# Partner Agency Guide to Scheduling An Appointment



fighting hunger. feeding hope.

#### **Introduction**

Calendly is a modern scheduling platform that makes "finding time" a breeze. This systems allows for easier access to schedule, reschedule and cancel warehouse appointments. Partner agencies are able to schedule appointments to pick up from the Second Harvest Food Bank warehouse a month in advance. It also gives agencies the flexibility to schedule appointments outside of our normal hours of operation.

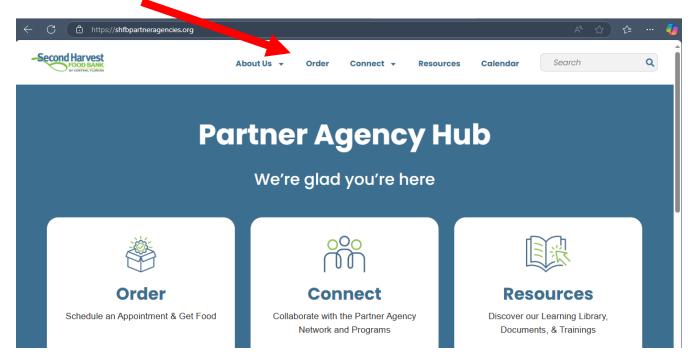
This instructional guide will aim to teach you how to schedule, cancel and reschedule appointments via Calendly.



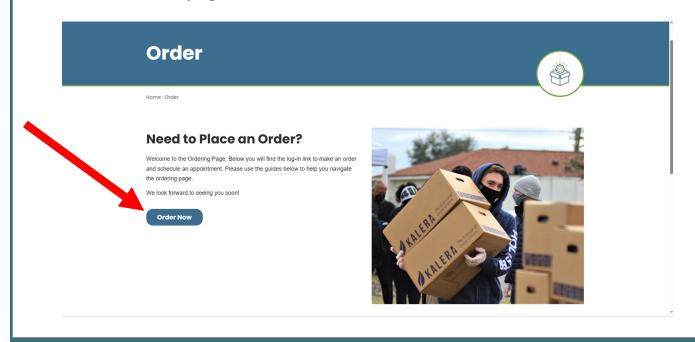
Scheduling an Appointment

# Requesting an Appointment Step 1 — Accessing Log-In Screen

To submit a request for an appointment, the agency must first log in to their portal. The agency accesses their portal through the Second Harvest Food Bank of Central Florida Partner Agency Website at shfbpartneragencies.org. Click the tab labeled "Order" at the top



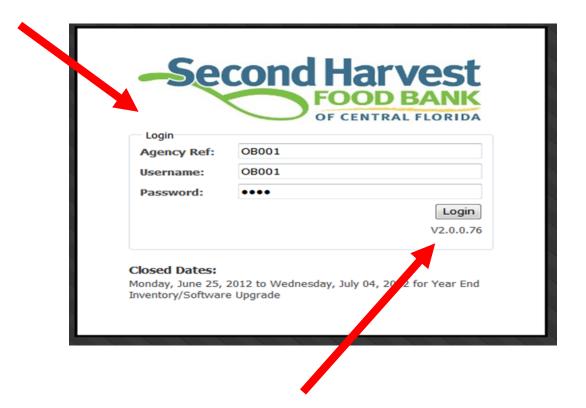
Once on the next page, click the blue "Order Now" button on the middle of the page.



# **Step 2—Logging in to the Portal**

The next page will look a little different. Each person authorized to order food online will need to know:

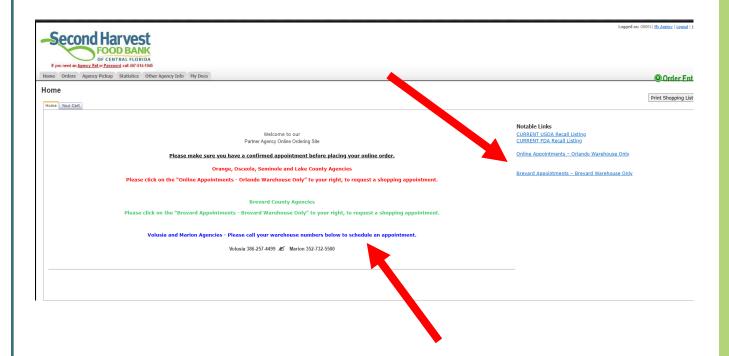
Agency Ref e.g. (OB001)
Username e.g. (OB001) (same as Agency Ref)
Password - if you are a new agency, we will provide one



Once your credentials are entered, please click Login.

# **Step 3—Logging in to Calendly**

The link to make your appointment will be on the *right-hand side* of your screen, highlighted in blue. If your agency is in Orange, Lake, Seminole or Osceola, click on the link that says "Online Appointments—Orlando Warehouse Only." If you are in Brevard county. Click "Brevard Appointments—Brevard Warehouse Only."



# \*\*\*Marion and Volusia County

partner agencies schedule appointments by contacting your local warehouse.

Volusia Branch: 386-257-4499

Marion Branch: 352-732-5500

# **Step 4—Requesting An Appointment**

First read the Instructions on the left-hand side of the page. (Available days and times will be in blue.)



