



**OZARKS
FOOD HARVEST**
THE FOOD BANK

Agency Ordering User Guide

June 2021

WELCOME TO PRIMARIUS WEB WINDOW

In 2011, The Food Bank introduced an online ordering system known as Primarius Online or POL. It was something unlike anything we had ever done and while it was not without challenges, it was a vast improvement from the old method of ordering which required agencies to fax orders to The Food Bank within 24 hrs.

The newest version, Primarius Web Window or PWW puts your agency's information at your fingertips and makes it more convenient for you to access basic information about your agency. Benefits which are available to view on PWW include:

- agency contact information
- current hours of operation
- graphs of information reflecting agency's statistics
- previous orders placed
- account balances
- invoices
- statements

The purpose of this user guide is to help you navigate the online system with ease. The following information is a visual walk-thru of all the features of PWW, as well as the online ordering process. If there are any questions while you are going through the ordering process, please feel free to contact us so we can assist you.

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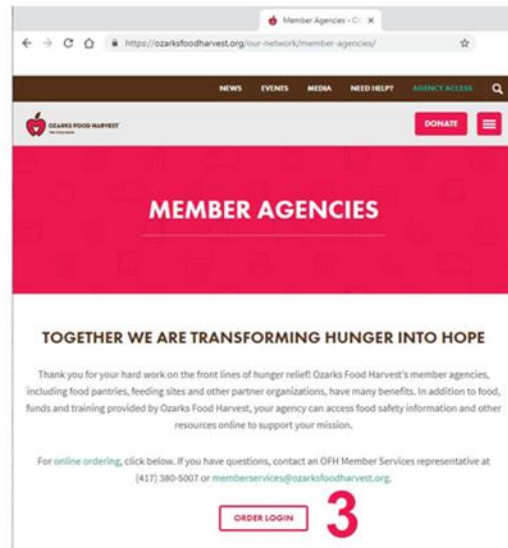
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ONLINE ORDERING-log in



4

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Login

Agency Ref:

Username:

Password:

Login

V02.01.00.0047

4 Log in using your agency credentials.

Agency Ref: or Agency Id usually starts with a P or a C or a B

Username: enter Agency Ref again

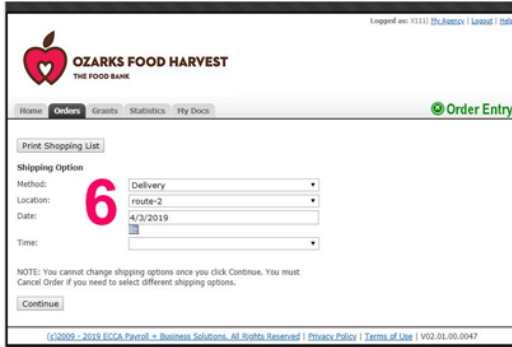
Password: enter your password, remember it must be in UPPERCASE, no spaces



ONLINE ORDERING delivery or pick up

FOR DELIVERY:

Agencies that are approved for delivery are assigned delivery days. In order to receive your order on the assigned delivery day, you must place your order on the day that is one week before your delivery.

The screenshot shows the 'Order Entry' page for Ozarks Food Harvest. A large red number '6' is overlaid on the left side of the form. The form includes a 'Print Shipping List' button, a 'Shipping Option' section with a 'Method' dropdown set to 'Delivery', a 'Location' dropdown set to 'route-2', a 'Date' field set to '4/3/2019', and a 'Time' dropdown. A note at the bottom states: 'NOTE: You cannot change shipping options once you click Continue. You must Cancel Order if you need to select different shipping options.' Below the note is a 'Continue' button. The footer contains copyright information: '(c)2009 - 2019 ECCA Payroll - Business Solutions. All Rights Reserved | Privacy Policy | Terms of Use | V02.01.00.0047'.

6 Enter your assigned delivery information.

METHOD: Delivery

LOCATION: Route number. This will already be set depending on truck availability.

