



Agency Express Guide

Welcome to the Agency Express Guide

Thank you for taking the time to review this training. It is important to us that you have this information readily available for you to use Agency Express properly. This guide is compiled of all the information needed to be successful with Agency Express. You will see that there is a **lot** of information shared and perhaps it might be overwhelming, we tried to make it as condensed as possible, but we did not want to keep any information out. See below for when you need to find a certain slide rather than going through the entire guide.

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**FEEDING[®]
SAN DIEGO**

Agency Express Live Website/ Logging In

Sign into the **Agency Express LIVE** website

<https://www.agencyexpress3.org/AgencyExpress30/NewLogin.aspx>

Partnership Coordinators have sent out an email pertaining this information. If you lost it or didn't get it, reach out to your Partnership Coordinator

Username is your first name initial and your last name

Password is always change12

Program Code will always start with 0077PP followed by your 4-digit agency number

FEEDING AMERICA

AGENCYExpress®

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](#)

Log In

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Delivering technology, driving change.

About TechBridge

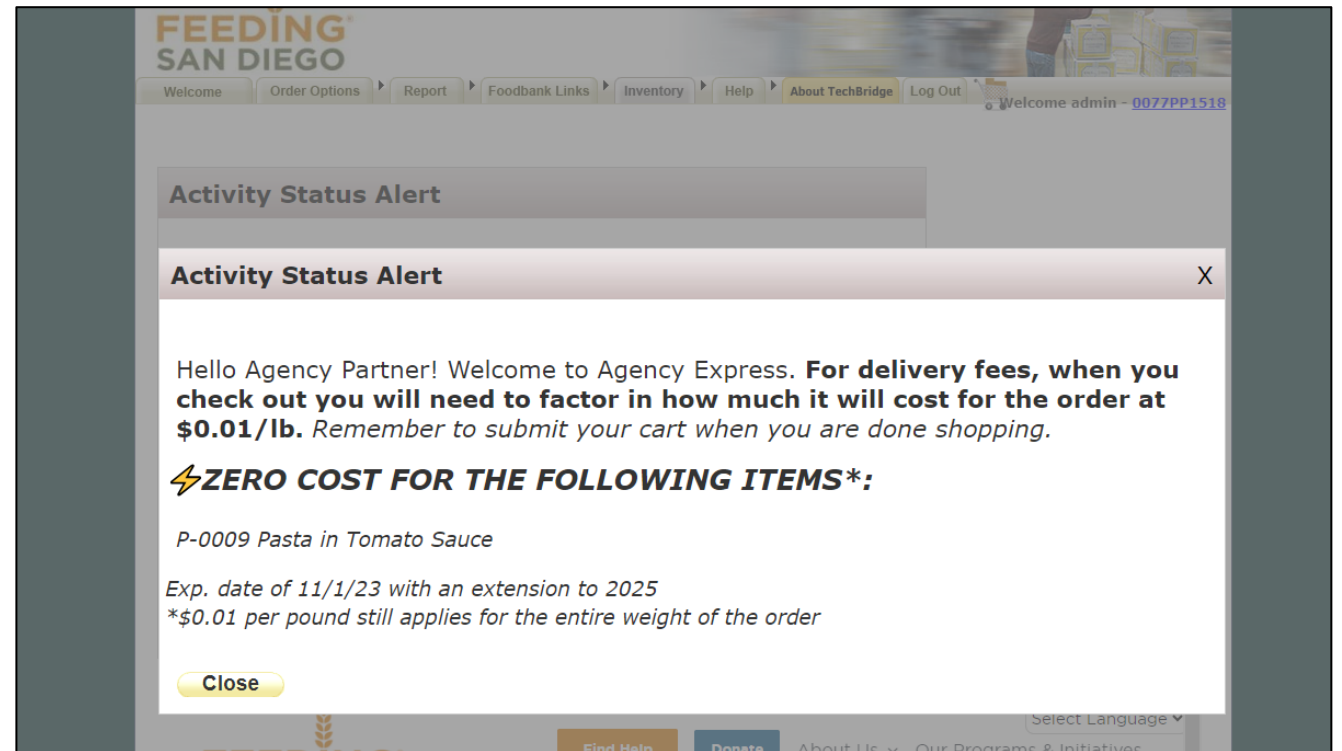
TechBridge breaks the cycle of generational poverty through the innovative use of technology to transform nonprofit and community impact.

