



Ordering System Manual

INSTRUCTIONS ON USING THE KIDVANTAGE ORDERING SYSTEM

UPDATED MARCH 2023

WWW.KIDVANTAGENW.ORG

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Message from KidVantage's Executive Director

Thank you for partnering with KidVantage!

Since its founding over thirty years ago, we've had one goal – to make sure that kids in our community have what they need to thrive! This mission is at the heart of all the work we do.

It is no surprise that an undertaking this huge means that we take a community-up approach. It begins with the donation of goods and funds from the community and continues with our huge volunteer network. We can't forget the contributions of our staff. At the top of this amazing effort are our provider partners in the community. You! And you make all the difference!

When we were founded, we wanted to build an organizational structure that was efficient and cost-effective while also answering the immediate needs of children and their families. What better way to do that than to work closely with the professionals who were already working with the families we wanted to reach the most? We felt that not only would this get essential goods into the hands of families quicker and with less hassle for them, but it could also enhance the work of our partners.

Since that initial commitment was made, working with families through our partners, hundreds of other diaper and basic need banks have been founded across the country using this model. Research, as well as on-the-ground experience, has shown us that it truly works.

We want to thank you deeply for being part of our partnership of ensuring that kids get what they need to thrive. By supplying dry diapers, a safe car seat, shoes that fit, hygiene supplies to stay clean and healthy, or toys and art supplies, KidVantage is proud to work with you to make sure that kids have their basic, concrete needs met.

We are so proud of the difference you make, and that we make together every day.

Jack Edgerton
Executive Director
KidVantage



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Overview

The KidVantage Ordering System, version 2.0, is powered by Salesforce, an online database service. This service enables the tracking and reporting that KidVantage needs to improve its operations, educate its supporters, and apply for specific grants.

The core system still runs in the same manner as before, but it has been upgraded to make the system easier to access resources for your clients. We heard your suggestions and requests and through feedback from you, are excited to debut our upgrade system.

This new version of the Ordering System is not only more user-friendly, but also includes new enhanced features, including an integrated product catalog with product images and product descriptions. Another big change, is when creating an order, only products a recipient can order will be visible and available for ordering based on the product criteria. For example, when ordering a crib, only recipients who are within the age, weight and height requirements for a crib, will have that particular product display on the order screen. No more endless scrolling through products that don't apply to the recipient!

This version of the Ordering System is also now mobile and tablet friendly, giving you more freedom to access it while visiting clients.

We hope you enjoy the upgraded KidVantage Ordering System, v2.0, as much as we do!

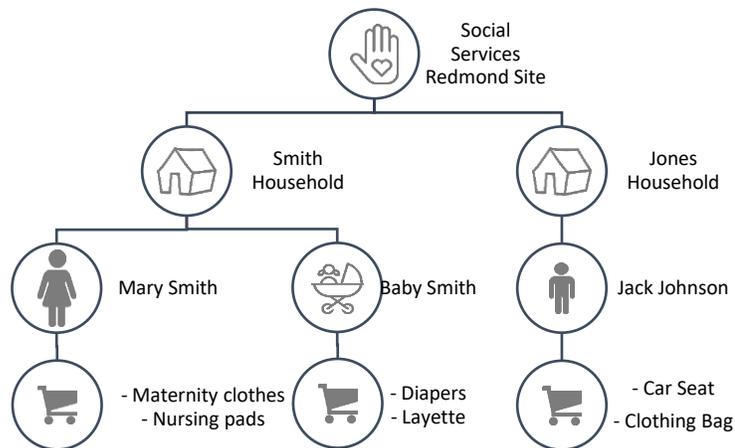
Record Types

Providers, Households, Contacts, and Orders are all records in the database that are linked to one another in a hierarchy.

	Provider	The person placing orders with KidVantage.
	Household	The physical location of the recipient and/or their primary caregiver. HOUSEHOLD = LAST NAME or <u>OTHER FAMILY IDENTIFIER</u>
	Contact/Recipient	The recipient, also referred to as a Household Member CONTACT = RECIPIENT
	Order	All items ordered for a given recipient for a given pick-up date and location.

