

Helping Harvest Online Ordering System User Manual (P2)



June 2023

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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

Reminders

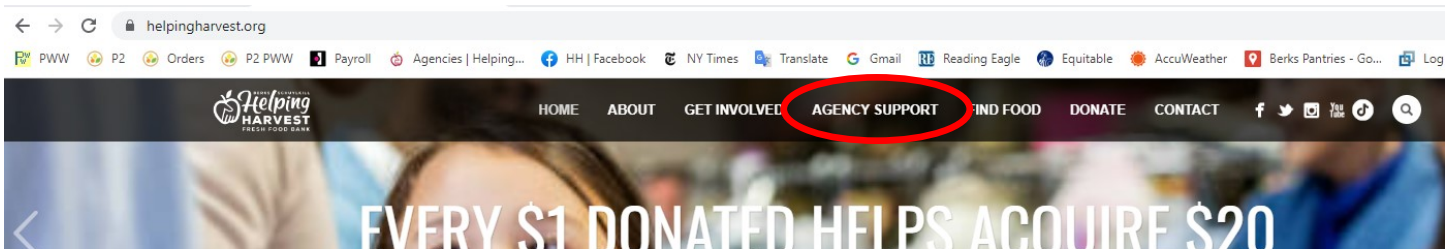
- Orders should be placed between 3-5 days before your scheduled pick-up or delivery.
- If you need to schedule a pick up or delivery for your order, please call or e-mail Helping Harvest before placing your order.
- Please only submit one order per pick-up or delivery.
- Please only order what your 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 8 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 x219

Shared Maintenance Fees

Please Note: As of the printing of this manual (January 2023), Helping Harvest is not charging shared maintenance fees. If and when shared maintenance fees are charged to agencies again, the cost columns will populate on the inventory list and be applicable to all agencies.

Accessing the Online Ordering System

⇒ Go to www.helpingharvest.org and click on “Agency Support” in the top menu bar.



⇒ Once on the Agency Support page, scroll down to the Online Ordering header and click the red “Online Ordering” button.

ONLINE ORDERING

Online Ordering

- If you need to schedule a delivery for your order, please call or e-mail Helping Harvest before placing your order. When placing your order, please only submit one order per pick-up or delivery.
- Do you need help with the Online Ordering system? Click the “Help” button on the top right hand corner of the page on the inventory list or call the Programs Department at 610-926-5802 x229 for assistance.

⇒ 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/pww/Home/Login/>

The screenshot shows the Primarius login interface. It features three input fields: 'Agency Reference' with the value '80070', 'User Name' with the value '80070', and 'Password' with masked characters. Below the fields are 'Login' and 'Reset' buttons, and a link for 'Forgot password?'.

To order food online you will need to know:

⇒ Your agency number

- This number is entered in both the Agency Ref and Username fields on the login screen

