



## Food Reservoir P2 Training Manual

Welcome to the HACAP Food Reservoir's online ordering system! This ordering system allows users to:

- view up-to-the-minute inventory lists
- place an order
- schedule a pick-up/delivery
- receive order confirmation
- submit monthly reports
- run reports

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.

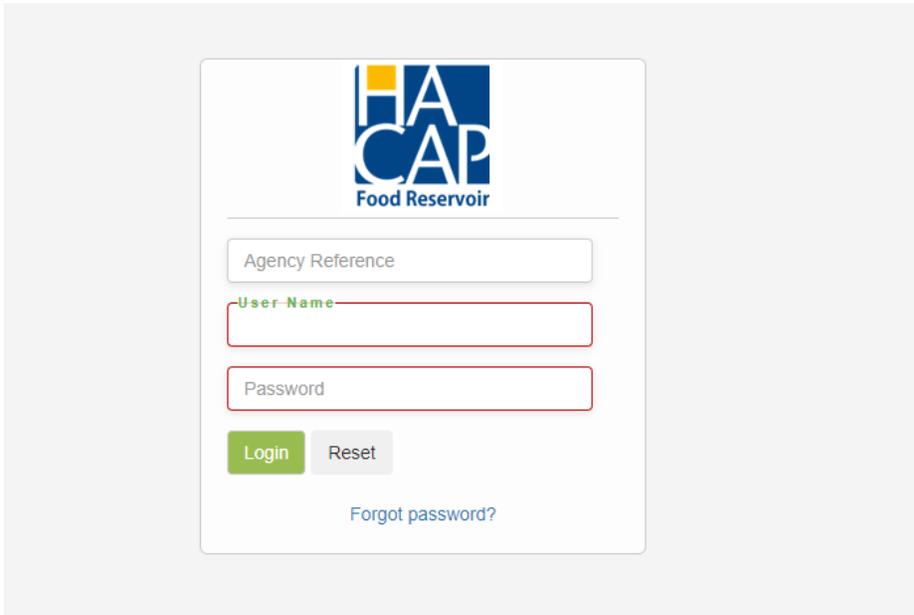
3 additional login credentials can be requested per agency. Please reach out to your Coordinator to add additional contacts to your account.

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

- **Web Address:** [www.hacap.org](http://www.hacap.org)
- **Agency Ref:**
- **Username:**
- **Password:**

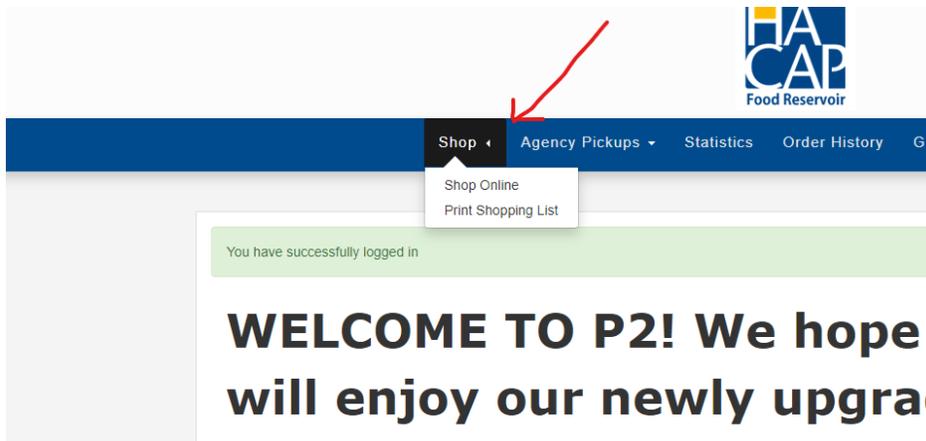
### **GETTING STARTED – LOGGING IN**

Go to [www.hacap.org](http://www.hacap.org) and click on the “Partner Login” link on the homepage which will take you to the login screen. An easy way to access the ordering system is to make a shortcut to the site on your desktop.



