Helping Harvest Online Ordering System User Manual





September 2020

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Introduction to Online Ordering

- ✓ Allows agencies to access real time quantities for Helping Harvest's inventory
- ✓ Opportunity to print a shopping list when coordinating with multiple people
- ✓ Ability to place your pantry or agency's order online instead of faxing or e-mailing your order
- ✓ Allows for quick and easy entering of required monthly statistics
- ✓ Check on orders, invoices and statements

Software Requirements

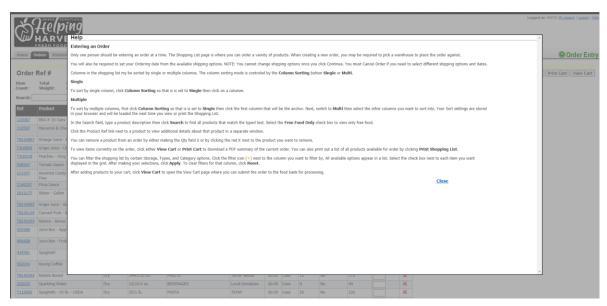
- ✓ Online Ordering (Primarius Web Window or PWW) is only supported on a Windows PC based computer with either Google Chrome, Mozilla Firefox or Internet Explorer
- ✓ To view and print certain features, you will need to have Adobe Reader installed on your computer. This free software can be downloaded at https://get.adobe.com/reader/

Reminders

- ✓ Orders should be placed between 3-5 days before your scheduled pick-up or delivery.
- ✓ If you need to schedule a pick up or delivery for your order, please call or e-mail Helping Harvest before placing your order.
- ✓ Please only submit one order per pick-up or delivery.
- ✓ Please only order what your agency is able to distribute in a reasonable time period. This allows all agencies to access our inventory to best serve those in need.
- ✓ Once you begin an order, you have 24 hours to complete the check-out process before the order is cancelled.
- ✓ Agency statistics for the previous month must be submitted before being able to place an order
- ✓ If you have questions regarding online ordering, please contact the Programs Department at 610-926-5802 x229

<u>Help</u>

- ✓ Use the <u>Help</u> link in the upper right-hand corner of a page for tips and descriptions of available options
- ✓ Click <u>Close</u> in the bottom corner to exit the Help section

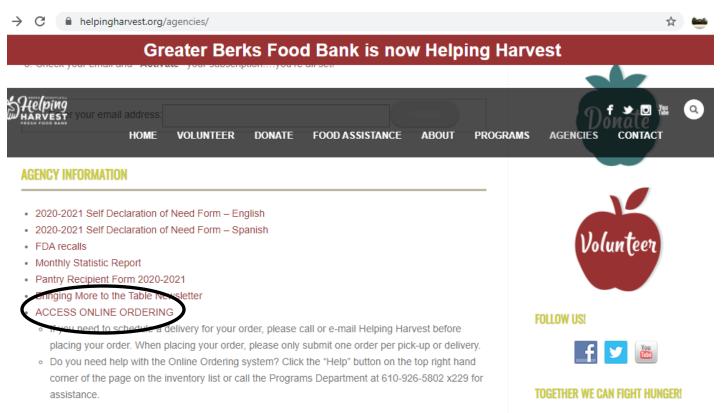


Accessing the Online Ordering System

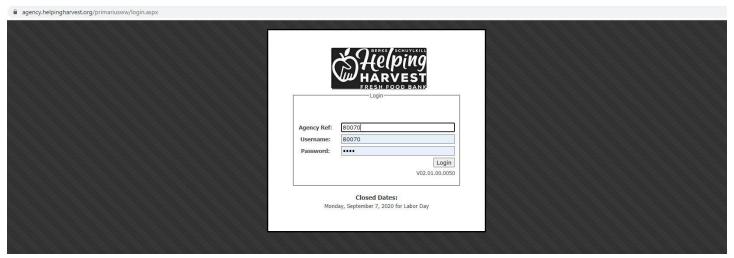
✓ Go to <u>www.helpingharvest.org</u> and click on Agencies in the top menu bar



✓ Once on the Agencies page, scroll down to the Agency Information header and select Access Online Ordering



✓ You will then be redirected to Helping Harvest's Primarius Web Window (PWW) login page



You can also access and bookmark this webpage at https://agency.helpingharvest.org/primariusww/login.aspx

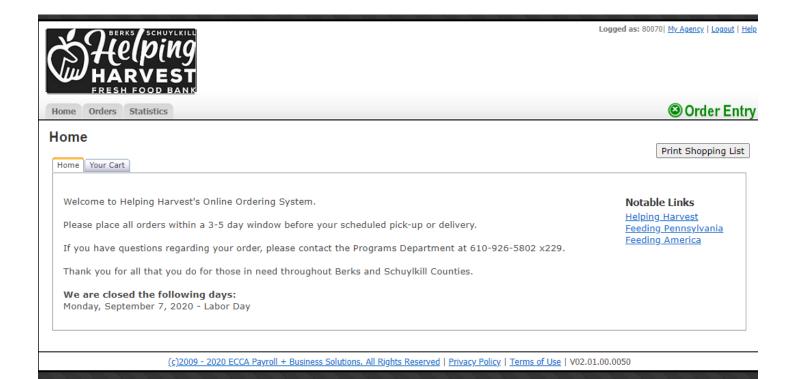


Each person authorized to order food online will need to know:

- ✓ Your agency number
 - This number is entered in both the Agency Ref and Username fields on the login screen
- ✓ Your agency password
 - NOTE: passwords are case sensitive and should be entered in all lowercase letters.
 - If your organization has misplaced your password, please contact the Programs Department at 610-926-5802 x229

PWW Home Page

You will find reminders and announcements from Helping Harvest on the PWW Home Page, as well as useful links. From the PWW Home Page, you can place an order, view past orders, enter statistics, access the shopping list (current inventory) and view your agency's information.

