Primarius Web Window (PWW) Guide

As of April 2021, the SLO Food Bank has officially transitioned to Primarius 2, a inventory management software designed specifically for food banks and their unique needs. The SLO Food Bank adopted Primarius 2 over other food banking softwares because of the incredibly thoughtful and robust features that it offers for our Agency Partners. Each Agency Partner will be given access to their own account where they can easily place an order, submit reports, review site visit findings, pull up past invoices, and more through the PWW. The PWW, or Primarius Web Window, is an Agency’s direct access to their account and related records at the SLO Food Bank.

To access the SLO Food Bank’s PWW, please go to the Agency Partners page on the SLO Food Bank’s website or use the following url:

https://slofoodbank.primarius.app/pww/Home/Login/

Please bookmark this website for future reference and use.

This Primarius Guide for Agency Partners is intended to be an instructional guide for Agency Partners. This guide will focus on the essential functions of PWW, including ordering food, submitting reports, and maintaining up-to-date contact and programmatic information. This document will be updated to include additional information on how to use the other functions of PWW as the SLO Food Bank begins to incorporate new features for use by Agency Partners.
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Accessing PWW

To access the SLO Food Bank’s PWW, please go to the Agency Partners page on the SLO Food Bank’s website or use the following url:

https://slofoodbank.primarius.app/pww/Home/Login/

Please bookmark this website for future reference and use.

One can also access the PWW through the SLO Food Bank’s website. After going to slofoodbank.org, click **Agency Partners** in the top green navigation. You will then scroll down to the section of the page titled “Are you an existing Agency Partner?” and click on the **Access PWW Account** button.

![Figure 1. The above images demonstrate how one may access an agency’s PWW account through the SLO Food Bank’s website.](image)

Logging In

Every Agency Partner has a unique account with the SLO Food Bank, whose information may be accessed through PWW. A new Agency Partner will receive the log-in information for their PWW account as part of the onboarding process. Nonprofits with a previously established account at the SLO Food Bank will be given their log-in information shortly before their assigned training session during Late Spring 2021.

To access a PWW account, you will receive three pieces of information.
**Agency Reference:** This is the 4 to 6 letter reference code unique to each Agency Partner.

**User Name:** This is usually the same as the Agency Reference, but may be unique to each user if deemed necessary for an Agency.

**Password:** The private access word to keep your account secure.

Each Agency Partner will be assigned a single User Name for their account to be shared among the representatives of each organization. The SLO Food Bank recommends sharing PWW access with all Authorized Shoppers and any individuals responsible for submitting reports to the SLO Food Bank. If there is a specific need to have multiple User Names for the same account, the SLO Food Bank is able to meet this need on a case-by-case basis as determined by the Partner Services Manager.

While there will be a single account with a single Agency Reference code assigned to each nonprofit in most cases, a nonprofit may have multiple accounts if the nonprofit runs several programs with independent financial and/or programmatic responsibilities that are each accessing the SLO Food Bank’s food resources and partner benefits.

**Resetting Your Password**

During the first log-in to the PWW, an Agency will be asked to change their Password from the temporary one provided by the SLO Food Bank. The Password you choose will be unique to the Agency Reference-User Name and should only be shared with those associated your nonprofit’s food programs operations, such as program coordinators, Authorized Shoppers, and those responsible for submitting reports to the SLO Food Bank on behalf of your organization.

**Changing Profile Settings**

In the case that an Agency needs to change their Username, Password, or the email address associated with the Agency’s PWW account, this may be done in one of two ways:

1. After clicking the user icon in the right-hand side of the navigation bar, select *Edit My Profile* to be taken to a page to change the access information associated with an Agency’s PWW account.
2. If for some reason the access to the Agency’s PWW account is lost or compromised, an Executive or Director from the nonprofit may contact the Partner Services Manager to reset the account information.

**My Agency**

In the upper right-hand of the navigation bar is a user icon that can lead to the My Agency page, which captures many of the day-to-day communications and operations of an Agency Partner. All organizations should do their best to make sure all the information captured here is up to date.