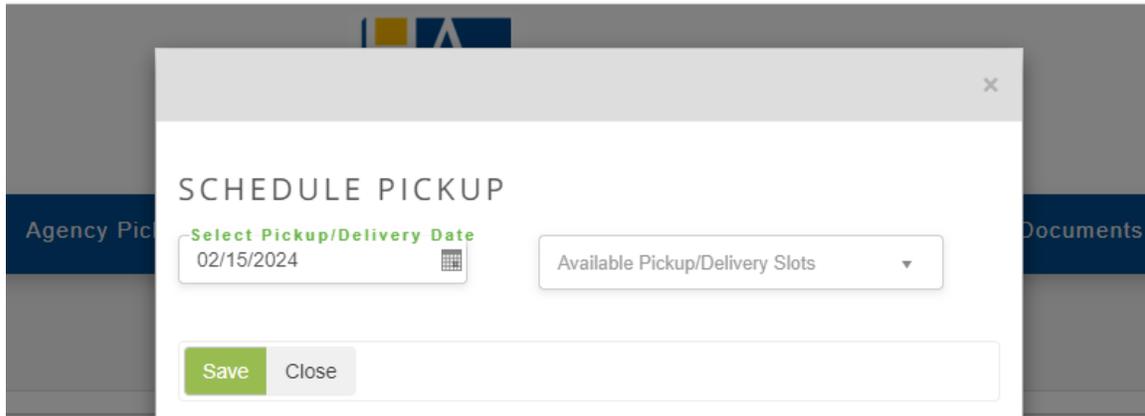
The login screen as it will appear after clicking the link. Enter your **Agency Reference**, **Username** and **Password**. Should you forget either your **Username** or **Password**, please click on the reset button to reset your own password. If you have problems resetting your password, contact your Regional Partnership Coordinator (RPC).

You will now be logged into your agency home page. Please check the home page when you log on for messages from the HACAP Food Reservoir.



Click the shop button at the top of the page, and select shop online to begin your order.

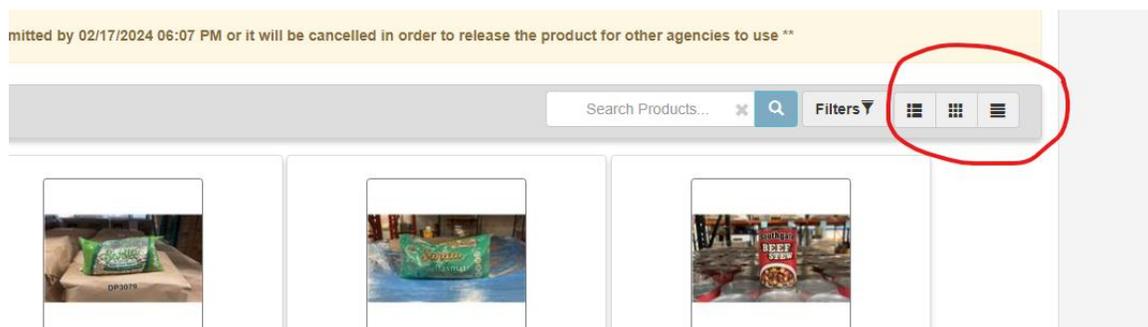
## SCHEDULING



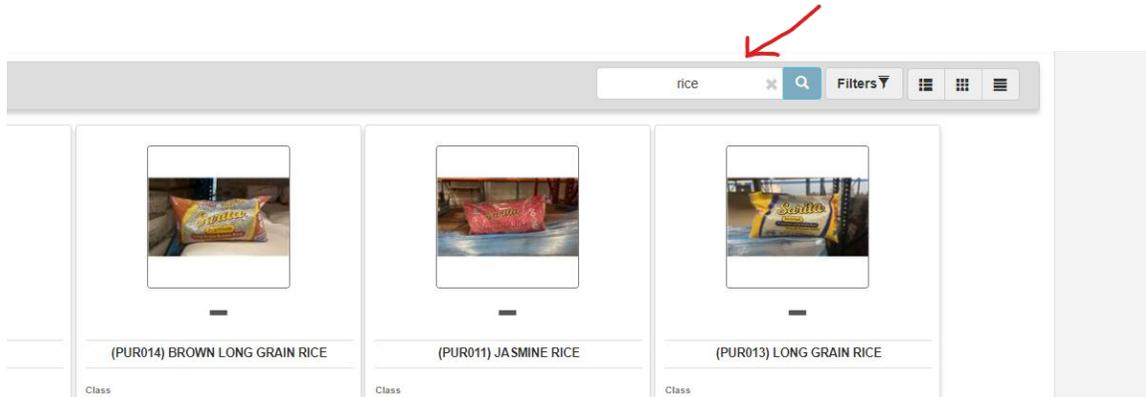
Select your time and date for your pick up or delivery. **Please note to select the correct option, delivery or pickup based on your need.** If you want your order delivered to you, you must select delivery.

