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Welcome Partner Agencies to Harvesters Express 3.5!

Harvesters’ primary goal is to support your programs activities in feeding people in need. Harvesters is pleased to offer our programs Harvesters Express 3.5, an upgraded version of the current online ordering system. The upgraded web ordering system features enhanced user interface and functionality to improve the ordering process, ease of use and increase order satisfaction outcomes.

We recognize that your task is huge and your staff resources are valuable. The changes made to the Harvesters Express 3.5 online ordering system came from suggestions made by our program users, Harvesters customer support staff and our development partners to reduce the amount of effort and time you spend obtaining products you need for your programs from Harvesters and free up your resources towards administering your program goals.

Because Harvesters Express is the primary method that our programs use to obtain products from Harvesters, it is very important to us that this system’s features and ordering process is designed so that you may yield the best possible outcomes and order satisfaction.

1.1 What is Harvesters Express 3.5?

Harvesters Express 3.5 is Harvesters online ordering system that provides 24/7 access to scheduling appointments and ordering our products. These products include non-perishable foods, household products as well as frozen food items. Harvesters Express 3.5 provides full access through our online shopping list to all available inventory items within minutes of product receipt at Harvesters.

1.2 How do I obtain Perishable Food Items?

Perishable items are also available at Harvesters through our Shopping Floor. Because these items are perishable, they are not included at this time on the Harvesters Express online ordering system. Perishable items vary daily in terms of quantity and availability but generally include products such as fresh produce, bakery and dairy.

Appointments for the Shopping Floor are made through the Harvesters Express 3.5 appointment scheduler. A Pick Up appointment will automatically provide you an opportunity to visit the Shopping Floor at your scheduled order pick up time. If you wish to visit the Shopping Floor and do not have an online order, there is an appointment scheduler specifically for Shopping Appointment Only visits. Details for scheduling all appointments are in Section 4 of this manual.

For further details regarding the Shopping Floor process and guidelines please see your Harvesters Partner Agency Handbook, page 8.
1.3 Harvesters Partner Agency Handbook

In addition to learning the online ordering system, there are additional processes that occur during your interface with Harvesters and your order. Your **Partner Agency Handbook** contains a great deal of helpful information that relates directly to the ordering process in terms of: The Agency Services Center; Order Pick Up; Parking; Shopping Floor; Check Out; Loading; Inclement Weather Closings and other important topics relevant to your order. This useful information is found in your **Partner Agency Handbook**, under the caption **Accessing Products**, pages 8-12. Copies of the **Partner Agency Handbook** are available at the Agency Services desk or by emailing the Agency Services Manager, Ryan Kepley at rkepley@harvesters.org. The handbook is also accessible on the Harvesters web site under Agency Resources, Agency Materials. [https://www.harvesters.org/agencies/resources](https://www.harvesters.org/agencies/resources)

1.4 Customer Care

Harvesters is committed to providing our agencies as much information and support needed to access our programs and services. Our **Customer Care** program is your link to getting answers to your questions and the support needed to accomplish your goals with Harvesters.

No matter what the issue, our **Agency Services** staff will listen and work diligently to promptly resolve your issues and/or direct you to the department that can best address your concerns.

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**To contact an Agency Services representative please call:**

816.929.3220 or email us at [customercare@harvesters.org](mailto:customercare@harvesters.org)
2. How to Access Harvesters Express 3.5

2.1 Internet Access and Email Account

To log on to Harvesters Express you must have access to the internet. If you do not have internet access at your program site consider some alternatives such as the Public Library, Church office or from your home.

Harvesters Agency Services Center hosts two computer terminals with internet access for your use during our normal hours of operation Monday through Friday 6:30 am to 2:00 pm.

**NOTE:** Agency Service’s days/ hours of operation may vary due to Holidays and staff events. You may contact the Agency Services office for updated information on days and hours of operation.

In addition to an Internet connection, you or your program must have an active email account. If you do not have an active email account, you can set one up with a free email provider such as:

- [www.hotmail.com](http://www.hotmail.com)
- [www.yahoo.com](http://www.yahoo.com)

2.2 Browser Requirements

To use Harvesters Express 3.5, the following are the web browser requirements:

- Internet Explorer 6.0 or higher
- Google Chrome

At this time, it is unknown if access can occur through other web browsers such as Firefox.
Once you have connection to the internet and an active email account then logging into Harvesters web site is the next step.