About Feeding America

For training purposes, we shared an Agency Express Test website, before submitting an order, ensure that you are not on the test website. You can check this by checking the browser and making sure the word "sandbox" IS NOT included in the web address. If it is, come back to this slide and use the web address shared here.

Activity Status Alert Pop-Up Window

After signing in you will see the Activity Status Alert pop-up will have important information regarding delivery fees and updated pricing on certain items, be sure to carefully read this before exiting.



If you exit before reading you still have access to it on the Welcome page (next slide)

Welcome Page

The Welcome Page, will have access to the Activity Status Alert as well as the Partner Portal.

The Partner Portal is a valuable resource for our agencies, tailored to our agencies' needs. You can find:

- Forms & Documents – Monitoring Visit Req. Documents, Redistribution Logs, Invoice & Payment FAQ's
- Food Rescue
- Food Safety
- CalFresh
- Cobranding

And so much more!

Feel free to check it out:

<https://feedingsandiego.org/partner-portal/>



FEEDING SAN DIEGO

Welcome | Order Options | Report | FoodBank Links | Inventory | Help | About TechBridge | Log Out | Welcome admin - 00779P1518

Activity Status Alert

Hello Agency Partner! Welcome to Agency Express. For delivery fees, when you check out you will need to factor in how much it will cost for the order at **\$0.01/lb.** Remember to submit your cart when you are done shopping.

⚡ZERO COST FOR THE FOLLOWING ITEMS*:

P-0009 Pasta in Tomato Sauce

Exp. date of 11/1/23 with an extension to 2025

*\$0.01 per pound still applies for the entire weight of the order

FEEDING SAN DIEGO | Find Help | Donate | About Us | Our Programs & Initiatives | Get Involved | Partner With Us | Search...

Partner Portal

Welcome to our Feeding San Diego Agency Partner Portal. Here you will find important updates and resources that pertain to operating a food distribution and addressing hunger. If you do not find what you are looking for below, please reach out to your regional partnership coordinator or use the contact form at the bottom of this page.

Forms & Documents

Here are various forms, documents, and agreements to help your organization operate a successful distribution

- Agency Handbook
- Agency Pre-Monitoring Form

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Welcome Page Cont.

At the top of the page, you will see the tabs of all the windows available - some are more important than others. We will review them, so you are aware of what is available to you.

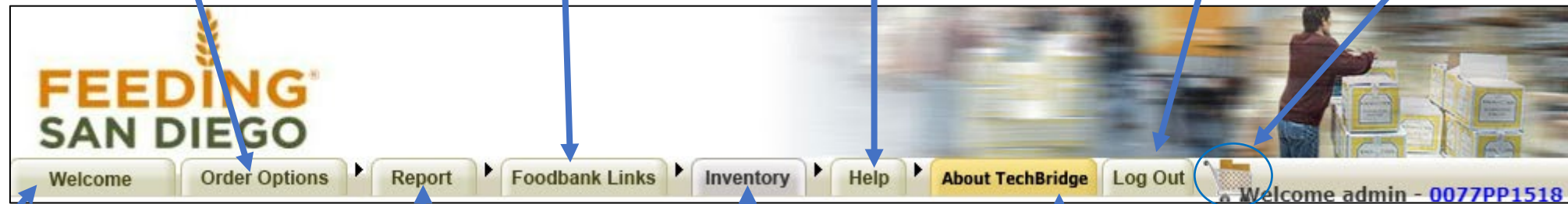
Order Options will be the most used tab. You can access your Scheduler, Shopping List, as well as your past and current orders

Foodbank Links will take you to the [Agency Partner Portal](#), [Find Food Map](#), our [FSD main website](#) and the [Agency Express FAQ](#). We will not review this in-depth as this is straightforward.,

If you wish to change your password the **Help** tab will allow you to do this. There is also an option to contact us, but we suggest you contact your Partnership Coordinator directly to get help sooner.