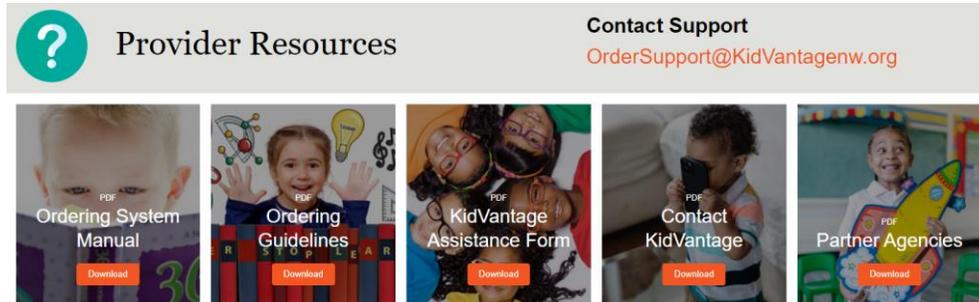
Record Hierarchy

To place an order on behalf of a client, providers must first register the household and recipient by creating new Household and Recipient records in the database. This one-time registration enables providers to quickly place orders for existing clients and edit their information (weight, height, clothing size, shoe size, etc.).



Provider Resources

Resources for providers are now available under the [Help](#) tab on the navigation bar.



Ordering Guidelines

This document includes everything about ordering goods, pickup procedures, suggested guidelines for ordering products through the ordering system. It is recommended that providers keep this document handy when ordering for their program recipients.

Phone Guide to reach KidVantage team (Who do you Call?)

Contact information for KidVantage employees.

List of KidVantage Partners

Complete list of agencies that KidVantage partners with.

Ordering System Manual

This document 😊

KidVantage Assistant Form

This form is helpful to capture demographic and anthropometric details required to enter the family into the Ordering System. This form is available in English and Spanish languages and is accessible as an editable or printable pdf. More about the assistance form can be found under ordering guidelines document.



Logging In

In accordance with the partnership agreement, providers cannot share login information within their team or pass it on to new employees. Any staffing changes need to be communicated to the Partner Services Coordinator as soon as possible. *This is critical for us to remain in compliance with our software license agreement.*

To inactivate a login ID or request a new one:

Contact KidVantage at ruchic@KidVantagenw.org or call 425-372-7528.

To access the online portal:

Option 1: Using the direct URL link

1. Visit <https://ebc.my.site.com/order/s/login/> to login. Make sure you bookmark this link!
2. Confirm the login screen looks like this:

3. Login using the same username and password as the old KidVantage Ordering System. Please email ordersupport@kidvantagenw.org if you have any trouble logging in.

Option 2: Via the KidVantage website

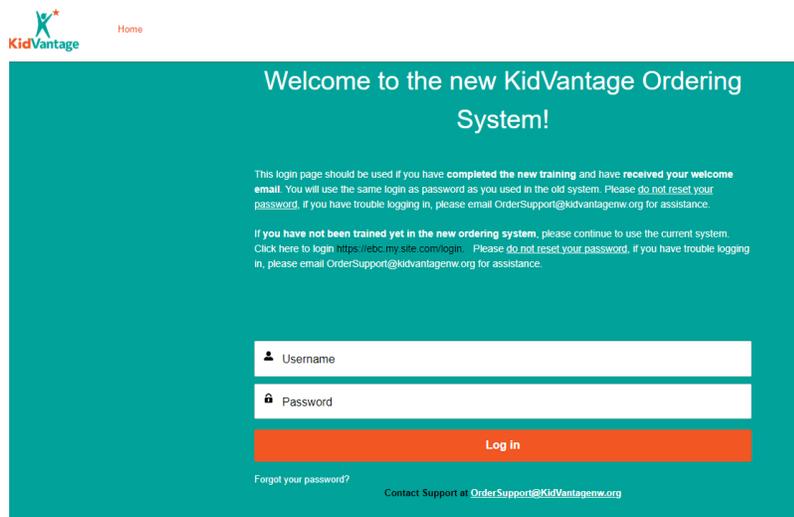
1. From any page on the KidVantage website (<https://kidvantagenw.org/>), scroll to the very bottom and click the orange **Provider Partners** button.



