

Partner Portal User Guide

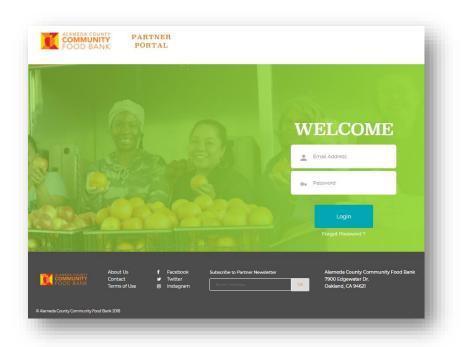
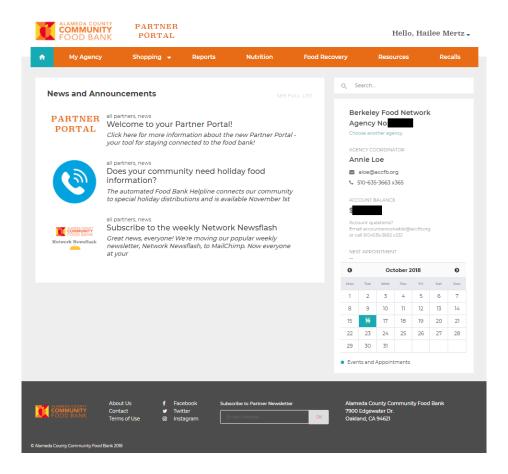


Table of Contents

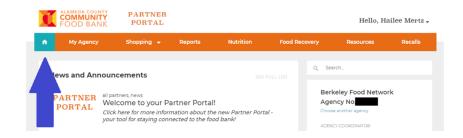
| Home Page | 3 |
|-----------------------------------|----|
| My Agency page | 7 |
| Shopping (Appointments & Account) | 9 |
| Appointments | 10 |
| Account | 12 |
| Reports | 15 |
| Nutrition | 16 |
| Food Recovery | 17 |
| Resources | 19 |
| ARC Connect | 20 |
| Recalls | 21 |
| My Profile | 22 |

Home Page

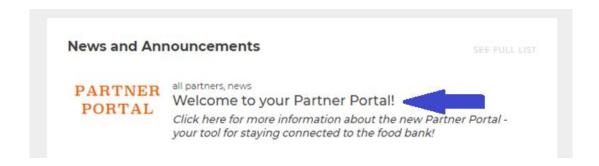
The Home Page provides partners with information about their account, events, and news and announcements.

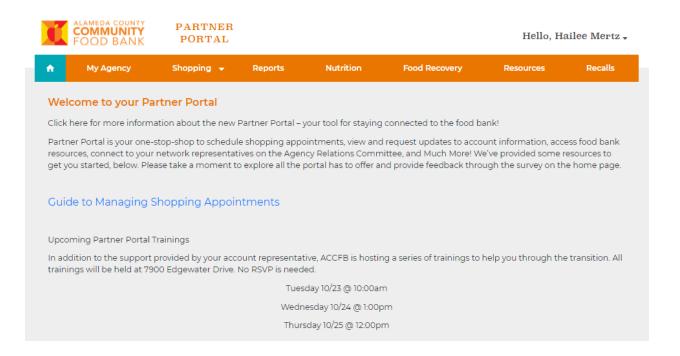


Partners arrive at the Home Page after logging in, and can otherwise access the page by hitting the blue button to the left of My Agency.

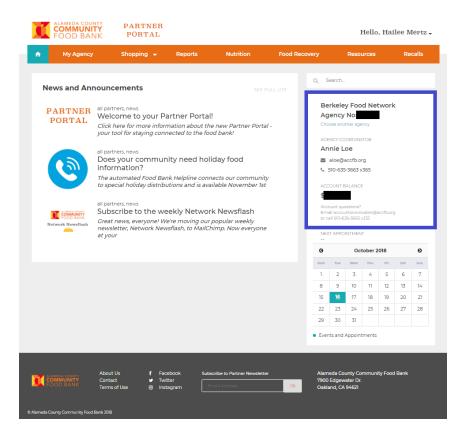


To learn more about News and Announcements featured on the Home Page, click the title.