- Go to the URL address space and type in [www.harvesters.org/Agencies/] then press search key (↵)

- Scroll to the bottom left of the Harvesters page to find the ORDER FOOD box and press the ‘Order Food’ bar.
2.3.1 Agency Log In

Login Entry requires 3 fields to be provided and entered
- For the User Name, use your Harvesters assigned program code, which is an alphanumeric series of five characters. (e.g. F9999)
- For Password, use the password provided or the password you created. Your Password is **NOT** case sensitive.
- For Program Code, use the Program Code provided
By clicking on the check box, next to **Remember me next time**, you will not need to enter your User Name and Program Code each time you login. Your computer will remember these two fields, and fill them in for you next time you use the system. However, you will still need to enter your password. Please do not use this feature on public computers (i.e. library, friend’s house, etc.).

- When you have entered the information correctly into the three log in fields, click on the Log in button below the 3 login fields.

### 2.3.2 Successful Log In to Harvesters Express

- Successfully logging into Harvesters Express will take you to the Welcome Page where an Activity Status Alert will be displayed. This will include information or notices that would impact Agency ordering or pickups.
When your account is placed on Hold by Harvesters you will receive an error message that your account has been deactivated and prompts you on who to contact at Harvesters.

**Activity Status Alert**

Account is inactive at Food Bank’s request

Your current activity status does not allow you to submit an order. Please contact your food bank.

Close

- Account holds are placed by Harvesters which prevents access to ordering when the following conditions exist:
  - Programs Open Invoices exceed the established Credit Limit
  - Financial or Reporting Holds
  - Account closed at Agency request or Food Bank Request

**NOTE:** Programs may enter the Harvesters Express website and use the resources and monthly report feature, however customers on activity status holds will not have access to the scheduler, shopping list or the ability to create new orders or edit existing orders until the hold status has been changed by Harvesters administrative staff.
2.4 Logging into Harvesters Agency Express

2.4.1 Forgot Your Password?

- This feature is designed to send a response to the email address requesting the information of your program password.

After you have clicked on Forgot Your Password? A new message box will appear on your screen.

1. You will need to enter your User Name and Program Code to retrieve your password.
2. Click on Submit.

An email will be sent to the email address on record at your Food Bank. This email will contain a reminder of your password. Use the password from the email to login.
3 Harvesters Express Welcome Screen

3.1 Harvesters Express Welcome page

- The Harvesters Express Welcome Screen is displayed each time you login.
- The body of this page is designed as a Shopper Information page that will display up to date information such as:
  - Activity Status alert
  - Available product on the shopping floor
  - Days and hours of operation changes
  - Free and reduced product item specials

1. **Welcome** - To return to this Welcome screen at any time, Click on the **Welcome** tab.
2. **Order Options** – This section contains links to “Shopping List, Check Out, Order Management, and optionally Scheduling”.
3. **Report** – This section contains links survey responses (*not used at this time*).
4. **Food bank Links** – This section contains links that are set up by Harvesters.
   a. This tab is where programs will access the **Monthly Agency Report** form that is to be submitted each month. They are due by the 5th business day of the month.
   b. Links available include:
      i. Agency Resources (access to the Harvesters Web)
      ii. CSFP Reporting (for agencies active in this program)
      iii. DR Tracker (Delivery Order Tracking) application
      iv. Feeding America
      v. GSR Reporting (for agencies active in this program)
      vi. Harvesters Web Site
      viii. TEFAP Reporting (Kansas only) (for agencies active in this program)
5. **Help** – This section contains the options “*Change Password*” and “*Contact Us*” where problems can be reported or you want to change your password.

6. **About TechBridge** – Link to the [techbridge.org](http://techbridge.org) website. TechBridge is a 3rd party vendor authorized by Feeding America and is the actual host (application support/development) for the application.

7. **Logout** – Logs you out of Harvesters Express.

8. **Shopping Cart** icon – Displays items selected on the shopping list

9. **Content Area** – Custom content can be displayed in this area. The content is determined by the Admin from the Food Bank.

10. **Display** of the program user logged in and information on who is logged in.