**Details**

The Details tab captures the basic information of an Agency Partner, including the main contact, main site address, agency size designations, and site visit information. The information shown on this page can only be changed by SLO Food Bank staff. If the information seen here is incorrect, please reach out to the Partner Services Manager immediately.

![Image of My Agency page](image)

The Main Contact and Main Address are the primary contact and address associated with the PWW Account.

The Agency Size and Agency Site Size are based on the number of people and households served by your organization monthly. These two values should be the same, while the Agency Pantry Size value should be blank. Agency Size designations affect the quantity of certain free or shared maintenance fee products your account has access to on the Shopping List and are based on the following parameters:
Small: Serves less than 100 people per month.

Medium: Serves 100-700 people per month.

Large: Serves more than 700 people per month.

Agency Size is based on the highest number of households and/or people served during a single month over the course of the previous year. This designation is automatically evaluated on an annual basis, though an agency may request a re-evaluation at any time.

Addresses
Each Agency Partner should regularly review and update the different addresses associated with their PWW account. In addition to the basics like stress address, city, and state, we also use Address Types to help determine the use of each address associated with your organization. Many of these roles help improve the SLO Food Bank’s communication with you, while others are essential to the functionality of your account.

The following Address Types are required:

**PHYSICAL:** Any location where food is stored and/or distributed from by an Agency Partner.

**Mailing Address:** The address where paper-based communications should be sent.

The following Address Type is recommended:

**Bill To:** The address where any hardcopy invoices and monthly statements should be sent. (To be used as a back-up to the Order Email Contact Type listed below.)

The following Address Types are used for other areas of the SLO Food Bank’s operations, and should not be used by an Agency Partner when setting up their account:

**Ship To, Contact, Order Email**

Contacts
Each Agency Partner should regularly review and update the different contacts associated with their PWW account. **Note:** Adding someone as a Contact on your account does not automatically grant them access to your Agency’s PWW account unless you share the account credentials with them.
Below is an example of a completed Contact for an account before saving. Please complete the contact type, first name, last name, title, email address, and telephone fields for each contact.

In addition to the basic contact information like name, phone number, and email, we also use Contact Types to help determine the role of each contact associated with your organization. Many of these roles help improve the SLO Food Bank’s communication with you, while others are essential to the functionality of your account.

The following Contact Types are required:

**Main:** The primary contact on the account for day-to-day communications and relations; should be a single designation per account.

**Administrative:** Responsible for submitting reports and statistics for an Agency Partner; should be a single designation per account.
- Receives reminder emails about statistics submission windows

**Agency Email List:** Any contact that should receive regular emails about program updates, new opportunities, and surveys; may be multiple contacts per account.

**Authorized Shopper:** An individual permitted to place and pick-up an order on behalf of an Agency Partner; may be multiple contacts per account.
- Receives reminder emails about ordering windows & upcoming warehouse closures
**Order Email:** Will receive any documents sent through PWW, including invoices, monthly statements, etc.; may be multiple contacts per account.

The following Contact Types are recommended:

**Executive:** The CEO, President, or Executive Director of an Agency Partner; should be a single designation per account.

**Program Coordinator:** The primary contact for all order and delivery questions; should be a single designation per account.

The following Contact Types are used for other areas of the SLO Food Bank’s operations, and should not be used by an Agency Partner when setting up a new contact:

**AC, Bill To, Contact, NCB, Receiving, Ship To, Site Leader, Food Safety Certificate**

If a contact is no longer associated with your Agency’s PWW Account, please click *Deactivate* on the **Edit Contact** page.

Please note that there may be one or two default contacts on your account that are not tied to any of your personnel. The first one is the “PWW” account, which is the contact associated with the general email associated with your agency. This is usually listed as “Agency Ref Code PWW.” For example, the Pantry at the SLO Food Bank’s PWW account is listed as “PSFB PWW.”

The second default contact is the SLO Food Bank Admin contact. This contact is added to an account to allow a SLO Food Bank employee to access your account and assist in any troubleshooting as needed.

**Hours**

The public service hours of your organization’s food program should be reflected in the Hours section. An Agency should do their best to ensure that this section is up to date since the SLO Food Bank will be using the information here to populate the Local Pantry & Meal Sites spreadsheet that is widely distributed throughout the county.