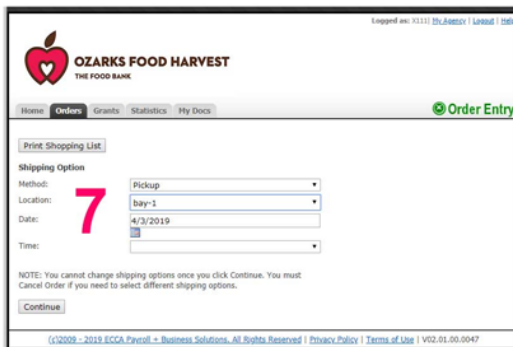
DATE: MUST BE CHANGED to your actual DELIVERY DATE~

TIME: A time must be selected but it will not affect the actual time of your delivery.

Once all of the fields are filled in, select Continue

FOR PICKUP:

All agencies are eligible to order and pick up at The Food Bank. Orders must be placed 2 to 5 business days before the desired pick up.

The screenshot shows the 'Order Entry' page for Ozarks Food Harvest. A large red number '7' is overlaid on the left side of the form. The form includes a 'Print Shipping List' button, a 'Shipping Option' section with a 'Method' dropdown set to 'Pickup', a 'Location' dropdown set to 'bay-1', a 'Date' field set to '4/3/2019', and a 'Time' dropdown. A note at the bottom states: 'NOTE: You cannot change shipping options once you click Continue. You must Cancel Order if you need to select different shipping options.' Below the note is a 'Continue' button. The footer contains copyright information: '(c)2009 - 2019 ECCA Payroll - Business Solutions. All Rights Reserved | Privacy Policy | Terms of Use | V02.01.00.0047'.

7 Enter your order pick up information.

METHOD: Pickup

LOCATION: bay-1


DATE: the system will default to the first available pick up date. **CHANGE THE DATE to your actual PICKUP DATE~**

TIME: Choose your pick up time. If the time is not shown, that time is not available

Once all of the fields are filled in, select Continue

ONLINE ORDERING menu

Logged as: X111 | [My Agency](#) | [Logout](#) | [Help](#)



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Amount of time to complete order

↓

[Home](#) | **[Orders](#)** | [Grants](#) | [Statistics](#) | [My Docs](#)

✕ Order Entry

You have 1 hours 59 minutes as of 4/1/2019 10:42:20 AM before your order is canceled.

Order Ref #

Item Count: Total Weight: Purchase Cost: Service Fees: Total Cost:

☐ Free Food Only


Column Sorting: **Multi** Page size: 20 ▼

| Ref | Product | ★ Storage | Packing | ★ Type | ★ Category ▲ | Price | Unit | Weight | Available | Qty | Del |
|-----------------------|--|-----------|-----------------|------------------------|-----------------|--------|------|--------|-----------|--------------------------------|---|
| 9861 | Pillsbury Funfetti Orange Vanilla Frosting | DRY | 8/15.6 oz Pkg. | 08-DESSERTS | A DONATED LOCAL | \$1.08 | CASE | 9 | 99 | <input type="text" value="3"/> | ✕ |
| 10344 | Granby Farms Cream Of Mushroom Soup | DRY | 12/22 oz Ctn. | 06-MEALS/ENTREES/SOUPS | A DONATED LOCAL | \$2.28 | CASE | 19 | 123 | <input type="text"/> | ✕ |
| 10957 | Mission Hearty Grains Flour Tortilla | FROZEN | 6/12ct | 04-BREAD AND BAKERY | A DONATED LOCAL | \$2.16 | CASE | 18 | 6 | <input type="text"/> | ✕ |
| 10965 | All Sport Hydration Drink Assorted Flavors | DRY | 24/20oz bottles | 03-BEVERAGES | A DONATED LOCAL | \$4.08 | CASE | 34 | 70 | <input type="text"/> | ✕ |
| 10978 | Town House Pita Crackers Tomato&Carmelized Onion | DRY | 12/9.5oz boxes | 25-SNACK FOOD/COOKIES | A DONATED LOCAL | \$1.08 | CASE | 9 | 255 | <input type="text"/> | ✕ |
| 10984 | Keebler Original Elfin Crackers | DRY | 60/2.12oz pkg | 25-SNACK FOOD/COOKIES | A DONATED LOCAL | \$1.20 | CASE | 10 | 81 | <input type="text"/> | ✕ |
| 11044 | Pretzella Pretzel Burger Buns | FROZEN | 12/12oz | 04-BREAD AND BAKERY | A DONATED LOCAL | \$1.44 | CASE | 12 | 37 | <input type="text"/> | ✕ |
| 11046 | Heinz Homestyle Turkey Gravy | DRY | 12/12oz jars | 26-CONDIMENTS | A DONATED LOCAL | \$1.80 | CASE | 15 | 1479 | <input type="text"/> | ✕ |

