



## Food Bank for the Heartland

# **Online Order Portal 2.0:**

## **User Guide**

Document Date: 01/02/2024

For questions or support please call or email us at

402-331-1213 / networkrelations@foodbankheartland.org



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### A Note from the FBFH Team

As the Food Bank for the Heartland works to support the growing need in Nebraska and Iowa, we take pride in offering our partners the tools needed to facilitate the equitable distribution of resources. We hope you enjoy this update to our Online Ording Portal. If you have any questions or comments, please call, or email us at 402-331-1213 / networkrelations@foodbankheartland.org

## **FBFH Ordering Portal 2.0 Release Notes**

#### Feature: Window Shopping

Agencies can now browse available stock without having to start an official order. Users will be redirected to book an appointment when they add some to their carts.

#### • Feature: Edit Order Function

Agencies can now edit submitted orders any time before the order deadline. Please see the "<u>Editing an</u> <u>Order</u>" and "<u>Delivery Methods</u>" sections for more information. (Please refer to Table of Contents)

#### • Announcement: Shopping Cart Changes

The shopping cart will now purge all items on **unsubmitted** orders every night at 12:00am. To secure an appointment we recommend submitting your order the same day you start it. Users can utilize the "Edit Order" function to add items to their orders as new inventory is added throughout the week.

#### • Announcement: Inventory Changes

To alleviate inventory issues found in the Online Ordering Portal 1.0, Inventory will not be held or guaranteed until an order is submitted or an existing order is edited and saved.

#### <u>Announcement:</u> New Non-Local Delivery Schedule

To better serve our partners across Nebraska and Iowa, our transportation team is transitioning to a new 72hour non-local delivery model. Food Bank for the Heartland will now offer non-local agencies two 3-day windows to place orders for delivery. Our first slot with be Monday – Wednesday and the second slot with Wednesday – Friday. Please refer to the "**Delivery Methods**" section for more information. (Please refer to Table of Contents)

#### <u>Announcement:</u> New Cutoff Time for all Order Types

Starting Jan 1st, 2024, all order types will now have a cutoff time of Noon CST two or three business days before the scheduled delivery date depending on your order type.

#### <u>Announcement</u>: Multiple Shoppers – One Cart

For agencies that have multiple shoppers, the agency itself will share one cart. Any changes made to the agency will be reflected across all accounts. Any authorized shopper can place, edit, and cancel orders.



## Logging on to the Online Ordering Portal

1. Welcome to the NEW ordering portal for the Foodbank for the Heartland. To access our site, click on this link:

#### https://orders.foodbankheartland.org/

- a. If your agency was provided with login credentials, please use them here to login to the online ordering portal.
- b. If you do not have any login credentials or you forgot your password, please click on "Forgot Password"

Log In
<b>Returning Customer</b> Login below to checkout with an existing account
Required * Email Address * your@email.com
Password *
LOG IN Forgot password?

2. Input your email address (same email as used in old portal) and click "Send Email"

Log In	
Reset Password Enter your email below and we'll send you a link to reset your password. Email Address * your@email.com	
SEND EMAIL	

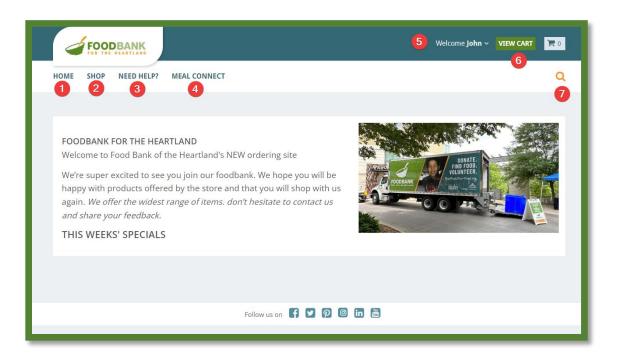


- 3. You will receive an email with a link. Click the link and follow the instructions to set your new password.
  - a. Password Requirements: At least 8 characters long

	Reset Password
	Enter a new password below
	Password *
	<b>©</b>
Click the following link to change your password for the Food Bank for the Heartland	Confirm Password *
Agency Portal. Change Password	CHANGE PASSWORD Cancel & Return To Log in

4. Once you reset your password, you will use this new password to log in.

### **Home Page**



Once logged in, you will be presented with the <u>Home Page</u> where the Food Bank for the Heartland will post important notices and updates.



