take up to 30 minutes for your order to be submitted to inventory. You will not be able to make any changes or edits to your submitted order until it shows **Acknowledged**. If your order still shows **Sent to Foodbank** after about 30 minutes, you will need to call your Agency representative because there is a problem with your order.

The screenshot shows a web application interface for Order Management. At the top is a navigation bar with links: Welcome, Order Options, Report, Food Bank Links, Help, About Aidmatrix, and Log Out. The user is logged in as 'Welcome hcfb - 0280P5819'. Below the navigation bar is a 'Search' section with fields for 'From Date:', 'To Date:', and 'Reference Number:', along with 'Search' and 'Show All' buttons. To the right is a 'Summary' box showing 'Total Orders: 1', 'Total Weight: 3046 lbs.', and 'Total Amount: \$501.48'. Below these is the 'Order Management' section, which contains a table with the following data:


	Reference Number	Status	Gross Weight	Total Price	Pickup/Delivery Date
  	PO1083012	Acknowledged	3,046.00	\$501.48	10/09/2012

From the **Order Management** page, a user has the ability to manage existing orders and view past orders. From this page, a user can:

- Check the status of an existing order.
- Open and edit an existing order (which included adding items to an existing order).
- Change the scheduled order date to a new appointment date.
- Print pending order lists.
- Cancel/Delete an existing order.

Edit and Cancel Orders


To be permitted to edit your order, the status must be in **Acknowledged** status. Please follow the steps below:

1. Order Options Tab and select Order Management
2. Click on the Pencil  icon. This will reopen your shopping cart and allow you to add items to your order as well as adjust the quantities of items you have already submitted

NOTE: You must wait 15 minutes after you have submitted your order before editing is allowed.
Reminder to re-submit the cart again!

Order Management								
<div>1 2</div>								
	Reference Number	Created By	Status	Gross Weight	Total Price	Pickup/Delivery Date	Admin Edited	Modified Date
	PO174717	Ida_Beal	Sent To Foodbank	7.00	\$0.70	02/19/2015		02/18/2015
 	PO174716	Ida_beal2	Draft	1,000.00	\$0.00	02/09/2015		01/29/2015
								


If for any reason you want to cancel your order you must follow the steps below:

1. Order Options tab and select Order Management
2. Click on the delete  icon. This will cancel the order.
3. A box will appear, and you must choose Cancelling order.

Cancel Order Number:PO173088

Please choose a cancel reason code below and click submit.

Cancelling order.



Submit

Cancel

Order Status

There are nine different statuses that you may see in the status column next to a submitted order:

Draft Order- has been started but not submitted. The grocery cart in the right hand corner will have a red number next to it.

New Order- indicates that you have successfully created a new order. You may delete the order by click the red X.

Sent to Food Bank- means the order has been submitted to the Food Bank. No changes to the order can be made while in this status.

Acknowledged- This means that your order has been received by our system. You can delete the order by clicking on the red X, or make changes to the order by clicking on the pencil and then clicking **Continue Shopping**. After you submit your cart, it is very important that you come back to the Order Management screen after about 20 minutes to make sure that your order is in the **Acknowledged** mode and not still in **Sent to Foodbank**- mode. If your order has not been **Acknowledged**, there will be no order for you to pick up. You don't want to drive all the way to the Foodbank and there not be an order. *It is up to you to ensure that your order has been Acknowledged.*

Released- the order has been completely processed and can no longer be changed.

Editing- this means you went into an existing order to make changes but you didn't resubmit the cart. You must submit the cart again if you made changes. If you made no changes, you can click Cancel Edit and the order will be restored to the Acknowledged state.

Cancelled- means the order was cancelled by the shopper

Rejected- means the order has been rejected and the NEIFB will contact you

Invoiced- means the order has been delivered or picked up. You will see every invoice generated on your account since the time your account was authorized to order online.

Invoices and Statements

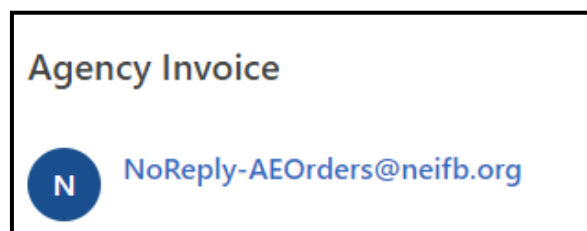
Invoices and statements cannot be found on Agency Express. All invoices and statements are automatically sent to the email address that is on file. A total of two email addresses can receive both invoices and statements. If you need to update the email address you must contact a NEIFB Representative. If you do not see the invoice or statement in your inbox you must check your spam/junk folder. We recommend that you keep a designated folder for all invoices and statements so that you can track information as needed.

