Central PA Food Bank (CPAFB) Online Ordering System User Manual



Primarius Web Window (PWW)

February, 2014

Contents

Benefits	2
Adobe Software	2
Reminders	2
Help	2
Accessing the On Line Web Ordering System	3
The Home Page	4
PLACING AN ORDER	5
Sorting the Shopping List:	9
Print Shopping List Button	12
Print Cart Button	12
View Cart Button	13
The Checkout Button	14
STATISTICS	15
To Enter Statistics:	15
To View Past Statistics:	17
Orders Tab	18
Grants Tab	19
My Docs Tab	19
MY DOCS – Statements Tab	19
MY DOCS – Invoices Tab	20
AGENCY INFORMATION	21
Locations Tab	21
Contacts Tab	22
Hours Tab	22
Open AR Tab	23
Service Info Tab	
Agency Information Update Form	24
PWW Agency Information Profile	25

Benefits

- Connects to live data which means that the available quantities are current.
- Able to print a shopping list.
- Able to place your order online.
- Able to enter your statistics online.
- Able to check on orders, statements, invoices, and grants.
- Some of the Agency information will also be displayed graphically. *Note: these features will only be available from the start date of the new online ordering system.*

Adobe Software

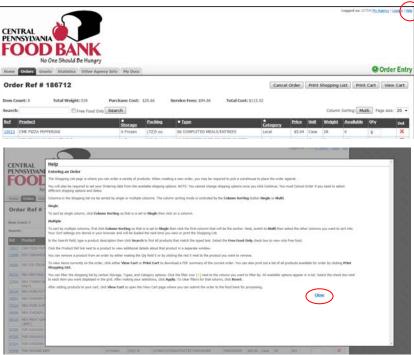
To view or print many of these items you will need to have installed on your computer the free software called Adobe Reader. You can find this at http://www.adobe.com

Reminders

- This program is only supported on a Windows PC based computer with the following web browsers: Internet Explorer and Mozilla Firefox.
- Use the Logout link in the upper right hand corner to close your Online Web Ordering session.
- Your Agency Relations representative can assist you in answering questions regarding your Agency's contents on the Web.

Help

• When on a particular page, use the <u>Help</u> link in the upper right hand corner to clarify frequently asked questions.

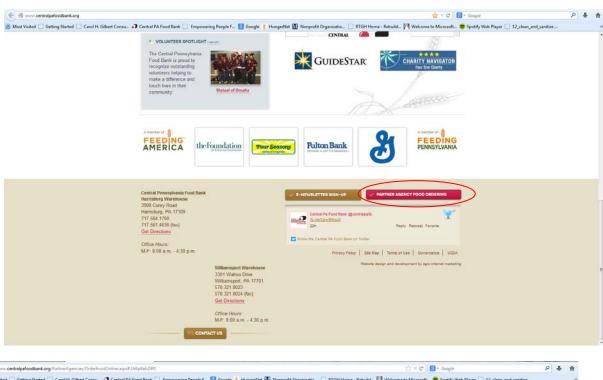


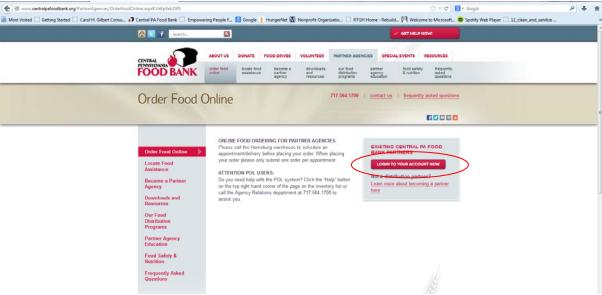
^{**}Scroll to bottom of help page and click on "close" exit the help function

Accessing the On Line Web Ordering System

You will begin the same by going to http://www.centralpafoodbank.org/

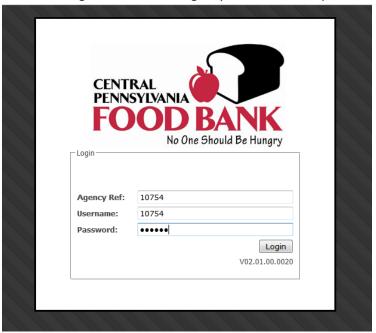
• Agency login link is at the bottom right hand corner of the homepage





