Gleaners’ Online Ordering System User Manual

Primarius Web Window (PWW)

February 2012
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**Benefits**

- Connects to live data which means that the available quantities are current.
- Able to print a shopping list.
- Able to place your order on line.
- Able to enter your statistics on line.
- Able to check on orders, statements, invoices, grants, and allocations. On many of the tables (such as Statements, Invoices, Orders, Statistics) double left clicking on the line will produce a new window with more details.
- Some of the agency information will also be displayed graphically. *Note: these features will only be available from the start date of the new online ordering system.*
- Each individual has a unique user name and password which not only identifies who has completed which agency process but also increases agency account security.

**Adobe Software**

To view or print many of these items you will need to have installed on your computer the free software called Adobe Reader. You can find this at [http://www.adobe.com](http://www.adobe.com)

**Reminders**

- Use the Logout link in the upper right hand corner to close your Online Web Ordering session.
- When on a particular page, use the Help link in the upper right hand corner to clarify frequently asked questions.
- Your partner relations representative can assist you in answering questions regarding your agency’s contents on the web.
Accessing the On Line Web Ordering System

You will begin the same by going to http://www.gcfb.org

- Partner Online Orders link at the top of the page OR
- Partner Agencies
  - Partner Online Orders

The next window will look a little different. Each person authorized to order food online will need to know:

- The Agency Number
- Their personal username
- Their personal password
The Home Page

From the home page, you can view and directly access your shopping cart by using the ‘Your Cart’ tab. You can also select any of the other tabs to look at agency information. This informational handout will walk through all the tabs to describe what you will see.

Administrator View

Order Entry View
AGENCY INFORMATION

If you click on the My Agency link in the upper right-hand corner, you will see:

Administrator View

Order Entry View

Note the tabs in the lower window pane –

- Agency Info – Administrator & Order Entry Views
- Locations – Administrator & Order Entry Views
- Contacts – Administrator & Order Entry Views
- Hours – Administrator & Order Entry Views
- Open AR – Administrator View
- Service Info – Administrator View

These tab windows will show you what information Gleaners has recorded on your partner agency file.
Locations Tab
The addresses listed are the different addresses that Gleaners has on file for your agency.

Contacts Tab
The contacts listed are the different contacts that Gleaners has on file for your agency.
**Hours Tab**

These are your agency’s business hours that Gleaners has on file.

<table>
<thead>
<tr>
<th>Day</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday</td>
<td>Closed</td>
</tr>
<tr>
<td>Monday</td>
<td>11:00 - 1:00</td>
</tr>
<tr>
<td>Tuesday</td>
<td>11:00 - 1:00</td>
</tr>
<tr>
<td>Wednesday</td>
<td>11:00 - 1:00</td>
</tr>
<tr>
<td>Thursday</td>
<td>11:00 - 1:00</td>
</tr>
<tr>
<td>Friday</td>
<td>Closed</td>
</tr>
<tr>
<td>Saturday</td>
<td>Closed</td>
</tr>
</tbody>
</table>

**Open AR Tab**

Shows *Administrators* if the order:

- Is Open or Closed
- Has been Reviewed by Gleaners
- Has been Picked (selected) by Gleaners
- Has a Balance
Service Info Tab
Displays to Administrators different graphs and charts based on the Partner Agency’s Statistics.
PLACING AN ORDER

The Home page:

**Administrator View**

![Administrator View](image1)

**Order Entry View**

![Order Entry View](image2)

Select the + Order Entry on the right side of the screen to open up the shopping list:

![Shopping List](image3)
Note the three buttons:

- **Print Shopping List**: Select to print a shopping list.
- **Print Cart**: Select to print the items in the cart.
- **View Cart**: Select to view the items within the cart.

The **Search textbox** allows you to type in the product name or the product reference number to search the shopping list for that particular item.

The **Ref (reference)** column contains the item number. Clicking on the product reference number will bring up a new window containing the product details and the product photo (if available).