If you select delivery, the time you see will be during the 6pm-midnight time frame. This does not mean you will receive your delivery at this time, it is simply a placeholder for your delivery day.

After selecting your date and time for the order, please click on "Save." Only available pickup dates and time slots will appear as options. If a pickup date or time is not shown, that time is not available to schedule. **Note: the HACAP Food Reservoir closes at noon on Fridays.**



A variety of sort options are available when viewing the shopping list. Click on the icons circled above to change the way your shopping list is displayed.



Are you looking for something specific? Enter in general info (rice, bean, cereal) into the search field to see if we have it.

New inventory will be entered weekly each Wednesday. If you don't see something you need, always check back on Wednesday.

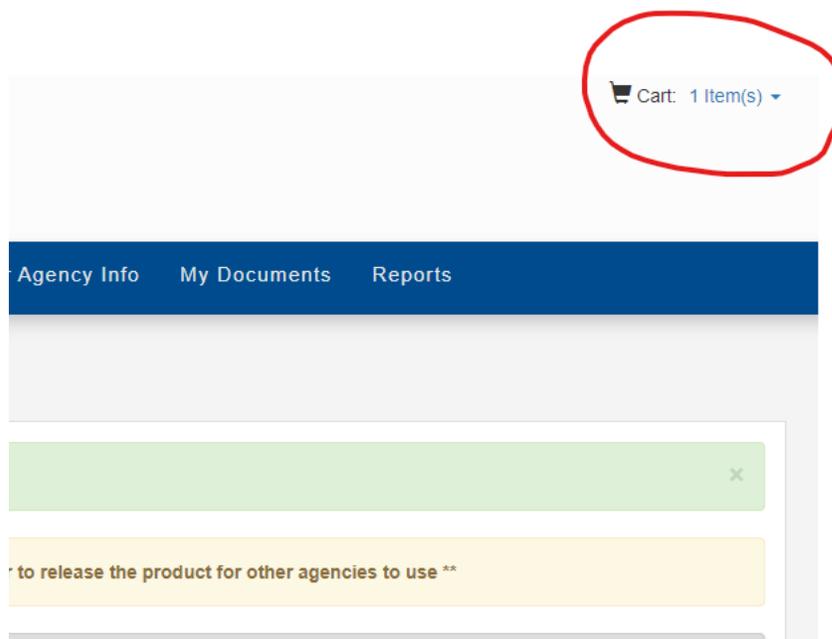
Click through the pages and enter in the quantity for each item that you need.

### **THINGS TO KNOW ABOUT PLACING AN ORDER:**

- All orders must be submitted at least 2 business days before the pickup/delivery day. The cut off time to place an order is 8am, two days prior to your pick up day. *Example: If you start an order on Friday March 1 the soonest you'll be able to schedule an appointment would be for Wednesday March 6 and the order must be submitted before 8 am on Monday March 4.*
- A pickup appointment or delivery date can be reserved 16 business days out. You will be able to edit that order as much as you would like until it is due to be submitted. **(Because of this, we will no longer combine multiple orders into one.)** *Example: If you start an order on Friday March 1<sup>st</sup>, you will be able to reserve an appointment as far out as March 25 (16 business days). You will have 2 business days prior to March 25<sup>th</sup> to submit your order.*
- New inventory will only be added to the shopping list each week on Wednesdays, with the exception of perishable product.
- We will review orders daily, once we have reviewed your current order, you may start a new one.

- All products are ordered by case quantity. There are weights, pictures, and detailed descriptions on the shopping list for reference. Please be sure you pay attention to packing information to ensure you are ordering the appropriate quantities.
- When you place an order for pick up, that automatically will ensure time for you to do in-warehouse shopping for additional product. You only need to select the “30 minute shopping slot” if you want to shop through our extras without placing an order.
- Pick sheets will be provided at the time of pick up or delivery to ensure you received what you ordered, as required for auditing purposes.