Note that the shopping list is multiple pages. → < Prev **1** 2 3 4 5 6 7 Next > | Page 1 of 7

- 8 On the shopping list, click the Ref number to see the product details. If there is a camera icon a picture of the product is available.
- 9 Select the items you wish to order by placing a quantity in the box. If you make an error, click the ✕ to remove the quantity.
- 10 Click the View Cart at the bottom of the screen to review your order or when you are ready to continue to Checkout.

ONLINE ORDERING checkout



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Home **Orders** Grants Statistics My Docs

Order Entry

Order Ref #78898 You have 1 hours 39 minutes as of 4/1/2019 11:47:51 AM before your order is canceled.

Contact Information

Name:

Phone Number:

E-mail Address:

Comment:

Shipping/Delivery

Method: Delivery

Location: route-2

Date: 4/3/2019

Time: 1:00 PM

Order Status: Entry NOT complete, Must Check Out

Shopping List **Checkout**

Item Count: 1 Total Weight: 102 Purchase Cost: \$0.00 Service Fees: \$12.24 Total Cost: \$12.24

| Ref | Product | Storage | Type | Weight | Category | Price | Unit Measure | Available | Qty | Del |
|-------|--|---------|--------------|--------|---------------|--------|--------------|-----------|-----|-----|
| 10965 | All Sport Hydration Drink Assorted Flavors | DRY | 03-BEVERAGES | 34 | DONATED LOCAL | \$4.08 | CASE | 65 | 3 | ✗ |

11 In order to complete the order, fill out your name, phone number and email address. In the Comments box, request the **Assorted Categories, quantity and type**. See below.

FOR EXAMPLE: 3 boxes Frozen, 1 tote of Bakery, 5 boxes Dry

12 You can review the items that you have placed in your cart at any time by selecting View Cart. If you aren't ready to Checkout, return to the shopping list by clicking Shopping List. Once you have completed all changes to your cart and filled out the required information, click **Checkout** at the bottom of the screen. You will receive a message that says. Thank-you **Your order was successfully submitted**. There is also an option to print a PDF of your order. After your order is submitted, OFH staff will review and send a confirmation email usually within 48 hours. Concerns or questions about your order? Call Member Services 1-417-380-5007



TOTE

BOX=
Banana BOX

PALLET
30 banana boxes stacked 3x5x2

Assorted Categories

request these items in the COMMENT box when ordering

- Bakery (box or tote)
- Produce (box or pallet)
- Eggs (box or pallet)
- Dairy (box or pallet)
- Refrigerated (box or pallet)
- Frozen (box or pallet)
- Frozen Meat (box or pallet)
- Dry (box or pallet)
- Cereal (pallet)
- Snacks (pallet)
- Candy (box or pallet)
- Soda (tote)
- Baby Food (box)
- Shelf-Stable Juice (tote) OR
- Refrigerated Juice (box or pallet)
- Water (tote) *could be bottles or gallons*
- Paper Products (box)
- Diapers (box)
- Health & Beauty (box)
- Cleaning Supplies (box)
- Charcoal (pallet)

We cannot guarantee assorted boxes will be available at the time of delivery or pick up, as the boxes are based on donations. Requests for individual items within the assorted boxes cannot be filled.