### 3.2 Order Options Tab

**It is within the order options tab that primary scheduling and ordering activities will occur. You can access the functions of the Order Options tab two ways:**

1. Use your mouse and hover over the Order Options tab and the following functionalities will appear:

   ![Harvesters Express Order Options](image)

2. The second way to access the functions within the Order Options tab is to click on the tab with your mouse. This will result in the appearance of the Order Options functions as icons. The user can click on any of the following icons to access that particular functionality.
Functionality within Order Options Tab

| **Scheduler** | Provides a display of all existing pre reservations and appointments associated with order. The scheduler also allows for the creation of new appointments as well as the ability to edit existing appointment dates and times within the requirements of the three schedule models of Shopping, Pick Up and Deliver. |
| **Shopping List** | Menu of inventory that can be sorted printed and or directly allow the ordering of product to add to your cart |
| **Check Out** | Allows for the review of the shopping cart, adding a reserved appointment date to the order, editing order item quantities, and submitting the order to the food bank. |
| **Order Management** | Displays all orders for program and allows for the viewing, printing and editing of program orders as well as the display of status of each order. |

### 3.2.1 The Scheduler

While the process has been simplified to associate an appointment with an order - the process still requires that **appointments be pre-reserved** (scheduled) in advance of associating the appointment date and time with a new order or modifying a schedule of an existing order.
Scheduler Types -- Each of the next three functions within the appointment module allow for setting appointments for each of the specific scheduler types.
**Pick Up** – This scheduler is designed to create appointments for order creation and pick up on the shopping floor.  

**Note**: Each Pick Up appointment automatically provides the opportunity to obtain perishable products on the shopping floor at the time of your scheduled order pick up.

**Delivery** – This scheduler is designed for customers who have a pre-arranged delivery schedule with our transportation department.  

**Note**: If you are interested in becoming a delivery customer, please contact an Agency Services representative.

**Shopping Only** – This scheduler provides the opportunity to schedule appointments to obtain perishable food items from our shopping floor.  

**Note**: It is not possible to generate a web order for non-perishable and frozen items with a Shopping Only appointment. This scheduler is for Shopping Floor visits only!

When you click on any of the scheduler types a calendar will appear reflecting all of the available dates for scheduling. The example below shows the open dates possible for this agency to build & schedule a pickup order.

![Calendar Example](image)

**NOTE**: Details on how to use the scheduler options to set appointments will be included in the section on Creating a New Order.
Selection of any of the column headers will sort the rows based on that column. 2nd selection of same column will re-sort that same column but in reverse order.

This will allow an agency to review existing appointments with the following appointment information:

- **Date**: The scheduled date
- **Time**: The schedule appointment time (Delivery times default dependent on if KC or KDC)
- **Reference Number**: This is the Purchase Order (P.O.) number assigned at the origin of each new web order.
  - The P.O. number is the document order assigned to each new order created.
  - A *Shopping Only* appointment will never have a P.O. number attached as there is never the ability to create an order with this type of appointment.
- **Standing**: Indicates if the appointment is a pre-determined standing appointment
- **Schedule Type**: This is the type of appointment e.g., *Pick Up, Delivery and/or Shopping Only*

*Note:* Delivery appointments noted in green background only indicated that an appointment was automatically generated for that agency for that date & time and is **NOT** an indicator that the agency can create an order for that date & time yet. To view ordering window, select the pickup/delivery option and open the calendar as shown in the beginning of this section.
Delete an Appointment

- The *My Appointments* scheduler also allows for the user to Delete previously set appointments that are not already associated with a new or existing order.

![My Appointments](image)
3.2.2 Order Management

The **Order Management** function provides the user with unique capabilities in managing existing orders and historical reference of past orders.

The **Order Management** function provides the following capabilities:

- Open and Edit an existing Order
- Check the status of an existing order
- Advance the scheduled order date to a new future appointment date
- Print current orders
- Print past invoiced orders
- Cancel/Delete an existing Order

Click the **Order Management** function of the Orders Module to bring up your programs order status and history screen.
Reference No. - Every order either past or current is represented by a Reference Number.

- When the order is still active on the web page (24 hours prior to shipping or pick up) it is a P.O. reference.
- Once the order is shipped the reference number becomes an A.O. No (agency order number) which is also your Order Invoice number as represented in our inventory software system.

Created By – indicates who initiated the order, Program indicates the agency initiated the order.

Status (of Order) - There are several order status messages that reflect the current stage in the order cycle. Below are the various status messages that your order will undergo during the management of the order.

