# *Primarius Online (POL) User Guide*

*Agency Name: _____ Account #: _____-___*

*Program Coordinator: _____*

*Date of Training: ____/_____/____*

# Content:

# *Online Ordering*

With the online ordering system, you can order from your agency without having to stop by the food bank.

You must know your Agency Reference Number and Password to use the online ordering system.



Type your Agency Account Number and your Password in the respective boxes then click **Login** or press ENTER.

# *Shopping List*

You can view and order products that currently have a quantity available for order using the **Shopping List**.

The **Shopping Lists** displays all products that you are eligible to order. However, you can select which products you want to view in case you are interested in ordering a certain type of product, such as fruits or vegetables.

**Storage**  Select a method of storage, such as dry, canned, refrigerated, etc.

**Type**  Select a type of product, such as household products, utensils, non-food, etc.

**Cat**  Select a food category, such as meat, produce, dairy, etc.

**Sort by**  Select a sort and secondary sort method. Your choices are as follows:
- Storage, then Type
- Type, then Storage
- Storage, then Category
- Category, then Storage
- Type, then Category
- Category, then Type

Click **Submit** to view all products that match the criteria that you set in the **Show** fields.

The options in the **Jump to** list depend on your selection for **Sort by**. For example, you select *Storage, then Type* for **Sort by**. In the **Jump to** list, you can select *Non-foods – Dry* to move automatically to the non-foods-dry products without having to scroll down the screen.

The Shopping List is a table of all products available for order. Basic information is displayed for each product.

**Item**  Displays the product reference number.

**Description**  Displays the name of the product.

**Unit Wt**  Displays the weight, in pounds, of one case of the product.

**Packing**  Displays how the product is individually packaged in a case. For example, a case of green beans could include 24 8 oz. cans of green beans.

**$ per U/M**  Displays the per case cost of the product.

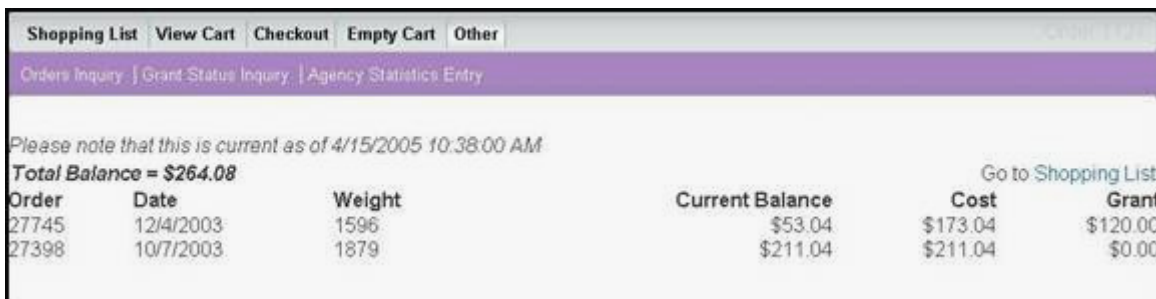**Avail Qty**  Displays the amount of product available to order.

**Order Qty**  Type the amount of product that you want to order. This cannot exceed the **Avail Qty**.

After typing the amount of product you want to order, press ENTER to add the product to your cart. You can also type the amount for each product you want to order then click **Add to Cart** at the bottom of the screen.

# *Orders Inquiry*

Move the pointer over **Other** then click **Orders Inquiry** to view all open orders. An open order is one where either you owe the food bank money or the food bank owes you money. Orders that have been paid in full are considered closed.

> **Note**  The **Orders Inquiry** link is only visible when you pause on the **Other** link.

| Shopping List | View Cart | Checkout | Empty Cart | Other | |
|---|---|---|---|---|---|

Orders Inquiry | Grant Status Inquiry | Agency Statistics Entry

Please note that this is current as of 4/15/2005 10:38:00 AM

Total Balance = $264.08                                                                 Go to Shopping List

| Order | Date | Weight | Current Balance | Cost | Grant |
|---|---|---|---|---|---|
| 27745 | 12/4/2003 | 1596 | $53.04 | $173.04 | $120.00 |
| 27398 | 10/7/2003 | 1879 | $211.04 | $211.04 | $0.00 |

A dollar amount that is encased in parenthesis represents a credit. For example, if the **Total Balance** is *($200)*, then the food bank owes you $200. If the **Total Balance** is just *$200*, then you owe the food bank $200 on that order.

**Total balance**  Displays the amount of money that needs to be paid or credited for all open orders.

**Order**  Displays the order number.

**Date**  Displays the date when the order was submitted.

**Weight**  Displays the total weight of all the products that were on the order. For example, if you purchased 50 lbs of beef and 10 lbs of green beans, then the **Weight** will be *60*.