PANTRY STATISTICS

begin by clicking the Statistics tab then click on the Enter Statistics button at the bottom of the screen



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Home Orders Grants **Statistics** My Docs

Order Entry

Enter Statistics

1 Effective Date: Month: Year:
Meals: People: **3**
Comments: **4**

| Category | Quantity | Comment |
|------------------------------------|----------------------|-------------------------------|
| Congregate: 1 Breakfast | <input type="text"/> | <input type="text"/> |
| Congregate: 2 Lunch | <input type="text"/> | <input type="text"/> |
| Congregate: 3 Dinner | <input type="text"/> | <input type="text"/> |
| Congregate: 4 Snack | <input type="text"/> | <input type="text"/> |
| Congregate: 5 Total Meals + Snacks | <input type="text"/> | <input type="text"/> |
| 2 Pantry: 0 to 18 | <input type="text"/> | 4 <input type="text"/> |
| Pantry: 19 to 59 | <input type="text"/> | <input type="text"/> |
| Pantry: 60+ | <input type="text"/> | <input type="text"/> |
| Pantry: a Total Individuals Served | <input type="text"/> | <input type="text"/> |
| Pantry: b Total Families Served | <input type="text"/> | <input type="text"/> |
| Pantry: c Food Stamps | <input type="text"/> | <input type="text"/> |

5

- 1.** Select the correct Month and Year from the drop down boxes on the top of the screen.
- 2.** Enter amount of each age group: Pantry: 0 to 18, Pantry: 19 to 59, Pantry: 60+
Pantry: a Total Individuals Served (total of all age groups)
Pantry: b Total Families Served
Pantry: c Food Stamps
- 3.** Enter the same number as “Pantry: a Total Individuals Served” to the PEOPLE category at the top of the page.
- 4.** Any comments regarding the statistics can be entered in the comment boxes.
- 5.** When you are finished entering statistics, click the Submit Statistics button at the bottom.

FEEDING SITE STATISTICS

begin by clicking the Statistics tab then click on the Enter Statistics button at the bottom of the screen



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Home Orders Grants **Statistics** My Docs

 **Order Entry**

Enter Statistics

1 Effective Date: Month: Year:
Meals: **3** People:
Comments: **4**

| Category | Quantity | Comment |
|------------------------------------|----------------------|-------------------------------|
| 2 Congregate: 1 Breakfast | <input type="text"/> | 4 <input type="text"/> |
| Congregate: 2 Lunch | <input type="text"/> | <input type="text"/> |
| Congregate: 3 Dinner | <input type="text"/> | <input type="text"/> |
| Congregate: 4 Snack | <input type="text"/> | <input type="text"/> |
| Congregate: 5 Total Meals + Snacks | <input type="text"/> | <input type="text"/> |
| Pantry: 0 to 18 | <input type="text"/> | <input type="text"/> |
| Pantry: 19 to 59 | <input type="text"/> | <input type="text"/> |
| Pantry: 60+ | <input type="text"/> | <input type="text"/> |
| Pantry: a Total Individuals Served | <input type="text"/> | <input type="text"/> |
| Pantry: b Total Families Served | <input type="text"/> | <input type="text"/> |
| Pantry: c Food Stamps | <input type="text"/> | <input type="text"/> |

5

- 1.** Select the correct Month and Year from the drop down boxes on the top of the screen.
- 2.** Enter number of each meal served: Congregate: 1 Breakfast, Congregate: 2 Lunch, Congregate: 3 Dinner, Congregate: 4 Snack, Congregate: 5 Total Meals + Snacks
ATTENTION SENIOR CENTERS: If you send meals home or provide homebound meals please record the number of those meals in "Congregate: 3 Dinner" and add them in to the total meals.
- 3.** Enter the same number as "Congregate: 5 Total Meals + Snacks" to the MEALS category at the top of the page.
- 4.** Any comments regarding the statistics can be entered in the comment boxes.
- 5.** When you are finished entering statistics, click the Submit Statistics button at the bottom.

ORDERS

Click on **Orders** tab to see the orders for your organization

Orders

Search: Search

Page size: 20 ▼

| Order | Status | Entered | ▲ Del/Pickup | Method | Reviewed? | Released | Picked | Confirmed? | Location |
|-------|--------|------------|--------------|---|-----------|------------|------------|------------|----------|
| 7342 | Open | 09/25/2018 | 09/25/2018 | delivery trlr no ____ tmp ____ tme ____ | Yes | 09/10/2018 | | No | route-2 |
| 7502 | Open | 09/18/2018 | 09/18/2018 | Pickup | Yes | 09/13/2018 | | No | bay-1 |
| 7251 | Closed | 09/13/2018 | 09/13/2018 | Delivery | Yes | 09/07/2018 | 09/12/2018 | Yes | route-3 |
| 7462 | Closed | 09/12/2018 | 09/12/2018 | ***NONE** | Yes | 09/12/2018 | 09/12/2018 | Yes | route-2 |
| 7456 | Closed | 09/12/2018 | 09/12/2018 | delivery trlr no ____ tmp ____ tme ____ | Yes | 09/12/2018 | 09/12/2018 | Yes | route-2 |

