Primarius Web Window
Online Ordering System Training Manual
Welcome to the Food Bank of Iowa’s online ordering system! This ordering system allows users to:

- view up-to-the-minute inventory lists;
- place an order;
- schedule a pick-up;
- receive order confirmation;
- submit monthly reports; and
- access agency invoices and statements.

This manual is designed as a step-by-step training tool to be used by both experienced and new users to the online ordering system. There are several key pieces of information that are needed every time a user logs into this system. We encourage you to write that information into this manual and keep this in a safe and convenient location.

**Agency log in information**, you will need this information every time you wish to log into the system:

- **Web Address**: [www.foodbankiowa.org](http://www.foodbankiowa.org)
- **Agency Ref**: ________________
- **Username**: ________________
- **Password**: ________________
GETTING STARTED – LOGGING IN

Go to www.foodbankiowa.org and locate **Partners and Programs** at the top of the home page.

Hover on **Partners and Programs** and click on **Place Orders and Submit Data**.
The login screen as it will appear after clicking the link is below. Enter your Agency Reference, Username and Password. The Agency Reference must be entered with a two at the beginning of your four digit agency number. Your Username and Password will be emailed to you. Should you forget either your Username or Password, please contact your Regional Partnership Coordinator.

Regional Partnership Coordinator: Allison Koresh ph: 641-682-3403

You will now be logged into your agency home page. Please check the home page when you log on for messages from the Food Bank of Iowa. From this screen, place an order by clicking Order Entry or view the current inventory by clicking Print Shopping List.
SCHEDULING

The shipping option Method and Location will automatically populate based on your master agency file. Do not change the default entries unless you are a delivery agency choosing to pick up in Ottumwa. The system will default to the first available pickup date. To choose another day, click the calendar icon and select your desired pickup date. The date you select should be the day your order will be delivered on, or the day you want to pick up.

After the date has been selected you will use the drop down arrow in Time to choose your delivery or pickup time. In order to continue placing your order, you are required to select a time. **The time you select for delivery is not the time your order will be delivered**. If a pickup date or time is not shown, that time is not available to schedule.
Once your date and time have been selected and you have moved off this page, no changes can be made, unless you cancel and start over. If you need to change or correct your pickup date or time, use the Comment box as noted on page 9 of this manual. After you have scheduled your pickup appointment, click Continue to begin selecting your products. Please note that you can view all of the inventory items on a single page by changing the page size to All.

A variety of sort options are available when viewing the shopping list. Any column with a star can be sorted by double clicking the column name or clicking the star to get a list of the categories, in this example, Type. Once you have selected how you would like to sort, click apply.
Additional product detail information can be found for an inventory item by clicking on the reference number (REF).
The **Search** box can be used to find specific products, such as cereal, in inventory by typing “cereal” in the **Search** box. When you are ready to place your order, simply enter the number of desired cases in the **Qty** box. **USDA Allocations:** The amount of USDA product listed as available is specific to your agency and is based on a calendar month. If the available amount is 10, you can get all 10 at one time or get a partial amount with one order and the remainder with another, within the same calendar month. If you place an order for partial amount, the available amount will be reduced accordingly. USDA allocations will reset on the 1st of each month. USDA allocations do not carry over. As you enter items the total weight and total cost automatically adjusts, giving you an instant snapshot of how much your order is.

![Order screenshot](image)

To finalize your order click the **View Cart** button.
On this page you will be required to enter your name, your telephone number and your email address, NOT the agency information. We want the details of the specific person who placed the order in case we have any questions. Add any instructions specific to your order or notes to change/correct your pickup appointment in the Comments field, for example: Pallet & Wrap, Hand Load, or which delivery you are on. If you find you need to add to this order BEFORE submitting, click Shopping List to return to your order detail. When you are satisfied with your final order, click Checkout to submit.

You must click Checkout or your order will NOT be submitted to the Food Bank of Iowa.
After clicking **Checkout**, the message below will appear. **If you do not receive this message, your order has NOT been submitted to the Food Bank of Iowa for review.**

**ORDER ENTRY ERRORS**

This example shows a quantity placed that exceeded the available amount. There were only 7 available and when 8 was entered, the box became **pink** indicating an error. If the error is not corrected, this message will appear when an attempt is made to move to another page or view your cart. You will not be able to continue until the correction is made.