<table>
<thead>
<tr>
<th>Order Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>When an order is new and is being created but has not been submitted to the food bank yet as a New Order. Note: This is a new status.</td>
</tr>
<tr>
<td>New Order</td>
<td>New status is when an order is submitted from the Harvesters Express to the inventory software system.</td>
</tr>
<tr>
<td>Sent to Food Bank</td>
<td>This status reflects orders that are in the process of synchronization from the web site to our Inventory software system confirming items on order to available inventory on hand.</td>
</tr>
<tr>
<td>Acknowledged</td>
<td>Acknowledged status confirms that all of the information on the order has successfully interfaced with the inventory system and returns the order to the web with confirmations of product that was able to be filled and or unavailable for fulfillment for product requested. Note: The Acknowledged status is the only status that allows an order to be reopened for changes and editing.</td>
</tr>
<tr>
<td>Edit</td>
<td>Edit status occurs when you have opened the order for editing. You must submit the order whether you made changes or not to return this order to the Acknowledged status. Note: This is a new status.</td>
</tr>
<tr>
<td>Released</td>
<td>Released status occurs 24 working hours prior to the order shipping date and confirms that your order has now been released to our staff for order preparation. Note: The order is no longer open on Harvesters Express for editing or changes.</td>
</tr>
<tr>
<td>Picked</td>
<td>Picked status confirms that the order has been picked and prepared for next day’s shipping.</td>
</tr>
<tr>
<td>Invoiced</td>
<td>The Invoiced status is the final stage of an order. This status represents the order has been shipped to the customer as well as invoiced to the customer.</td>
</tr>
</tbody>
</table>
**Gross Weight** - Designed to represent the total aggregate weight of the order to be shipped

**Total Price** - Designed to reflect the total price of all items on the order

**Pickup/Delivery Date** - Reflects the date the order is to be picked up or delivered

**Admin Edited** - (not used at this time)

**Modified Date** - Reflects the date that the order was created or last modified.

**Print Feature** - By clicking on the printer icon to the left of the Reference No. column a printable version of the order either present or past is available.

- Additional options to print by selecting the print icons on the page as shown below:

3.2.3 **Check Out option under the Order Options tab**

The **Check Out** function is used when you have completed adding product to a new order or an order you are editing. It is in the Check Out stage that orders are submitted to the Food Bank for synchronization with our inventory system and quantities are reserved for your programs order.
Check Out icon also available from the Shopping List function

### 3.2.3.1 Check Out Screen

When the agency has completed their order and submitted their cart, they should do a final review of the order including time and date of order to be picked up or delivered, Shopping Cart Summary and the Shopping Cart itself in addition to the final Action Icons.

**Shopping Cart Summary**

The shopping Cart Summary section will display the following information:
• **Total due** – The total estimated monies due for this order. This value will increase or decrease as items are added to the open shopping cart.
• **Total Line Items** – The total number of unique item numbers that have been ordered
• **Gross Weight** – The current total weight of the items on the order.
• **Total Cube Size** – The total area needed for this order.
• **Available Credit Limit** – This is an optional item that will show the agencies current remaining credit limit. This value will increase or decrease as items are added to the open shopping cart.

**Action Icons**

The action icons will be used for the following actions:

• **Print** – Will print the currently displayed list of items.
• **Clear Cart** – Will clear any items that have been added to a cart.
• **Continue Shopping** – Will return the shopper to the Shopping List page.
• **Update Cart** – Will update any selected items from the items list to the current shopping cart.
• **Submit Cart** – Will submit this order to the Food Bank.

**NOTE:** You should receive a pop-up message on the screen verifying that the order was submitted.

**Shopping Cart**

Agencies should check back periodically to validate that their order was acknowledged in the Harvesters inventory system. Acknowledgment of an order in Navision indicates that Navision has determined the items desired are currently available. The Agency can do this by opening the shopping cart for that order then view the columns that indicated items submitted and what and the quantity accepted. It’s always possible that between the time an Agency selects an item into their shopping cart and when it gets acknowledged in Navision, that some or all that product could have been reserved on a different order by a different Agency.

**NOTE:** Anytime the order is opened and edited, you should check these two fields for each item ordered.

On the screen shot below, column **Order Qty** is the quantity that the Agency has requested and **Accepted Qty** is the quantity that Harvesters has now set aside for this order.
3.2.4  Shopping List option under the Order Options tab

Customers can access the shopping list by selecting it from the Order Options drop down list

Or by clicking on the Order Options tab and selecting the Shopping List icon.