4. On the Provider webpage, click on **Lightning Ordering System**.



5. Click on the orange **Login Now** button
6. Enter the password: **lightning**
7. Confirm the URL is <https://ebc.my.site.com/order/s/login/> and that the login screen looks like this:
Make sure you bookmark this link!





8. Login using the same username and password as the old KidVantage Ordering System.
Please email ordersupport@kidvantage.org if you have any trouble logging in.



For quick access, create a bookmark in your web browser to jump directly to the login page: <https://ebc.my.site.com/order/s/login/>

To retrieve a password:

Click **Forgot Your Password?** and **enter your username**. An automated message will be sent through Salesforce to the email address associated with your account. (You may need to check your spam/junk folder for an email coming from @Salesforce.com)

To retrieve a username:

Contact KidVantage Support at OrderSupport@KidVantageNW.org.

Basic Features

1. Navigation Bar

The headings across the top navigation bar each link to different pages of the ordering website.

The underline indicates which page you are currently on.

2. Universal Search

Search for any record.

You may enter all or part

of a name using at least 2 characters. Results are grouped by record type (households, contacts (recipients) and Orders.

3. Announcements

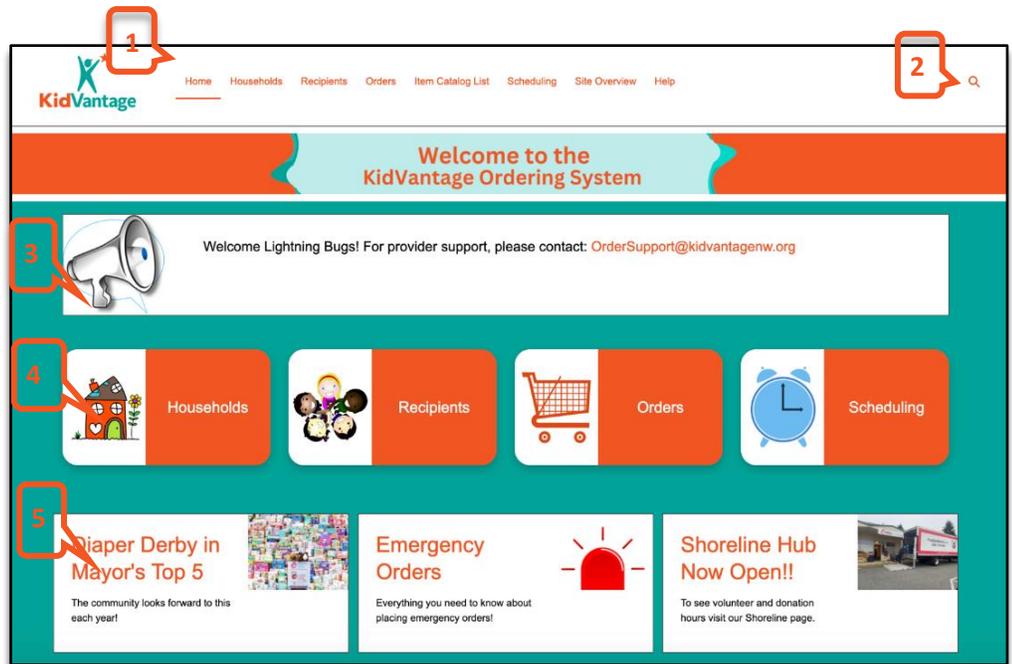
Please check this area each time you log in for announcements such as system updates, facility closures, or other time-sensitive information.

4. Short Cut Buttons

These link to the most used pages on the ordering website. They are duplicates of the top navigation bar tabs.

5. News

These link to helpful KidVantage and/or Ordering System specific news items.