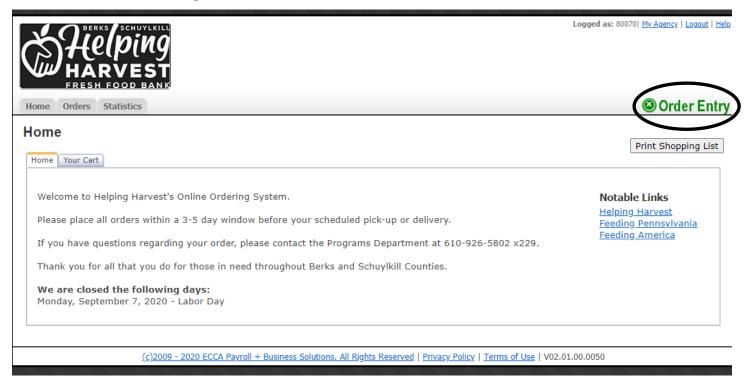


Placing an Order

Select

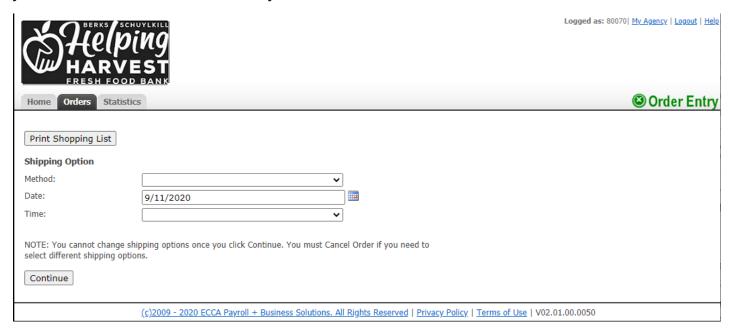


Order Entry on the right side of the screen to begin the ordering process.



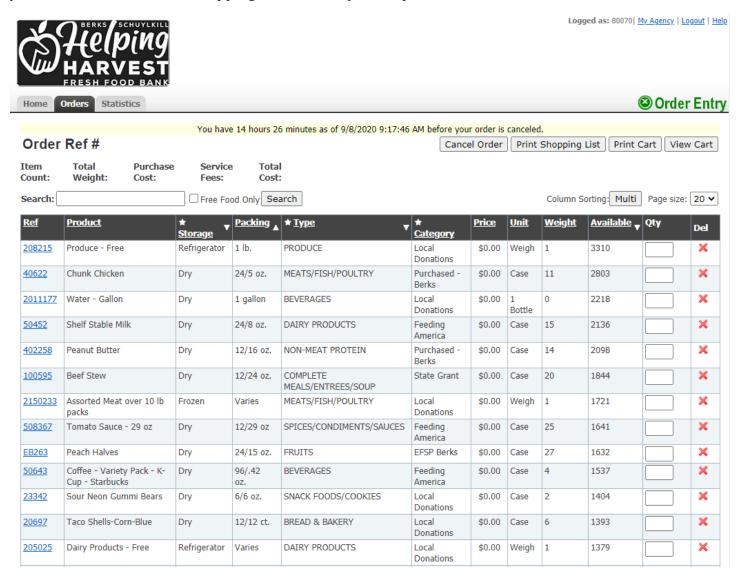
The first step in the ordering process is to select your date and time of pick-up or delivery. **If your** agency does <u>not</u> already have a scheduled pick-up or delivery date and time, please call the Programs Department at 610-926-5802 x229 to get on the schedule.

Please remember that orders must be placed 3-5 business days before your pick-up or delivery (the system automatically defaults to three business days out). If you need to schedule a delivery, we ask that you contact us at least 10 business days in advance.



Once you have entered in your Shipping Method (either Pickup or Delivery) the Date and Time, please select "Continue". The next screen will bring you to the current inventory list.

Please Note: If you would like to access a hard copy of our current inventory without placing an order, you can click on the "Print Shopping List" from any of the previous screens.



Helpful Tools

Search:		Free Food Only Search	will allow you to type in a product name or reference
(produ	ct) number to searc	h for that particular	item.

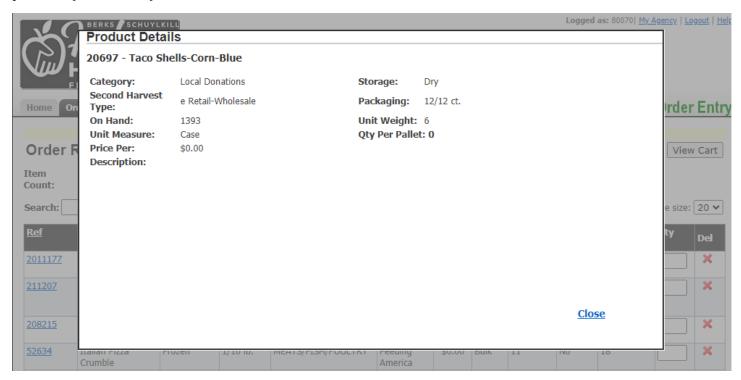
More information on sorting the shopping list, including sorting columns, can be found on page 10.

[&]quot;Print Shopping List" allows you to print a list of the current inventory

[&]quot;Print Cart" will print all items that you have placed in your cart at the time of printing

[&]quot;View Cart" allows you to see what products you have added to your cart

The first column "Ref" (reference) contains the item number for each individual product. By clicking on the product reference number a pop-up will appear that provides product detail and a photo of the product (if available).



BAB BABY FOOD APPLES Products with photos will have a camera icon next to the product name and a photo will show on the Product Detail screen.