#### **Home Page Links**

- 1. Home A link to the Home Page
- 2. **Shop** A link to browse available inventory
- 3. Need Help? A link to this documentation.
- 4. Meal Connect An external link to Meal Connect
- 5. Account Overview A drop menu with links to specific pages regarding the agency account (Profile, Orders, Etc.)

			١	Welcome John 🗸 🚺	/IEW CART 🐂 0
Account Overview					🕞 Sign Out
ORDERS	BILLING	STATISTICS	SETTINGS		
ORDER HISTORY	INVOICES PRINT A STATEMENT	CLIENT STATISTICS	PROFILE INFORMATION ADDRESS BOOK UPDATE YOUR PASSWORD		
again like ottor the wire	lost range of itoms, dop'	t bositato to contact us			A STATE VARIAN

- 6. View Cart
  - a. Click "View Cart" link to view your cart and start the checkout process.
  - b. Click the <u>Cart Icon</u> to get a quick "mini" view of your cart.
- 7. Search Icon A standard search field to look for specific items in inventory

### Shopping

#### **Browsing the Food Bank Inventory**

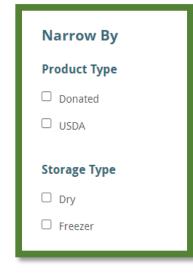
In the Online Ordering Portal 2.0, agencies do not need to start an appointment to look at inventory. This allows our partners to plan their orders before committing to an order date.

1. From the Home Page, click on the Shop link to get to a list of all available inventory items.

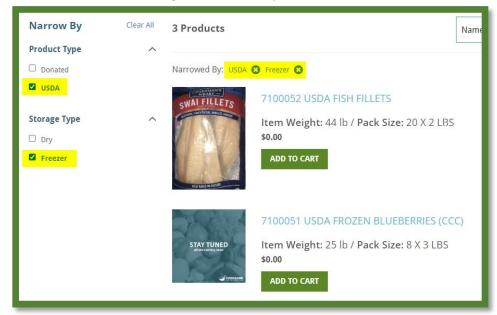
HOME SHOP	NEED HELP?	MEAL CONNECT



- 2. Once the page has loaded, you'll see the total number of products available. You can also narrow down your view in several ways:
  - a. You can use the filters on the left side to narrow your list by one of our pre-designed filters:



b. Note that these filters work together. For example, USDA with Freezer:



c. To remove these filters, you can either uncheck the boxes OR click the X in the Narrow By section at the top of the page.



3. Another way to narrow in on specific items is to use the top-level navigation by hovering over the Shop link at the top and clicking on one of our pre-defined sub-categories:

				Welcome <b>John</b> ~ VIEW CART	0 🛒
HOME SHOP NEED HELP?	MEAL CONNECT				۹
FRESH FRUITS AND VEGETABLES	NON-MEAT PROTEIN	MEAT. SEAFOOD, CHICKEN	PASTA & GRAINS	CANNED/FROZEN FRUITS AND VEGETABLES	
DAIRY PRODUCTS	CEREAL	BEVERAGES			
Product Type	^				_

a. Here you will see all the items in that, specific item category:

HOME > PASTA & GRAINS					
Narrow By		Pasta & Gra	ins .		
Product Type Donated USDA	^	4 Products		Name (A-Z)	→ NEW ORDER
Storage Type	^	STAY TUNED Jacob Harrison Barrow Science State	1100414 ASSORTED PASTA NOODLES Item Weight: 15 lb / Pack Size: ASSORTED \$0.00 ADD TO CART	) PASTA NOOD	DLES
		STAY TUNED Jacobian y Bar Jocepania	4800264 PP DRY PASTA Item Weight: 24 lb / Pack Size: 12 X 2 LB E \$0.00 Add to CART	BAGS	

- b. **NOTE:** The side filter updates based on the items within the product category (for example, the Pasta & Grain category only contains Dry storage type, so Freezer is no longer an available filter in this category.)
- 4. Finally, you can refine the list by using the Search feature. To use the search feature, click the magnifying glass in the upper left, below the cart:





a. A box will open where you can type in a key word (such as Meat). A list of all available items with this keyword will appear. You can click on any item from the list:

<b>Q</b> meat		<b>8</b> GO
See All Re	esults	
EARTL of the ee you		
ered t est rar k. LS	1100721 OMAHA STEAKS NON MEA (14#)	AT SALES READY