The **Log Out** Tab will do just that, log you out of Agency Express

This is the **Shopping Cart**. There are various ways of accessing the shopping cart- this is one of them. When you start adding items to your cart, you will see a number in red next to the cart indicating how many items you have added.



The **Welcome** tab will always redirect you to the Activity Status Alert and the Partner Portal as mentioned in the previous slide

The **Report** tab will not be used yet. In the future, this is where all surveys you have completed or need to complete can be found. We will not review this page in this training. Once we require you to use it there will be a separate training for this tab for you to review.

Inventory is also not available yet. When this is available and required for you to use, we will provide a separate training on how to use this.

The **About TechBridge** tab will direct you to the TechBridge website. TechBridge is the company that manages Agency Express.

This will be customized to your Username and Program Code

Order Options

The Order Options window will give you access to the following:

The screenshot shows the FEEDING SAN DIEGO website interface. The top navigation bar includes links for Welcome, Order Options, Report, Foodbank Links, Inventory, Help, About TechBridge, and Log Out. A user is logged in as 'admin' with ID '0077PP1518'. The main content area features four highlighted options:

- Shopping List**: View FSD's Inventory, this where you can pick out the food you wish to purchase and order produce.
- Check Out**: Access your shopping cart and check out.
- Order Management**: Previous and Current Order information, status, cost.
- Scheduler**: You can find your standing appointments here.

At the bottom of the page, there is a Godaddy Verified & Secured logo and a copyright notice: © TechBridge, Inc. Copyright 2000-2015 [Terms and Condition](#) [Privacy Policy](#).

Order Options – Shopping List



If you are looking for specific items you can search by item number, description, category, and nutritional information. When an item is on sale, the Activity Status Alert pop-up will also provide the item number for you to easily search the item.

Search

Item No. Description

Category Nutritional Information
- Select a Cate - Select Nutritional Inf

[Search](#) [Show All](#) [View Favorites](#)

Shopping Cart

Total Line Items **0** Total Due **\$0.00**

Gross Weight **0**

[Print](#)
 [Clear Cart](#)
 [Add to Cart](#)
 [Check Out](#)

The Shopping Cart section will give you an insight as to what you have in your cart. This will help you to determine the total due, the weight, and the total line items.

From the shopping list, you can do the following:

- Print the entire inventory by clicking on the printer icon that says [Print](#).
- If you would like to delete all items in your cart, click on the shopping cart with the red circle that says [Clear Cart](#)
- Whenever you wish to add items to your cart, click the shopping cart with the orange circle that says [Add to Cart](#) – we will go over this further
- Once you are ready to submit your order, click on the pen and check icon that says [Check Out](#).

Shopping List

Sort By - v

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	Nutritional Information	Favorite
<input type="text"/>	50	D-0764	Instant Oats, Vanilla Almond BP Microwaveable	BOX	0.60	0.00	12-2.18oz		6	Choose Sometimes	<input type="checkbox"/>
<input type="text"/>	50	D-0797	Lemonade	CASE	2.30	0.00	6-50.7oz Boxes		23	Choose Rarely	<input type="checkbox"/>

The **Shopping List** will have the entire FSD inventory for you to view. **All items have a cost associated with them** – see the [Unit Price](#) column for individual pricing.

*We will dive into the shopping list and the items a bit more in slide #9

Order Options – Shopping List | Items

Item Detail : D-0764

Gross Weight. 6	Item Name Instant Oats, Vanilla Almond BP Microwaveable	Handling Req. Dry
Extra Info. NA		Pack Size 12-2.18oz
Category Grain		Price per Unit 0.60
Food Source DONATED		Cube Size 0
VAP Fee 0.00		Packaging Type Box
Unit of Measure BOX		People Served 0
Price per Pound 0.10		Cost per person NA

Close

This window will pop up if you select Item No. – Not all information will be updated as most item details are provided within the line item. **Some items** will have more information regarding Expiration Dates and sometimes include pictures.

Available Qty. is the quantity that is available to you, this is the maximum amount you can add to your order

The Unit of Measure (**UOM**) is related to how this item is packed, it could be a BOX, CASE and sometimes it will say LB or EACH. For LB you will want to enter a qty. of 1 as this is sent out depending on your household delivery number. EACH is for an entire pallet.