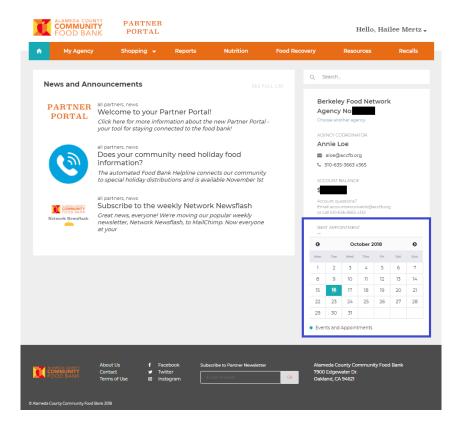


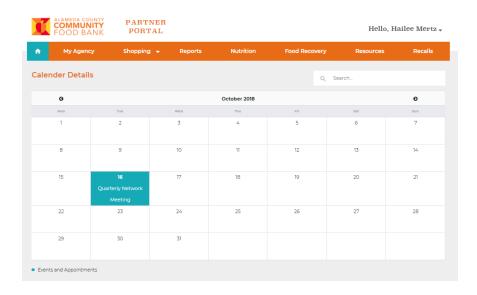


The side bar of the Home Page displays the account name, number, ACCFB representative, and balance. If a contact is connected to more than one agency, they can click the link titled "Choose another agency," located beneath the agency number to switch accounts.

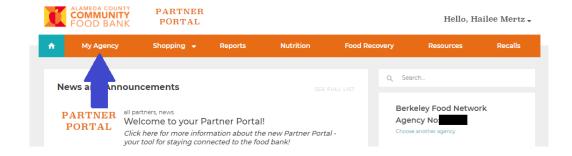


The calendar highlights upcoming events and shopping appointments. Click on the calendar to learn more.

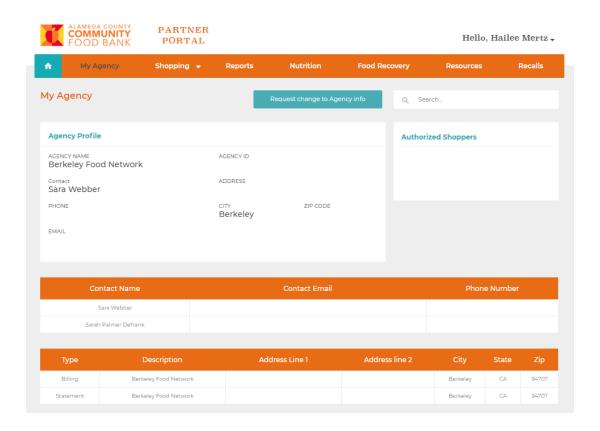




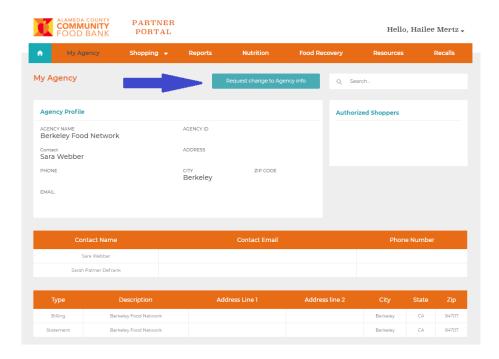
My Agency



The My Agency page displays information about your account's contacts, location, authorized shoppers and supplemental addresses.



Click the "Request change to Agency info" button to request an update or correction to the information on this page.



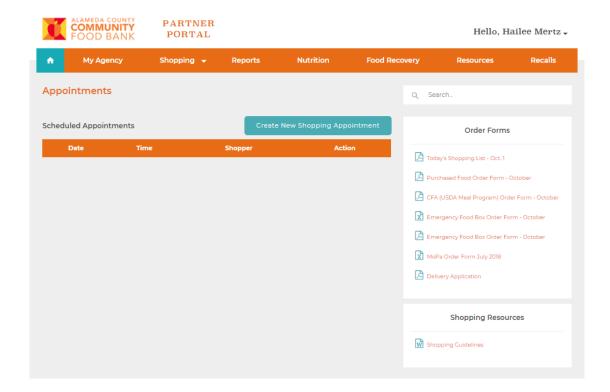
When requesting updates for the account, contacts must enter the name and Email associated with their profile, choose the category related to their request, and describe the change in detail. The account's Agency Representative will reach out for more information after the request is received.