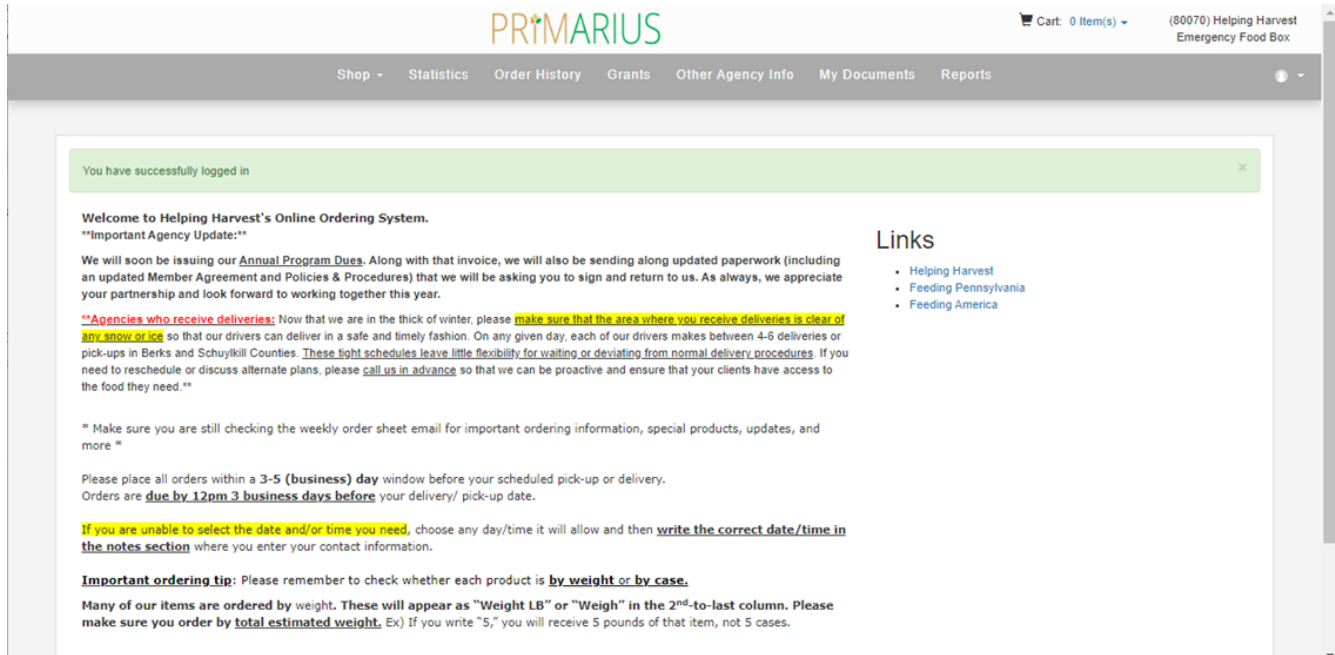
⇒ Your agency password

- **NOTE:** passwords are case sensitive.
- If your organization has misplaced your password, please contact the Programs Department at 610-926-5802 x229 or x219

If for some reason the access to the Agency’s PWW account is lost or compromised, you may contact the Programs Department at 610-926-5802 x229 or x219 to reset the account information.