Orders on **Order Management** are to be used only as a recap of the items you have selected. Invoices sent via email should be your main source for accurate charges of all fees including grants and delivery fees.

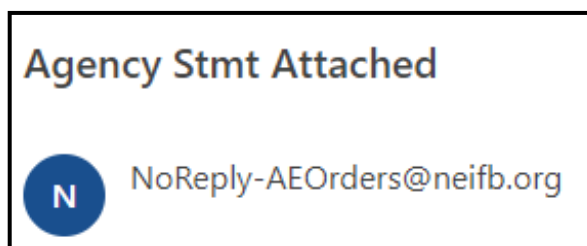
All statements will be generated the first week of each month. When sending in payments you must include your agency number in the memo. If checks are sent without an agency number it will be returned. All checks should be sent to the following address:

*Attn. Accounting
Northeast Iowa Food Bank
PO Box 2397
Waterloo, Iowa 50704*

Invoices will appear in your inbox as:



Monthly Statements will appear in your inbox as:



Reports and Survey Management

All agencies are required to submit monthly reports formally known as statistics to the Food Bank. It must be entered no later than the 15th business day of each month. If you did not serve anyone in the month, please fill in with zeroes so we know you are still active. If you miss the deadline your account will automatically be suspended until you have reported. Please allow 15 minutes for the system to recognize your submission and it will automatically unsuspend your account. Agencies should be logged in for the program for which they are submitting a report (i.e. an agency that has a pantry and backpack account with the Food Bank, should log into each account separately to submit each account's service report for that month).

Fill out the following steps below:

1. Hover over **Report** and select **Survey Management**.



2. This will redirect you to **Search, My Surveys** and **My Responses** page.

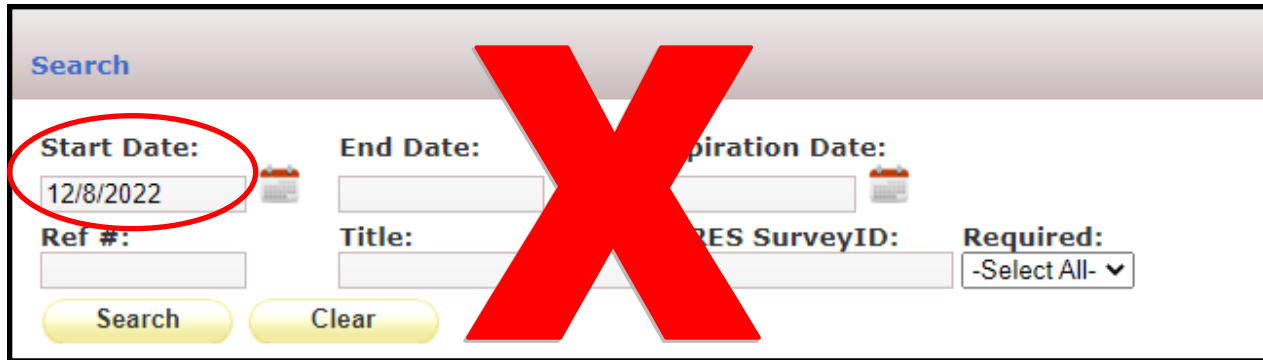
A screenshot of a web application interface. At the top is a navigation bar with buttons: 'Welcome', 'Order Options', 'Report', 'Food Bank Links', 'Help', 'About TechBridge', and 'Log Out'. Below the navigation bar is a 'Search' section with input fields for 'Start Date' (12/8/2022), 'End Date', 'Expiration Date', 'Ref #', 'Title', 'CERES SurveyID', and a 'Required' dropdown menu. Below these fields are 'Search' and 'Clear' buttons. The 'My Surveys' section contains a table with survey data. The 'My responses' section contains a table with response data.

	Ref #	Title	Start Date	End Date	Status	Expiration Date	CERES SurveyID	Required
Submit	4281	PANTRY STATISTICS	Feb 1, 2023	Mar 1, 2023	Active	Dec 31, 2049	0206~00 PANTRIES 2023-02-01	True

	Ref #	Title	Start Date	End Date	My Response #	Submitted to Ceres
View Your Responses	4235	PANTRY STATISTICS	1/1/2023 12:00:00 AM	2/1/2023 12:00:00 AM	1	Successful

Search and Surveys

3. Clear out the **Search** engine at the top for any automatic filters that may be applied. Once it has been cleared select *Search*. The **Search** section should resemble the second picture outlined in red.

