

DOGWOOD MICRO DESIGN INC.

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Online Order System

# Food Bank Administrator User Guide

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# Table of Contents

<b>Chapter 1 – System overview</b>	<b>1</b>
<b>Preparing the system for use</b>	<b>1</b>
<b>Chapter 2 – Gaining access to the system</b>	<b>2</b>
<b>Chapter 3 – System settings</b>	<b>3</b>
<b>Chapter 4 – Agency maintenance</b>	<b>4</b>
<b>Uploading agency information</b>	<b>4</b>
<b>Maintaining the agency list</b>	<b>5</b>
<b>Chapter 5 – Signon maintenance</b>	<b>6</b>
<b>Chapter 6 – Inventory maintenance</b>	<b>7</b>
<b>Uploading inventory</b>	<b>7</b>
<b>Maintaining the inventory list</b>	<b>7</b>
<b>Viewing available inventory</b>	<b>8</b>
<b>Maintaining the product category list</b>	<b>8</b>
<b>Chapter 7 – Daily operation of the system</b>	<b>9</b>
<b>Processing orders</b>	<b>9</b>
<b>Keeping your inventory up to date</b>	<b>10</b>

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## System overview

*What the system can do for your food bank, and how to prepare it for use*

The food bank order system is designed to:

- Allow your client agencies to browse your food bank's available inventory
- Allow your client agencies to place an order for product,
- Send an e-mail confirmation to the agency after the order is placed
- Send an e-mail confirmation to the food bank, along with a file attachment that can be loaded into Dogwood Micro Design Inc.'s Food Bank Inventory & Billing System.

## Preparing the system for use

The steps to preparing the online order system for use are:

- Set up your client agency list (see chapter 4)
- Add signon codes for each agency that is to access the system (see chapter 5)
- Set up your inventory list of products available to order (see chapter 6)

## Gaining access to the system

*This chapter covers how to login to the system.*

Access to the system is gained by opening your web browser and navigating to <http://www.FoodBankOrder.com/orders/userlogin.html>. You will be presented with the screen prompting for your signon and password. This information is supplied to you when you sign up for the system with Dogwood Micro Design Inc. Enter the user name and password you were given into the designated fields. Be aware that both codes are **case sensitive** – be sure to enter them just as given.

After entering your signon and password, click the “Login” button or press enter.

If your signon or password is not valid, you will receive a message to that effect, with a link to click to return to the signon screen to try again.

If your signon is accepted, you will see the system main menu. Your name and food bank name will be displayed at the top of the menu for confirmation.

Record your login information here:

Signon: \_\_\_\_\_

Password: \_\_\_\_\_

## System settings

*This chapter covers system wide settings.*

The settings you need to make for your food bank are:

- The e-mail address to be used for orders to be sent to the food bank. When an agency places an order, an order confirmation will be e-mailed to the food bank at this address. If your food bank uses Dogwood Micro Design Inc.'s Food Bank Inventory & Billing System, the e-mail will contain an attachment that can be loaded directly into the system to create the order without typing.
- The e-mail address to be used for questions sent to the food bank. Your client agencies will have a menu option to e-mail questions to the food bank.
- The text that will be included at the end of the order confirmation e-mail sent to your client agency. This text can include any information you want the agency to see with the order. You might include such items as notices that weights and charges are subject to confirmation or change, pickup or delivery notices, or food bank hours.
- Whether your agencies are allowed to place orders for pickup, for delivery, or for both.
- Whether or not your agencies are allowed to request a date and time for pickup or delivery.

From the main menu, click on the “System settings” link. The current settings will be displayed. Make any changes needed to these entries. Click the “Update settings” button when finished. You will receive a confirmation message, along with a link to return to the main menu.

If you change your mind, and do not wish to change the settings, use your browser's “Back” button to return to the menu, or click on the “Click here to cancel” link at the bottom of the page.

## Agency maintenance

*This chapter covers setting up your list of client agencies.*

Each client agency must be set up in the system before they can place orders. A minimum of information is required for each agency:

- Agency ID
- Agency name
- Agency city and state
- Name of contact at the agency
- E-mail address (required to receive order confirmation)

If your food bank uses Dogwood Micro Design Inc.'s Food Bank Inventory & Billing System, you can create a file to upload your agency information to the order site, saving you a great deal of typing. The next section covers how to do that. The section after that covers viewing and changing agencies on file, as well as how to add agencies one at a time.

### Uploading agency information

In the Food Bank Inventory & Billing System, go to the "Inventory" menu, "Orders" sub-menu, and choose "Build web export files." Answer "Y" to "Build the agency listing file." This will create a file named WEBAGCY.TXT in the same folder as your program. (If you are unsure of this folder name, go to the "Help" menu, choose "About" and note the folder name beside the "Installed" header.)