**Messages**

While there is a Messages function through PWW, the SLO Food Bank will still use email, text messages, phone calls, and traditional mail service as the official methods of communicating with its Agency Partners.
PWW Home Page

The PWW Home Page will be the first thing you see after logging into the PWW. This landing page provides Agency Partners with immediate and easy access to important SLO Food Bank information, including best contacts for common questions, important dates, reporting reminders, and how to access different resources and forms through the SLO Food Bank’s Hunger-Relief Network Toolbox.

Navigation Bar

You will also notice the green navigation bar along the top of the page. This navigation bar allows an Agency to jump to different functional areas of PWW.

- **Shop**: Access to the current catalog of available foods available to all Agency Partners
- **Allocations**: Program-specific food allotments
- **Agency Pickup**: Submit weekly Agency-Direct Rescue reports
- **Statistics**: Submit monthly Statistics reports
- **Order History**: Review active and complete orders
- **Grants**: Feature not used by SLO Food Bank
- **Other Agency Info**: Surveys & questionnaires
- **My Documents**: Access invoices, monthly statements, site visit results, etc.
- **Reports**: Access community impact reports, poundage reports, and more coming soon
Shopping List and Ordering Process
To begin a new order, select Shop on the navigation bar. You will then see the complete list of products available for ordering by your organization. On the list, you will see several different food products available through the SLO Food Bank. The category, storage requirements, packaging and unit information, and nutrition are available to be viewed for each product. An Agency can view only certain types of products by using the Filters feature in the upper right corner of the catalog based on the Price, Category, Storage, or Nutrition designations assigned to each product.

The Category designations include Co-op, Donation, Government Purchase Unrestricted, Produce, and Purchased. Some organizations may also see other program-specific categories such as TEFAP and No Cook Bags based on their prior enrollment in those programs. The Storage designations include Dry, Frozen, and Refrig based on the temperature requirements of the product. The Nutrition designations include Choose Often, Choose Sometimes, and Choose Rarely where the more healthful product is considered Choose Often, and the least healthful is considered Choose Rarely as determined by the SLO Food Bank’s Nutrition Policy.

The full catalog of products may be toggled by using the three display icons in the upper right-hand corner of the catalog next to the Filter selection box based on one’s own preferences:

1. **List Display**: Shows the name, category, storage requirements, packaging description, nutrition category, and price for each product along with a picture if available.

2. **Condensed Display**: Shows only the name, price, and limit for each product.

3. **Tile Display**: Similar information to the List Display, but in a tile format.

Your Shopping Cart
To begin the ordering process, add an item to your cart. To add an item to your cart, input the quantity you wish to have in the Qty field and then click “Add to Cart.” After starting the order process, you will have one hour to submit the order before your selections expire and you will
have to start the ordering process over again. This is to ensure that the product selections you make are up to date and are not unduly preventing other agencies from having access to those products if your order remains unsubmitted.

To view the items in your cart, click the blue “X Item(s)” link next to the cart icon at the very top of the PWW page.

Once you are ready to finalize your order, click the item count link next to the Shopping Cart symbol in the upper right-hand corner to review your shopping cart.

To adjust the quantities of any item in your shopping cart, you may either type in the quantity you wish to have or use the up and down arrows within the Qty field. Then click Update Cart to confirm the adjustment. To remove an item from your cart, you must click the red X at the right side of the row.

Once you have reviewed all the items and quantities in your cart or the green Proceed to Checkout button at the bottom of the shopping cart list. Both options are indicated by the orange arrows below.

### Checking Out
The final stage of the ordering process is checkout. To complete your order, please confirm that the information is accurate in the Pickup Delivery Date and Agency Contact fields.
The **Pickup Delivery Date** should be your pre-assigned pickup and/or delivery day. Please note, if your regular pickup delivery date is not selectable, then you may be ordering outside of your agency’s ordering window. Follow-up with the Partner Services Clerk to confirm that your order was received and able to be processed in time for your scheduled pick-up or delivery. If you do not have a pre-assigned pickup and/or delivery day, please contact the Partner Services Manager.