Place quantity of item in the **Qty Textbox** and either tab or select another **Qty** box by moving the mouse cursor. While the system is placing the item in your cart you will see above the available column.

The **Red X** selection will delete the item quantity from the cart.

The **starred columns (★)** indicate columns that the Shopping List can be sorted on. Clicking on the **underlined word** will sort the column in ascending or descending order. Keep clicking the word until you get the view you want. *Note the small arrow pointing downward indicating an ascending selection (smallest number to largest number or alphabetical).*

```
<table>
<thead>
<tr>
<th>Ref</th>
<th>Product</th>
<th>Storage</th>
<th>Type</th>
<th>Category</th>
<th>Price</th>
<th>VAP</th>
<th>Unit</th>
<th>Weight</th>
<th>Available</th>
<th>Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>71005</td>
<td>NP1 BABY WIPES (3 CS LIMIT)</td>
<td>Dry</td>
<td>01-ASSORTED NON-FOOD ITEMS* (NOT COVERED BY GRANT)</td>
<td>$1.20</td>
<td>$0.00</td>
<td>Case</td>
<td>7</td>
<td>15</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>12123</td>
<td>BAB BABY FOOD</td>
<td>Dry</td>
<td>02-BABY</td>
<td>S/H National</td>
<td>$1.08</td>
<td>$0.00</td>
<td>Case</td>
<td>6</td>
<td>374</td>
<td>Yes</td>
</tr>
</tbody>
</table>
```
Clicking on the **Star (⭐)** in the Type Column creates a drop down list so you can select the category you want.

At the bottom of the list you will see **Apply** so that the column will only show those items or **Reset** to erase previous selections.

Then you will only see what is filtered and the **Star (⭐)** turns **yellow** indicating a filter is on:

Clicking on the **Yellow Star (⭐)*** and selecting **Reset** at the bottom of the column will remove the filter.
On the shopping list, more product information can be found by clicking on the reference number or the camera icon (when available).

A product detail page will show with the product image when available.
Print Shopping List Button

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

A new web window will appear with the following message

Select **Open** button

A printable shopping list will appear:

---

**Shopping List**

**ANTIOCH TABERNACLE**

Date Printed: 1/9/2012 At 2:41 PM

*Item availability may change prior to ordering.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Product</th>
<th>Category</th>
<th>Storage</th>
<th>Type</th>
<th>Weight</th>
<th>Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>10010</td>
<td>CME PIZZA ASSORTED</td>
<td>Local</td>
<td>Frozen</td>
<td>D2- COMPLETED MEAL ENTRIES</td>
<td>30</td>
<td>12760</td>
</tr>
<tr>
<td>10525</td>
<td>BEV COFFEE DECAF (5 CASE LIMIT)</td>
<td>Local</td>
<td>Dry</td>
<td>02- BEVERAGES, NOT COVERED BY GRANT</td>
<td>10</td>
<td>55</td>
</tr>
<tr>
<td>10896</td>
<td>RIC RICE</td>
<td>Local</td>
<td>Dry</td>
<td>24- RICE</td>
<td>22</td>
<td>43</td>
</tr>
<tr>
<td>11069</td>
<td>DAI YOGURT GREK</td>
<td>Local</td>
<td>Refrigerated</td>
<td>07- DAIRY PRODUCTS</td>
<td>13</td>
<td>57</td>
</tr>
<tr>
<td>11262</td>
<td>CER HONEY &amp; OAT BLENDERS (6 CS LIMIT)</td>
<td>S/H Local</td>
<td>Dry</td>
<td>05- CEREAL</td>
<td>17</td>
<td>11</td>
</tr>
<tr>
<td>11387</td>
<td>CER CINNAMON TOASTERS CEREAL (6 5/8 CS LIMIT)</td>
<td>Local</td>
<td>Dry</td>
<td>05- CEREAL</td>
<td>16</td>
<td>59</td>
</tr>
<tr>
<td>11823</td>
<td>CER OATMEAL INSTANT</td>
<td>Local</td>
<td>Dry</td>
<td>05- CEREAL</td>
<td>3</td>
<td>1000</td>
</tr>
<tr>
<td>11963</td>
<td>SNA ANIMAL COOKIES</td>
<td>Local</td>
<td>Dry</td>
<td>COOKIES NOT COVERED BY GRANT</td>
<td>13</td>
<td>22</td>
</tr>
</tbody>
</table>
Print Cart Button

To print a shopping cart, select the **Print Cart** button.