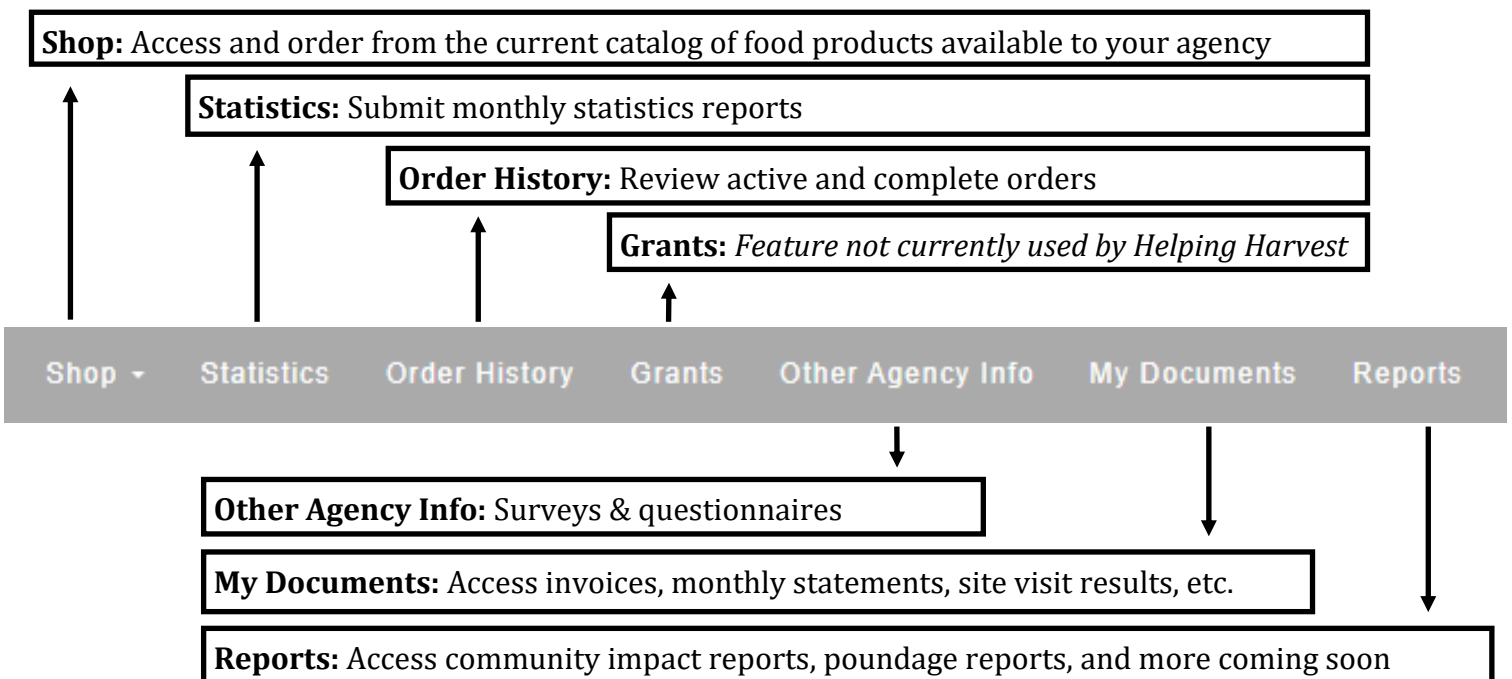
PWW Home Page

You will find **reminders and announcements** from Helping Harvest on the Primarius Home Page, as well as useful links. From the PWW Home Page, you can place an order (Shop → Shop Online), view past orders (Order History), enter statistics (Statistics), access the shopping list (Shop → Print Shopping List) and view your agency’s information (Other Agency Info).



Navigation Bar

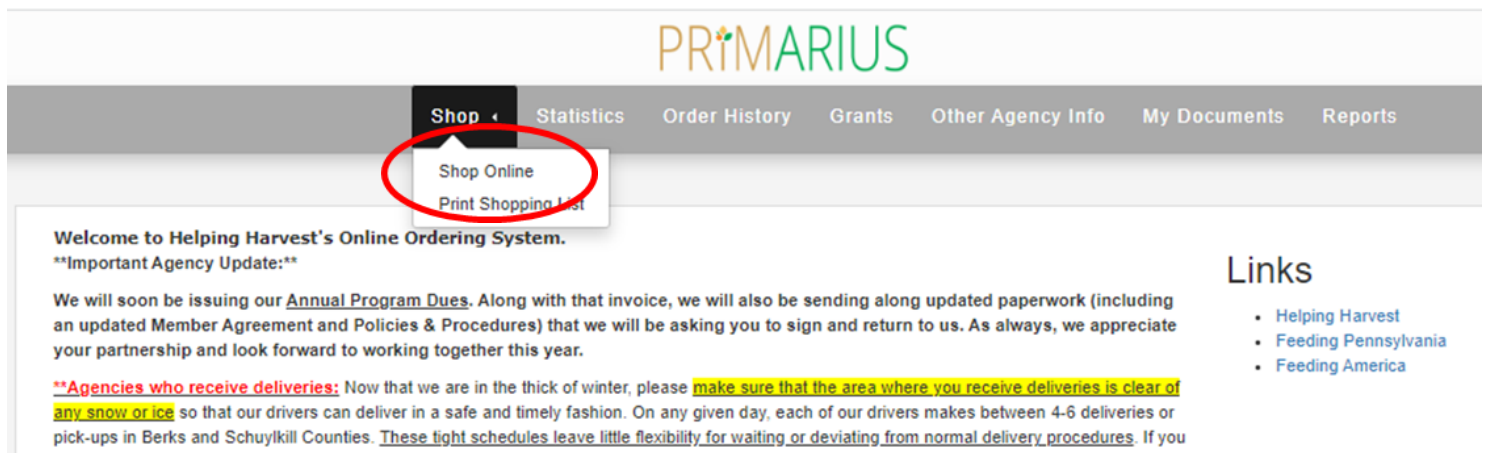
You will also notice the gray navigation bar along the top of the page. This navigation bar allows an Agency to jump to different functional areas of PWW.