This Shopping List displays the items that are on the menu for ordering.
These items can be sorted by clicking on the column headers or by selecting an items value from the drop down list in the text box.

Shopping list can be sorted by the following:

On each line, the user will see an Order Quantity, Available Quantity, Item No, Description, UOM, Unit Price, VAP Fee, Pack Size, Feature Type, Gross Weight and Favorite.
- **Order Quantity** – Where the shopper puts the quantity desired of the line item.
- **Available Quantity**: You will not be able to order more than the available quantity for each item.
- **Item No**: This code is specific to each item.
- **Description** – The description of the line item.
- **UOM** – Unit of Measure
- **Unit Price** - This is the cost of one unit of the item in U.S. dollars
- **VAP Fee** – Value added processing fee.
- **Pack Size** - The size of the individual items.
- **Feature Type** – If this line item is a featured item or a special item.
- **Gross Weight (in lbs)** - The weight of one unit of the item
- **Favorite**

If the shopper wants more detailed information of the item, then the shopper will need to click on the blue highlighted item number for example “10543” and it will display a detail information box for that item. Press the ‘Close’ button to return to processing.

![Item Detail: 10543](image)

The detail view has all the previous information plus the following:
- **Gross Weight** – gross weight of item
- **Item Name** – Name of the item
- **Handling Req.** – What type of handling is required for this item.
- **Extra Info** – This info is set up by the food bank to help describe the item.
- **Pack Size** – number of items in pack and weight of each
- Category – The category of this item.
- Price per Unit – The cost of each unit of this pack.
- Food Source – Special information to display where this item came from.
- Cube Size – A measurement to allow for how much space is required for this item.
- VAP Fee
- Packaging Type – How this item is packaged.
- Unit of Measure
- People served – Optional information on how many people this item will serve
- Price per Pound – A calculated value to determine how much per pound this item cost.
- Cost per person – A calculated value to determine how much per person this item cost.

**Note:** When shopping before you select the next available shopping page, make use you update the shopping cart. If not, once off that page, any product selected will have been ignored.
3.3 Help Tab

Program Management provides an opportunity for program administrative staff to control and manage your staff access to the ordering functions of Harvesters Express.

Change Password option
- This feature allows for the change of the users password without having to contact the food bank.

Contact Us option
- This feature allows you to communicate problems to the food bank directly while in Harvesters Express.
- The user can use the drop down menu and choose from the list of categories to define the type of problem requiring resolution. This expedites the routing of problems to the appropriate person at the food bank for quicker communication and resolution.
3.4 Log Out tab

This option allows you to exit the Harvesters Express web ordering system the appropriate way.

If you have items in your shopping cart but have not submitted the order you will see the following message when you try to exit:

You are leaving Agency Express and have not submitted your cart. The items will not be reserved unless the cart is submitted. Click OK if you still want to leave.
4 Scheduling Appointments

4.1 Creating a Pick Up, Delivery or Shopping Appointment

- Go to the Options Tab of the Harvesters Express Welcome Page
- Select the Pick Up, Delivery or Shopping option and hit enter (Remember that an order can only be created with a PICKUP or DELIVERY appointment.)

- Click on the Date calendar and select a date that is available. Open dates will be highlighted with background of the mustard yellow. Closed dates will have slash thru the dates.

**Note:** Pickup windows will be 12 rolling business days including the current date. There are no pickups on weekends or holidays.

- Select the date you wish to make an appointment by placing your mouse on the date and clicking.
- Once the date is selected go to the time field and use the drop down list to select an available time.
Select the Reserve button to retain your appointment.

Select the OK message on the message pop-up.

Your appointment will appear in the My Appointments section of the Scheduler.

You can use the Delete button to cancel the appointment date and time if there is no Purchase Order associated with the scheduled date/time.
4.2 Delivery / Pickup -- Order Cutoff Time tables

Agencies may not modify an order in Harvesters Express after 6 a.m. two business days prior to their scheduled pick-up or delivery day. For example, the last opportunity to submit or modify an order for a Wednesday pick-up or delivery would be 6 a.m. on Monday of that week. Modifications to an order to be picked-up/delivered on Monday would need to be submitted by 6 a.m. on Thursday of the previous week.