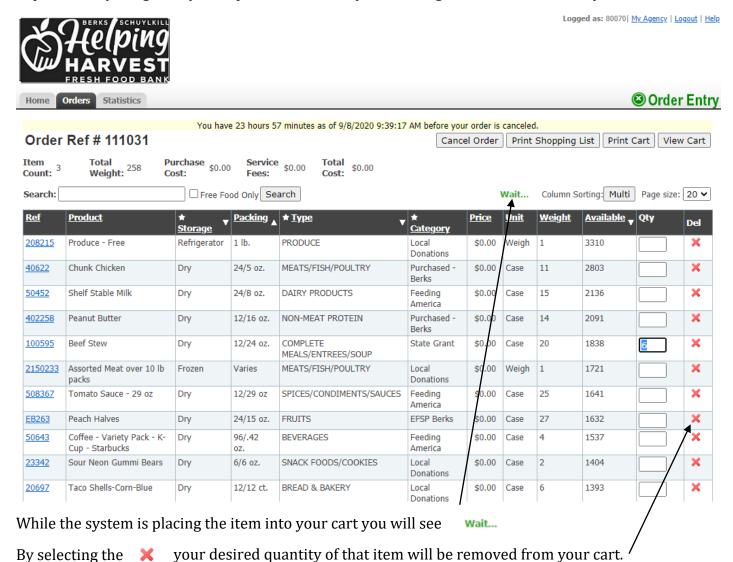


Please note the Unit column, which identifies whether or not the product is measured by case or weight. This is important to make sure that you are ordering the desired quantity of the selected product.

Adding Items to Your Order

Place the number of the desired item in the **Qty** textbox and either use the tab key or select another **Qty** textbox by using the mouse cursor. **Please make note whether items are measured by Weight or Case when ordering.**

The available quantity of case products will update as you place items in your cart. The available quantity of products by weight may not update immediately even though the item is added to your cart.



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

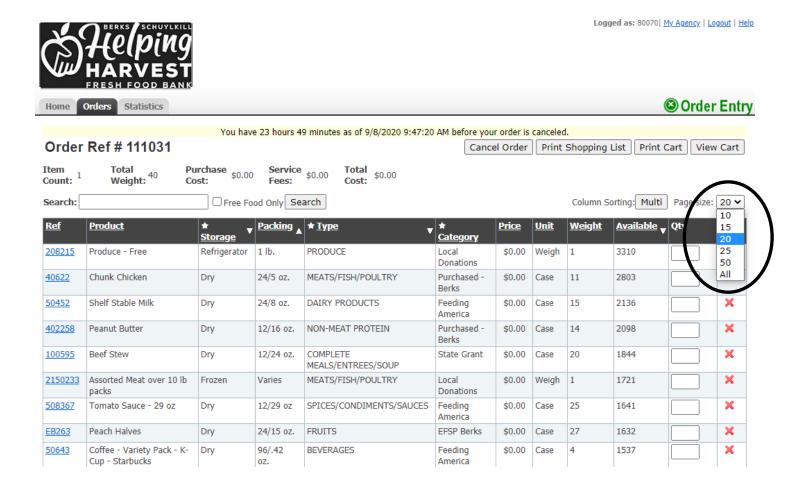
Order Ref # 111030

Item Count: 3 Total Weight: 419 Purchase \$0.00 Service \$0.00 Total \$0.00 Cost: \$0.00 Cost:

Please Note: As of the printing of this manual (September 2020), Helping Harvest is not charging shared maintenance fees. If and when shared maintenance fees are charged to agencies again, the cost columns will also populate.

Sorting the Shopping List

You can select the number of items that appear on the screen by changing the page size from anywhere to 10 items to All. Select "All" to avoid having to scroll through multiple pages of product.

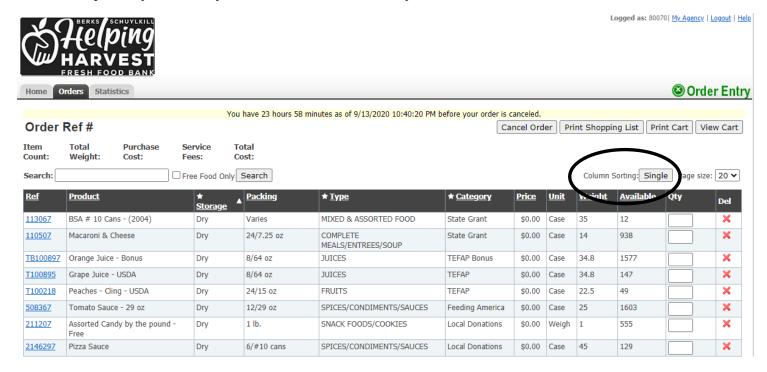


All columns can be sorted by clicking on the <u>underlined word</u>. This will sort the selected column in ascending or descending order. You can click on the work again until you have items sorted in the way that you want.

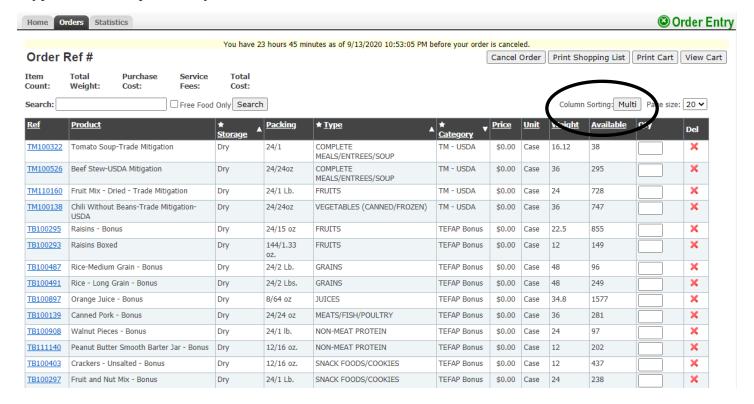
Please note that the small arrow pointing downward (see above in column header "Type") indicates an ascending order (smallest to largest or alphabetical)

<u>Ref</u>	<u>Product</u>	★ Storage	<u>Packing</u> ▲		★ <u>Category</u>	<u>Price</u>	<u>Unit</u>	<u>Weight</u>	<u>Available</u> ▼	Qty	Del
208215	Produce - Free	Refrigerator	1 lb.	PRODUCE	Local Donations	\$0.00	Weigh	1	3310		×
40622	Chunk Chicken	Dry	24/5 oz.	MEATS/FISH/POULTRY	Purchased - Berks	\$0.00	Case	11	2803		×
2011177	Water - Gallon	Dry	1 gallon	BEVERAGES	Local Donations	\$0.00	1 Bottle	0	2218		×
50452	Shelf Stable Milk	Dry	24/8 oz.	DAIRY PRODUCTS	Feeding America	\$0.00	Case	15	2136		×
402258	Peanut Butter	Dry	12/16 oz.	NON-MEAT PROTEIN	Purchased - Berks	\$0.00	Case	14	2098		×