Placing an Order

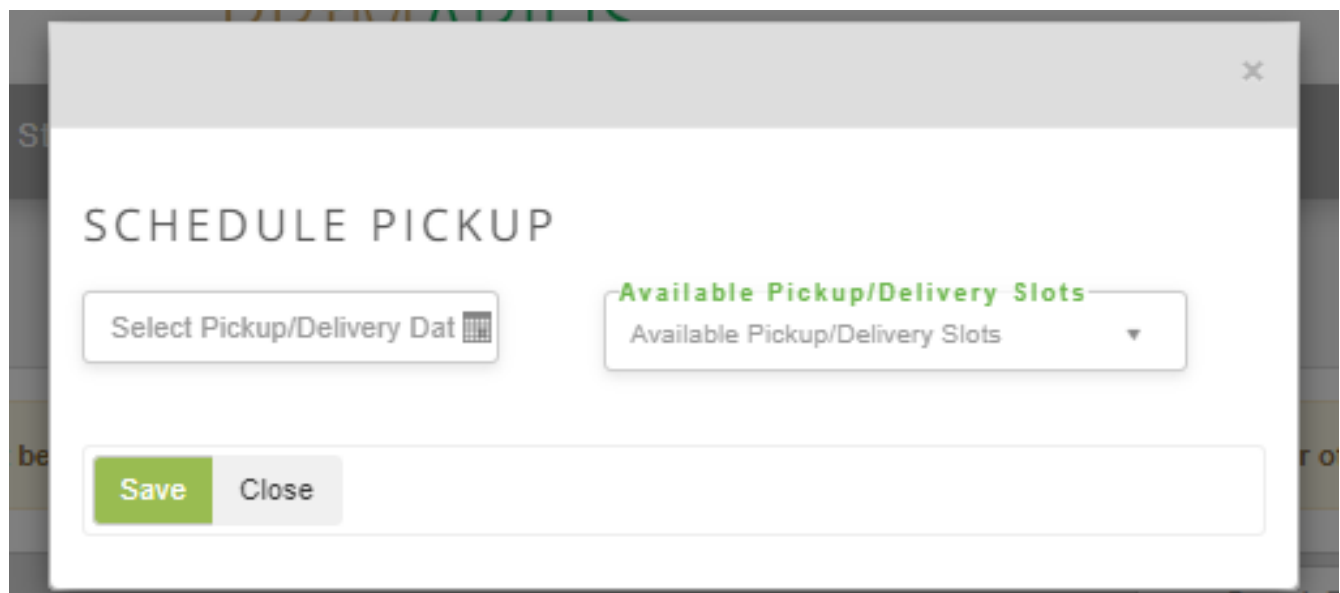
Select “**Shop**,” then “**Shop Online**” on the navigation bar at the top of the screen to begin the ordering process.

**** Once you begin an order, you have 8 hours to complete the check-out process before the order is cancelled. ****



The first step in the ordering process is to select your date and time of pick-up or delivery. **If your agency does not already have a scheduled pick-up or delivery date and time, please call the Programs Department at 610-926-5802 x219 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.

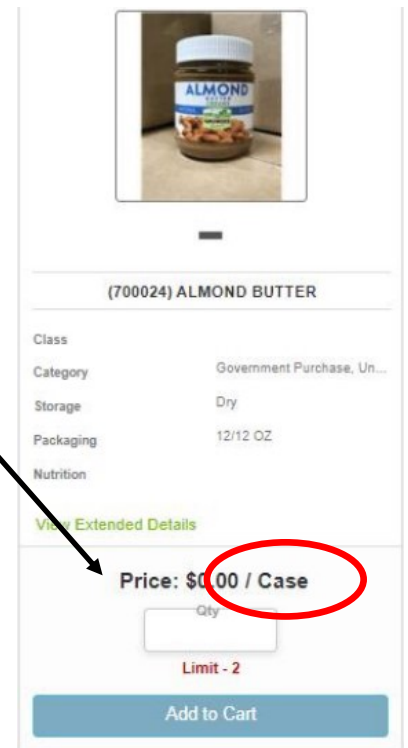
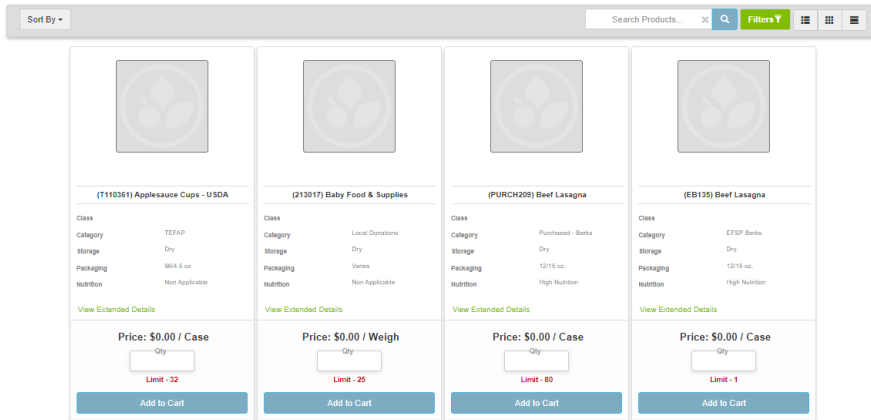


Once you have entered in the Date and Time of your pickup or delivery, please select “Save”. The next screen will bring you to the current inventory list.