| Hailee | Mertz |
|----------------------------------------------------------------------------|-----------------------------------------|
| First | Last |
| Email * | |
| hmertz@accfb.org | |
| Categories | |
| Days or Hours of Distribution | • |
| Description * | |
| We have changed our distribution fro Thursdays @ <u>1:00pm-3:00pm</u> . | m Wednesdays @ <u>12:00pm-2:00pm</u> to |

Shopping (Appointments & Account)

To access the Appointments page, hover over "Shopping" and choose Appointments.





Appointments

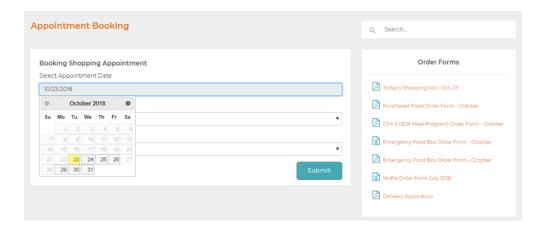
1. Click on the **Shopping** tab and choose **Appointments** from the drop-down menu.



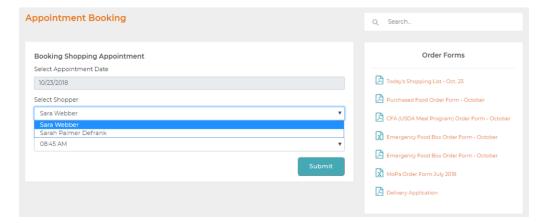
2. Click on the **Create New Shopping Appointments** button.



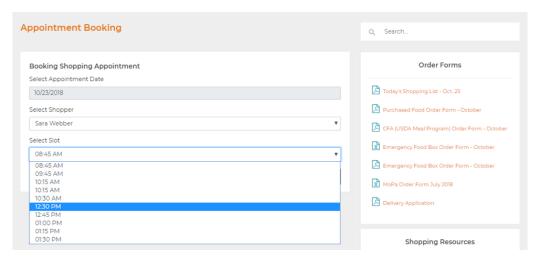
3. Click on the triangle on the right end of **Select Appointment Date** to open a calendar. Click on your preferred appointment date.



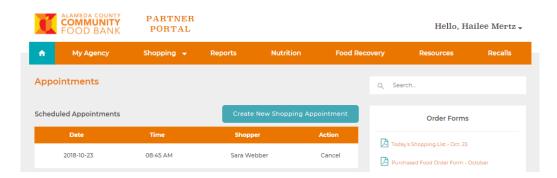
4. Click the Select Shopper field and choose a shopper from the drop-down menu.



5. Click the Select Slot field and choose your preferred appointment time from the drop-down menu.



6. All scheduled appointments will appear on the Appointments page. Click Cancel to remove the appointment, if needed.

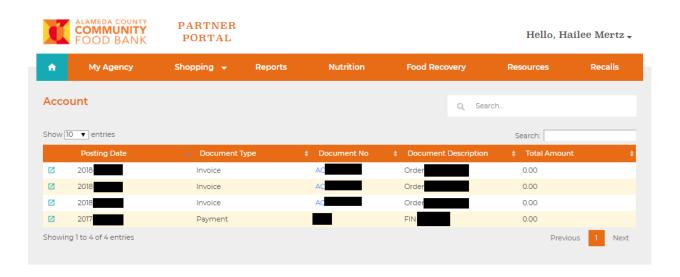


Account

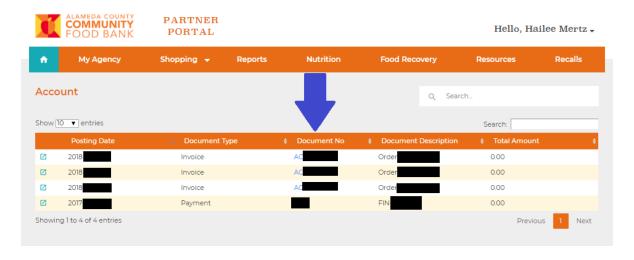
To access the Account page, hover over "Shopping" and choose Account.