Managing Recipients

Each recipient has a unique recipient record that is associated with a household. Providers can find, add, and edit Contact (recipient) records.



- Before adding a recipient, you must first create a household record for them.
- To avoid creating duplicates, please [search for an existing household or recipient](#) before creating a new one.

Find an Existing Household or Recipient

There are multiple ways to search for an existing Household or Recipient record.

Option 1 - Universal Search

This will search all record types (Households, Recipients, and Orders), including past orders and inactive households and recipients.

Click on the  search icon in the top-right corner of your screen. Enter all or part of the household or recipient name in the search box (at least 2 characters) and press **Enter** or click on the icon again. (Household names are generally the last name of the primary caregiver at the recipient's address.) Search results will be grouped by record type.

Option 2 - List View Search

This will narrow your search to a specific record type and category.

Click on **Households** or **Recipients** tab in the top navigation bar.

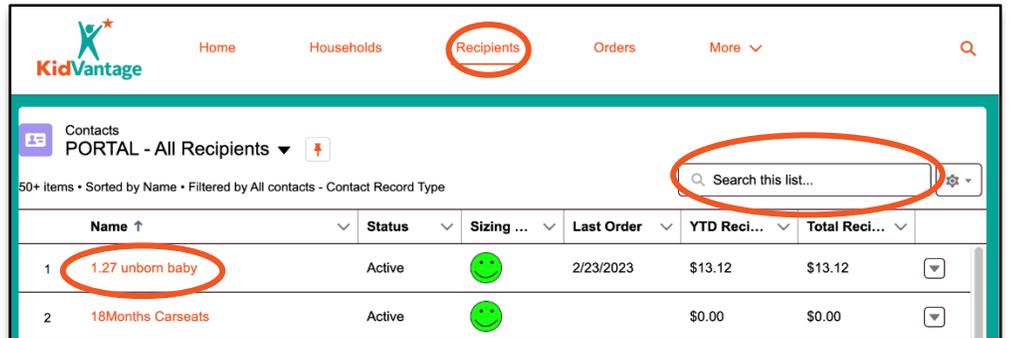
On the Households or Recipients page, select a List View from the drop-down list.

By default, you can see lists of Most Recent, Active, or Inactive records.



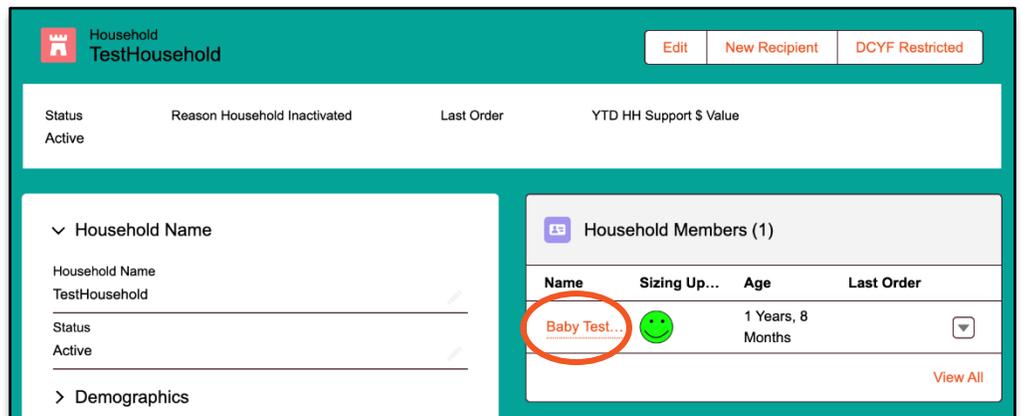
Type at least the first 2 characters of the Household or Recipient name in the **Search this list...** search box and press **Enter**. This will limit your search to the currently viewed list.

Click on the Household or Recipient name to open that record.



Recipients are also listed within their Household records. And at one time the list will view up to six recipients created under the household.

Click **View All** to see complete list of recipients within the household.