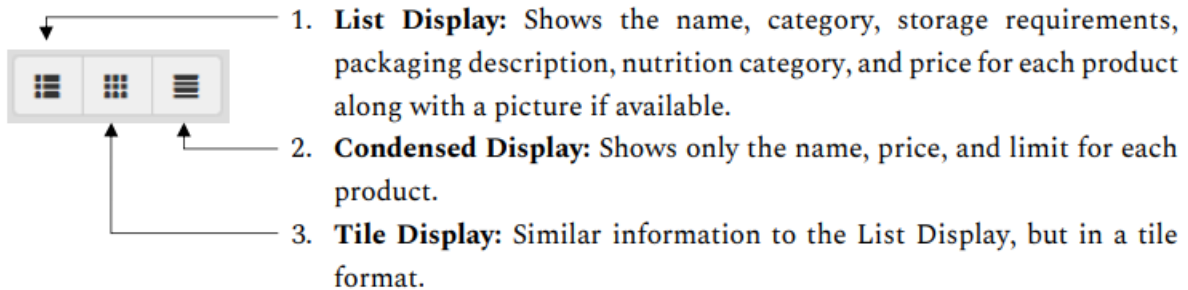
Please Note: If you would like to access a hard copy of our current inventory without placing an order, you can click on “**Print Shopping List**” under “**Shop**” on the navigation bar at the top of the screen.

Navigating the Inventory List

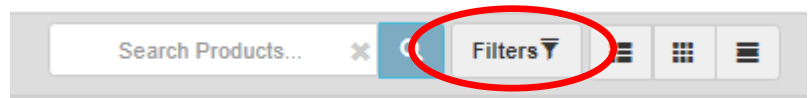
- ⇒ On the current inventory list, you will see several different food products available through the Helping Harvest Food Bank.
- ⇒ The category, storage requirements, packaging and unit information, and nutrition are available to be viewed for each product.
- ⇒ **You can see whether item is by Case or by Weight in the “Price” area**



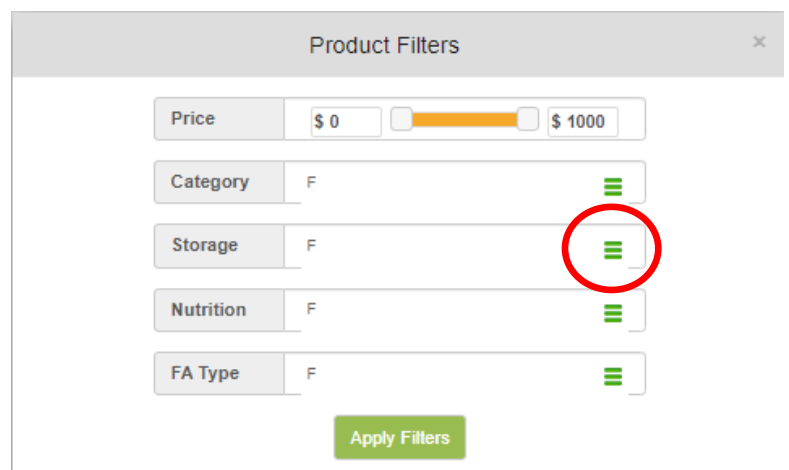
The full catalog of products may be toggled by using the three display icons in the upper righthand corner of the catalog next to the Filter selection box based on one’s own preferences:



⇒ An Agency can sort by **certain types of products** by using the “Filters” feature in the upper right corner of the catalog.



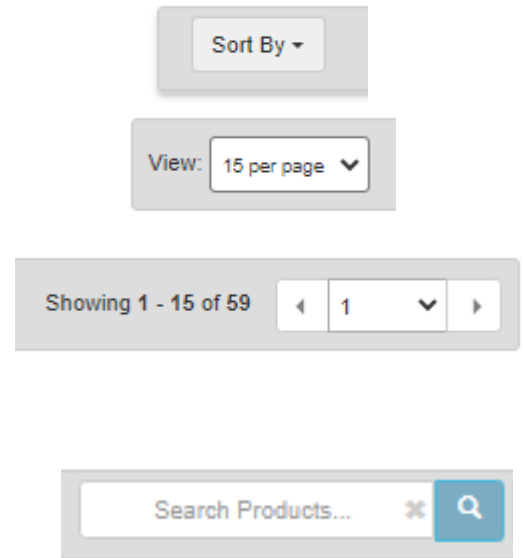
⇒ This feature allows you to filter the products you see based on the **Price, Category, Storage, or Nutrition** designations assigned to each product.