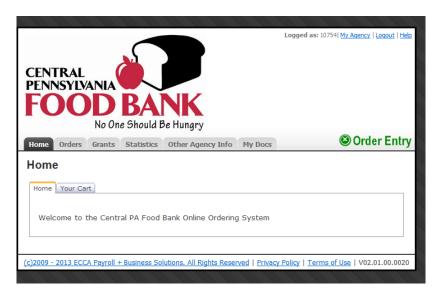
The next window will look a little different. Each person authorized to order food online will need to know:

- Your agency number
- The username (which is the same as the agency number)
- The agency's password
 - o **IMPORTANT NOTE:** Your password is now case sensitive. All passwords must be entered in all lowercase lettering. Please contact Agency Relations with questions.



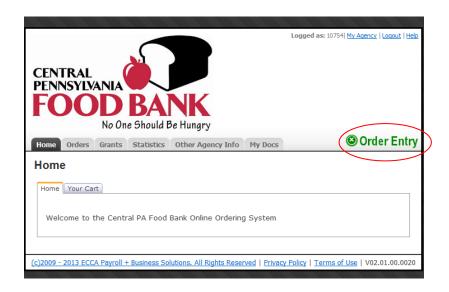
The Home Page

On the home page, you will find Central PA Food Bank announcements and useful web links. From the home page, you can view and directly access your shopping cart by using the 'Your Cart' tab.



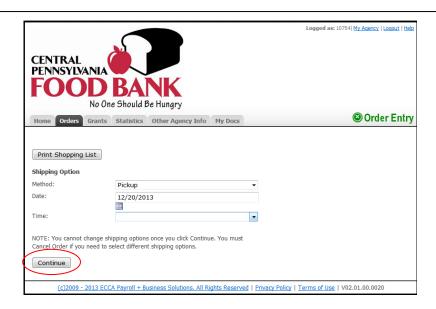
PLACING AN ORDER

Select the + Order Entry on the right side of the screen to open up the shopping list:

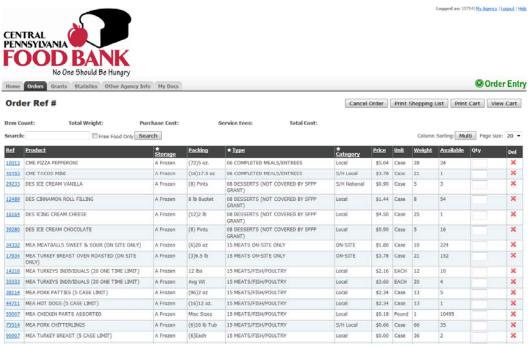


You will first come to the page below. You must continue to call our office to schedule your pick up time before placing an order. After you call, you will simply enter the day and time of your scheduled appointment in the form below. For deliveries: Please check our website or call us to verify our delivery schedule and please enter the scheduled delivery date and a "filler time" in the form below. Once you have entered the correct information, please press continue.

** <u>Please Note:</u> You are required to enter a date in order to see the live inventory. If you get the inventory and do not see anything that you would like to order, please simply call our office to cancel your appointment. To print a hard copy of the inventory without inputting a date, simply click on the "Print Shopping List" Button on the home page of PWW.



Here is how the shopping list will appear:



Note the three buttons:

- **Print Shopping List:** Select to print a shopping list.
- **Print Cart:** Select to print the items in the cart.
- **View Cart:** Select to view the items within the cart.