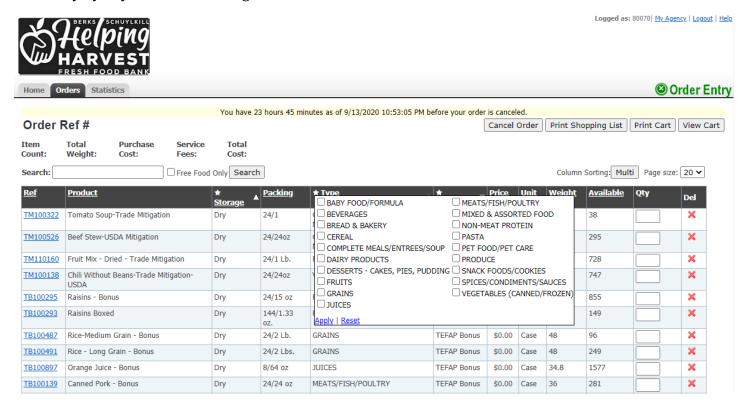
To sort multiple columns at the same time, first click on "Column Sorting" to change it to Single. Then click on the underlined column header that you want to sort (storage, category, type, etc.). That will choose the primary column by which to sort the inventory.



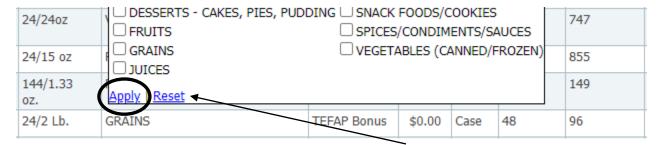
Once you have chosen the primary sort column, click on "Column Sorting" again and set it to Multi. Then click on the second underlined column by which you want to sort (storage, category, type, etc.) within the primary sort. In the example below, "Storage" is the primary sort, "Category" is the secondary sort, with "Type" as a third qualifier by which to sort.



Clicking on the star (★) in any of the column headers creates a drop down list to allow you to filter the inventory by any or all of the categories listed.



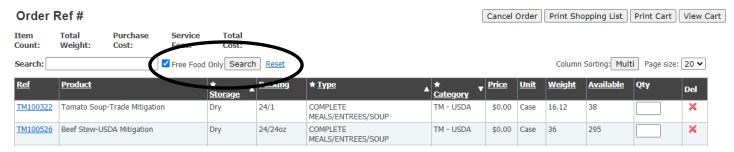
After selecting the categories that you wish to filter by, choose **Apply**. The star (**) will turn yellow indicating that the filter is on.



Clicking on the yellow star in the column header and selecting **Reset** will remove any filters.

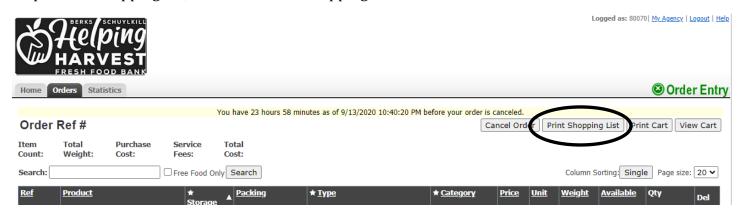
TIP: Free Food!

To view only free products, check the box next to "Free Food Only" and click "Search". Click "Reset" to view the entire list again.



Printing the Shopping List

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



A .pdf of the Shopping List will be created and will either be located in your Downloads folder or can be opened by clicking the icon at the bottom of your web browser.



Shopping List

Helping Harvest Emergency Food Box Date Printed: 9/13/2020 At 11:29 PM *Item cost and available quantity may vary.

Ref	Product	Storage	Packing	Туре	Category	Price	Unit	Weight	Available	Qty. Order
TM100322	Tomato Soup-Trade Mitigation	Dry	24/1	COMPLETE MEALS/ENTREES /SOUP	TM - USDA	\$0.00	Case	16.12	38	
TM100526	Beef Stew-USDA Mitigation	Dry	24/24oz	COMPLETE MEALS/ENTREES /SOUP	TM - USDA	\$0.00	Case	36	295	
TM110160	Fruit Mix - Dried - Trade Mitigation	Dry	24/1 Lb.	FRUITS	TM - USDA	\$0.00	Case	24	728	
TM100138	Chili Without Beans-Trade Mitigation-USDA	Dry	24/24oz	VEGETABLES (CANNED/FROZE N)	TM - USDA	\$0.00	Case	36	747	
TB100295	Raisins - Bonus	Dry	24/15 oz	FRUITS	TEFAP Bonus	\$0.00	Case	22.5	855	

Alternatively, a new window may appear asking if you would like to open or save the Shopping List file. Selecting 'Open" will allow you to view the document before printing.



Printing Your Cart

To print a list of what is in your shopping cart, select the "Print Cart" button.



A .pdf of you cart will be created and will either be located in your Downloads folder or can be opened by clicking the icon at the bottom of your web browser.

Alternatively, a new window may appear asking if you would like to open or save the Shopping List file. Selecting 'Open" will allow you to view the document before printing.