Use the **red X** to remove items, backspacing will not delete the product from your cart.
Moving too quickly between items when ordering quantities will result in the items not being placed in your cart. Primarius will prompt you to ‘Wait...’ before adding a new item. Be sure to check that the quantity ordered shows up in the Qty column before moving to the next item.

Please remember that the shopping cart empties out 48 hours after an order has been started if it has not been submitted. You may continue to add product and delete product from the cart within 48 hours of starting the order.

If you get the message ‘problem(s) submitting order’ look for the red highlighted boxes to find what you need to fix. For example, this order is missing a phone number.
ORDER CONFIRMATION

Once an online order has been received and reviewed by the Food Bank of Iowa, you will receive a confirmation message to the email address listed as the POL Contact in your agency file. The order has been scheduled and will be available for pickup/delivery on the date in the email message. Bring this email with you when picking up your orders.

Warning: If you do not receive this email message within 24 hours of submitting the order, please call the Food Bank to check that your order has been submitted.
PREVIOUS ORDER SUMMARY

The Orders tab at the top of the page shows all orders that have been placed. A Yes, in the Reviewed column indicates that your order has been received and reviewed by the Food Bank of Iowa.

A ‘No’ in the confirmed column indicates that your order hasn’t been closed out yet, if you can see your most recent order on this screen, it has definitely been submitted in the system. You can click on an open order to view the details of the order.

You can print a copy of the order from the ‘Print order’ button.
ENTERING MONTHLY AGENCY STATISTICS

All monthly agency statistics must be reported through the online ordering system. The Statistics tab is where you will submit your statistics. Current policy requires agency statistics to be up to date. If your agency is missing statistics for the previous month, the system will lock you out of ordering until these are entered.

Click Enter Statistics to begin entering your monthly agency statistics.

The Date must be the last day of the month for which you are reporting; otherwise your statistics will not be recorded. For example, to report August statistics you would enter 8/31/2018. Use calendar button to change the date.

Onsite meals are meals served and consumed onsite at a soup kitchen, shelter, residential facility, day care, senior meal site, rehabilitation center, camp, etc.
Food pantries report the number of pantry households and pantry individuals served for the month.

Complete all three categories only if your agency is multi-service, meaning it has an onsite meal program and a food pantry program, otherwise complete the categories that apply to your agency.

Click Submit Statistics when your monthly entry is complete. If any statistics have been entered incorrectly, please call the Food Bank of Iowa to correct or change them.

Accurate reporting helps us gain better access to funding and grants, as well as ensuring that pantry allocations are adequate.
STATEMENTS AND INVOICES

The My Docs tab has 2 sub-tabs. One contains your monthly statements; the other one contains all invoices.

Double clicking any invoice or statement listed will bring up a copy of that invoice. We do not mail invoices or statements. This option allows agencies to quickly access and print invoices and statements at any time.

When paying your balance, we recommend paying from the statements, as they will show any credits that are on your account, as well as any overdue balances.

Orders are required to be paid within 60 days of the pickup date.

Checks should have the agency reference number and the invoice numbers that you are paying for included.

Sample Invoice: For agency use only, this is not a “confirmation”
<table>
<thead>
<tr>
<th>Product Reference</th>
<th>Description</th>
<th>Storage</th>
<th>Quantity</th>
<th>Weight Unit</th>
<th>Shared Maintenance /Lb</th>
<th>Cost Unit</th>
<th>Cost Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1258</td>
<td>Fruit by the Foot</td>
<td>Dry</td>
<td>1</td>
<td>3</td>
<td>$0.14</td>
<td>$0.42</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>3</td>
<td>$0.42</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>1279</td>
<td>&quot;All Laundry Soap&quot;</td>
<td>Dry</td>
<td>1</td>
<td>21</td>
<td>$0.14</td>
<td>$2.94</td>
<td>$0.00</td>
</tr>
<tr>
<td>602</td>
<td>Lucky Charms - Double Packs</td>
<td>Dry</td>
<td>1</td>
<td>4</td>
<td>$0.14</td>
<td>$0.56</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>2</td>
<td>25</td>
<td>$3.50</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>1182</td>
<td>Fudge Stripe Cookies</td>
<td>Dry</td>
<td>1</td>
<td>6</td>
<td>$0.14</td>
<td>$0.84</td>
<td>$0.00</td>
</tr>
<tr>
<td>850</td>
<td>Oyster Crackers</td>
<td>Dry</td>
<td>1</td>
<td>11</td>
<td>$0.14</td>
<td>$1.54</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>2</td>
<td>17</td>
<td>$2.38</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>1242</td>
<td>Mandarin Oranges</td>
<td>Dry</td>
<td>1</td>
<td>28</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>28</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>638</td>
<td>Cut Green Beans</td>
<td>Dry</td>
<td>1</td>
<td>26</td>
<td>$0.14</td>
<td>$3.64</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>26</td>
<td>$3.64</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Invoice Totals:**