### Delivery/Pick up Time Tables

<table>
<thead>
<tr>
<th>Kansas City Area Agencies</th>
<th>Topeka Area Agencies (KDC)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Order Placed or Modified by 6:00am</strong></td>
<td><strong>Order Placed or Modified by 6:00am</strong></td>
</tr>
<tr>
<td>Monday</td>
<td>Order Received</td>
</tr>
<tr>
<td>Tuesday</td>
<td>Order Received</td>
</tr>
<tr>
<td>Wednesday</td>
<td>Order Received</td>
</tr>
<tr>
<td>Thursday</td>
<td>Order Received</td>
</tr>
<tr>
<td>Friday</td>
<td>Order Received</td>
</tr>
</tbody>
</table>

| Monday | Order Received |
| Tuesday | Order Received |
| Wednesday | Order Received |
| Thursday | Order Received |
| Friday | Order Received |

**NOTE:** Agencies served from the facility in Topeka, Kansas, must submit their orders at least **three** business days prior to their anticipated delivery or pickup.
5  Ordering Process

5.1  Creating a New Order

Go to the Order Options tab and select Shopping List

![Harvesters Express Shopping List screen](image)

**NOTE:** To create a new order you must have an appointment for *Pick Up* or *Delivery* already made and visible in the *My Appointments* schedule.

**Ordering Product**

- Sort the Shopping List as needed, Location, product type, favorites, product source, etc...
- Identify the items needed for the order
- Enter quantities for these items *Enter Quantity* boxes and select the *Add To Cart* button to add this product to your order.
If more information about an item is needed prior to ordering – click on the Item No. field and an expanded detail of a description will appear.

Use the Close button to return to the Shopping List.
• Use the Action Icon *Add to Cart* to order the quantities requested on this menu.

• When you have completed adding all items to the *Shopping Cart* order, you can select the *Check Out* option within the Action Icons row to view the order.

*Adding and Removing Items from the Shopping Cart*

• Within the shopping cart, you have the ability to add more items to your order by returning to the *Shopping List* function and adding additional items to the cart.
You may also remove items from your cart by clicking on the X Button in the Order Quantity field to the left of the Item No. of the item ordered.

It is also possible to decrease and/or increase the quantity ordered of items currently in the cart without returning to the shopping list only if additional inventory of this item is available.

When you add or remove items from the shopping cart it is essential to select the Update Cart button located with the Action Icons in the upper right above the line items to insure that all changes are registered in the cart prior to Submitting your order.

A pop up message will appear that confirms the update of the lines and requires you to select OK to continue or Cancel to stop the updates.
Submitting the Order

- The *Submit* function of the order is a **critical step** to the success of your order completion.
- The *Submit* function signals the interface of your order requested from the web and submits this request to our inventory software system.
- Once your order is completed and all updates to lines are satisfactory select the *Submit* button at the far left bottom corner of the screen.

- When you click the *Submit* button, a pop up message will appear asking you to confirm that you are ready to submit your order.
- Click OK if you wish to continue the Submit request or the Cancel tab.
The system will prompt you to retrieve a pre-reserve appointment that you have already made in the scheduler and associate a date and pick up time to the order prior to submitting the order.

Go to the My Appointment section of the cart and select the Pick Up/Delivery Date section in the upper right corner and use the drop down box to select a scheduler type.

Note that the calendar is highlighted to reflect the appointments that you have previously scheduled for that scheduler type.
- Select the date with using your mouse and click.
- Go to the appointment time and select the time that appears for that appointment date.
- Type in any special instructions or extra information concerning your order.

- Select the Submit Cart again and click OK in the confirmation message pop up.
A confirmation message will appear that the Shopping Cart order was submitted to the Food Bank successfully.

**NOTE:** You should check back periodically to validate that the order was acknowledged in the Harvesters inventory system. Open the order to view what was submitted and what was accepted.

**NOTE:** Anytime the order is opened and edited, you should check these two fields for each item ordered. (see below)
5.2 Order Management

- The Order Management function provides the following capabilities:
  - Check the status of an existing order
  - Open and Edit existing order
  - Advance the scheduled order date to a new future appointment date
  - Print current orders and past invoiced orders

**Check the status of an Order**

- Orders in Harvesters Express 3.5 can be re-opened once submitted for adding and removing inventory items to the order.
- Orders may be adjusted in the Acknowledged status only.
- Orders are in the Acknowledged status and editable up until one workday preceding the order ship date.
  - The status of your order will reflect a Released status so that it may be prepared by our order pullers and in a Picked status when order prep is complete and the order is ready for shipping the next day.