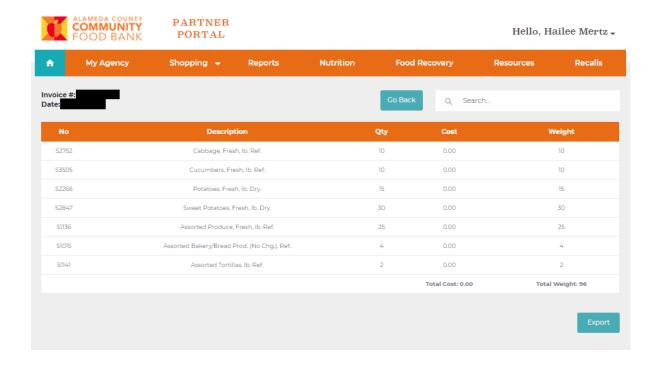


The Account page offers a record of past invoices, payments and credits. Information can be sorted by clicking columns headers (Posting Date, Document Type, etc.).

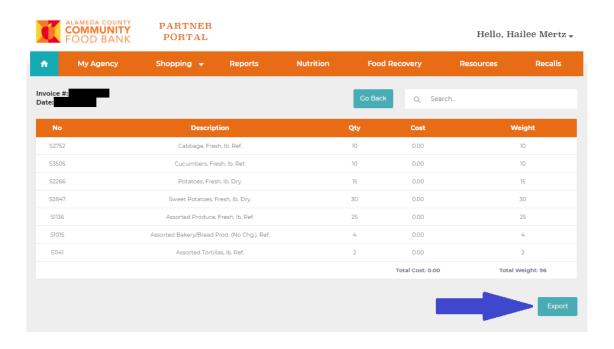


Click a document number to get more information about the document.

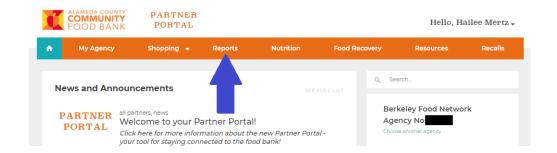




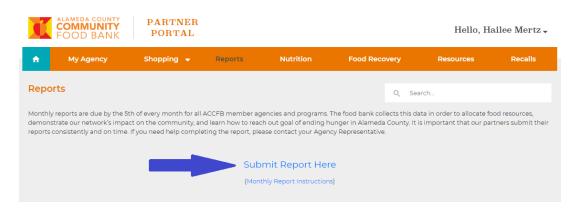
Invoice details can be exported to an excel file by clicking "Export."



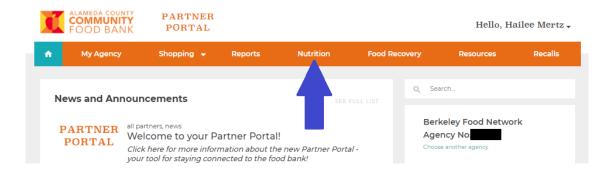
Reports



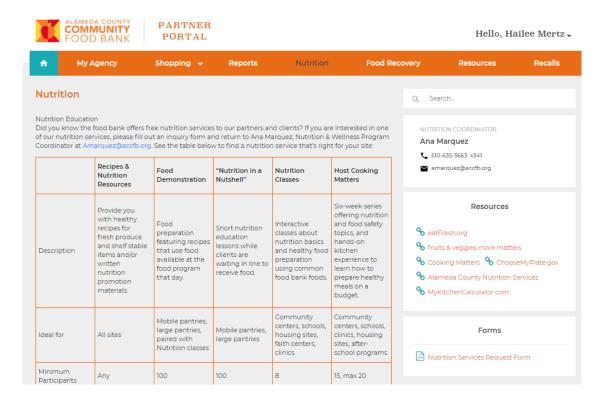
The Survey Monkey report can be accessed by clicking the link on the Reports page.