### **FINALIZING YOUR ORDER**



If your order is completed and you want to submit it, simply click on the shopping cart at the top of the page.

From here if you have several options.

- Continue shopping- if you forgot something you can still go back and add to the order
- Cancel
- Proceed to checkout



\*\* The current order must be submitted by 02/17/2024 06:07 PM

Shipping Method Agency Pickup	Is Delivery <input type="checkbox"/>
Pickup Warehouse Main	Pickup Delivery Date 2/22/2024 10:00:01 AM

Order Totals	Weight 0.00
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Once you are at the checkout, submit the order and you are finished.

### **PREVIOUS ORDER SUMMARY**

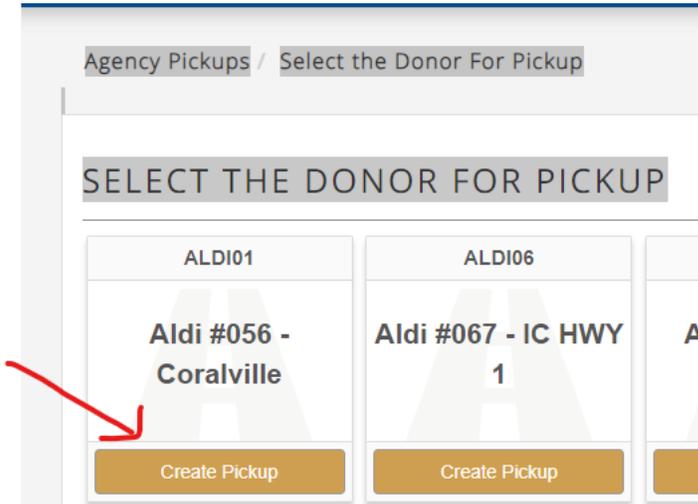
The **Orders History** tab at the top of the page shows all orders that have been placed.

Double clicking on any order will bring up a summary screen. Use this to print a copy of past orders if needed.

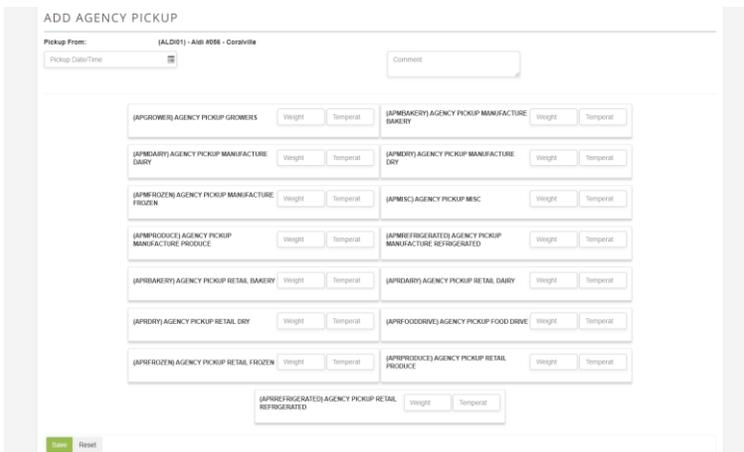
### **AGENCY PICKUPS (ONLY for agencies that pick up additional food from other sources)**

This section is only for partners that pick up food from outside sources including, but not limited to: Target, Kwik Star, Fareway etc. Click on **New Pickup** to enter the additional food.

Prior to starting agency pickups, we will need to set up the donor profiles for your agency. Please reach out to your RPC to add in additional stores or donors as needed.



Find the store you are picking up from and click on “create pickup”.



This will bring you to the screen above, where you will add in the product details. When you have entered in the weight for each category, click save at the bottom of the page.

**Please note the many categories for entering weight in pounds. This is to ensure we are able to track things appropriately for reporting requirements.**



## Agency Pickup Category Descriptions

**AGENCY PICKUP GROWERS-** anything donated to you from a farmer or a gardener

**(APMBAKERY) AGENCY PICKUP MANUFACTURE BAKERY-** Bakery donated from a manufacturer that is not from a retail store such as Bimbo Bakery

**(APMDAIRY) AGENCY PICKUP MANUFACTURE DAIRY-** Dairy donations that are from a manufacturer that is not from a retail store such as a direct donation from a creamery

**(APMDRY) AGENCY PICKUP MANUFACTURE DRY-** Dry goods donations that are from a manufacturer that is not from a retail store such as Quaker Oats cereal