#### Viewing an Item

1. The initial shopping list for items will include the item code, name, weight, pack size and image.



- a. Most items will include an image. **NOTE:** The Food Bank for Heartland tries to represent the exact product in the photos, but we are not able to guarantee this due to supplier swaps, etc.
- b. To see more details about an item (including availability), click on the item link:



#### Item Details Page:

HOME > 1101164 ALL NATURAL PORK SAUSAGE	
	State   State </th

- 1. Item Weight The item weight for a quantity of 1
- 2. Pack Size Description Describes the package details of the item
- 3. Selected Delivery Date The active order date/appointment for the item
- 4. **Quantity Available Grid** This view is intended for the user to see how much of this product would be available based on potential order dates.
  - a. **Order on or before** based on your ship date and the expiration date of the various "lots" of this item, you can see how many would be available.

#### **Creating an Order**

The user can browse the Food Bank inventory without an order, but to add anything to the shopping cart the user will need to create an order/appointment. If the user clicks "<u>Add to Cart</u>" and hasn't picked a date/time, the system will redirect the user to select an order type (delivery or pick up) and the date/time slot.

1. To start a new order, go to Shop and click the "<u>New Order</u>" button:

FOOL	BANK HEARTLAND	<b>Open Orders</b> Welcome <b>HEART MINISTRY CENTER INC</b> ~ <b>VIEW CART</b>	0
HOME SHOP NE	ED HELP? MEAL CONNECT		۹
HOME > SHOP			
Narrow By Product Type	93 Products	Name (A-Z) 🗸 NEW ORD	ER
Donated			



HOME	SHOP	NEED HELP?	MEAL CONNECT	
Pl	ease S	Select The	e Following	
De	livery m	ethod		
Lo	cal Deliver	ry 🗸		
N	o <mark>cal Deliver</mark> on-Local D ckup			
c	HECK AVAI	LABILITY		

#### **Delivery Methods**

- 2. Select your Delivery Method (Options vary by regions)
  - a. Local Delivery (Regions: 1A, 1B and 6)
    - i. Schedule: Monday Friday
      - ii. Time Slots and Availability:
        - 1. 8:00am 10:00am / 4 Appointments
        - 2. 10:00am 12:00pm / 4 Appointments
        - 3. 1:00pm 3:00pm / 2 Appointments
      - iii. Order Deadline: 12:00pm Two business days prior to delivery date

#### b. Non-Local Delivery (72 Hour Model)

- i. Schedule: Wednesday and Friday
- ii. Availability:
  - 1. Monday Wednesday delivery / 50 Appointments
  - 2. Wednesday Friday delivery / 50 Appointments
- iii. Order Deadline: 12:00pm on Wednesday (M-W Delivery) and 12:00pm on Friday (W-F Delivery)

#### c. Non-Local Delivery (Weekly) (Phased out)

- i. Schedule: Tuesdays Actual delivery date is communicated by the distribution dept. weekly
- ii. Availability: 66 Appointments per week
- iii. Order Deadline: 12:00pm on the Tuesday prior to the week of delivery

#### d. Pick Up

- i. Schedule: Monday Friday
- ii. Time Slots and Availability:
  - 1. 8:00am 12:00pm 1 Appointment per 30-minute window
- iii. Order Deadline: 12:00pm Two business days prior to pickup
- 3. Next click "<u>Check Availability</u>" and the calendar will appear below:



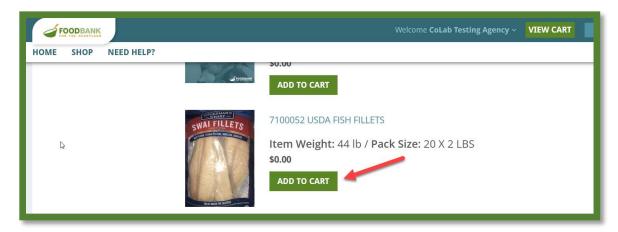
	TLAND		Open Orders Wel	come HEART MINISTRY CEN	TER INC - VIEW CART 📜 0
HOME SHOP	NEED HELP? ME	EAL CONNECT			Q
Please Se	elect The Fo	ollowing			
Delivery me	thod				
Local Delivery	~				
SELECT					0
Dec 25	20 2022				
Dec 25 -	29, 2023				× ,
	Mon 12/25	Tue 12/26	Wed 12/27	Thu 12/28	Fri 12/29
6am					
7am		0		3	
		2	8:00 - 10:00	8:00 - 10:00	8:00 - 10:00
8am Slots - A			Slots - Available:(4), Taken:(2)	Slots - Available:(4), Taken:(2)	Slots - Available:(4), Taken:(2)
9am					
10am <sup>10:00 - 12:</sup>		10:00 - 12:00	10:00 - 12:00	Slots - Available:(4), Taken:(4)	10:00 - 12:00
Slots - Av	ailable:(4), Taken:(2)	Slots - Available:(4), Taken:(2)	Slots - Available:(4), Taken:(0)		Slots - Available:(4), Taken:(0)
11am					
12nm					