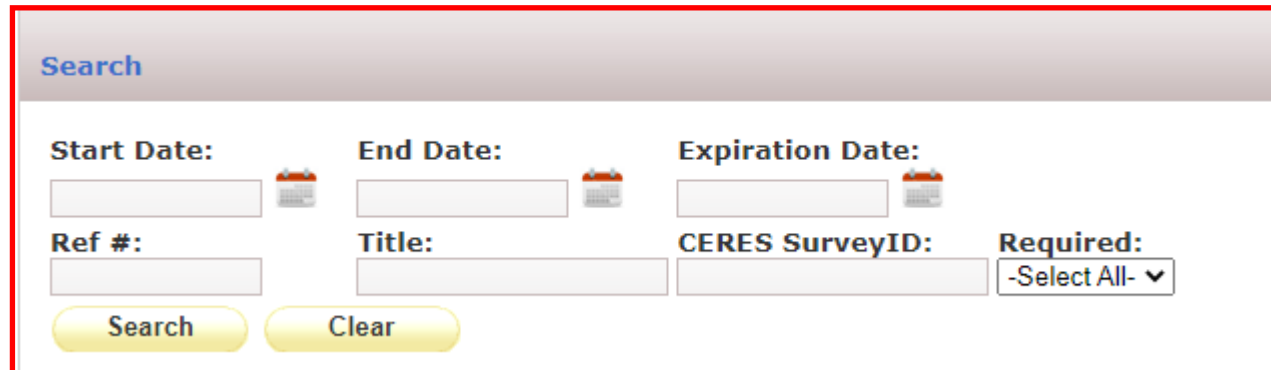


Search

Start Date: 12/8/2022 End Date: Expiration Date:

Ref #: Title: CERES SurveyID: Required: -Select All- ▼

Search Clear



Search

Start Date: End Date: Expiration Date:

Ref #: Title: CERES SurveyID: Required: -Select All- ▼

Search Clear

4. You can now view the pending **Surveys** that need to be submitted and the Surveys you have already submitted, **My Responses**.

My Surveys								
	Ref #	Title	Start Date	End Date	Status	Expiration Date	CERES SurveyID	Required
Submit	4281	PANTRY STATISTICS	Feb 1,2023	Mar 1,2023	Active	Dec 31,2049	0206~00 PANTRIES 2023-02-01	True

My responses						
	Ref #	Title	Start Date	End Date	My Response #	Submitted to Ceres
View Your Responses	4235	PANTRY STATISTICS	1/1/2023 12:00:00 AM	2/1/2023 12:00:00 AM	1	Successful
View Your Responses	4195	PANTRY STATISTICS	12/1/2022 12:00:00 AM	1/1/2023 12:00:00 AM	1	Successful
View Your Responses	4166	PANTRY STATISTICS	11/1/2022 12:00:00 AM	12/1/2022 12:00:00 AM	1	Successful
View Your Responses	4147	PANTRY STATISTICS	10/1/2022 12:00:00 AM	11/1/2022 12:00:00 AM	1	Successful
View Your Responses	4142	PANTRY STATISTICS	9/1/2022 12:00:00 AM	10/1/2022 12:00:00 AM	1	Successful

Submitting My Surveys

5. Under **My Surveys** the [Start Date](#) is the month you will want to report for. You must correlate your monthly data with the correct [Start Date](#). In the example below this agency needs to submit for the months of October, November and December.

My Surveys								
	Ref #	Title	Start Date	End Date	Status	Expiration Date	CERES SurveyID	Required
Submit	4195	PANTRY STATISTICS	Dec 1,2022	Jan 1,2023	Active	Dec 31,2049	0206~00 PANTRIES 2022-12-01	True
Submit	4166	PANTRY STATISTICS	Nov 1,2022	Dec 1,2022	Active	Dec 31,2049	0206~00 PANTRIES 2022-11-01	True
Submit	4147	PANTRY STATISTICS	Oct 1,2022	Nov 1,2022	Active	Dec 31,2049	0206~00 PANTRIES 2022-10-01	True


6. To submit a survey go to **My Surveys** and select [Submit](#). This will populate a new window with the survey questions that must be filled out. Please read questions thoroughly and select Submit once completed.

PANTRY STATISTICS
 PANTRY
 Number of visits to your pantry (total # times you served a HH not how many times you were open) *

 Number of households (unduplicated, if possible) *

 Number of individuals (unduplicated, if possible) *

 Pounds Distributed *



NOTE: Questions are subject to change depending on your agency type

Successful Submission

6. After pressing Submit, wait for a “Thank You” screen to appear. If this screen does not appear, the report was not submitted successfully and you need to resubmit your report.