Gross Weight - (in pounds) The weight of one unit of the item

The **VPA Fee** is the value-added processing fee

Order Qty	Available Qty.	Item No.	Description	UOM	Unit Price	VAP Fee	Pack Size	Feature Type	Gross Weight	Nutritional Information	Favorite
<input style="width: 100%;" type="text"/>	50	D-0764	Instant Oats, Vanilla Almond BP Microwaveable	BOX	0.60	0.00	12-2.18oz		6	Choose Sometimes	<input type="checkbox"/>

Order Qty. is for you to submit the amount you want for this item.
Ex: If you want 10 cases, enter 10 in the space provided

Item No. is the unique number of the item. You will notice there are items that start with a **D** and **P**. [D-Items](#) will have a lower cost than [P-Items](#). Clicking on this number will open a pop-up window that will give you more information regarding the item, see the left example picture.

The **Unit Price** is the price per **UOM** – in this example, it is \$0.60 per BOX

Pack Size is the size and number of items included in each unit.
This section can also help you determine how much product to order. Ex: you serve 150HH and each case has 12 cans per case and you want to provide each HH 1 can then you would order 13 cases.

Favorite will allow you to designate an item as a favorite

Order Options – Order Management

From the Order Management page, a user can 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*, cancel/delete an existing order and print pending order lists.


You can search for specific past orders. →

← This is a summary of all your past orders.

Current and past orders will populate starting with the most recent at the top. →

Depending on the status of the order, you will see different icons listed here. In this example, you can also see a pencil icon – this is to edit*, or a red circle with an x – this is to cancel the order. →

The screenshot displays the Order Management interface. At the top, there is a 'Search' section with filters 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: 38', 'Total Weight: 54071 lbs.', and 'Total Amount: \$2740.85'. Below these is the 'Order Management' section, which includes a table of orders. The table has columns for Reference Number, Created By, Status, Gross Weight, Total Price, Pickup/Delivery Date, Admin Edited, and Modified Date. A single order is listed with Reference Number OMA-351722, Created By Ruth Vazquez, Status Invoiced, Gross Weight 873.00, Total Price \$0.00, Pickup/Delivery Date 10/28/2023, and Modified Date 10/24/2023. Arrows point from descriptive text to various elements in the interface.

	Reference Number	Created By	Status	Gross Weight	Total Price	Pickup/Delivery Date	Admin Edited	Modified Date
	OMA-351722	Ruth Vazquez	Invoiced	873.00	\$0.00	10/28/2023		10/24/2023

↑ This will let you know the **Status** of your order. Review slide #11 for more information regarding the Status info.

↑ Total weight of the order, not including produce.

↑ Date of your delivery

↑ Date the order was created or modified

*An order can only be opened and edited before the submit-by date and time. If an order is opened and edited after the submit-by date and time, the order will not be accepted.

Order Options – Order Management - Status

There are nine different order 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 clicking the red X.
Sent to Food Bank	means the order has been submitted to the Food Bank. <u>NO CHANGES</u> 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 <i>Continue Shopping</i> . After you submit your cart, it is important to return to the Order Management screen after 20 minutes to ensure that your order is in the Acknowledged status and not still in Sent to Foodbank- status. If your order has not been acknowledged, there will be no order for you to receive. <i>It is up to you to ensure that your order has been Acknowledged.</i>
Released	the order has been completely processed and can no longer be changed.
Editing	means you went into an existing order to make changes but you did not resubmit the cart. You must resubmit the cart again if changes were made. If you made no changes, you can click, <i>Cancel Edit</i> and the order will be restored to the <i>Acknowledged</i> status.
Cancelled	means the order was canceled by the shopper.
Rejected	means the order has been rejected and a FSD representative 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.

It is the agency's responsibility to ensure the order has been submitted correctly.