Add a Household

Adding a household creates a record that is automatically associated with your provider account. A household represents the physical location of the recipient or their primary caregiver.



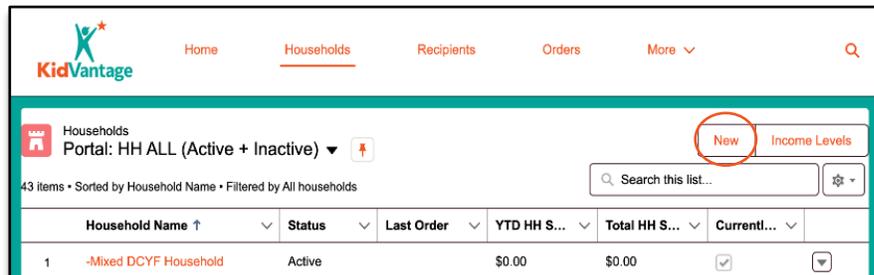
To avoid creating duplicate records, [search for an existing Household](#) before adding a new one.



To determine a Household's income category, click on the **Income Levels** button on the Households tab to see Washington's income limits based on household size.

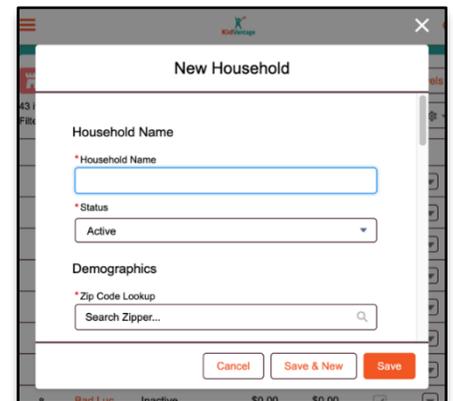
1. On the **Households** tab, click **New**.

- In the popup window, fill in every field of the new Household record. The red asterisk next to each field indicates fields that are required. If they are left blank when you click **Save**, the record will not be saved, and you will be prompted to fill in the required fields.



2. You can use **Tab** to jump to the next field or **Shift + Tab** to go back to the previous field.

Click **Save**. Or, if you have several households to add, click **Save & New** to save the current record and open a new one





Guide for entering fields under the Household record:

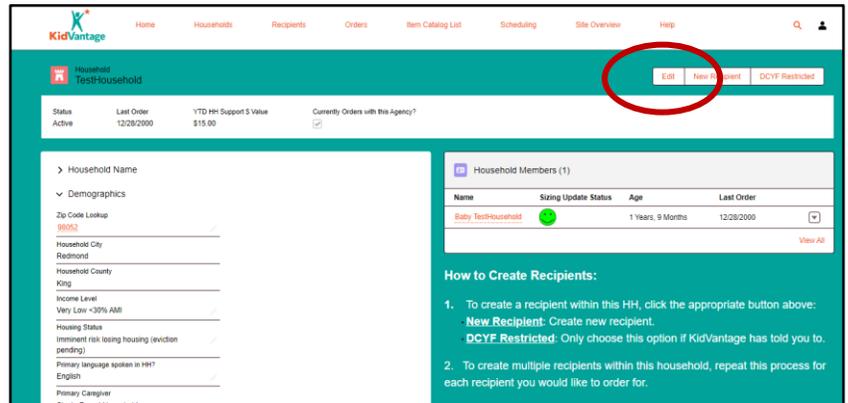
Field	Description
Household Name	Enter the last name of the recipient's primary caregiver at this address.
Household Status	Select Active .
Zip Code Lookup	Enter the zip code and click on the matching zip code in the search results. For homeless recipients, enter the zip code where they generally reside.
Income Level	Select the Household's percentage of Average Median Income (AMI). Click the Income Levels button on the Households page to view Washington state's AMI and income limits: https://www.huduser.gov/portal/datasets/il.html
Housing Status	Select the living situation for the family.
Primary Language Spoken in HH	Select the primary language that is spoken within the household.
Primary Caregiver	The type of primary caregiver(s) responsible for the recipient.
Employment Status	The primary caregiver's employment status.
Benefits Received	Select all benefits the family is receiving from the Available column and move them to the Chosen list using the arrows. If the family is not receiving any benefits, select "No Benefits"
Primary Caregiver has a disability	If yes , check the box.
Does the primary Caregiver identify as LGBTQ+?	If yes , check the box.