The Authorized Shopper completing the order should be named in the **Agency Contact** field so that our warehouse team knows who to follow-up with if there are any questions about your order. The Agency Contact box will be a drop-down of all Contacts listed on the PWW Account, which should already include all the Authorized Shoppers for an organization.

If there are any additional notes, comments, or questions you wish to share with the Warehouse team, please add those to the **Delivery Pickup Notes** field. This would also be the appropriate place to note who we should expect to be picking up the order if that Authorized Shopper differs from the one that placed the order.

Once your order and pickup/delivery details are complete, click the green **Submit Order** button. After your order is submitted, you will be taken to the **Order History** page.

**Reviewing Order Status**

All active orders made by or on behalf of an Agency Partner may be viewed on the **Order History** page, as shown below. This is also where you can check the status of your recently placed orders, when an order was released, picked, and confirmed, and the scheduled delivery/pickup date and time for a specific order.
The following is a list of the different Status labels for an order:

1. **DataEntry**  
   Products for an order are actively being selected
2. **Entered**  
   The order has been submitted to the Food Bank
3. **Reviewed**  
   The order has been reviewed and accepted by the Food Bank
4. **Released**  
   The order has been released to be compiled and built
5. **Picked**  
   The order has been compiled and built
6. **Confirmed**  
   The order has been picked up by and/or delivered to the Agency Partner

**Statements, Invoices, and Credit Memos**

Through their PWW Account, an Agency Partner may view their invoices and monthly statements at any time.

To view an account’s invoices, click the Order History tab in the green navigation bar as shown below. On this page, you can view the invoices for all completed orders by selecting the Complete toggle on the upper left-hand side of the page and selecting View next to an order.

To view all monthly statements, invoices, and credit memos for an account, click the My Documents tab in the green navigation bar. The My Documents page provides access to a complete list of all the financial and compliance documents associated with an account, all of which are available for immediate download.
In addition, all invoices and monthly statements will be emailed to any contact on an Agency’s PWW Account with the Contact Type of Order Email.

**Reviewing Accounts Receivable**

To review any outstanding invoices, go to the Order History page and click the Open AR tab. According to our records, the invoices displayed here have not yet been paid and are, therefore, outstanding.

**ORDER HISTORY**

To view the credits applied to your account, go to the My Documents page and review any documents there with the file name of CreditMemo-CR123456.pdf.
Payment Procedures

Account payment is due 30 days from the date the agency statement is issued. Monthly agency statements are automatically generated and distributed via email at the end of each month and can also be viewable at any time on the My Documents page. An example of an agency statement can be seen to the right.

Agency Partners are encouraged to make regular payments following the receipt of the monthly statement. The SLO Food Bank accepts payments through the following methods:

- A check from the nonprofit’s bank account
- Money order
- Cash in a designated envelope

For all checks and money orders, please indicate the Agency Reference Code and invoice numbers and/or monthly statement date in the memo line. Payments made without indicating an Agency Reference Code may be accidently processed as a general donation instead of as an agency payment.

Payments may be left in the Agency Payment Drop Box near the Agency Pick-Up door or mailed to ATTN: Partner Services, SLO Food Bank, 1180 Kendall Rd., San Luis Obispo, CA 93401.

If an Agency fails to make payment on their account balance after 30 days of receiving their monthly statement, the Agency Partner will be notified that their account has an overdue balance. After 60 days, the Agency Partner will only be able to access free product until their existing balance is paid in full. After 90 days, the Agency Partner’s account will be suspended, though they will have the option to appeal the suspension through the Chief Executive Officer.

Statistics Reporting

The Statistics tab is where agency partners will submit their monthly reports (formerly quarterly reports). Statistics must be submitted monthly to maintain consistent access to SLO Food Bank products. The statistics submission window for each month opens 7 days before the end of that month and closes at midnight on the 7th day of the next month.
To submit statistics, select the **Statistics** tab from the navigation bar. As shown below, you can view previous submissions and make new ones. Click the green *Add New Agency Statistics* button in the right-hand corner to create a new submission.

On the **Agency Statistics** page, you can view previous submissions and make new ones. Click the green *Add New Agency Statistics* button in the right-hand corner to create a new submission. A drop-down menu will appear, as shown below, which you will use to select the month you are reporting for. After a month is selected, click the green *Save* button to go to the next step.