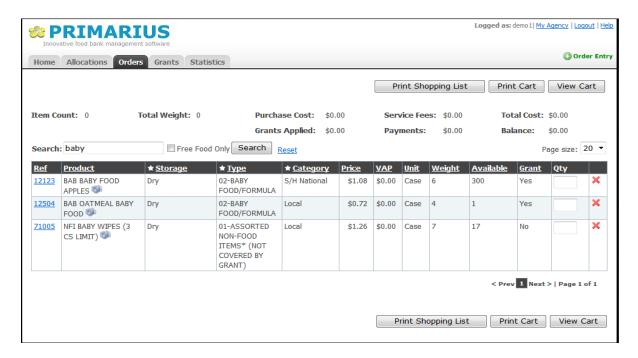
The **Search textbox** Search: allows you to type in the product name or the product reference number to search the shopping list for that particular item.

The **Ref** (*reference*) column contains the item number. Clicking on the product reference number will bring up a new window containing the product details and the product photo (if available).



More product information can also be found by clicking on the camera icon (when available)

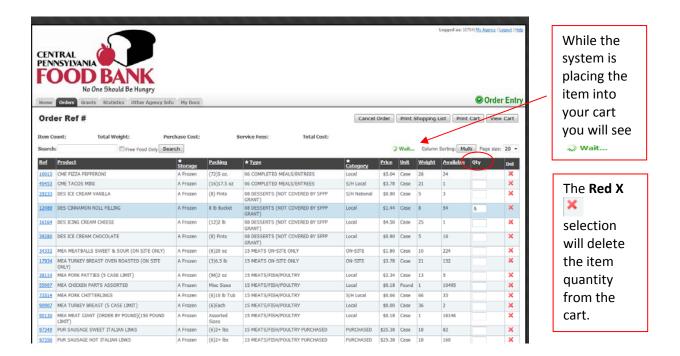




A product detail page will show with the product image when available.



Place quantity of item in the **Qty Textbox** and either tab or select another **Qty** box by moving the mouse cursor.



As you order product, the fields above the search engine will generate information based on what is in your cart:



PLEASE NOTE: An order that is left in cart for more than 48 hours will be automatically canceled and deleted.

Sorting the Shopping List

You can change how many products are viewed on a page by choosing a different page size. To avoid scrolling through pages of product, select "all."



All columns can be sorted by clicking on the **underlined word**. This will sort the column in ascending or descending order. Keep clicking the word until you get the view you want.

Note: the small arrow pointing downward indicating an ascending selection (*smallest number to largest number or alphabetical*).

The **starred columns** (☆) indicate columns that the Shopping List can be filtered by.



To sort multiple columns at the same time. First make sure that "Column Sorting" is set to single. Then click on the underlined column that you want to sort (i.e storage, packing, etc.).



Once you have chosen the first column to be the primary sort, click on "Column Sorting" again and set to multi. Then click on the 2nd underlined column that you want to sort (i.e. storage, packing, etc.) within the primary sort. In the example below, "storage" is primary sort and "type" is the secondary sort.



Clicking on the Star (☆) in the Type Column creates a drop down list so you can select the category you want.



At the bottom of the list you will see **Apply** so that the column will only show those items or **Reset** to erase previous selections.



Then you will only see what is filtered and the **Star** (☆) turns **yellow** indicating a filter is on:

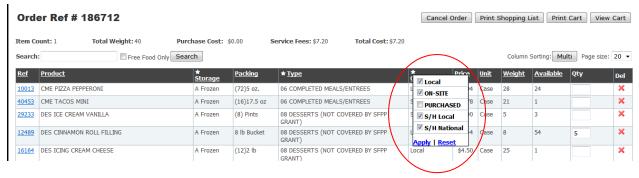


Clicking on the **Yellow Star** (☆) and selecting **Reset** at the bottom of the column will remove the filter.

TIPS:

To remove purchased product from your shopping list:

Sort shopping list by category and choose all categories other than "PURCHASED" and click "Apply." Please note that this will remove purchased produce, which is still only \$.1 per pound.



To view only free products:

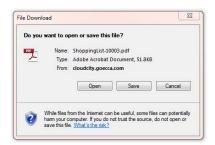
Check off "Free Food Only" and click search. Click the reset button to view entire list again.



Print Shopping List Button

To print a shopping list, select the **Print Shopping List** button.