Order# 111080

Agency: 80070 - Helping Harvest Emergency Food Box Order Status: Entry NOT complete, Must Check Out

Order Placed: 9/13/2020 Warehouse: Helping Harvest Shipping Method: Pickup

Delivered/Picked Up: 9/17/2020 At 9:00 AM

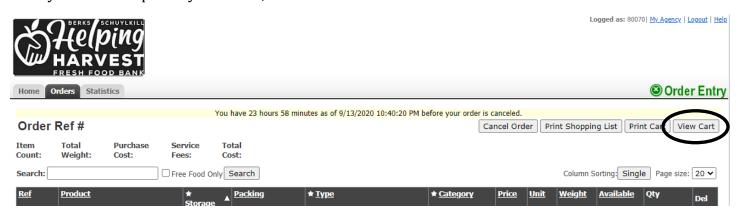
Deliver/Pick Up Location: Door 1

Product Ref	Product	Туре	Category	Quantity	Weight	Unit Measure	Total Cost
TM100138	Chili Without Beans-Trade Mitigation-USDA	VEGETABLES (CANNED/FROZEN)	TM - USDA	7	252	Case	\$0.00
T110740	Com Square Cereal-USDA	CEREAL	TEFAP	3	31.5	Case	\$0.00
TB100295	Raisins - Bonus	FRUITS	TEFAP Bonus	10	225	Case	\$0.00
			Totals:	20	508.5		\$0.00

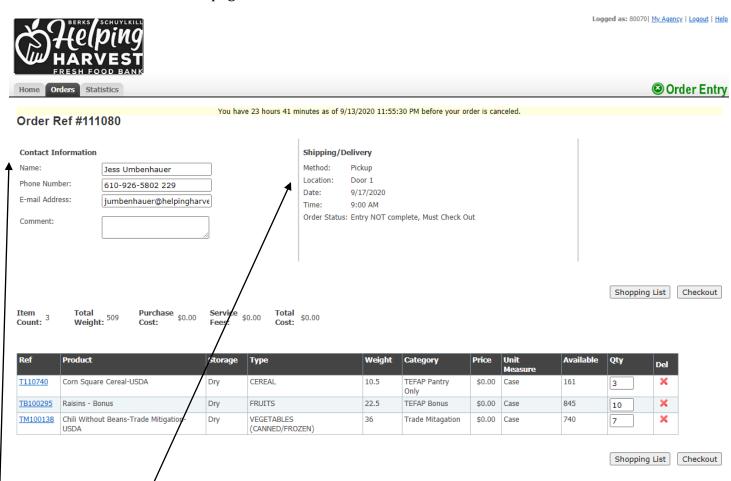
Please note, your order is not submitted until you check out.

Viewing Your Cart

Once you have completed your order, click on "View Cart".



You will then be taken to this page...



The **Shipping/Delivery** information will automatically fill in – please be sure that it matches the pick-up or delivery date and time that was communicated with Helping Harvest.

Contact Information is required to continue and will assist Helping Harvest in communicating any changes with your order. Please include any requests or comments in the box provided.

Select "Shopping List" at the bottom to return to the inventory list.

Select "Checkout" to submit your order to Helping Harvest.

Checking Out

After selecting "Checkout", a successful submission will then show the following message:



Logged as: 80070 | My Agency | Logout | Help



Order Entry

Order Ref #111080

Thank-you! Your order was successfully submitted.

Click here for a PDF summary of your order.

Clicking on the "Click here for a PDF summary of your order" will create a document that can serve as your order confirmation.

The .pdf will either be located in your Downloads folder or can be opened by clicking the icon at the bottom of your web browser.

Alternatively, a new window may appear asking if you would like to open or save the Shopping List file. Selecting 'Open" will allow you to view the document before printing.



Order# 111080

Agency: 80070 - Helping Harvest Emergency Food Box

Order Status: Waiting to be Reviewed

Order Placed: 9/13/2020 Warehouse: Helping Harvest Shipping Method: Pickup

Delivered/Picked Up: 9/17/2020 At 9:00 AM

Deliver/Pick Up Location: Door 1

Product Ref	Product	Туре	Category	Quantity	Weight	Unit Measure	Total Cost
TM100138	Chili Without Beans-Trade Mitigation-USDA	VEGETABLES (CANNED/FROZEN)	TM - USDA	7	252	Case	\$0.00
T110740	Corn Square Cereal-USDA	CEREAL	TEFAP	3	31.5	Case	\$0.00
TB100295	Raisins - Bonus	FRUITS	TEFAP Bonus	10	225	Case	\$0.00
			Totals:	20	508.5		\$0.00

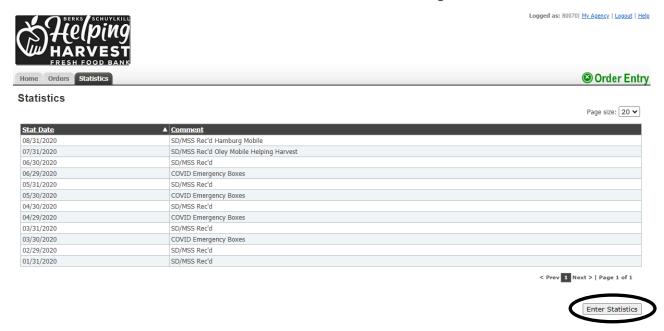
Please note that the **Order Status** is now "Waiting to be Reviewed". This means that the staff at Helping Harvest is aware of your order, will review it for appropriate quantities and accuracy, and will release your order to the warehouse to be picked and processed.

Entering Statistics

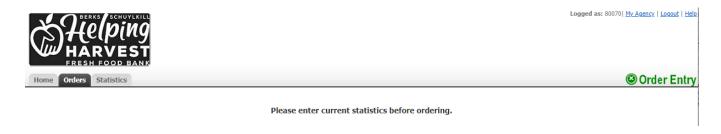
Click on the Statistics Tab.



From this screen, you will be able to enter current statistics and access all previously submitted statistics. To enter current statistics, click on "Enter Statistics" in the bottom right hand corner of the screen.



PLEASE NOTE: You will not be able to place an order if your agency's statistics are not up to date. Statistics for the previous month must be entered by the 5th of the following month (i.e. November statistics are due by December 5th). The following screen will show if current statistics are not entered.



For Pantry Programs (agency reference numbers starting with 1)

To enter your agency's statistics, select the month and year for which you are entering statistics.

Complete all the fields listed on the 'Enter Statistics' screen (please note the categories are in a different order than they appear on the Monthly Statistic Form).