*To add a benefit, click on its name in the Available column, then click on the arrow icon to move it to the Chosen column.

Updating a Household

If anything changes for the family, make sure you **edit the household record**, instead of creating a new one. This will keep it associated with the correct recipients and their past orders.

1. [Find and open the Household record.](#)
2. Click **Edit**.
3. Update the relevant fields and click **Save**.



Inactivate a Household

Once a household is created, it cannot be deleted by a provider. If you are **no longer working with a family**, **simply edit the Household record to change its status to “Inactive”**. When you inactivate a household record, all of the household members (all the recipient records associated with that Household) will automatically be inactivated as well. If you created a household record by mistake, contact OrderSupport@KidVantageNW.org to delete the record.

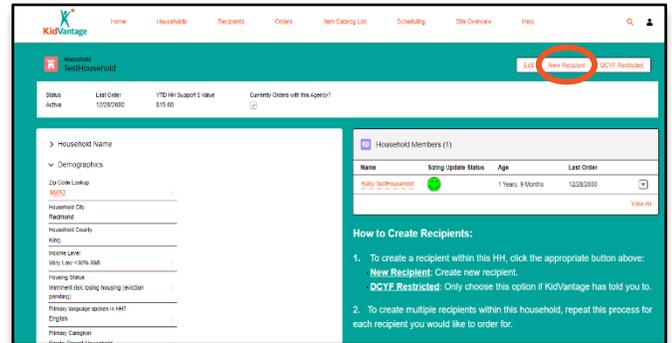
1. [Find and open the Household record.](#)
2. Click **Edit**.
3. From the **Status** drop-down menu, select **Inactive**.
4. Click **Save**.

Add A Recipient – Standard KidVantage Recipient



To avoid creating duplicate records, [search for an existing](#) recipient record before adding a new one.

1. [Find and open the recipient's Household record](#) to automatically connect the new recipient to the correct household.
2. In the Household record, click the **New Recipient** button.
3. In the pop-up window, fill in all required fields.



- a. The ***red asterisk** next to each field indicates that those fields are required. If they are left blank when you click **Save**, the record will not be saved, and you will be prompted to fill in the required fields.
- b. You can use **Tab** to jump to the next field or **Shift + Tab** to go back to the previous field.



These fields are still required for unborn infants.

See the chart below for what values to enter for these cases. Refer to Ordering Guidelines document for more information on creating account for unborn babies.

For assistance creating an account for an unborn baby view the [guide for entering fields under the recipient record](#).

- c. Click **Save**. Or, if you have several recipients to add to the same Household, click **Save & New** to save the current record and open a new one that will be automatically associated with the same Household.

Add A Recipient – DCYF Restricted Recipient

This section is ONLY FOR USE IF KIDVANTAGE HAS TOLD YOU TO USE IT and you are creating a recipient record for a DCYF restricted recipient.



To avoid creating duplicate records, [search for an existing](#) recipient record before adding a new one.

- 4. [Find and open the recipient’s Household record](#) to automatically connect the new recipient to the correct household.