Order - A number assigned to the order. This number will also appear in the **My Docs Invoices** tab.

Status - In the ordering process, after items are selected, the "CHECKOUT" button submits the order to OFH. After being submitted, the order is reviewed and a confirmation email is sent to the agency. The order status appears as open until the orders are confirmed.

Entered and Del/Pickup - Date of the delivery or pickup.

Method - shows an order as Delivery, Pickup or NONE. "None" usually refers to a Retail Pickup order that is credited to the account.

Reviewed - In the ordering process, after an order is submitted, it is reviewed by OFH staff. No other orders can be placed until the review is done. Once an order is reviewed it appears as "released". During work hours, orders are reviewed several times throughout the day.

Picked - In the ordering process, once the order is reviewed, it is sent to the warehouse staff who then select and stage the items ordered. Orders are picked throughout the week, depending on the date of delivery or pickup.

Confirmed - In the ordering process an order is not confirmed until it has been picked up by or delivered to the agency. Confirmations happen at the end of the pickup or delivery day. Once the orders are confirmed, it appears as closed status and will be listed in the **Invoices** of **My Docs**. Never try to pay for an order until it is closed.

MY DOCS

Click on **My Docs** tab to see **Statements** and **Invoices** for your organization. Clicking on the blue link will open the document or download it to your computer, depending on your internet browser.



Statements

Ozarks Food Harvest's Documents

statement Invoices

Statements

Page size: 20 ▼

| File | Date Added |
|--|------------|
| Statement for 6-1-2016.PDF | 06/01/2016 |
| Statement for 5-2-2016.PDF | 05/02/2016 |



Invoices

Ozarks Food Harvest's Documents

Statements **Invoices**

Invoices

Search:

Search

Page
size:
20 ▼

| File | Order Ref | Date Added |
|---------------------------|-----------|------------|
| 70567.PDF | 70567 | 08/14/2018 |
| 33643.PDF | 33643 | 10/15/2014 |
| 29742.PDF | 29742 | 03/31/2014 |
| 13434.PDF | 13434 | 01/31/2012 |

MY AGENCY

Click on **My Agency**, top right of any page then click through the tabs to see the information that we have on file for your organization.
Please email corrections to memberservices@ozarksfoodharvest.org,
(corrections can't be made over the phone)

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[Order Entry](#)

Home

[Home](#) | [Your Cart](#)

[Print Shopping List](#)

Welcome to the Ozarks Food Harvest Online Ordering System.

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Ozarks Food Harvest

[Agency Info](#) | [Locations](#) | [Contacts](#) | [Hours](#) | [Open AR](#) | [Service Info](#)

Contact:

Address:

Phone:

Email:

Last Monitored:

Mary Zumwalt

2810 N. Cedarbrook
Springfield, MO 65802

(417)865-3411

mzumwalt@ozarksfoodharvest.org

1/1/0001

Agency Size: **NONE**

PantrySize: **NONE**

OnSite Size: **NONE**

Inactive? No

Suspended? No

Serve Onsite? Yes

Serve Offsite? Yes

Balance: \$0.00

Last Paid: 3/27/2019

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Ozarks Food Harvest

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Addresses

| Type | Name | Address | Address 2 | City | State | Zip |
|---------|---------------------|-------------------------|-----------|-------------|-------|-------|
| Ship To | Ozarks Food Harvest | 2810 N. Cedarbrook Ave. | | Springfield | MO | 65804 |
| Bill To | Ozarks Food Harvest | P.O. Box 5746 | | Springfield | MO | 65801 |