**(APMFROZEN) AGENCY PICKUP MANUFACTURE FROZEN-** Frozen products that came from a manufacturer or locker that is not from a retail store, such as meat donations from a locker or frozen soup from Heinz

**(APRBAKERY) AGENCY PICKUP RETAIL BAKER-** Bakery from any retail store

**(APRDRY) AGENCY PICKUP RETAIL DRY-** Dry goods from any retail store

**(APRDAIRY) AGENCY PICKUP RETAIL DAIRY-** Dairy products from any retail store

**(APRFROZEN) AGENCY PICKUP RETAIL FROZEN-** Frozen foods or meat from any retail store

**(APRPRODUCE) AGENCY PICKUP RETAIL PRODUCE-** Produce donations from any retail store

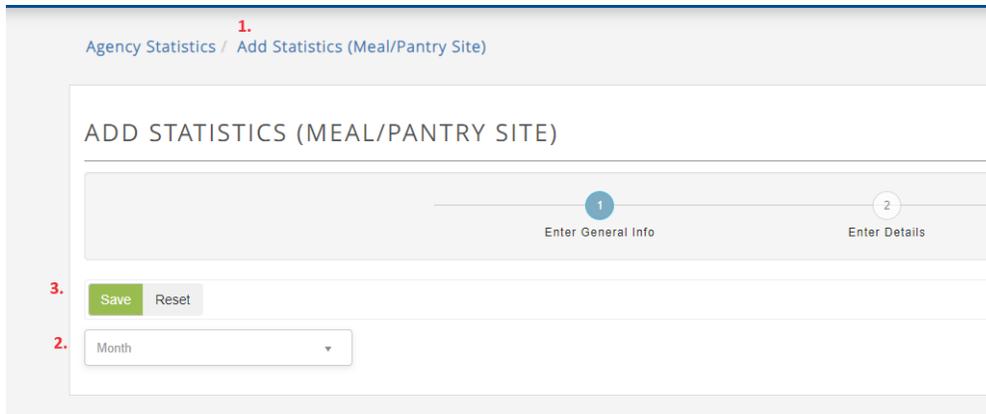
**(APRREFRIGERATED) AGENCY PICKUP RETAIL REFRIGERATED-** Any nondairy refrigerated donations from retail stores

**(APMISC) AGENCY PICKUP MISC-** any non-produce donations that do not fall into the categories above

**(APRFOODDRIVE) AGENCY PICKUP FOOD DRIVE-** Items received by food drives or individual donors that bring donations to your agency.

## STATISTICS

All monthly statistics reports must be submitted through the online ordering system by the 5<sup>th</sup> of the month for the prior month. Current policy requires agency reports to be up to date. If your agency is missing reports in the previous 37 days during a rolling 12 month period, you will **not** be allowed to place an order.



Agency Statistics / Add Statistics (Meal/Pantry Site)

### ADD STATISTICS (MEAL/PANTRY SITE)

1. Enter General Info      2. Enter Details

3. Save    Reset

2. Month ▾

1. Click on statistics
2. Select your month from the drop down. Statistics should be done each month for the prior month. *Example: On March 3<sup>rd</sup> you will enter in February statistics.*
3. Click save

The record was saved successfully

### EDIT STATISTICS (MEAL/PANTRY SITE)

1 Enter General Info      2 Enter Details

Period: January 2024

Statistic Name	Value	Comment
Duplicated Household	0	
Duplicated Individual	0	
Duplicated Total Meals	0	
Unduplicated household	0	
Unduplicated Individuals	0	

Go to page: 1 Show rows: 10 1-5 of 5

Next, enter in your statistics into the value field. The data automatically saves once you enter the numbers into the fields, there is no “save” button.

If you enter data incorrectly, you can go to the top of the page, enter into the statistics again, click on the month that you want to correct, and hit edit.

### **MY DOCUMENTS**

This is where you can find all invoices for previous orders.

### **REPORTS**

This is where reports on distribution information will be stored so that you are able to run your own data inquiries. If you have suggestions or ideas of reports that you would like to see, please share your feedback with your RPC.

**We hope you will find the online ordering system to be an efficient and effective tool for your agency. Should you have any questions or comments, please do not hesitate to contact our office at 319-739-1536.**