Helpin Harves	<i>9</i> T	Logged	as: 80070 <u>My Agency</u> <u>Logout</u> <u>Hel</u> r
Home Orders Statistics			Order Entry
Enter Statistics			
Effective Date: Month:	▼ Year: ▼	l	
Comments:			
Category	Quantity	Comment	
ADULT			
CHILDREN			
NEW HOUSEHOLD			
SENIOR			
TOTAL			
TOTAL HOUSEHOLD			
UNDUPLICATED			
			Submit Statistics

Adult - Enter the number of adults (age 18-59) served during the month

Children – Enter the number of children (age 0-17) served during the month

New Household - Enter the number of new households served for the first time since Iulv

Senior – Enter the number of seniors (age 60+) served during the month

Total – Add the number of children, adults and seniors served during the month

Total Household – Enter the number of households served during the month (if a household was served twice during the month, it should be counted twice here)

Unduplicated – Enter the number of different or unique households served during the month (if a household was served twice during the month, it should only be counted once here)

PLEASE NOTE: The "Total" fields do not automatically populate for you. Please be sure that you are adding correctly and check your math before entering and submitting your statistics!

Once you have entered your statistics and checked your math, click the bottom of the page. If you find any errors in your statistics after they are submitted, please contact the Programs Department.

Paper or electronic copies of Pantry Recipient Forms (Berks and Schuylkill Pantries) and Self-Declaration of Need Forms (Berks Pantries) must be submitted to Helping Harvest to keep on file.

For Soup Kitchen, Snack and Shelters Programs (agency reference numbers starting with 2 or 3)

To enter your agency's statistics, select the month and year for which you are entering statistics.

Complete all the fields listed on the 'Enter Statistics' screen (please note the categories are in a different order than they appear on the Monthly Statistic Form).

HARVEST FRESH FOOD BANK	<u>My Agency</u> <u>Logout</u> <u>Hel</u>
	Order Entry
Enter Statistics	
Effective Date: Month:	
Comments:	
Category Quantity Comment	
MEALS SERVED TO ADULTS	
MEALS SERVED TO CHILDREN	
MEALS SERVED TO SENIORS	
TOTAL MEALS	
UNDUPLICATED SERVED BY MEALS	Submit Statistics

Meals Served to Adults – Enter the total number of meals served to adults (age 18-59) during the month **Meals Served to Children** – Enter the total number of meals served to children (age 0-17) during the month

Meals Served to Seniors – Enter the total number of meals served to seniors (age 60+) during the month **Total Meals** – Add the number of meals served to children, adults and seniors during the month (if a person was served meals multiple times during the month, each of meals served to that individual person will be counted here)

Unduplicated Served by Meals – Enter the number of different or unique individuals served during the month (if a person was served multiple meals during the month, they will only be counted once here)

PLEASE NOTE: The "Total" fields do not automatically populate for you. Please be sure that you are adding correctly and check your math before entering and submitting your statistics!

Once you have entered your statistics and checked your math, click the **Submit Statistics** button at the bottom of the page. If you find any errors in your statistics after they are submitted, please contact the Programs Department.

Viewing Past Statistics

The statistics tab also shows all the documented statistics that were previously reported to Helping Harvest.

Logged as: 80070| My Agency | Logout | Help



Home

Orders Statistics



Statistics

Page size: 20 ✔

Stat Date	▲ Comment
08/31/2020	SD/MSS Rec'd Hamburg Mobile
07/31/2020	SD/MSS Rec'd Oley Mobile Helping Harvest
06/30/2020	SD/MSS Rec'd
06/29/2020	COVID Emergency Boxes
05/31/2020	SD/MSS Rec'd
05/30/2020	COVID Emergency Boxes
04/30/2020	SD/MSS Rec'd
04/29/2020	COVID Emergency Boxes
03/31/2020	SD/MSS Rec'd
03/30/2020	COVID Emergency Boxes
02/29/2020	SD/MSS Rec'd
01/31/2020	SD/MSS Rec'd

< Prev 1 Next > | Page 1 of 1

Clicking on any of the table rows (or lines) will show the statistic report details.



Home Orders Statistics



Order Entry

Statistics for 6/30/2020

Comments: SD/MSS Rec'd

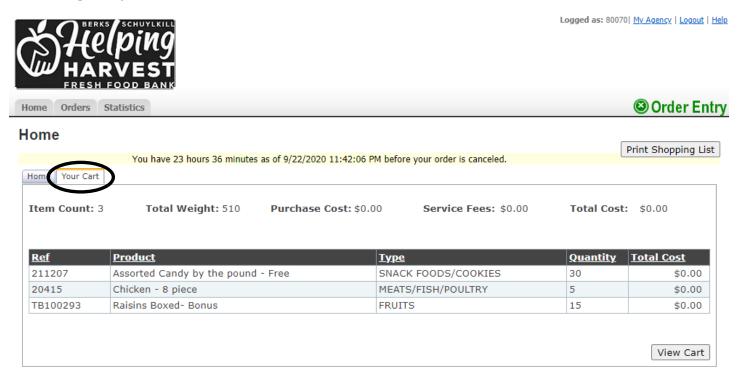
<u>Category</u> ▼	Quantity	Comment
ADULT	83	
CHILDREN	72	
NEW HOUSEHOLD	48	
SENIOR	44	
TOTAL	199	
TOTAL HOUSEHOLD	48	
UNDUPLICATED	48	

Print Stats

Your Cart

From the home page, you can see what is currently in your shopping cart by clicking on the "Your Cart" tab. The tab window displays the current items in your cart along with basic summary detail.

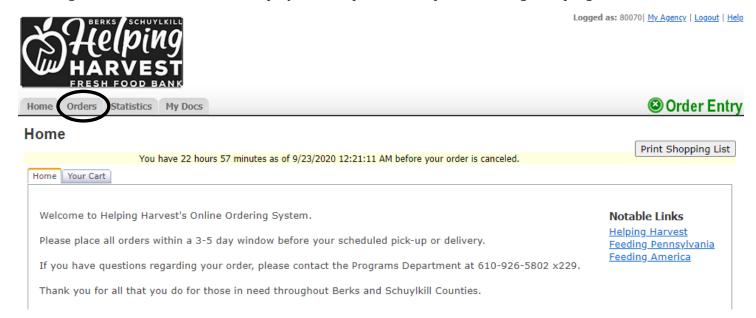
This is helpful if you start an order but need to come back to it at a later time.