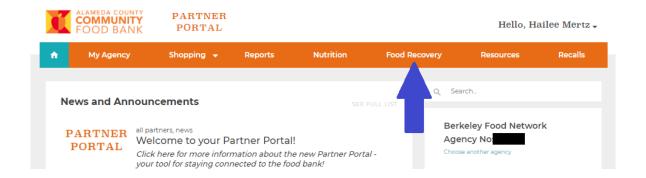
Nutrition



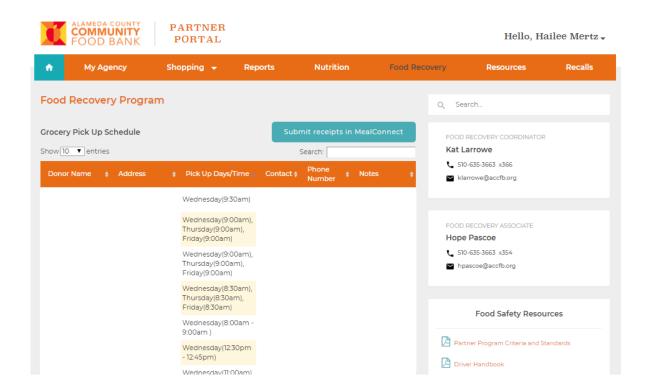
The Nutrition page offers information about Nutrition programs and classes, as well as external links. Use the Nutrition Services Request Form to request services for your program.



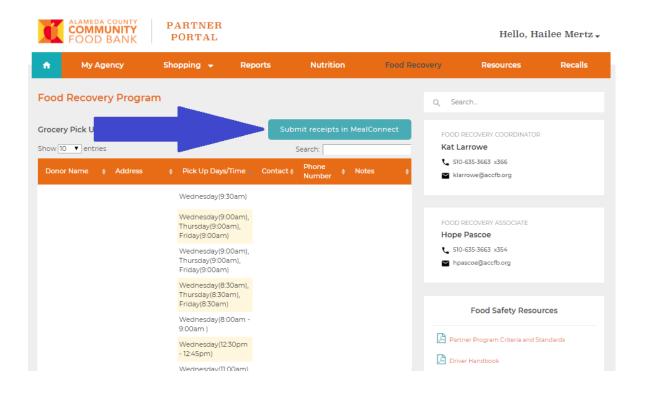
Food Recovery



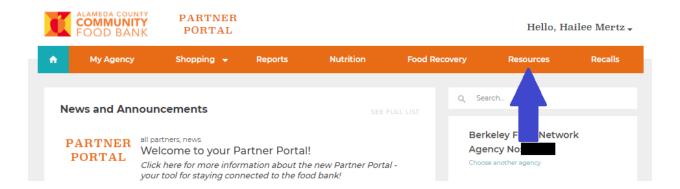
The Food Recovery page is only accessible to partners participating in the Grocery Rescue and Food Recovery programs. The page includes contact information for ACCFB FRP representatives, as well as a pick up schedule specific to the agency.



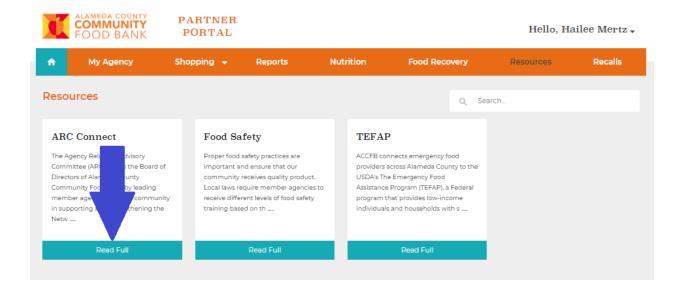
Click the "Submit receipts to MealConnect" button to submit weekly receipts to MealConnect.