7. It is recommended that you verify the report was submitted by checking **My Responses** and seeing **Successful** under Submitted to Ceres column.

My responses						
	Ref #	Title	Start Date	End Date	My Response #	Submitted to Ceres
View Your Responses	4235	PANTRY STATISTICS	1/1/2023 12:00:00 AM	2/1/2023 12:00:00 AM	1	Successful
View Your Responses	4195	PANTRY STATISTICS	12/1/2022 12:00:00 AM	1/1/2023 12:00:00 AM	1	Successful
View Your Responses	4166	PANTRY STATISTICS	11/1/2022 12:00:00 AM	12/1/2022 12:00:00 AM	1	Successful
View Your Responses	4147	PANTRY STATISTICS	10/1/2022 12:00:00 AM	11/1/2022 12:00:00 AM	1	Successful
View Your Responses	4142	PANTRY STATISTICS	9/1/2022 12:00:00 AM	10/1/2022 12:00:00 AM	1	Successful

FAQ's

Q: *Why can't I login?*

A: There a few reasons you could be having difficulty logging into Agency Express. Make sure the credentials you are using to login are being entered correctly. The most common error is users forgetting to include '0206P' at the beginning of the Program Code field. Additionally, it is possible that your agency made changes to its Authorized Agency Express Users list and your Username was deactivated.

Q: *What do I do if I am unable to select a date and time to attach to my order?*

A: If there no dates on the calendar at Check Out, contact your food bank.

Q: *Why are the items I added to my cart not showing on the Checkout page?*

A: It is likely that you did not click "Add to Cart" before going to the next page of the order list. If you do not click "Add to Cart" before you move to the next page, Agency Express clears the quantities you entered. Another possibility is that you entered a quantity that exceeds the case limit we have set for that item. Agency Express will not add an item to your shopping cart if your request exceeds the set limit.

Q: *How can I change my order after I've submitted it?*

A: On Order Management if you see these icons in the first column:

- A red circle with an X - order can be canceled by the shopper.
- A pencil - order can be edited by the shopper.
- After editing an order, click to send the edited order to the food bank. Failure to click means no changes are recorded.
- An order can never be edited once it is in Released status

Q: *Why doesn't my invoice on Order Management match my invoice sent through email?*

A: Orders on **Order Management** are to be used only as a recap of what items you have selected. Invoices sent via email should be your main source for accurate charges of all fees including grants and delivery fees.

Q: *How do I view my invoices each month?*

A: Invoices are only sent through email. Only two people can be on the account to receive invoices. If you need someone beyond this it is the coordinators responsibility to pass this along.

Q: *How do I view my statements each month?*

A: Statements are only sent through email. Only two people can be on the account to receive statements. If you need someone beyond this it is the coordinators responsibility to pass this along.

FAQ's Continued

Q: *What do I do if I am not receiving invoices and statements?*

A: Please check junk/spam folders for anything from the email address of NoReply-AEOrders@neifb.org. If you still do not see anything please contact your regional representative.

Q: *Why am I receiving zeros on items that are by weight?*

A: You must order a minimum of 20 lbs. to guarantee you receive that item.

Q: *Why are there no available order pick-up dates when I go to the Checkout page?*

A: You must schedule a pick-up from the **Scheduler** page before you start adding to your shopping cart. Then, the date you scheduled on that page will be the only date you can choose at the Checkout page.

Q: *Why cannot I submit my cart and check out?*

A: It is likely you are outside the 10-day window. You must be within the 10-day window from when you receive your delivery/pickup (includes weekends).

Q: *What do I do if I submitted an order, but it does not show up in Order Management?*

A: Check to see if the order is still in *DRAFT* status. If you see a **red number** next to the grocery cart at the upper righthand corner that means your order is in *DRAFT* mode. If you do not see this, wait an additional 15 minutes for it to appear. If you still do not see anything, contact your regional representative.

Q: *Who do I send monthly statements to?*

A: Please include your agency number in the memo and send to the following address. If checks are sent without an agency number it will be returned.

Attn. Accounting

Northeast Iowa Food Bank

PO Box 2397

Waterloo, Iowa 50704

Q: *I forgot my password, what should I do?*

A: Select **forgot password** at the login page.

Q: *I do not see a delivery for the day I'm scheduled for, what do I do?*

A: Contact your regional representative and confirm schedule.

Q: *How do I report my monthly statistics now?*

A: You must hover over the Report Tab and select Survey Management. You must then select Submit which will populate a window of questions. Reports are due by the 15th of each month.

For Further Questions



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Children's Programs Coordinator



Tia Gutierrez

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