PLEASE NOTE: Once you begin an order, you have 24 hours to complete the check-out process before the order is cancelled.

Orders Tab

Clicking on the "Orders" tab, will display a list of past orders placed through Helping Harvest.



Clicking on an order will display the order details.

Logged as: 80070| My Agency | Logout | Help

Home Orders Statistics

Order Entry

Orders

Search:			Search						Page size: 20 🗸
<u>Order</u>	<u>Status</u>	Entered A	Del/Pickup	<u>Method</u>	Reviewed?	Released	<u>Picked</u>	Confirmed?	<u>Location</u>
111238	Open	09/22/2020	09/28/2020	Delivery	No			No	No Del/PU Location
110954	Closed	08/28/2020	08/28/2020		Yes	08/28/2020	08/28/2020	Yes	No Del/PU Location
110819	Closed	08/19/2020	08/24/2020	DELIVERY	Yes	08/19/2020	08/21/2020	Yes	No Del/PU Location
110786	Closed	08/14/2020	08/18/2020	DELIVERY	Yes	08/14/2020	08/17/2020	Yes	No Del/PU Location
110622	Closed	08/03/2020	08/06/2020	PICK-UP	Yes	08/03/2020	08/05/2020	Yes	No Del/PU Location
110538	Closed	07/24/2020	07/29/2020	DELIVERY	Yes	07/24/2020	07/29/2020	Yes	No Del/PU Location
110522	Closed	07/23/2020	07/27/2020	DELIVERY	Yes	07/23/2020	07/27/2020	Yes	No Del/PU Location
110217	Closed	06/25/2020	07/01/2020	DELIVERY	Yes	06/25/2020	06/30/2020	Yes	No Del/PU Location
110213	Closed	06/24/2020	07/02/2020	PICK-UP	Yes	06/24/2020	07/01/2020	Yes	No Del/PU Location
110206	Closed	06/23/2020	06/29/2020	DELIVERY	Yes	06/23/2020	06/26/2020	Yes	No Del/PU Location
110167	Closed	06/19/2020	06/22/2020	DELIVERY	Yes	06/19/2020	06/19/2020	Yes	No Del/PU Location
110166	Closed	06/18/2020	06/24/2020	DELIVERY	Yes	06/18/2020	06/23/2020	Yes	No Del/PU Location
109991	Closed	06/05/2020	06/10/2020	DELIVERY	Yes	06/09/2020	06/09/2020	Yes	No Del/PU Location
109990	Closed	06/05/2020	06/10/2020	DELIVERY	Yes	06/05/2020	06/08/2020	Yes	No Del/PU Location

On the order detail screen you can view a summary of the order as well as a list of products.

Logged as: 80070 | My Agency | Logout | Help

Order Entry





Home Orders Statistics

Order Date: 6/23/2020 **Order Status:** Weight: 2671 Warehouse: Total Cost: Shipping Method: \$60.00 Payments: \$60.00 Delivered/Picked Up: **Applied Grants:** \$0.00 Picked Up By: Balance: Delivery/Pick-up Location: \$0.00

Confirmed 6/30/2020 Helping Harvest DELIVERY 6/29/2020 1:00 PM cbergstresser No Del/PU Location

Order Notes: Alleghany Mobile Deliver to Alleghany Lutheran Church 1327 Alleghany Rd Mohnton, PA 19540 1 dry skid, 1 freezer skid --> Rich 2 cooler

gaylords --> MJ

Products

<u>Product</u>	<u>Name</u>	Туре	<u>Category</u>	<u>Weight</u>	<u>Quantity</u>	Total Cost
205025	Dairy Products - Free	DAIRY PRODUCTS	Local Donations	348	348	\$0.00
2151975	Emergency Sorted Dry Food Box	MIXED & ASSORTED FOOD	Local Donations	1495	65	\$0.00
208215	Produce - Free	PRODUCE	Local Donations	373	373	\$0.00
2151973	Sorted Frozen Food Bags	MIXED & ASSORTED FOOD	Local Donations	455	65	\$0.00

Print Order | Convert To Receipt

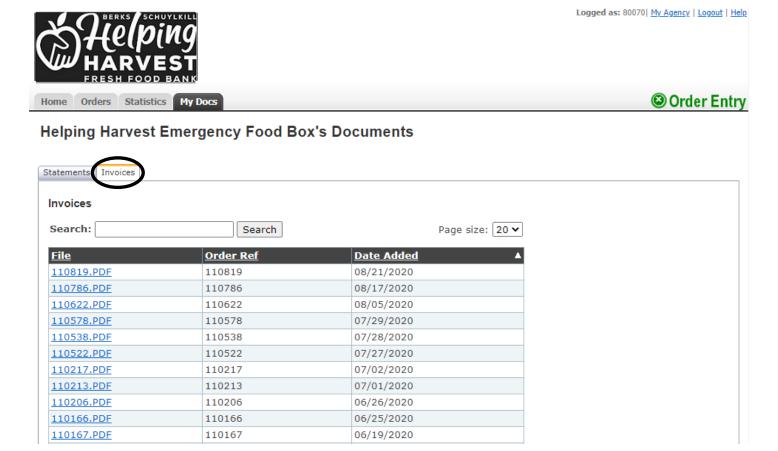
Invoices

By clicking on the "My Docs" tab, you will be able to access your agency's past invoices.

Logged as: 80070 | My Agency | Logout | Help Order Entry Home Orders **Statistics** Home Print Shopping List You have 22 hours 57 minutes as of 9/23/2020 12:21:11 AM before your order is canceled. Home Your Cart Welcome to Helping Harvest's Online Ordering System. Notable Links Helping Harvest Please place all orders within a 3-5 day window before your scheduled pick-up or delivery. <u>Feeding Pennsylvania</u> Feeding America If you have questions regarding your order, please contact the Programs Department at 610-926-5802 x229. Thank you for all that you do for those in need throughout Berks and Schuylkill Counties.