**Current balance**  Displays the amount of money that needs to be paid or credited for this order only.

**Cost**  Displays what the cost of the order was. This includes the product cost, service fees, etc.

**Grant**  Displays how much grant money is being used to cover the **Cost**.

# *Grant Status Inquiry*

Move the pointer over **Other** then click **Grant Status Inquiry** to view all grants that you have received.

> **Note**  The **Grant Status Inquiry** link is only visible when you pause on the **Other** link.



**Total balance**  Displays the total dollar amount from all the available grants. This is the amount of grant money you have left to spend.

**Grant**  Displays the name of the grant.

**Effective**  Displays the date when the grant can be used.

**Expires**  Displays the date when the grant will no longer be available for use, even if there is a balance left.

**Pooled**  If yes, then other agencies are able to use the money from this grant to purchase product.

**Active**  If yes, then this grant can still be used. A grant that is not active cannot be used to purchase product.

**Current Balance**  Displays the amount of money left on the grant.

**Total**  Displays how much money was on the grant before it was used to purchase any products.

**Used**  Displays how much money has been spent.

You can arrive at the **Total** by adding the **Current Balance** and **Used**.

# *Agency Statistics Entry or Quarterly Service Report*

Move the pointer over **Other** then click **Agency Statistics Entry** to enter information about the people that your agency serves.

> **Note**  The **Agency Statistics Entry**  link is only visible when you pause on the **Other** link.



**Date**  This defaults to the current date.

**People**  Type the number of people, regardless of age, that your agency currently serves.

**Meals**  Type the number of meals that your agency serves.

You can enter the number of people you serve, broken down into age groups.

Under **Quantity**, type the number of adults, children, and seniors that your agency serves. You can type a comment about each age group under the **Comment** column.

**Comment for statistics for this date**  Type any additional comments that concern the statistics as a whole.

After filling in the necessary information, click **Submit** to send the information to the food bank.

# *View Cart*

Click **View Cart** to view all the products that you have currently entered on this order.



**Item**  Displays the product reference number.

**Description**  Displays the name of the product.

**Qty**  Displays the amount of product that you entered in the **Shopping List**. You can change this number if you want to order more or less. To remove the product from the cart, type *0* for the **Qty**. After changing the Qty, click **Update Cart**.

**S Fee/Unit**  Displays the service fee per unit of product.

**Price/Unit**  Displays the product cost per unit of product.

**Total Cost**  Displays the total cost of the product. This number is arrived by calculating **Qty** x (**S Fee/Unit** + **Price/Unit**) = **Total Cost**.

**Wt**  Displays the weight, in pounds, of one case of the product.

**U/M**  Displays how one unit of product is ordered and distributed, such as by case, can, box, jar, etc.

You can add additional product to an order without having to go back to **Shopping List**. Type the product reference number in **Item Ref** then type the amount of product you want to order in **Quantity**. Click **Quick Entry** to add the item to the cart.

**Total**  Displays the total cost and the total weight of all the products that are on the order.

After reviewing the order, click **Checkout – Submit this Order!** to go to the **Checkout** screen.

# *Empty Cart*

To remove all products from an order, click **Empty Cart** then click **Yes**. This will clear all products from the cart, allowing you to start the order over.
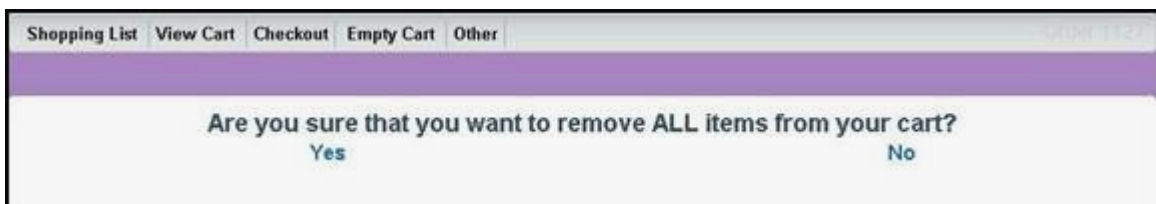


**Note**  If you only want to remove one item, simply change the quantity to *0* in either the **Shopping List** or **View Cart**.

# Checkout



Type or select a pickup or delivery date. Click the calendar icon to open a calendar where you can click on the date you want the products to be delivered or picked up, whatever the case may be.

Select the time, from the list, when you want the food to be delivered or when you expect to pick up the food.

Select either pickup or delivery from the list.

You can type any notes in the **Notes to food bank** box. For example, you can type delivery directions or what door the delivery driver should use when delivering the product.

Review the product information displayed. If it is correct, click **Submit** to send the order to the food bank for processing. After submitting an order, you will receive an e-mail that acknowledges the order has been received and lists the products that you ordered.