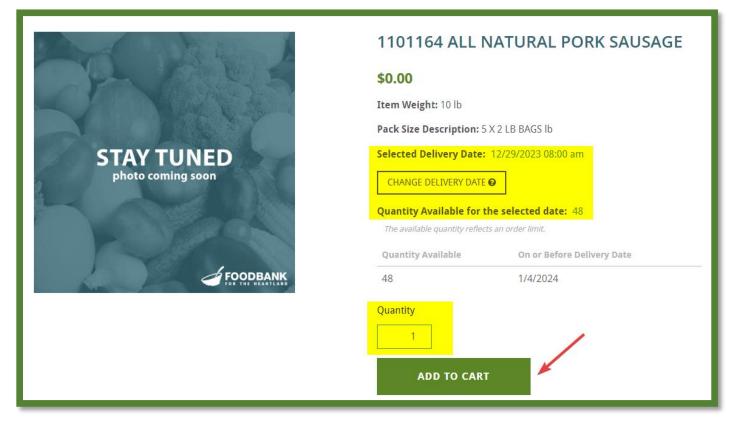
- 4. The Calendar will start at the first available date. Browse the calendar and select an available time slot.
  - i. The arrow buttons can be used to switch weeks.
  - ii. Time slots in **blue** have open availability while the time slots in **light green** are fully booked.
  - iii. The user selected time slot is shown in dark green.
  - iv. Confirm the time slot by clicking the "Select" button.
- 5. Once the user has a slot selected (**dark green**), then click on the "**Select**" button. The user will be redirected back to the shopping list or to the item you were on when you were redirected to the calendar.
- 6. **NOTE:** You can change the Delivery Date when you are on an item, but this will clear all previous items from your cart. After an order is placed, you cannot change the delivery date (you would have to submit a request to customer support).



#### Adding Items

1. You can add items to your cart from the main Shop pages or from the items' detailed page:





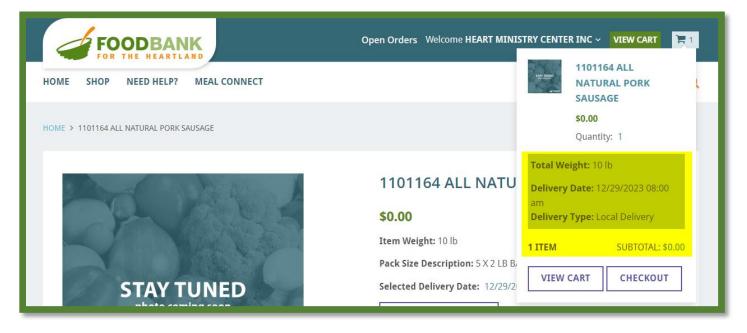
- The system will show the user exactly how many of these items are available based on your delivery/pick up date. **NOTE:** You can change the delivery date, but this will clear all items that you have put in your cart, and you will have to start over.
- Select the quantity by using the up/down arrows (these arrows will show when you hover your mouse over the quantity box). When the desired quantity is correct click "<u>Add to Cart</u>"



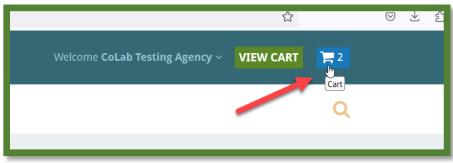
a. **IMPORTANT:** If you try and add more than is available, the system will pop-up a message and nothing will be added to your cart

FOODBANK	Welcome CoLab Testing Agency ~ VIEW CART	)
HOME SHOP NEED HELP?	Error ×	λ
	Item has only 2 available for the selected period.	

b. As you add items to the Cart, the "mini" cart will show you the items, as well as your "<u>Delivery</u> <u>Date/Time</u>", "<u>Delivery Type</u>", "<u>Total Items</u>", "<u>Total Weight</u>" and "<u>Order Amount</u>".