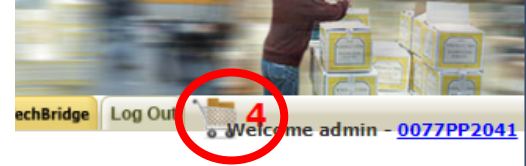


TIP:

- Do not wait until the deadline to submit your order. This will allow for any mistakes to be corrected on time.
 - Ex. If you have a delivery on Friday 12/1 you can submit your order as early as Friday 11/24. You can then view the Order Management page on Monday and check your order is in the Acknowledged status. If not, depending on the status you can either submit your order or reach out to your Partnership Coordinator.

*An order can only be opened and edited before the submit-by date and time, if an order is opened and edited after the submit-by date and time, the system will not allow you to submit and it will not be processed.

Order Options – Check Out/Shopping Cart



The checkout page will take you to your shipping cart. You will see the Shopping Cart on the top-right side of the page, it will display how many line items you currently have in your cart in **red**.

My Appointment

This section will have the delivery details such as the time and date of delivery and any comments you wish to share with the Order Fulfillment team. This is filled out by the agency.

My Appointment

Reference Number: **PO5083571**
 Pickup/Delivery Date: Time:

Comment (Please limit comment to 150 characters, no special characters (&, <, >, ", '). Anything over 150 characters will be cut off when PO is updated or submitted.)

Shopping Cart Summary

Total Due \$19.20	Total Line Items 4
Gross Weight 194 lbs	Total Cube Size 0 Cu. Ft.
Estimated Delivery Fee \$0.00	

Shopping Cart

Top Off
[Print](#)
[Clear Cart](#)
[Continue Shopping](#)
[Update Cart](#)
[Submit Cart](#)

Order Qty	Item No.	Description	Quantity	UOM	Gross Weight	Unit Price	Packaging Type	Pack Size	Handling Requirements	VAP Fee	Special	Nutritional Information
<input style="width: 30px;" type="text" value="1"/> Available Qty. [1]	D-0789	ASFD-DRY Hold Based On Availability	1	CASE	1	0.00	Case		Dry	0.00		Choose Often
<input style="width: 30px;" type="text" value="7"/> Available Qty. [7]	D-0765	Applesauce	7	BOX	42	0.60	Box	4/12-3.2oz (48 Units)	Dry	0.00		Choose Sometimes
<input style="width: 30px;" type="text" value="1"/> Available Qty. [1]	D-0385	Big Lots-Dry Goods	1	EACH	150	15.00	Shipper Display	Up to 150 HHs= 1 pallet	Dry	0.00		Assorted Not Ranked
<input style="width: 30px;" type="text" value="1"/> Available Qty. [1]	D-0660	Produce Hold Based On Availability	1	CASE	1	0.00	Case		Dry	0.00		Choose Often

Shopping Cart Summary

<p>Total Due This is totaling the Unit Price– this will not include the produce and the \$0.01/lb.</p> <p>Gross Weight This is totaling the weight– this will not include the produce and any ASFD or Rescued product.</p>	<p>Total Line Items Total number of line items</p> <p>Total Cube Size This is a disabled function.</p> <p>Estimated Delivery Fee This is a disabled function.</p>
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The **Shopping Cart** section will have all the items you would like to purchase, the quantity of UOM (CASE, BOX, or EACH) and you can update, clear, or submit your cart through this page. We will cover this information in slide #13.

Order Options – Check Out/Shopping Cart Cont.

The following are Check Out/Shopping Cart Actions



[Print](#)

If you wish to print the unsubmitted shopping list, click [Print](#).



[Clear Cart](#)

If you would like to start over or no longer want any of the items in your shopping cart, click [Clear Cart](#) – this will remove all items from your shopping cart.



[Continue Shopping](#)

If you would like to go back to the Shopping list to continue shopping, click [Continue Shopping](#).



[Update Cart](#)

If you have added new items to your list OR opened a submitted order to edit, you must click [Update Cart](#) before submitting the order. If this is not done the changes you made to the order will not be captured and your order will stay the same without the changes you made.



[Submit Cart](#)

Once you are ready and the order is correct, click [Submit Cart](#).

All actions will prompt a pop-up window that will ask if you are sure to [Clear Cart](#), [Update Cart](#), [Submit Cart](#), based on your action please click YES or NO.

Order Options – Check Out/Shopping Cart Cont.