A new Web window will appear with the following message Select **Open** button



A printable shopping list will appear:

Shopping List

ANTIOCH TABERNACLE
Date Printed: 1/9/2012 At 2:41 PM

*Item availability may change prior to ordering.

Ref	Product	Category	Storage	Туре	Weight	Available
10010	CME PIZZA ASSORTED	Local	Frozen	06-COMPLETED MEALS/ENTREES	30	12760
10525	BEV COFFEE DECAF (5 CASE LIMIT)	Local	Dry	03-BEVERAGES (NOT COVERED BY GRANT)	10	55
10806	RIC RICE	Local	Dry	24-RICE	22	43
11069	DAI YOGURT GREEK	Local	Refrigerated	07-DAIRY PRODUCTS	13	57
11282	CER HONEY & OAT BLENDERS (6 CS LIMIT)	S/H Local	Dry	05-CEREAL	17	11
11387	CER CINNAMON TOASTERS CEREAL (6 CS LIMIT)	S/H Local	Dry	05-CEREAL	16	59
11823	CER OATMEAL INSTANT	Local	Dry	05-CEREAL	3	1060
11953	SNA ANIMAL COOKIES	Local	Dry	COOKIES (NOT COVERED BY GRANT)	13	22

Print Cart Button

To print a shopping cart, select the **Print Cart** button.

A new Web window will appear with the following message Select **Open** button and a printable cart list will appear:

Order#

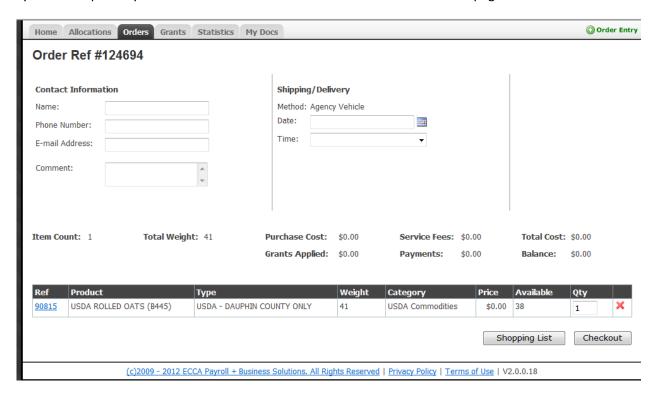
Order Placed: 11/10/2006 Warehouse: ECCA-PUG2011

Delivered/Picked Up: 11/10/2006 At 12:00 AM Deliver/Pick Up Location: No Del/PU Location

Product Ref	Product	Category	Quantity	Weight	Total Cost
		No product found.			
		Totals:	0	0	\$0.00
		Grants Applied:	\$0.00	Payments: \$0.00	Balance: \$0.00

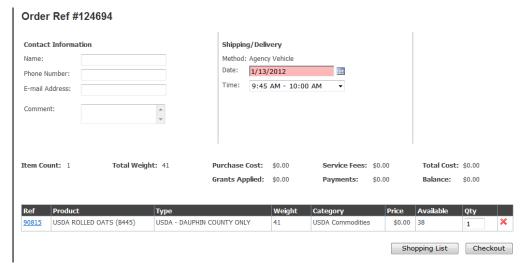
View Cart Button

Once you've completed your order click on "View Cart." You will be taken to this page:



The **Shipping/Delivery** information will automatically fill in - like it does on the POL - unless CPAFB is closed on your date. Be sure to fill in the shipping date and times if it doesn't auto fill.

The **Contact Information** is required.



Select the **Shopping List** button to return to the shopping list.

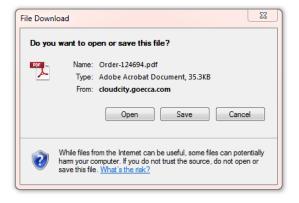
Select the **Checkout** button to submit your order to CPAFB.