A new web window will appear with the following message

Select **Open** button

A printable cart list will appear:

```
Order#  
Order Placed: 11/10/2006  
Warehouse: ECCA-PU32011  
Delivered/Picked Up: 11/10/2006 At 12:00 AM  
Deliver/Pick Up Location: No Del/Pick Up Location  

<table>
<thead>
<tr>
<th>Product Ref</th>
<th>Product</th>
<th>Category</th>
<th>Quantity</th>
<th>Weight</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No product found.

Totals: 0  
Grants Applied: $0.00  
Payments: $0.00  
Balance: $0.00
```
View Cart Button

The **Shipping/Delivery** information will automatically fill in - like it does on the POL - unless Gleaners is closed on your date. **Be sure to fill in the shipping date and times if it doesn’t auto fill.**  
*The Contact Information will be removed from the live version.*

Select the **Shopping List** button to return to the shopping list.

Select the **Checkout** button to submit your order to Gleaners.
The Checkout Button

After selecting the **Checkout** button, a successful submission will show the following message:

![Checkout Success Message](image)

Clicking on the ‘Click [here](#) for a PDF summary of your order’ will show the following message:

![PDF Download Prompt](image)

Selecting the **Open** button will show the order summary:

![Order Summary](image)
HOME SCREEN WINDOW

HOME - Home Tab

Displays messages from the food bank such as closed dates, recalls, etc. In addition, any relevant links to other web pages are displayed under the Notable Links heading.

Administrator View

Order Entry View

Note that only the Administrators can view the My Docs Tab
HOME - Your Cart Tab

Short cut to what is currently in your shopping cart. This tab window displays the current items in your cart along with basic summary detail. Click the View Cart button to go to the view cart window and either select the Shopping List button to continue the order or the Checkout button to begin submitting the order to Gleaners. If you do not have an order in process, click Order Entry to start a new order.

HOME - Available Batches Tab

(if used) Displays any allocation batches that the food bank has made available. Click the desired batch to view the products that are available.
HOME - Pending Review Tab

(if used) Displays all products that have been accepted on an allocation batch and are awaiting the food bank to process.
Allocations Tab

(If Used) This lists the product batches that are assigned to an agency

Orders Tab

This lists all of the orders for your agency and their current status.

Left clicking on a table row (line) will bring up the order details.
Grants Tab

This lists the grants that have been applied to an agency with amounts used, initial balances, and remaining balances.

Statistics Tab

STATISTICS - Statistics Tab

This shows all the documented statistics that have been reported to Gleaners.

Left clicking on a table row (line) will bring up the statistic report details.

To Enter Statistics:

Select the Enter Statistics button and an enter statistics page will appear:

The format and labels will change on our unique system.

*Note that you can alter the numbers until you select the Submit Statistics button*. After that, if corrections need to be made, contact your agency relations personnel.
STATISTICS – User Defined Tab
(If Used) User Defined information.

<table>
<thead>
<tr>
<th>Stat Date</th>
<th>Meals Served</th>
<th>Males</th>
<th>Females</th>
<th>Total People</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/20/2011</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/30/2011</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>05/31/2011</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/30/2011</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>02/21/2011</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>02/28/2011</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>01/31/2011</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/31/2010</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/30/2010</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/31/2010</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09/30/2010</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/31/2010</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/30/2010</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/30/2010</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
My Docs Tab

MY DOCS – Statements Tab
This window lists your agency’s statements that have been published to view online – for administrators only.

If you click on a file name (for example: Statement for 8-31-2011.PDF), you would see:

![Statement Image]
MY DOCS – Invoices Tab

This window lists the invoices for your agency.