⇒ **To filter by dry, frozen, fresh, or refrigerated, select the green lines to the right of “Storage” and select the storage category you want to see.**

Navigating the Inventory List (continued)

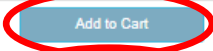
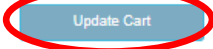
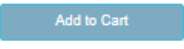
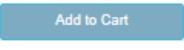
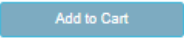
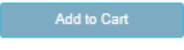
- ⇒ You can select the “Sort By” to have to the products display alphabetically or by price.
- ⇒ At the bottom left of the page there is a View option to change how many products are viewed on the page at a time.
- ⇒ At the bottom right of the page it shows you how many products you are viewing and the total number of products available. You can hit the arrow to go to the next page of products, or you can select the page number using the drop-down box in the middle of the arrows.
- ⇒ You can also search for specific products by using the “Search Products” bar. Enter the product you are looking for, then click the blue magnifying glass button and any products with that name will appear.



Adding Items to Your Cart

- ⇒ To begin the ordering process, add an item to your cart.
- ⇒ To add an item to your cart, input the quantity you wish to have in the Qty field and then click “Add to Cart.”
- ⇒ Once you add the item, the blue button will change from  to .
- ⇒ To delete an item, you must go into your cart and delete it from there (see next section).

** The current order must be submitted by 01/19/2023 08:51 AM or it will be cancelled in order to release the product for other agencies to use **

Item Name	Price	Qty	Limit	Category / Packaging	Action
(L321) Alfredo Sauce	\$0.00 / Case	<input type="text"/>	Limit - 1	Category: Local Donations Packaging: 4/4 lb	
(20414) Apple Slices - Snack Pack	\$0.00 / Case	<input type="text" value="1"/>	Limit - 31	Category: Local Donations Packaging: 100/2 oz.	
(T110361) Applesauce Cups - USDA	\$0.00 / Case	<input type="text"/>	Limit - 32	Category: TEFAP Packaging: 96/4.5 oz	
(L316) Assorted Filled Churros	\$0.00 / Case	<input type="text"/>	Limit - 8	Category: Local Donations Packaging: 100 ct/Bulk	
(L283) Assorted Frozen Meals	\$0.00 / Weigh	<input type="text"/>	Limit - 9	Category: Local Donations Packaging: Varies	
(213015) Assorted Frozen Products	\$0.00 / Weigh	<input type="text"/>	Limit - 1458	Category: Local Donations Packaging: Varies	

- ⇒ After starting the order process, you will have **8 hours to submit the order** before your selections expire and you will have to start the ordering process over again. This is to ensure that the product selections you make are up to date and are not unduly preventing other agencies from having access to those products if your order remains unsubmitted.

Viewing Your Shopping Cart


⇒ To view the items in your cart, click the blue “# Item(s)” link next to the cart icon at the very top of the PWW page.



⇒ To adjust the quantities of any item in your shopping cart, you may either type in the quantity you wish to have or use the up and down arrows within the Qty field. Then click “Update Cart” to confirm the adjustment.

SHOPPING CART

** The current order must be submitted by 05/04/2021 10:51 PM or it will be cancelled in order to release the product for other agencies to use **

Name	Weight	Price	Service Fee	Grants Ap...	Qty	Price Ext	
 (700024) ALMOND BUTTER	18.00	\$0.00	\$0.00	\$0.00	2 <small>Update Cart</small>	\$0.00 ✕	
Totals		Weight 18.00	Quantity 2	Price \$0.00			

Cancel Order
Continue Shopping
Proceed to Checkout

⇒ To remove an item from your cart, you must click the red X at the right side of the row

⇒ To continue adding items to your cart, click the “Continue Shopping” button at the bottom of the screen to return to the current inventory list.

Printing Your Order

⇒ Before checking out, remember to print your order when you are still looking at your cart (you can hit “Ctrl + P to print the screen, or click “File”-> “Print”). If you forget, you can still print your order after you have submitted it by reviewing your submitted order (see “Reviewing Order Status”)

Checking Out

⇒ The final stage of the ordering process is the checkout. Once you have all of the items you require in your cart, click the green “Proceed to Checkout” button on the bottom of your shopping cart.