**TOTAL CHARGES:** $9.94

**Amount Owed:** $9.94

Invoice Message:

This food is not to be sold, transferred or bartered for money, other products or services. The items are to be used only for distribution to the ill, the needy and infants (minor children).
## Sample Agency Statement

### Statement

**Period Ending:**
01/31/2018

**Thursday, February 01, 2018**

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**Orders**

<table>
<thead>
<tr>
<th>Reference</th>
<th>Date</th>
<th>Amount</th>
<th>Date</th>
<th>Check #</th>
<th>Discount</th>
<th>Applied</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/04/2018</td>
<td>84105</td>
<td>$34.42</td>
<td>1/23/18</td>
<td>28911</td>
<td>($34.42)</td>
<td>$0.00</td>
</tr>
<tr>
<td>01/29/2018</td>
<td>85289</td>
<td>$90.38</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total Balance:**

<table>
<thead>
<tr>
<th>Current</th>
<th>Over 30</th>
<th>Over 60</th>
<th>Over 90</th>
<th>Over 120</th>
<th>Total Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>$90.38</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$90.38</td>
</tr>
</tbody>
</table>

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**To:**

American Home Finding Daycare

**From:**

Food Bank of Iowa
PO Box 1517
Des Moines IA 50309

**(515) 554-0330**

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**P.O. Box 556**

Davenport, IA 52801
AGENCY INFORMATION

From the main Home page you are able to access information specific to your agency by clicking on My Agency.

Agency Info tab

This is your agency information. It is important to note that the information in these tabs cannot be changed by your agency. The information is imported from the master agency file. Any changes or corrections will need to be communicated to your regional partnership coordinator or by filling out a Partner Agency Update form, located on the Food Bank of Iowa website.
Locations tab

Lists the addresses we have on file for your agency.

Contacts tab

Lists all the contacts on file for your agency.

Hours tab

Lists hours of operation, if these are not accurate, please contact your regional partnership coordinator.
**Open AR (Accounts Receivable) tab**

This shows all of the invoices that still have a balance that needs to be paid.

<table>
<thead>
<tr>
<th>OrderRef</th>
<th>Status</th>
<th>Entered</th>
<th>Delivered/PickedUp</th>
<th>Reviewed?</th>
<th>Picked?</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>66664</td>
<td>Closed</td>
<td>02/26/2018</td>
<td>02/27/2018</td>
<td>Yes</td>
<td>Yes</td>
<td>$42.00</td>
</tr>
<tr>
<td>88528</td>
<td>Closed</td>
<td>04/03/2018</td>
<td>04/03/2018</td>
<td>Yes</td>
<td>Yes</td>
<td>$26.34</td>
</tr>
<tr>
<td>88842</td>
<td>Closed</td>
<td>04/13/2018</td>
<td>04/13/2018</td>
<td>Yes</td>
<td>Yes</td>
<td>$0.14</td>
</tr>
<tr>
<td>89044</td>
<td>Closed</td>
<td>04/16/2018</td>
<td>04/16/2018</td>
<td>Yes</td>
<td>Yes</td>
<td>$99.56</td>
</tr>
<tr>
<td>89336</td>
<td>Closed</td>
<td>04/18/2018</td>
<td>04/18/2018</td>
<td>Yes</td>
<td>Yes</td>
<td>$30.80</td>
</tr>
<tr>
<td>50025</td>
<td>Closed</td>
<td>05/02/2018</td>
<td>05/02/2018</td>
<td>Yes</td>
<td>Yes</td>
<td>$140.84</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$251.58</td>
</tr>
</tbody>
</table>

**Service Info tab**

A great snapshot of your agency’s service with easy to read graphs. This is an excellent tool for reporting to board members, etc. It is also a good tool for fundraising requests.
We hope you will find the online ordering system to be an efficient and effective tool for your agency and should you have any questions or comments, please do not hesitate to contact our office at (515) 564-0330.