On the online order system agency maintenance menu, choose "Upload agency codes." (If you are not a Food Bank Inventory & Billing system client, this menu option will not be available.) You will be prompted to enter the folder and file name of the file to upload. Use the "Browse" button to navigate to the folder and file built above (WEBAGCY.TXT). Click the "Upload now" button. After a few seconds, you

will see a confirmation message telling you how many agencies were loaded, along with a link to return to the menu.

## **Maintaining the agency list**

From the agency maintenance menu, click “View agency codes.” This will display a list, sorted by agency code, of all agencies on your file. At the end of the list is a link to add a new agency, and a link to return to the main menu. Use your browser’s “Find” feature (usually accessed with Ctrl-F) to find a particular agency code or name in the list.

To edit an agency, click on its name in the list. A new page will be displayed with the agency information. Make any needed changes and click the “Update this entry” button. You will receive a confirmation message that the agency was updated, along with links to return to the agency list or to the main menu.

Two items on this screen deserve further explanation. The first relates to quantity limits. This check box controls whether quantity limits apply to this agency when its representatives place an order. For example, if you allowed another food bank to place orders here, you might not want the quantity limits to apply to them.

The active/inactive choice allows you to suspend an agency from ordering. If any agency is inactive, its representatives will be greeted with a message to that effect when they try to place an order through the system.

Clicking the “Add a new agency” link will display a new page with blanks to enter the required information. All fields on the screen are required. Note that a valid e-mail address is required for the agency to place an order. Click the “Add entry” button to add the agency. You will receive a confirmation message that the agency was added, along with links to return to the agency list or to the main menu.

## Signon maintenance

*This chapter covers setting up signon codes and passwords for your client agencies and for other users at your food bank.*

Once you have set up your agency list, you can set up a signon and password for each agency to use to access the order system. You can also set up access for other users at your food bank who can perform the administrative tasks described in this document.

From the main menu, click on the “Signon code maintenance” link. This will display a list, sorted by last name, of all signons on your file. At the end of the list is a link to add a new signon, and a link to return to the main menu. Use your browser’s “Find” feature (usually accessed with Ctrl-F) to find a particular user ID or name in the list.

To edit an signon, click on it in the list. A new page will be displayed with the signon information. Make any needed changes and click the “Update this entry” button. You will receive a confirmation message that the signon was updated, along with links to return to the signon list or to the main menu.

The active/inactive choice allows you to suspend a signon. If any signon is inactive, it cannot be used to access the order system. A message will be displayed, and the user is asked to contact the food bank for assistance.

Clicking the “Add a new signon” link will display a new page with blanks to enter the required information. All fields on the screen are required. You can designate the user as a food bank administrator or as an agency user. If it is an agency user, you must enter the agency ID. Click the “Add entry” button to add the signon. You will receive a confirmation message that the signon was added, along with links to add another signon or return to the main menu.

## Inventory maintenance

*This chapter covers maintaining the list of available inventory from which your client agencies can order.*

In order to give your client agencies an accurate picture of your available inventory, you need to set up and maintain a list of your product on the order site. If your food bank uses Dogwood Micro Design Inc.'s Food Bank Inventory & Billing System, you can create a file to upload your inventory information to the order site, saving you a great deal of typing. The next section covers how to do that. The section after that covers viewing and changing your inventory, as well as how to add inventory one item at a time.

### Uploading inventory

In the Food Bank Inventory & Billing System, go to the “Inventory” menu, “Orders” sub-menu, and choose “Build web export files.” Answer “Y” to “Build the inventory listing file.” This will create a file named WEBINV.TXT in the same folder as your program. (If you are unsure of this folder name, go to the “Help” menu, choose “About” and note the folder name beside the “Installed” header.)

On the online order system inventory maintenance menu, choose “Upload inventory information.” (If you are not a Food Bank Inventory & Billing system client, this menu option will not be available.) You will be prompted to enter the folder and file name of the file to upload. Use the “Browse” button to navigate to the folder and file built above (WEBINV.TXT). Click the “Upload now” button. After a few seconds, you will see a confirmation message telling you how many inventory items and product category codes were loaded, along with a link to return to the menu.

### Maintaining the inventory list

From the inventory maintenance menu, click “View inventory item codes.” This will display a list, sorted by item code, of all inventory on your file. At the end of the list is a link to add a new inventory item, and a link to return to the main menu. Use your browser’s “Find” feature (usually accessed with Ctrl-F) to find a particular item code or description in the list.

