

NetSuite 001-002 (Ordering)_How-To

OVERVIEW: Use this guideline in order to most effectively/efficiently place agency Food Pantry/Soup Kitchen orders online.

- **Additional Resources:** Video Walkthrough Titled “001-002 Agency Training - Ordering”

I. PROCEDURE: (Ordering)

- a. After Log-in (Follow Log-in How to) click Select Agency in the upper right-hand corner and select the agency you are ordering for from the drop down.



Home New Order User Guide Agency Account

Select Agency Sign Out



- b. Click New Order on the left side of the screen, just below the Feeding Westchester Logo.



Home New Order User Guide Agency Account

Shopping for: Test Agency 2 Sign Out



- c. Click on the blue Order link to the right of the agency you are ordering for. This appears under the column marked ORDER.



Home New Order User Guide Agency Account


Shopping for: Test Agency 2 Sign Out

NAME	ACCOUNT NUMBER	BALANCE DUE	CREDIT LIMIT	CREDIT AMT	AGENCY STATUS	AGENCY REASON	ORDER
Test Agency		-20		100	Payment Overdue	Overdue	Order
Bethel Baptist Church - FP		-16.58	2000	0	Overdue	Client Service Statistics	-
Test Agency 2		0		0			Order



- d. Select delivery or pick-up and your Appointment Time. Remember you must have ordered more than 750 lbs. in order to qualify for delivery.


Test Agency 2



■ Holiday ■ Order ■ Unavailable

Mar 29 – Apr 2, 2021

today < >


	MON 3/29	TUE 3/30	WED 3/31	THU 4/1	FRI 4/2
 08:30 am					
01:00 pm					

1. If date is grayed out, it is not a date Feeding Westchester delivers to your area. If the date is white, it is valid and you can chose that date to receive your product.
2. If you get a scheduling error, you have picked a date Feeding Westchester cannot accommodate. Please pick another date.
3. Enter your delivery time. Remember delivery times are a request and NOT guaranteed. You will be called the morning of your delivery with a 2–3-hour block of time for delivery.

- e. Click Begin Order

Shopping for: **Test Agency 2**

Test Agency 2
Date/Time: 03/29/2021 08:30:00 am
Appointment Type: Delivery
Area: Elmsford
Note: Feeding Westchester Foodbank works to deliver within a morning/afternoon window. Your delivery window BEGINS at 8:30am and ENDS at 1:00pm.



f. Choose the items you would like to order and enter the amount of each in the quantity box. Please be cognizant of minimum amounts when ordering. Click on the orange shopping cart next to each ordered item to enter the item into your shopping cart. You should see the “Successfully added to your cart banner” if your item has been put in your shopping cart.

Test Agency 2
 Date/Time: 4/5/2021 8:30:00 am
 Appointment Type: Delivery
 Area:

View Grants View Cart

100 per page Relevance

ID	Description	HPNAP	Weight	Price	Grant Eligible	Max. Qty.	Min. Qty.	Qty.	Actions
4700743	Rice_Brown 30/2 Lb. / Dry / Shelf Stable	N	60 lb		N	466	0	0	
6700246	Peaches_Sliced (In Juice) 24/15 OZ / Dry / Shelf Stable	Y	26 lb	\$8.64	N	279	0	0	

Successfully added to your cart. You can continue to [View Cart](#).

↑ ↑

g. Click on the green View Cart on the right-hand side, just below the search icon.

Test Agency 2
 Date/Time: 4/5/2021 8:30:00 am
 Appointment Type: Delivery
 Area:

View Grants View Cart

100 per page Relevance

ID	Description	HPNAP	Weight	Price	Grant Eligible	Max. Qty.	Min. Qty.	Qty.	Actions
4700743	Rice_Brown 30/2 Lb. / Dry / Shelf Stable	N	60 lb		N	466	0	0	
6700246	Peaches_Sliced (In Juice) 24/15 OZ / Dry / Shelf Stable	Y	26 lb	\$8.64	N	279	0	0	

Successfully added to your cart. You can continue to [View Cart](#).

←

h. If all information is correct (Agency Name, Appointment Date, Items Ordered and Balance) click on the green Checkout button on the right just below the Agency Name and Sign out link.

04/05/2021 08:30:00 am

(1 Product)

99984 Test Agency 2

Est. Weight: 104.00

Total: 34.56

Appointment Type: Delivery

Area: Elmsford

Check if correct

Checkout

Continue Shopping

ID	Description	HPNAP	Weight	Price	Grant Eligible	Max Qty.	Min Qty.	Qty.	Actions
6700246	PEACHES_SLICED (IN JUICE) 24/15 OZ - Dry / Shelf Stable	Y	26.00 lb	\$34.56	N	279	0	4	

- i. This is your final chance to review your order, make corrections, or add items to your order. If all is correct, scroll to the bottom of the page and click on the green Place Order on the lower right. Your order will not be submitted to Feeding Westchester until you click on the Place Order button.

Edit Cart

Summary

SUBTOTAL 4 ITEMS	\$34.56
Est. Weight	104.00 lb
Delivery Fee	\$0.00
Grant	\$0.00
TOTAL	\$34.56

Place Order

- j. Record your order number for future reference.

Thank you for shopping with us!

Your order number is #SO104.

We received your order and will process it right away.

You will receive an email with this confirmation in a few minutes.

Continue shopping

CONGRATULATIONS...YOU HAVE SUCCESSFULLY PLACED YOUR ORDER