⇒ To complete your order, please make sure that the information is correct in the Pickup Delivery Date and Agency Contact fields.

CHECKOUT

** The current order must be submitted by 05/04/2021 10:51 PM or it will be cancelled in order to release the product for other agencies to use **

<input type="text" value="Shipping Method: None"/>	<input type="checkbox"/> Is Delivery	<input type="text" value="Agency Contact: Bird, Carolyn"/>	<input type="text" value="Delivery Pickup Notes"/>
<input type="text" value="Pickup Warehouse: Main"/>	<input type="text" value="Pickup Delivery Date: 05/06/2021"/>	<input type="text" value="Agency Address: Pantry at SLO Food Bank - 1180 Kendall"/>	

Submit Order
Reset

Checking Out (continued)

⇒ The *Pickup Delivery Date* is your pickup or pre-assigned delivery day. (Please note, if your pickup delivery date is not selectable, then you may be ordering outside of the 3-5 day window). If you do not have a pre-assigned date and time for delivery, please contact the **Programs Department at 610-926-5802 x219**.

⇒ If your order is a delivery, please check the box next to the “**Is Delivery**” field.

CHECKOUT

** The current order must be submitted by 05/04/2021 10:51 PM or it will be cancelled in order to release the product for other agencies to use **

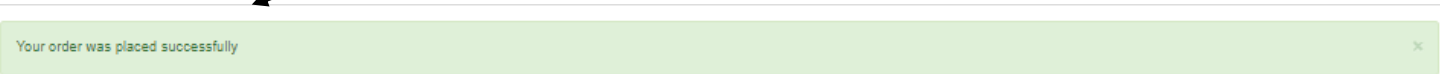
Shipping Method *None*	Is Delivery <input type="checkbox"/>	Agency Contact Bird, Carolyn	Delivery Pickup Notes
Pickup Warehouse Main	Pickup Delivery Date 05/06/2021	Agency Address Pantry at SLO Food Bank - 1180 Kendall	

Submit Order Reset

⇒ If there are any additional notes, comments, or questions you wish to share with the Agency Services Representative, please add those to the “Delivery Pickup Notes” field. This would also be the appropriate place to note if you are unable to select the actual date for your pickup or delivery.

⇒ Once your order and pickup/delivery details are complete, click the “Submit Order” button at the bottom of the screen. After your order is submitted, you will be taken to the Order History page.

⇒ As a confirmation that your order was placed, you will see in a green bar at the top of the screen that says “Your order was placed successfully”



ORDER HISTORY

Orders										
Active Complete										
	Order Ref	Status	Released	Picked	Confirmed	Delivery/Pickup	Order Warehouse	Entry Origin	Shipping Method	
View	126332	Entered				01/20/2023 02:58 PM	Helping Harvest	PWW	**NONE**	
View	126331	Entered				01/20/2023 02:58 PM	Helping Harvest	PWW	**NONE**	
View	126316	Released	01/05/2023			01/11/2023 08:30 AM	Helping Harvest	PWW	**NONE**	
View	126080	Picked	12/28/2022	12/29/2022		01/04/2023 08:30 AM	Helping Harvest	Primarius	**NONE**	

Reviewing Order Status

- ⇒ All active orders made by your agency may be viewed on the Order History page, as shown below. This is also where you can check the status of your recently placed orders, when an order was released, picked, and confirmed, and the scheduled delivery/pickup date and time for a specific order.
- ⇒ You may also **print your order** from this screen by clicking “view” to open your order, then printing the screen (you can hit “Ctrl + P to print the screen, or click “File”-> “Print”).

ORDER HISTORY

Orders		Open AR									
Active		Complete								Export Data	
	Order Ref	Status	Released	Picked	Confirmed	Delivery/Pickup	Order Warehouse	Entry Origin	Shipping Method		
View	509192	DataEntry				06/08/2021 09:30 AM	Main	PWW	Agency Vehicle		
View	509187	Picked	06/04/2021	06/04/2021		06/08/2021 09:30 AM	Main	PWW	Agency Vehicle		

The following is a list of the different **Status** labels for an order:

1. **DataEntry:** Products for an order are actively being selected
2. **Entered:** The order has been submitted to the Food Bank
3. **Reviewed:** The order has been reviewed and accepted by the Food Bank
4. **Released:** The order has been released to the warehouse to be compiled and built
5. **Picked:** The order has been compiled and built
6. **Confirmed:** The order has been picked up by and/or delivered to the Agency Partner

Entering Statistics

Click on the Statistics tab on the navigation bar at the top of the page. As shown below, you can view previous submissions or make new ones. Click the green “Add New Agency Statistics” button in the right-hand corner to create a new submission.