- 3. To get rid of the mini cart drop down, simply click your mouse anywhere on the screen.
- 4. To bring up the mini cart, click on the Cart icon:





#### Modify Quantity or Remove an Item from Cart:

 Click the "<u>View Cart</u>" Button or the user can also access the cart via the <u>"mini" cart</u> by clicking on the "<u>Cart</u> <u>icon</u>" and then clicking the "<u>View Cart</u>" button:

IIST	RY CENTER INC ~	VIEW CART	<b>R</b> 1
	SAUSA	RAL PORK	L
	\$0.00		
	Quantit	y: 1	
	Total Weight: 10	b	
J	<b>Delivery Date:</b> 12 am <b>Delivery Type:</b> Lo		
	Denvery Type. Lo	cal Delivery	
8,	1 ITEM	SUBTOTAL: <b>\$0</b>	.00
2	VIEW CART	СНЕСКОИТ	
-			-

 The user will be directed to the Shopping Cart page. This page will display every item currently in the cart. Every item in the cart will have an "<u>Edit</u>" and "<u>Remove</u>" link.

HOME > SHOPPING CART		
Shopping Cart 2 Products, 2 Items		
J.V.V.	1100774 ASSORTED SALAD DRESSING \$0.00	ORDER SUMMARY
STAY TUNED	Quantity: 1	SUBTOTAL 2 ITEMS \$0.00
and the second	Amount: \$0.00	ESTIMATED TOTAL \$0.00
	Edit Remove	HAVE A PROMO CODE? 😡 🛛 🗸
A Part &	1101164 ALL NATURAL PORK SAUSAGE	
	\$0.00	<b>GO TO CHECKOUT</b>
STAY TUNED	Quantity: 1	
Tool .	Amount: \$0.00	Total Weight: 18 lb
FOODBANK	Edit Remove	Delivery Date: 12/29/2023 7:00:00 am
		Delivery Type: Delivered By



- i. Quantity Quickly adjust the quantity in cart without bring up the item card's full details
- **ii.** Edit The "Edit" function will bring the item details page back allowing the user to see the availability again. Here the user can make changes and then click "<u>Update</u>".

Selec	ted Delivery Date: 12	/29/2023 7:00:00 am
СН	ANGE DELIVERY DATE 🚱	]
	ntity Available for the	selected date: 76
Qua	ntity Available	On or Before Delivery Date
77		1/4/2024
Quan	tity 1	
	UPDATE	

- iii. Remove Removes the item from your cart.
- 3. Until you check out, you can continue to shop and add items to the cart or modify items already in your cart.

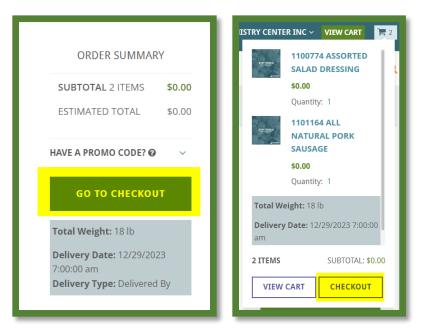
IMPORTANT: None of the items in your cart are "held". You MUST check out and receive an Order Number. If you do not check out by 12:00 am, the system will clear your cart. Your appointment hold will remain and the next time you create an order the system will ask if you want to keep your appointment or update to a new one.

Existing Delivery Dat	e Exists	×
There is an existing appointm Confirm you want to keep the	,	, , ,
Delivery Method: Delivery Warehouse: Start: 11/24/2023 7:00:00 am End: 11/24/2023 9:00:00 am		
l⊋	Кеер	Update



#### **Checking Out**

1. Once you have completed shopping, click on the "View Cart" or "Checkout" button from the mini cart.



#### Final Inventory Check

There is a possibility that the inventory in the user's cart has gone to another order. E.g (High demand for certain donated products). In this case, the user will see a system message in red at the top of the "<u>Review/Checkout</u>" page – indicating that there is not enough availability to fulfill the order.