The Checkout Button

After selecting the **Checkout** button, a successful submission will show the following message:



Clicking on the 'Click here for a PDF summary of your order' will show the following message:



Selecting the **Open** button will show the order summary:

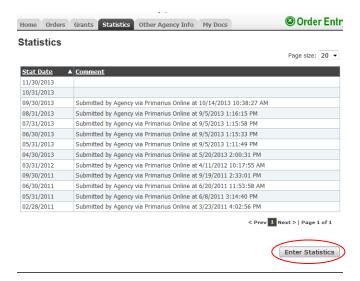


STATISTICS - Entering Statistics

1. Click on the statistics tab.



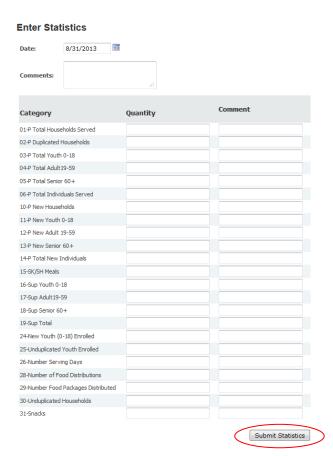
2. Select the Enter Statistics button and the enter statistics page will appear.



3. Choose the last day of the month that you are submitting statistics for by typing in the date or by clicking on the calendar icon and choosing the date.



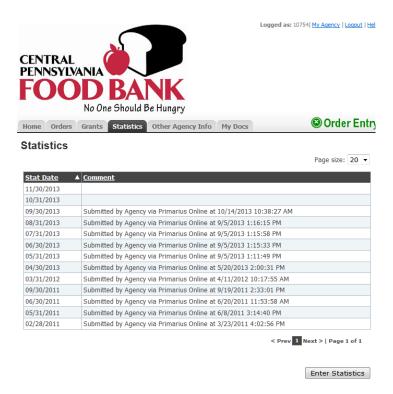
- 4. Enter the statistics according to your agency type.
- Pantry Programs are to complete only those fields that start with a P
 Also remember that your Total Households Served (#1) is ALL households served that month,
 INCLUDING NEW HOUSEHOLDS. When you get to fields 10 14, you are to tell us, of the Total NEW
 HH/People served for the month. Duplicate HH (#2) reflects the number of households that you
 served more than one time that month, if applicable to your program.
- Soup Kitchen and Shelter Meal Programs are to complete Field #15 -SK/SH Please mark how many meals were served that entire month, not people.
- Supplemental Programs (day cares, senior centers, residential programs other than emergency shelters, etc.) are to complete fields #16-19- Sup
- Youth Programs (Accounts in 30000, 60000 ranges; Backpack/Kids Cafe/School Pantries) are to complete fields #24-31 (contact Karen Woodings with questions)
- ** In some cases, your organization may have multiple program types such as a soup kitchen and a pantry program. If this is applicable to you, complete your appropriate sections.
- ** PLEASE REMEMBER TO ADD CORRECTLY! The TOTAL fields do not populate for you. Please check your math before entering your data.



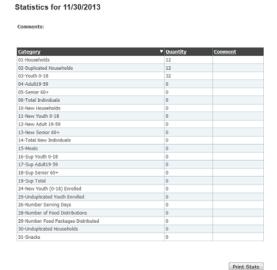
Note that you can alter the numbers until you select the **Submit Statistics** button Submit Statistics button. After that, if corrections need to be made, contact your Agency Relations personnel.

Viewing Past Statistics:

The statistics tab also shows all the documented statistics that have been reported to CPAFB.



Clicking on a table row (line) will bring up the statistic report details.



HOME -Your Cart Tab

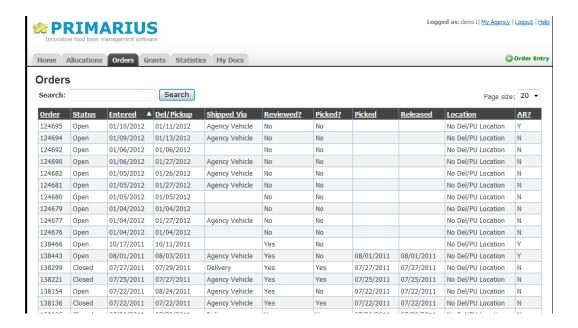
Short cut to what is currently in your shopping cart. This tab window displays the current items in your cart along with basic summary detail. Click the **View Cart** button to go to the view cart window and either select the **Shopping List** button to continue the order or the **Checkout** button to begin submitting the order to CPAFB. If you do not have an order in process, click **Order Entry** to start a new order.