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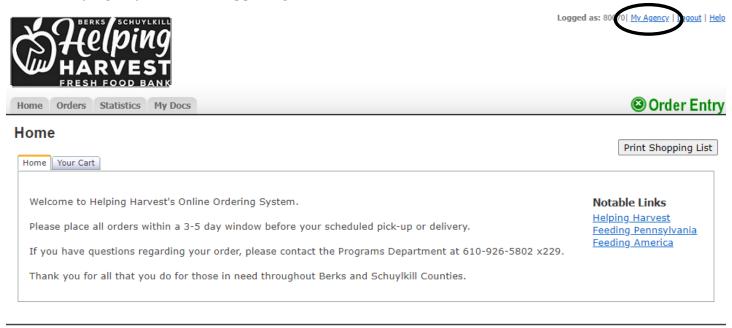
On the Document screen, click on "Invoices". A list of all past invoices will load. Click on the file name to download a .pdf of the selected invoice.



Agency Information

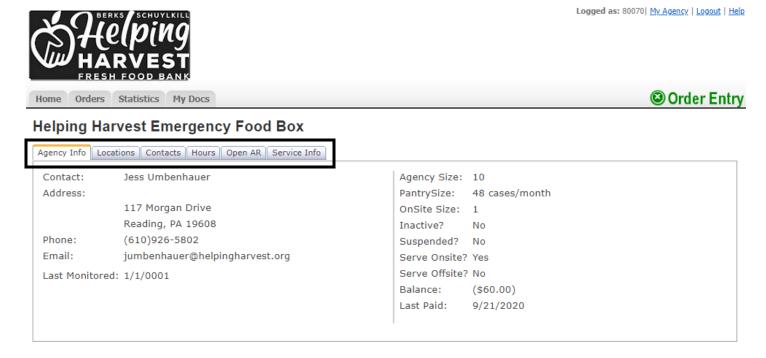
Primarius Web Window (PWW) allows agencies to access general information on file for your agency.

Click on "My Agency" link in the upper right hand corner.



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Each tab will show the information that Helping Harvest has on file for your agency. To update any information, please contact the Programs Department at 610-926-5802 x229.



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Locations displays the different addresses that Helping Harvest has on file for your agency.



Contacts lists the different names and contact information of people associated with the agency account.

Administrator – person who oversees the agency or organization

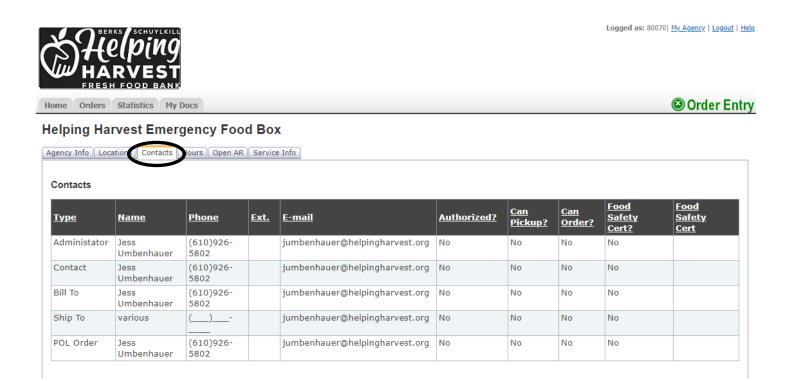
Contact – the primary contact and designated person to communicate with Helping Harvest

Bill To – the person who receives financial information (invoices, statements, etc) from Helping Harvest

Ship To – the person designated to receive the deliveries at the agency or organization

Authorized – additional contacts who can contact Helping Harvest on behalf of your organization

POL Order – the primary contact for online ordering (PWW)



Hours lists the hours that your agency or organization is open for food distribution.



To update any information including hours, please contact the Programs Department at 610-926-5802 x229.

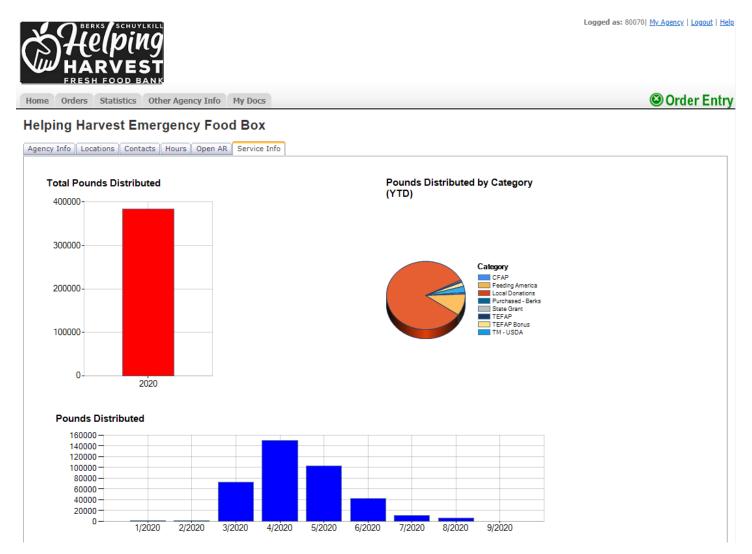
Open AR shows if orders:

- ✓ are open or closed
- ✓ have been reviewed by Helping Harvest
- ✓ have been picked (or selected) by the warehouse
- ✓ have a balance



You are able to click anywhere on the line of an order to be taken to another screen that will display the details for that particular order.

Service Info displays different graphs and charts based on the agency's information.



Please note on the Service Info tab, that the three graphs below the above screenshot will not display data because of how Helping Harvest's statistics are set up.

Closing

If, after reading this manual, you still have questions regarding online ordering – please do not hesitate to contact the Programs Department (610-926-5802 x229) at Helping Harvest.

We are very grateful for the work that our agencies, organizations, pantry coordinators, soup kitchens, shelters, and volunteers do to feed those in need throughout Berks and Schuylkill counties.

The work that you all do is humbling and inspiring and the staff at Helping Harvest is grateful for all that you do!

Please reach out with questions or feedback and stay well!