To edit an inventory item, click on its name in the list. A new page will be displayed with the product information. Make any needed changes and click the “Update this entry” button. You will receive a confirmation message that the item was updated, along with links to return to the inventory list or to the main menu.

Two items on this screen deserve further explanation. The first is the quantity limit field. When ordering, an agency will not be allowed to order more than this number of cases on a single order. (As explained in chapter 4, it is possible to set up an agency so that quantity limits do not apply to its orders.)

The active/inactive choice allows you to control whether or not this item is available for orders. If you mark an item as unavailable, it will not be displayed in the available inventory when the agency places an order.

Clicking the “Add a new inventory item” link will display a new page with blanks to enter the required information. All fields on the screen are required. Click the “Add entry” button to add the item. You will receive a confirmation message that the item was added, along with links to return to the inventory list or to the main menu.

## **Viewing available inventory**

From the inventory maintenance menu, click “View inventory available to order.” This will display the same inventory list that your client agencies will see when they access the system. This allows you to verify that the list includes products you want the agencies to see, and excludes those you do not want them to see.

The product is displayed grouped by the product category. Inside each product category, the product description, cases available, case weight, shared maintenance fee per pound, and case quantity limit (if any) are displayed.

## **Maintaining the product category list**

The product category code is used to divide your inventory into categories for display when viewing available inventory or placing orders. If you have uploaded inventory from Dogwood Micro Design Inc.’s Food Bank Inventory & Billing System, you do not have to do anything else to maintain this list. Otherwise, on the inventory maintenance menu, click “View product category codes.” This will display a list, sorted by product category code, of all the product categories on your file. At the end of the list is a link to add a new product category, and a link to return to the main menu. Use your browser’s “Find” feature (usually accessed with Ctrl-F) to find a particular code or description in the list.

To edit an product category, click on its name in the list. A new page will be displayed with the product information. Make any needed changes and click the “Update this entry” button. You will receive a confirmation message that the code was updated, along with links to return to the product category list or to the main menu.

Clicking the “Add a new product category” link will display a new page with blanks to enter the required information. All fields on the screen are required. Click the “Add entry” button to add the item. You will receive a confirmation message that the code was added, along with links to return to the product category list or to the main menu.

If you do not want a inventory items with a particular product category to display to agencies, you can set the status of the product category to “Inactive”. This will prevent inventory items with this product category from displaying on the “View inventory available to order” screen or on the screen the agency sees when they choose “Enter an order” from the agency main menu.

## Daily operation of the system

*This chapter covers what you need to do on a daily basis to use the system*

Daily operation of the system involves two major tasks:

- Processing orders received from the online order system
- Keeping the order system inventory up to date

### Processing orders

When a client agency submits an order, two e-mail messages are created. The first is an order confirmation sent to the agency. This e-mail is sent to the address specified in your agency list. The second e-mail comes to the food bank. This e-mail is sent to the address specified when your account was set up with Dogwood Micro Design Inc.

If your food bank does **NOT** use Dogwood Micro Design Inc.'s Food Bank Inventory & Billing System, you will have to take the information contained in this e-mail and create the order in your food bank's order system.

If your food bank uses Dogwood Micro Design Inc.'s Food Bank Inventory & Billing System, the e-mail will contain an attachment that can be loaded directly into the system to create the order without typing.

When you receive an e-mail with the attachment, save the file into the ORDERS folder under the folder where your food bank system is installed. For example, if your system is installed in C:\FB30, then you would save the attachment in the C:\FB30\ORDERS folder. . (If you are unsure of the folder name where your system is installed, go to the "Help" menu, choose "About" and note the folder name beside the "Installed" header.)

To process the order , go to the "Inventory" menu, "Orders" sub-menu, and choose "Load orders from web site." After you confirm, it will load all the orders saved in the ORDERS folder. You will be given the opportunity to print all the orders loaded when the process completes. After being loaded, the orders are treated the same as orders entered into the system manually.

## Keeping your inventory up to date

If you have orders being entered manually into your order system (whether it is Dogwood Micro Design Inc.'s Food Bank Inventory & Billing System or another system), the inventory levels on the online order system site will gradually become outdated.

If your food bank uses Dogwood Micro Design Inc.'s Food Bank Inventory & Billing System, you can repeat the process described in the "Uploading inventory" section of chapter 6 to refresh the inventory list on the online order site. It is up to you to decide how often this needs to be done.

If your food bank does **NOT** use Dogwood Micro Design Inc.'s Food Bank Inventory & Billing System, you will need to manually update the inventory quantities, using the editing techniques described in the "Maintaining the inventory list" section of chapter 6.