AGENCY STATISTICS

** Statistics can be edited throughout the day of the original submission date **

Active		Inactive								Export Data		Add New Agency Statistics	
	Period Type	Collection Period	Effective Date	Comment	Submitted On								
View	Monthly	March 2021	03/31/2021	Submitted by Agency via Primarius Web Window at 04/05/2021 10:26 AM	04/05/2021								
View	Monthly	April 2021	04/30/2021	Submitted by Agency via Primarius Web Window at 04/22/2021 12:22 PM	04/22/2021								

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 ‘Edit Statistics’ screen (please note the categories are in a different order than they appear on the Monthly Statistic Form).

EDIT STATISTICS (ORIGINAL)

1
Enter General Info
2
Enter Details

Period: November 2022

Statistic Name	Value	Comment
ADULT	0	
CHILDREN	0	
NEW HOUSEHOLD	0	
SENIOR	0	
TOTAL	0	
TOTAL HOUSEHOLD	0	
UNDUPLICATED	0	

Go to page: 1 Show rows: 10 1-7 of 7

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 July

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!

Statistics are automatically saved as you enter them and can be edited throughout the day of the original submission date. If you find any errors in your statistics after they are submitted, please contact the Programs Department at **610-926-5802 x208**.

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 ‘Edit Statistics’ screen (please note the categories are in a different order than they appear on the Monthly Statistic Form).

EDIT STATISTICS (SOUP/SHELTER)

1
Enter General Info
2
Enter Details

Period: December 2022

Statistic Name	Value	Comment
MEALS SERVED TO ADULTS	0	
MEALS SERVED TO CHILDREN	0	
MEALS SERVED TO SENIORS	0	
TOTAL MEALS	0	
UNDUPLICATED SERVED BY MEALS	0	

Go to page: 1 Show rows: 10 1-5 of 5

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!

Statistics are automatically saved as you enter them and can be edited throughout the day of the original submission date. If you find any errors in your statistics after they are submitted, please contact the Programs Department at **610-926-5802 x208**.

Viewing Past Statistics

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

Clicking “View” to the left of the submission will show the statistic report details. If you find any errors in your previously submitted statistics, please contact the Programs Department (x208).

AGENCY STATISTICS

** Statistics can be edited throughout the day of the original submission date **

Active Inactive Export Data Add New Agency Statistics

	Period Type	Collection Period	Effective Date	Comment	Submitted On
Edit	Monthly	November 2022	11/30/2022	Submitted by Agency via Primarius Web Window at 12/28/2022 10:10 AM	12/28/2022
Edit	Monthly	December 2022	12/31/2022	Submitted by Agency via Primarius Web Window at 12/28/2022 10:08 AM	12/28/2022
View	Monthly	June 2022	06/30/2022		06/30/2022
View	Monthly	May 2022	05/31/2022		05/31/2022
View	Monthly	April 2022	04/30/2022		04/30/2022
View	Monthly	March 2022	03/31/2022		03/31/2022
View	Monthly	February 2022	02/28/2022		02/28/2022
View	Monthly	January 2022	01/31/2022		01/31/2022
View	Monthly	December 2021	12/31/2021		12/31/2021
View	Monthly	November 2021	11/30/2021		11/30/2021

Invoices

By clicking on the “My Documents” tab, you will be able to access your agency’s current and past invoices.

Click “Download” to the left of the file to download a PDF of the invoice.

MY DOCUMENTS

	Name	Description	Effective Date
Download	122573.PDF	122573.PDF	08/04/2022
Download	122556.PDF	122556.PDF	07/29/2022
Download	122413.PDF	122413.PDF	07/28/2022
Download	122396.PDF	122396.PDF	07/22/2022
Download	122272.PDF	122272.PDF	07/21/2022
Download	122119.PDF	122119.PDF	07/14/2022
Download	122111.PDF	122111.PDF	07/11/2022
Download	121970.PDF	121970.PDF	07/08/2022
Download	121637.PDF	121637.PDF	06/23/2022
Download	121545.PDF	121545.PDF	06/16/2022

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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 x219) 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!