Resources

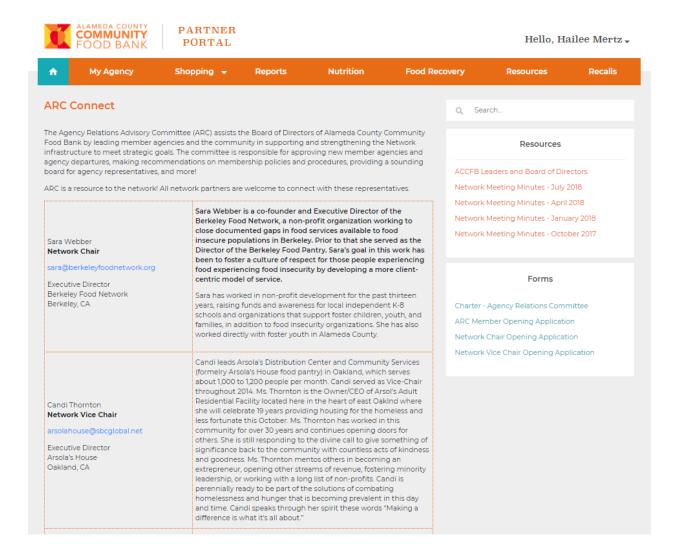


The Resources page offers more information on several topics. Click "Read Full" to get more information on each resource.

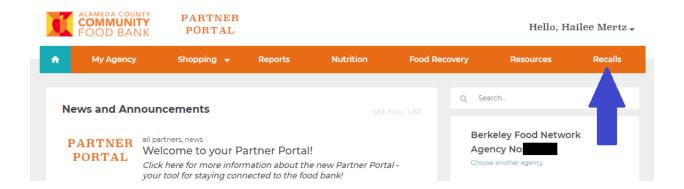


ARC Connect

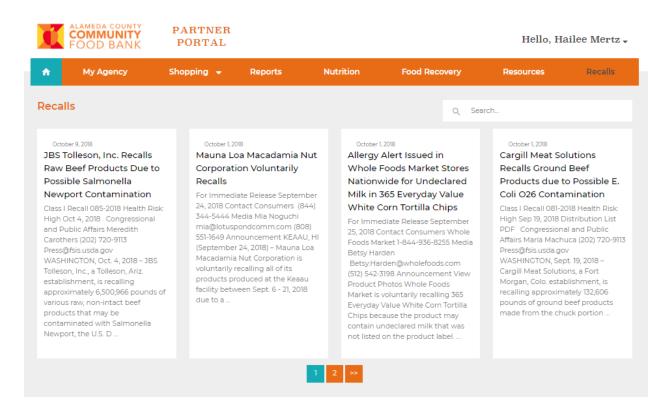
ARC Connect is your connection to the Agency Relations Committee, the partner network's representative body. Information on the Network Chai, Vice Chair, and other committee members is listed, here.



Recalls



Current and past recalls are listed on this page. Click the recall title for detailed information about the recall.

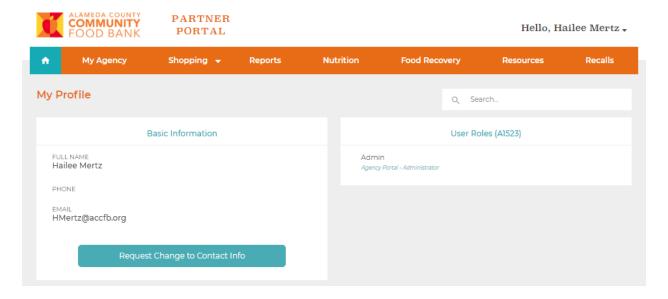


My Profile

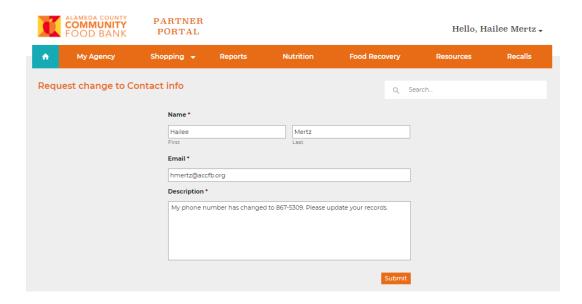
To access My Profile, hover over your name in the top right corner of the Portal, then click My Profile.



My Profile displays information on the user. To request an update or correction to this information, blick "Request Change to Contact Info."



Enter the name and email associated with your account, and describe the update. Your Agency Representative will contact you for more information after the request has been received.



To log off Partner Portal, hover over your name in the top right corner of the Portal, then click "Logout."