My Appointment needs to be filled out by the agency.

Reference Number: **PO5083571**

Every order will have a PO#, it is automatically populated, do not confuse this as a successful submitted order. If you have not submitted your cart, you cannot use the Reference Number for us to look for your order.

Pickup/Delivery
Delivery ▾

This will depend on whether you expect a delivery or will be picked up at FSD. *You cannot request to pick up your delivery, this change must be communicated with your Partnership Coordinator.

Date:


You must choose your standing appointment – Standing Appointments are premade by your Partnership Coordinator – if you are trying to submit an order within the right timeline when you click on the calendar icon, you will see your standing appointment highlighted in green.

Time:


You must choose the time for your delivery – you will only have one available option. If this option is incorrect, reach out to your Partnership Coordinator however still submit your order. The time is not super important but needs to be included to successfully submit an order.

Comment (Please limit comment to 150 characters, no special characters (&, <, >, ", '). Anything over 150 characters will be cut off when PO is updated or submitted.)


You can add a comment of up to 150 characters, be sure to not include anything urgent in this section. If it is urgent- such as the wrong time or the wrong standing appointment date, reach out to your Partnership Coordinator to make the proper updates.

My Appointment


Reference Number: **PO5083571**

Pickup/Delivery Date:

Delivery ▾



Time:



Comment (Please limit comment to 150 characters, no special characters (&, <, >, ", '). Anything over 150 characters will be cut off when PO is updated or submitted.)

There will be a separate training on placing an order, we will dive into successfully submit an Agency Express Order. If you have not received this training reach out to your Partnership Coordinator to access this training.



Order Options – Scheduler



The **Scheduler** section is for agencies to make their own appointment – **Feeding San Diego does not use this**; we have standing appointments that are already scheduled for you. See **My Appointments**.

The Scheduler page will display and list all your Standing Appointment(s).

Scheduler

Pickup / Delivery Date:  Time: 

My Appointments


	Date	Time	Reference Number	Standing	Type
	11/17/2023	09:00 AM		Y	Delivery
	11/10/2023	09:00 AM		Y	Delivery
	11/3/2023	09:00 AM		Y	Delivery

The **My Appointments** section will allow you to see the current month's standing appointments. **Do not confuse this for food orders, these are standing appointments, and an order needs to be submitted to get a delivery on your standing appointment.**

Timeline for Submitting Orders Guide

This guide will help you know when to submit orders and the deadlines.

You can submit orders 7 calendar days (including weekends) before your delivery day and your order must be submitted 2 business days (not including weekends) prior to your delivery day.

 The earliest I can submit an order

 Order must be submitted before 3 pm

 Delivery Day

Mon.	Tue.	Wed.	Thur.	Fri.	Sat.	Sun.
	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				

Delivery Day	Submit Order before 3pm
Monday or Saturday	Wednesday
Tuesday	Thursday
Wednesday	Friday
Thursday	Monday
Friday	Tuesday

Agency Express FAQ

Is using Agency Express in addition to our regular deliveries? No. Agency Express will replace your regular deliveries. In the past, Partnership Coordinators were submitting orders on your behalf. We are now allowing you to create your own menu and shop for the items that meet your clients' needs.

What is Agency Express? Agency Express is a web-based tool that enables partner agencies to order directly from Feeding San Diego's online inventory.

Are we required to use Agency Express to receive a food delivery? All agencies are required to use it to receive deliveries, **including produce-only deliveries.**

I am ready to submit an order, but I do not know how to.

You can access the *Agency Express: How to Submit and Order Guide* through the [Partner Portal](#) under Agency Express

Is there a cost associated with the food ordered through Agency Express? Most food items come with a cost and very few do not however, there is a \$0.01/lb. fee applied to the weight of the entire order- including items that do not have an individual cost.

I have some feedback regarding Agency Express and the training, who can I share this with? Please reach out to us. Share feedback with your Partnership Coordinator, we are always open to hearing your feedback.

When will we be using Agency Express? Agencies have been actively using Agency Express to place their orders daily since September 2023 and will continue to use it.

I have more questions, where can I find more information? We have a separate FAQ you can find it [here](#).