Orders Tab

This lists all of the orders for your Agency and their current status.

Clicking on a table row (line) will bring up the order details.



Grants Tab

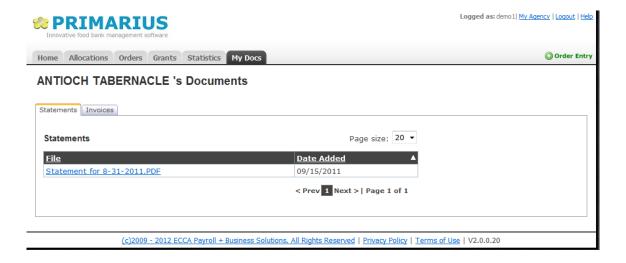
This lists the grants that have been applied to an Agency with amounts used, initial balances, and remaining balances.



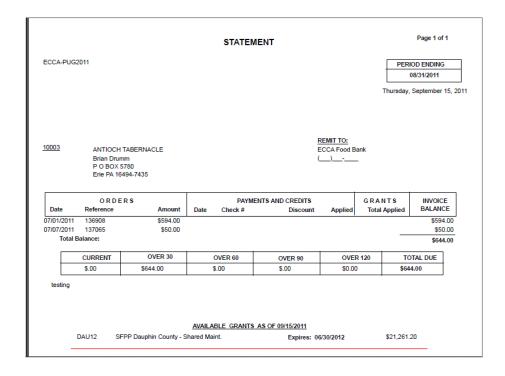
My Docs Tab

MY DOCS - Statements Tab

This window lists your Agency's statements that have been published to view online – for *administrators* only.

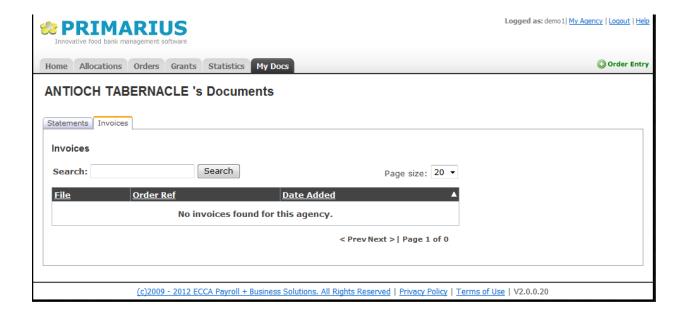


If you click on a file name (for example: Statement for 8-31-2011.PDF), you would see:



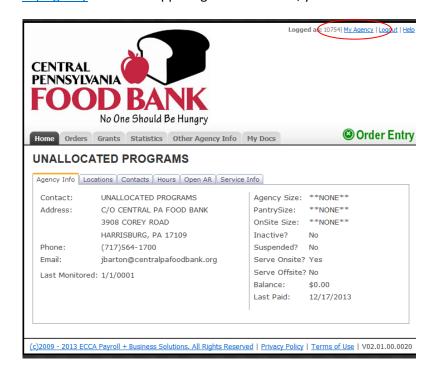
MY DOCS - Invoices Tab

This window lists the invoices for your agency and works the same way as the statements tab.



AGENCY INFORMATION

If you click on the My Agency link in the upper right-hand corner, you will see:



Each tab will show you what information Central PA Food Bank has recorded on your agency file. To update any information, please fill out the form at the end of this document and fax or mail it to the Food Bank.

Locations Tab

The addresses listed are the different addresses that the Food Bank has on file for your agency.