Checkout	
Review Your Order	
Item: 1101164 has only 3 available. Please adjust the item quantity. ADJUST ALL QUANTITIES	
	SUMMARY

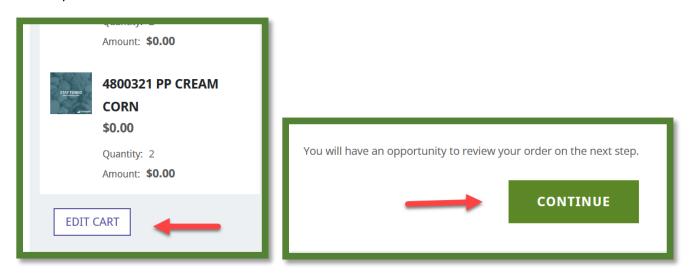
a. In this scenario, the user will need to click the button "<u>Adjust All Quantities</u>". The system will adjust your quantity down to the total currently available and adjust your totals accordingly.



#### Payment/Billing Information

Checkout 1. Checkout Information / 2. Review	
Payment	SUMMARY
Payment Method Invoice Terms Net 30	SUBTOTAL 2 ITEMS         \$0.00           SHIPPING         \$0.00           TOTAL         \$0.00
Billing Address	HAVE A PROMO CODE? • ~
Attn 2222 BINNEY ST Omaha Nebraska 68110-2038 United States (531) 225-8688	Ship to Attn > Interfect t
	1100774 ASSORTED SALAD DRESSING \$0.00 Quantity: 1

- 3. The FBFH has suspended shared maintenance since 2020. The Invoice option is selected by default. The user should take a moment to review the "<u>Billing Address</u>". If it's incorrect the user should contact their CSR or the FBFH at 402-331-1213 / <u>networkrelations@foodbankheartland.org</u>.
- 4. On the right side of the Checkout screen, you can review your order and you have one more chance to edit your order.



5. If your order looks good, scroll down to the bottom of the page, and click on "Continue".



#### **Final Checkout**

The second page of the Checkout is for a final review. You can click "<u>Edit Cart</u>" to make any last-minute changes. If everything looks good, click on "<u>Place Order</u>".

Checkout 1. Checkout Information / 2. Review			
Review Your Order			
	Devenue to Trans	SUMMARY	
Billing Address	Payment Type	SUBTOTAL 2 ITEMS	\$0.00
Attn 2222 BINNEY ST	Invoice: Terms Net 30	SHIPPING	\$0.00
Omaha Nebraska 68110-203	38	TOTAL	\$0.00
United States (531) 225-8688			
		PLACE ORDER	
Back to review billing information		HAVE A PROMO CODE? 😡	~
	BACK PLACE ORDER		
	DACK PLACE ONDER		

**IMPORTANT NOTE:** Processing an order can take a while. Do **NOT** click the browser back button or close the browser during this time. Wait until the order processing is complete. Once an order number is generated and the user is presented with the "**Thank You**" page, the inventory is locked in for the order.

	SUMMARY	
Thank You For Shopping With Us! Your order number is #SO09894.	SUBTOTAL 4 ITEMS	\$0.00
We received your order and will process it right away.	SHIPPING	\$0.00
You will receive an email with this confirmation in a few minutes.	TOTAL	\$0.00
CONTINUE SHOPPING DOWNLOAD PDF		

6. The user can download a PDF copy of the order on this page. A copy will also be sent to the email address for the user's records.



#### **Editing an Order**

An agency can edit their orders at any time before the order type deadline/cutoff described in the "<u>Delivery</u> <u>Method</u>" section. (Please refer to the Table of Contents)

1. When you first log in you will see "<u>Open Orders</u>" at the top of the page. Click on "<u>Open Orders</u>" to see the order number and ship date:

Open Orders Welcome CoLab Testing Agency	VIEW CART 📜 0 DOWNLOAD PDF
SO09886 - 11/24/2023	EDIT ORDER
SO09887 - 11/28/2023 SO09892 - 11/29/2023	CANCEL ORDER
SO09885 - 11/30/2023 SO09894 - 12/1/2023	Order delivery date is too close or has passed.