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Contacts

| Type | Name | Phone | Ext. | E-mail | Authorized? | Can Pickup? | Can Order? | Food Safety Cert? | Food Safety Cert |
|--------------------|--------------|--------------|------|-------------------------------|-------------|-------------|------------|-------------------|------------------|
| POL Order | Tessy Tester | 417-333-4444 | cell | ttester@ozarksfoodharvest.org | Yes | Yes | Yes | Yes | 05/22/2022 |
| Executive Director | Test Tester | 417-888-6666 | | | Yes | Yes | Yes | No | |

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Ozarks Food Harvest

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Hours of Operation

| Day | Hours |
|-----------|----------|
| Sunday | Closed |
| Monday | 8 - 4:30 |
| Tuesday | 8 - 4:30 |
| Wednesday | 8 - 4:30 |
| Thursday | 8 - 4:30 |
| Friday | 8 - 11 |
| Saturday | Closed |

Hours Comments:

closed to shoppers on the last three days of the month during inventory

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Open Account Receivables

| OrderRef | Status | A Entered | Delivered/Pickedup | Reviewed? | Picked? | Balance |
|----------|--------|------------|--------------------|-----------|---------|-------------|
| 77949 | Closed | 03/14/2019 | 03/14/2019 | Yes | Yes | \$3,362.52 |
| 78068 | Closed | 03/21/2019 | 03/21/2019 | Yes | Yes | \$1,830.91 |
| 78672 | Closed | 04/01/2019 | 04/01/2019 | Yes | Yes | \$4,869.35 |
| | | | | | | \$10,062.78 |

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Ozarks Food Harvest

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Total Pounds Distributed

Pounds Distributed by Category (YTD)

Pounds Distributed

Total Meals Served Per Year

Total People Helped Per Year

Community Service

TROUBLESHOOTING ERROR MESSAGES

Please enter current statistics before ordering.

Statistics must be kept up to date in order to be able to order. Click on the Statistics tab and enter any monthly statistics that are needed in order to bring your account up to date. Statistics are due by the fifth of the following month.

Your agency is suspended, you may not order.

Agencies are suspended when some type of document or action needs to be completed. The reason for suspension is also stated in this error message.

Login failed. Incorrect username and /or password.

Format for entering your agency credentials

Agency Ref: or Agency Id (starts with a P or a C or a B)

Username: enter Agency Ref again

Password: enter your password, remember it must be in UPPERCASE, no spaces.

We can verify that you are using the correct credentials over the phone but Agency Ref and Password information **cannot be given over the phone**. To get that information, check within your organization or email memberservices@ozarksfoodharvest.org.

Problem(s) submitting order. Date must be at least (date) but no later than (date).

You are attempting to make an appointment for a date that is not in the correct time frame. Also be sure and use the calendar graphic to enter the date in the correct format.

For Delivery: order on the day that is one week before your delivery day.

For Pick Up: order 2 to 5 business days before your desired appointment.

You are over your credit limit by \$ dollar amount! Please reduce your order.

Each agency has a credit limit that is based on a history of ordering. A current balance on the account could limit your order, make sure payments are up to date. If you find that your credit limit is set too low, call Member Services to discuss if it might be temporarily adjusted.

FREQUENTLY ASKED QUESTIONS

Q. When can I order?

A. Online ordering is available 24 hours a day, 7 days a week, even when the Food Bank is closed.

For Delivery: order on the day that is one week before your delivery day.

For Pick Up: order 2 to 5 business days before your desired appointment.

Q. What if I can't place my delivery order on the required day?

A. Remember online ordering can be done from anywhere. If you can't place your order for delivery on the day that is one week before, we can still accept your order the following day, as long as it is in by noon!

Q. Appointments are for 30 minutes. Can I arrive at any time?

A. You should arrive on time at the beginning of your appointment time. In order for us to stay on schedule, we must refuse service if you arrive more than 10 minutes late. Your entire order will need to be loaded into your vehicle during your 30 minute appointment.

Q. Can I print out the menu so that I can go over it before I start my order?

A. Yes, you can print the menu by clicking on the Print Shopping List button on the home page or on the Order Entry page. Keep in mind that the menu is constantly updating and the paper copy that you print will only be accurate for a short time.