**Open and Edit an Existing Order**

- To Open an Existing order in the Acknowledged status for editing, go to the Options Tab and select the Order Options tab.
- Select the PO order in the Acknowledged Status by clicking on the Pencil (Edit) icon.
You will receive a message warning that you are about to edit an order.

**NOTE:** You must submit the order again whether you made changes to the order or not!

When the edit of the order is completed, it is essential to **Submit** the order so that the Food Bank inventory system will interface with the changes made on the web order.

If you do not remember to **Submit**, the order will remain in the **Edit** status until you do **Submit** the order.

### 5.3 Change an Order Date

- Once an order has a P.O. reference number - it is no longer possible to make changes to the shipping date and time for order Pick Up or Delivery from the **Scheduler Function** of the Navigation menu.
- The scheduling change **must** now occur within the **Orders Options** tab of the Order Management function.

**Changing an Existing Order Date/Time**

- Once the Shopping Cart is open for the P.O. reference number, select the small calendar that is to the right of the Shipping Date within the Appointment
- If you have an appointment already that is in an **Open** status with no P.O. number attached to it you may select this date. You can check your appointment status in the **Scheduler** of the **Order Options** tab.
• If you do not have an appointment you must reserve an appointment first in the Scheduler and then return to the Check Out of the Order Options tab to associate the new or existing appointment to the order.
Selecting the calendar in the Shopping Cart of an order will take you to a calendar to identify a new shopping Pick Up or Delivery date.

- Select the available date and click on the time link indicated in blue font.
- The order shipment information for date and time will now reflect the new Pick Up appointment date of March 12 and the new time of 1:55 represented on the shopping cart in Military time (e.g. 13:55).
- You must Submit the order to stimulate a synchronization of the order interface with our inventory system.
- If the order is not submitted, the Food Bank will not be aware of the order change in shipping date/time changes and your order will not be available as anticipated.

5.4 Print a Copy of Order

- Go to the Order Options tab and select the Order Management function.
- Select the order you want printed.

- Use the Print icon in upper right corner of the toolbar menu.
My Appointment

Reference Number: PO272359
Pickup/Delivery Date/Time
Pickup: 11/07/2008 @ 08:50 AM
Comment

Shopping Cart Summary

Total Due: $60.32
Total Line Items: 4
Gross Weight: 377 lbs
Total Cube Size: 0 Cu. Ft.
Available Credit Limit: $651.04

Shopping Cart

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Description</th>
<th>Quantity</th>
<th>UNH</th>
<th>Gross Weight</th>
<th>Unit Price</th>
<th>Packaging Type</th>
<th>Pack Size</th>
<th>Handling Requirements</th>
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<td>9/20 OZ</td>
<td>DRY</td>
<td>0.00</td>
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<td>Chips</td>
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<td>CASE</td>
<td>2</td>
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<td>BAG</td>
<td>15/2 OZ</td>
<td>DRY</td>
<td>0.60</td>
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<td>6</td>
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<td>0/11.5 OZ Bags</td>
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<td>0.60</td>
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</tr>
<tr>
<td>16583</td>
<td>Croissant</td>
<td>15</td>
<td>CASE</td>
<td>21</td>
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<td>1/21 LB BOX</td>
<td>FROZEN</td>
<td>0.00</td>
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Harvesters Agency Express Order Process Flow

Agency

Start

Initiate Order

Schedule Pickup &/or Delivery Date

Status: Draft

Build Order (Select items)

Order Change?

Yes

Order Released

Order Status Updated

No

Submit Order

Order Status Updated

Status: New

Status: Sent to Foodbank

Agency

Order Delivered or Pickedup

Order Invoiced

End

Status: Invoiced

Harvesters

Accepts Order

Status: Acknowledged

Release Orders

Order Sent to AGI/WMS

Order Picked & Loaded

Start

Status: Released
## Documentation History

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<thead>
<tr>
<th>Date</th>
<th>Responsible</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2016</td>
<td>QA</td>
<td>Document upgraded from Original Release</td>
</tr>
<tr>
<td>June 2018</td>
<td>QA</td>
<td>Corrections &amp; clarifications added</td>
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