- Click on the order number of the order you want to edit. You will be directed to the "<u>My Account</u>" -> "<u>Orders</u>" page Then click on "<u>Edit Order</u>"
  - a. If the order is past the point where it can be modified, you will see that the "<u>Edit Order</u>" button is grey with a message: "<u>Order Delivery date is too close or has passed.</u>"

OVERVIEW     Online Purchase SO14980     \$0       Date: 12/12/2023     Date: 12/12/2023     Status: Pending Fulfillr       ORDERS     PENDING SHIPMENT TO ATTN: Y     >	<b>).00</b> nent
BILLING V STATUS: PENDING SHIPMENT SUBTOTAL	\$0.00
STATISTICS V TOTAL S	\$0.00
SETTINGS V STAY TUNED \$0.00	
Warehouse: 1 EDIT ORDER	
Quantity: 1 CANCEL ORDER	

3. Once the user clicks on "Edit Order", The system will redirect you to the "Shopping Cart" page.

**NOTE:** <u>All items from the order are put back in the cart. All previously ordered items are still locked and</u> guaranteed inventory to the order unless it is removed and resubmitted.



		Open Orders Welcome HEART MINIST	RY CENTER INC 🗸 VIEW CART 🛛 🗮 2	
HOME SHOP NEED HELI	?? MEAL CONNECT		Q	
Shopping Cart 2 Products, 2 Items				
	1101189 3 MEAT PERSONAL PIZZA		ORDER SUMMARY	
STAY TUNED	\$0.00 Original Order Quantity: 1		SUBTOTAL 2 ITEMS \$0.00	
- State	Quantity: 1		ESTIMATED TOTAL \$0.00	
Amount: \$0.00			HAVE A PROMO CODE? @ 🗸 🗸	
	1100857 300# ASSORTED FROZEN BIN \$0.00 Original Order Quantity: 1 Quantity: 1 Amount: \$0.00	EN BIN	SAVE ORDER	
STAY TUNED photo coming soon				
Атоорванк			CANCEL EDIT ORDER	
	Edit Remove		Existing items from the order have been put in your cart. You can modify or remove existing items on this page. To add NEW items, simply add them to your cart.	
			Total Weight: 307 lb	
			Delivery Date: 12/27/2023 7:00:00 am Delivery Type: Delivery	

- 4. Once the order is reopened, the user can:
  - a. Modify the quantities of items on the order.
    - Please see the "<u>Modify Quantity or Remove an Item from Cart</u>" section of this document. (Refer to Table of Contents)
  - b. Remove items from the order.
    - i. Please see the "Modify Quantity or Remove an Item from Cart" section of this document. (Refer to Table of Contents)
  - c. Cancel Edit Order Cancels the edit order process and retains the original order details.
  - d. Add new items to an existing order.
- 5. To add new items to an existing order, click the "**<u>Shop</u>**" button on the menu bar.
- Add new items to the cart like normal as described in the "<u>Adding Items</u>" section of this document. (Refer to Table of Contents)
- 7. When finished, click on the "<u>View Cart</u>" button, and then click "<u>Save Order</u>" to confirm the changes.
  - a. The user will receive an updated order confirmation email to the email on file.

**IMPORTANT:** Inventory that is already on your order is NEVER removed from your order by the system. New items added to order are only saved to your order if you click "<u>Save Order</u>".



After you click on "<u>Save Order</u>" your cart will empty, and user will be redirected to the "<u>Order History</u>" page in "<u>My Account/Account Overview</u>" section. Any modifications will be reflected on the order now (Adds, Deletes and Edits). The system will also send an update order summary email to the address on file.

**NOTE:** You can adjust and save an order unlimited number of times before the order is locked.



The "<u>My Account/Account Overview</u>" section of the <u>FBFH Online Ordering Portal</u> contains all the information related to the agency. In this section, the user can access "<u>Order History</u>", "<u>Invoices</u>", "<u>Statements</u>", "<u>Client</u> <u>Statistics</u>", and "<u>Profile Information</u>".

To access the "My Account/Account Overview" section, click the agency name in the top right corner and then select "Account Overview".

FOODE	ARTLAND	Open Order	s Welcome HEART MINISTRY CENTER	R INC 🗸 VIEW CART 📜
Account Overview				🕩 Sign Out
ORDERS	BILLING	STATISTICS	SETTINGS	
ORDER HISTORY	INVOICES PRINT A STATEMENT	CLIENT STATISTICS	PROFILE INFORMATION ADDRESS BOOK UPDATE YOUR PASSWORD	
	rui chase ivo.	Date Amount	Status	וומנת ונכוווס

#### **Order History**

On the "<u>Order History</u>" the user can view all previous orders, the date the order was created, the Ship Date of the order, the amount due, and the status. The user can click on any order to review the details of that order. This table includes filters like date ranges and sorting by account number or SO number.