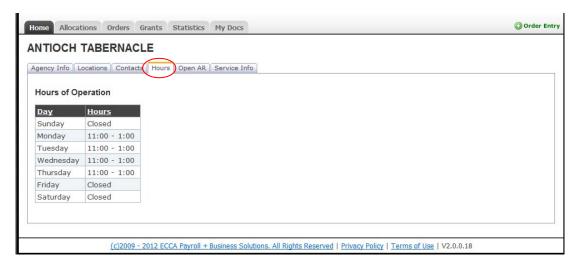
Contacts Tab

The contacts listed are the different contacts that the Food Bank has on file for your agency.



Hours Tab

These are your agency's business hours that the Food Bank has on file.



Open AR Tab

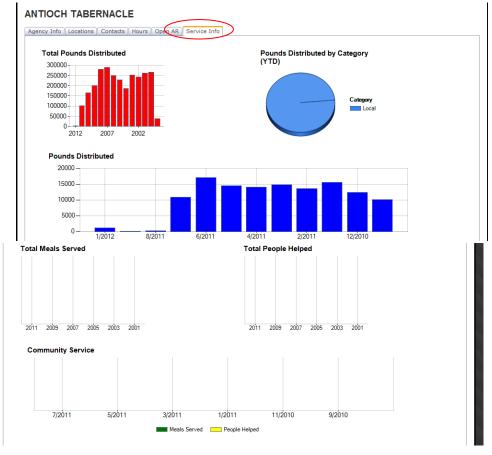
Shows if orders:

- Are open or closed
- Have been reviewed by Central PA Food Bank
- Have been picked (selected) by Central PA Food Bank
- Have a balance



Service Info Tab

Displays different graphs and charts based on the agency's information. Please note the bottom three graphs will not display any information because of how statistics are set-up.





Agency Information Update Form

Agency Name:	_	
Please make the following changes to: (Print or type all info	rmation)	
□ Agency Name:		-
Contacts:		
□ Director/administrator name:		
□ Primary Contact Name:		
□ POL contact:		
□ Bill to contact:		
□ Statistical Report contact:		
Authorized □ Add: (Please schedule orientation for new persons)		
	_ □ Pick up □ Order □ shop	
Delete:		
General Info □ Agency physical address: □ Agency bill to address:		- -
□ Telephone Number: (main)		
(contact(s)		
□ Fax #:		
□ Email addresses: (please include anyone who may be interested in re	eceiving CPFB E-News):	
Hours of Operation:		
Submitted by:	Date:	
Fax to: 717-561-4636 Email to: smccree@centralpafo		
Office use only: Date entered in primarius:	Ву:	.
	F:\Agency Relations\Forms	\Data Information Update Form.doc



PRIMARIUS WEB WINDOW SERVICE AGENCY INFORMATION PROFILE

Date:

We are pleased to announce that we have launched our new inventory ordering service, **Primarius Web Window** (PWW). We are very excited about this feature and trust that, if you have internet access available, you will enjoy the convenience that this service offers to you!

In order for you to access PWW, we need some pertinent information from you, which when entered into our system, will allow you to enter your inventory orders, monthly statistics, and access your account or grant status. Please complete the information below and return it by mail, or email to smccree@centralpafoodbank.org. You may also drop it off at the Food Bank or fax it to 717-561-4636. We will enter your information into our system and notify you when you are authorized to begin using the service. User-friendly instructions are available on the site that will guide you through the various features. User videos and tutorials are available on our website at http://www.centralpafoodbank.org/PartnerAgencies/DownloadsandResources.aspx.

Please feel free to contact the Agency Services Staff at 717-564-1700 if you have any questions regarding your email address or password selections.

Agency Name:		Account #:
Agency Address:		
Agency Food Bank Primar	ry Contact:	
Primary Contact Phone N	umber:	
Email Address(es) provided below v	vill receive order confirmations.	
Primary Email Address #1		
Back-up Email Address #2	:	(if applicable)
Password:		
	•	umbers, letters or combination thereof. The primary contact ith the Food Bank for your agency must be informed of this
PLE	ASE REVIEW YOUR INFORMATION <u>BEFORE</u>	YOU SUBMIT IT TO US!
It is your	responsibility to notify us of any changes t	o this information. Thanks!
Office Use:	Entered By:	Date:

Agency PWW Update Submitted By:___