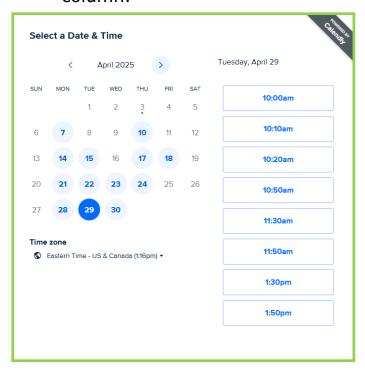
Select a **day** on the calendar by clicking on it.

Select a **time** from the right column.

Please note that all appointments will begin at the start of the hour corresponding to the selected time.

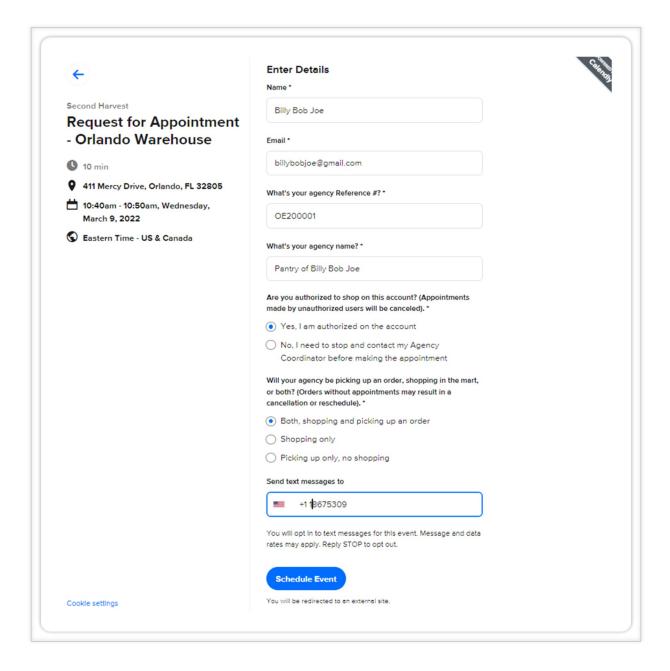
#### For example:

- An appointment scheduled for 9:30AM will begin at 9:00AM.
- An appointment scheduled for 1:50PM will begin at 1:00PM.



# **Step 5—Entering Information**

Enter all required information and details. Be sure to doublecheck this information, including the scheduled appointment time. Once entered and checked, click the blue "**Schedule Event**" button



## **Step 6—Request Received Email**

Your appointment is **NOT** scheduled when you click "Schedule Event." This is a request for an appointment. Your appointment must first be reviewed and approved. You will receive an email stating that your request has been received. You will receive a second confirmation OR denial email within 1-2 business days of your request from a Partner Agency Support Specialist.

\*\*\*This is NOT an Appointment Confirmation\*\*\*



Request for Appointment - Orlando Warehouse at 01:50pm (Eastern Time - US & Canada) on Tuesday, May 16, 2023 is in review for

Once your request has been reviewed, you will receive an appointment confirmation or denial e-mail from a Partner Agency Support Specialist between 1-2 business days.

Your request may be denied or canceled if:

- An appointment was made by an unauthorized user
- Multiple appointments were made in one day
- Agency did not follow scheduling instructions

Please call (407) 295-5009 if you have any questions or concerns.

Location: 411 Mercy Drive, Orlando, FL 32805

Your Answers:

What's your Agency Name?

Eli's Pantry Test

What's your agency Reference #?

TES1

Are you authorized to shop on this account? (Appointments made by unauthorized users will be canceled).

Yes, I am authorized on the account

Will your agency be picking up an order, shopping in the mart, or both? (Orders without appointments may result in a cancellation or reschedule).

Both, shopping and picking up an order

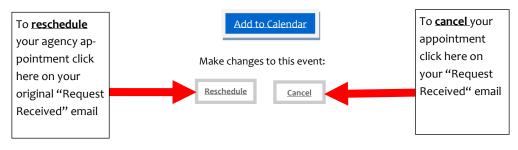
Do you understand that all appointment slots begin at the start of the hour? (For example, 11:20am, 11:30am, and 11:40am slots start at 11:00am).

Yes - I understand I must arrive at the beginning of the hour.

What type of Vehicle will you be using to shop with?

Box Truck

This event should automatically show up on your calendar. If needed, you can still add it manually:



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# **Step 6—Confirmation or Denial of Appointment**

You will receive via email confirmation **or** denial of your appointment within 1-2 business days of submitting your request.

#### **Confirmation of Appointment**

Hello,

<u>PLEASE READ:</u> Your appointment request for "Date Requested will be here" is confirmed. Remember that <u>all orders must be submitted at least THREE business days in advance</u> and shoppers must be authorized on the account before checking into the warehouse.

All appointments continue to start on the hour (For example, 1:30pm request will start at 1pm). If you need any additional assistance, please call (407) 295-5009.

If you are not going to make the appointment please call the lobby highlighted above or cancel through Calendly.

Denial of Appointment	
Hello,	
Your appointment request for	is denied due to the following reason:
Reason for Denial will be located here	
If you need any additional assistance, please call (407) 295-5009.	

## **Step 7—Rescheduling and Canceling**

If an agency needs to reschedule or cancel an appointment, click the corresponding button on the "Request Received" email that you received when requesting your appointment.

If you have questions or need assistance scheduling, rescheduling or cancelling an appointment the Agency Relations team can be reached at (407) 514-1470.