You will then see the list of questions to fill out for your agency pertaining to the service you provided the community during the month.

Different types of agencies will see slightly different questions based on the nature of food service they provide. If an agency offers multiple types of food service types, they may see a combination of the statistics questions.
Here is a list of the types of statistics each agency is expected to report based on the type of food service program they provide:

<table>
<thead>
<tr>
<th>Pantry</th>
<th>Meal Site</th>
<th>Residential</th>
</tr>
</thead>
<tbody>
<tr>
<td>A) Total # of Families/ Households Served</td>
<td>A) Total # of Families/ Households Served</td>
<td>A) Total # of Families/ Households Served</td>
</tr>
<tr>
<td>B) Total # of People Served</td>
<td>B) Total # of People Served</td>
<td>B) Total # of People Served</td>
</tr>
<tr>
<td>C) Total # of Young Children Served (Age 0-5)</td>
<td>C) Total # of Young Children Served (Age 0-5)</td>
<td>C) Total # of Young Children Served (Age 0-5)</td>
</tr>
<tr>
<td>D) Total # of School-Aged Children Served (Age 6-17)</td>
<td>D) Total # of School-Aged Children Served (Age 6-17)</td>
<td>D) Total # of School-Aged Children Served (Age 6-17)</td>
</tr>
<tr>
<td>E) Total # of Adults Served (Age 18-59)</td>
<td>E) Total # of Adults Served (Age 18-59)</td>
<td>E) Total # of Adults Served (Age 18-59)</td>
</tr>
<tr>
<td>F) Total # of Seniors Served (Age 60 and above)</td>
<td>F) Total # of Seniors Served (Age 60 and above)</td>
<td>F) Total # of Seniors Served (Age 60 and above)</td>
</tr>
<tr>
<td>G) # of Days Pantry Open to the Public</td>
<td>I) # of Days Meals Were Served to the Public</td>
<td></td>
</tr>
<tr>
<td>H) # of Days Pantry Open Only for Program Participants</td>
<td>J) # of Days Meals Served Only to Program Participants</td>
<td></td>
</tr>
</tbody>
</table>

You can make edits to the numbers throughout the day that the submission was created. On the next day, editing will be locked and any corrections will need to be made by either the Partner Services Manager or Community Programs Coordinator.

**Note:** The number of families/households, people, and the age demographics should be *unduplicated* over the course of the month. For example, if you serve a single family of 5 three times during May, then that family would only count as 1 family/household served and 5 individuals and not as 3 families and 15 individuals.
Agency Pickup Reporting

Agency Pickup is the term used by Primarius to describe grocery rescue activities performed by agency partners (Agency Direct Rescue). At the end of each week, you can enter weights of all rescue items collected through your PWW account.

After logging into PWW using your Agency Login Credentials, select the “Agency Pickup” tab from the navigation bar at the top of the page. This will display an Agency Pickup page that includes options for all the donors that you currently collect from:

You will select “create pickup” for any of these donors and enter weights of all rescues for each. The spreadsheet included in your Agency Direct Rescue packets will automatically calculate weekly totals from each of your individual pickup entries, and you can enter that weekly total for each of the food categories. For the date of pickup, since we’re totaling all of the weekly weights, you can use the last date of the week you’re entering weights for.

The food categories listed includes a “waste/unusable” category. This is where you would record the weight of food items that has been deemed unusable for food safety reasons upon arrival to your agency. For example, if you received 25 lbs. of prepared foods which was two weeks past its best-by date on the day you received it, you would then record 25 lbs. under the waste category.

After you submit, you will be automatically sent back to your donor options for agency pickups. Repeat the process for all donors you picked up from.

Note: If you did not receive any donations during a given week, you must still submit a report with a “0” total and a comment noting that no collection was done. You can submit this “0”
total in the first donor on your donor selection page. In the case of the donors in the image above, a “0” total would be entered into the Costco pickup.

Also note that for any totals above 1,000 lbs. you will receive a warning once you submit your pickup that this total exceeds the limit. You will still be able to submit weights over 1,000 lbs.—this warning simply functions to ensure that these entries are correctly entered.