		NK			Open Orders We	elcome HEART MINISTR	Y CEN	ITER INC \	VIEW CART	<b>) =</b> 0
ном	E SHOP NEED HELP	? ME	AL CONNECT							Q
HOME	> MY ACCOUNT > PURCHASI	e history	,							
	My Account									- 1
	OVERVIEW		Purchase History							
1	ORDERS	^	Open All							- 1
	Order History 2		From	to	Ê			t↓ So	ort By Date	~
	BILLING	~	Purchase No.		Date	Amount	Sta	tus		- 1
	STATISTICS	~	SO14986		12/18/2023	\$0.00	Per	nding Fulfil	lment	
	SETTINGS	~	SO14692		12/15/2023	\$0.00	Per	nding Fulfil	lment	
			SO14477		12/14/2023	\$0.00	Per	nding Fulfil	lment	



#### Invoices

Once an order is fulfilled, the system will create an Invoice. The invoice will include the amount that is due for the order. **NOTE:** The FBFH has no shared maintenance cost right now. All invoices will be zero-dollar statements.

The page will show all open invoices (where there is a balance due) first. If you want to see Paid invoices, you can click on "**Paid in Full**". To see the details of the invoice or to print it out, click on the Invoice number.

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ном	E SHOP NEED HELF	?? ME	AL CONNECT					۹
HOME	> MY ACCOUNT > INVOICES							
	My Account							
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	ORDERS	~	Open Paid in Full					
1	BILLING	^	From 🛍 to	Ê	]	ţţ	By Close Date	~
	Invoices 2 Print a Statement		Invoice No.	Dat	e Close I	Date	Amou	int
	STATISTICS	~	Invoice #INV00715	11/14/202	2 11/14/2	022	\$0.0	00
	SETTINGS	~	Invoice #INV00729	11/14/202	2 11/14/2	022	\$0.0	00
	JETTINGS		Invoice #INV00731	11/14/202	2 11/14/2	022	\$0.(	00

#### **Client Statistics:**

As a partner of the Food Bank for the Heartland, we require our partner agencies and pantries to submit monthly statistics summary the headcount of the people served during the prior month. Client Statistics for every partner agency <u>is due on the 5<sup>th</sup> of the following month</u>.

If that deadline is missed, the user will be presented with "Hold Flag" that will prevent the agency from ordering until the prior month's statistics have been submitted.

FOODBANK
HOME SHOP NEED HELP? MEAL CONNECT
The following holds exist on your account <b>Statistical Hold</b> . Please visit your account page in order to fix.



1. Go to the "Account Overview" menu and click on "Client Statistics".

	BANK	Open Orders	Welcome HEART MINISTRY CENTER	RINC 🗸 VIEW CART 📜 🛛
Account Overview				🕞 Sign Out
ORDERS	BILLING	STATISTICS	SETTINGS	
ORDER HISTORY	INVOICES PRINT A STATEMENT	CLIENT STATISTICS	PROFILE INFORMATION ADDRESS BOOK UPDATE YOUR PASSWORD	
	rui chase No.	Date Amount	Status	וומנא ונכוווס

- 2. Here the user will see all previous statistics for the agency. The user can edit previous months' statistics by clicking on the ID. **NOTE:** <u>Service Statistics records are locked after three months. Pease contact your CSR to request a correction.</u> 402-331-1213 / <u>networkrelations@foodbankheartland.org</u>
- 3. To create a new client statistics record, click on the "Create New Record" button:

My Account								
OVERVIEW			NEW RECORD					
ORDERS	~	ID	Service Date	Individuals	Households	USDA Individuals	USDA Households	USDA Households with Children
BILLING	~	4067	11/30/2023	10	5	10	5	0
STATISTICS	^	4066	11/30/2023	10	5	10	5	0
Client Statistics		3724	10/28/2023	7874	2022	7874	2022	
SETTINGS	~	3453	09/28/2023	8281	2119	8281	2119	



 Choose the "<u>Month</u>" and "<u>Year</u>" and input the agency statistics. When finished, click on the "<u>Submit</u> <u>Statistics</u>" button. <u>NOTE: Depending on the agency type the fields may change based on agency</u> <u>requirements.</u>

Service Date *	November ~ 2023 ~ 11/30/2023
Individuals *	10
Households *	5
USDA Individuals *	10
USDA Households *	5
USDA Households with Children *	2
Comments	Test Comments
	SUBMIT STATISTICS