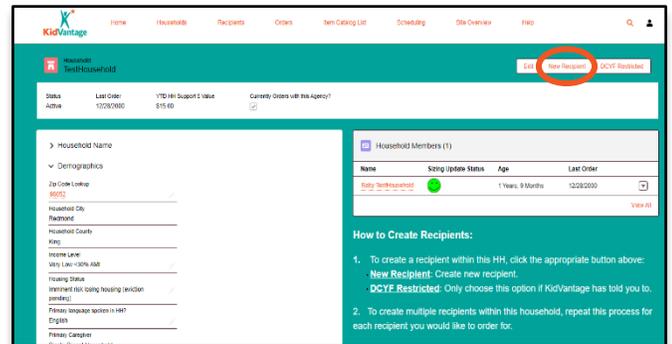
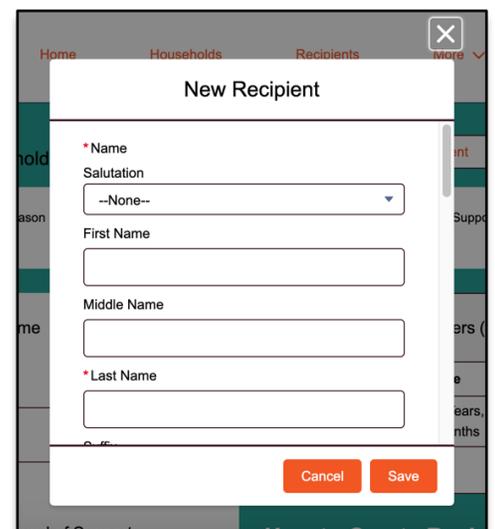
- 5. In the Household record, click the **DCYF Restricted** button.

- 6. In the pop-up window, fill in all required fields.

- d. The **red asterisk** next to each field indicates that those fields are required. If they are left blank when you click **Save**, the record will not be saved, and you will be prompted to fill in the required fields.

*Make sure you include the specific **DCYF – HV Funding Source**.*

- e. You can use **Tab** to jump to the next field or **Shift + Tab** to go back to the previous field.



These fields are still required for unborn infants.

See the chart below for what values to enter for these cases. Refer to Ordering Guidelines document for more information on creating account for unborn babies.

For assistance creating an account for an unborn baby view the [guide for entering fields under the recipient record](#).

- f. Click **Save**. Or, if you have several recipients to add to the same Household, click **Save & New** to save the current record and open a new one that will be automatically associated with the same Household.



For anonymous recipients:

You may enter numbers or other identifiers in the name fields. Keep a private list of the keys so that each household and recipient is accurately tracked. Please ***consistently use the same unique identifier*** each time you order for the same child. This is critical for KidVantage’s annual reporting.

Actual Name		Unique Identifier		Example
First Name	Last/Household Name	First Name	Last/Household Name	
John	Smith	John	SiteName + SiteUniqueCode	John KIAC001
John	Smith	John	First4OfLastName + Unit/Room#	John SMIT403
John	Smith	John	Internal ID/Medical# your org uses	John PM-03-340
John	Smith	John	Mom’s First Name	John Mary



Guide for entering fields under the recipient record:

Field	Notes	Unborn Infants*
First Name	Enter the recipient’s first name or unique identifier.	“Baby” if unknown
Last Name	Enter the recipient’s last name or unique identifier.	
Height	Enter height in inches using numbers only.	“19”
Weight	Enter weight in pounds using numbers only.	“7”
Clothing Size	Select the recipient’s general clothing size. All clothing sizes are children’s unless marked “MAT” for maternity.	0-3 months
Shoe Size	Shoe sizes are 0-13 <u>C</u> hild, 1-7 <u>Y</u> outh, or 8-12 <u>A</u> dult. Example: 3Y means size 3 Youth. Half sizes may be indicated in the comment field when ordering shoes. See Appendix B for shoe sizing assistance.	“0C”
Shoe Width	Medium by default.	
Birth Month		Month expected
Birth Year		Year expected
Gender Expression	Preferred clothing style. This prints out on the order labels and determines the style of items received. Choose the gender that correlates with the clothing, toys, books, etc. the child wants to receive.	
Gender Identity	This is kept private and used only for reporting demographic information in aggregate.	
Race/Ethnicity		
English Proficiency	Choose the level of language proficiency of the recipient. For young children, this is determined by the caregiver’s English proficiency.	

Field	Notes	Unborn Infants*
Military Service		
Refugee/Immigrant		
Recipient has a Disability	As defined by your organization.	

* [Update the Recipient record](#) once the baby is born.

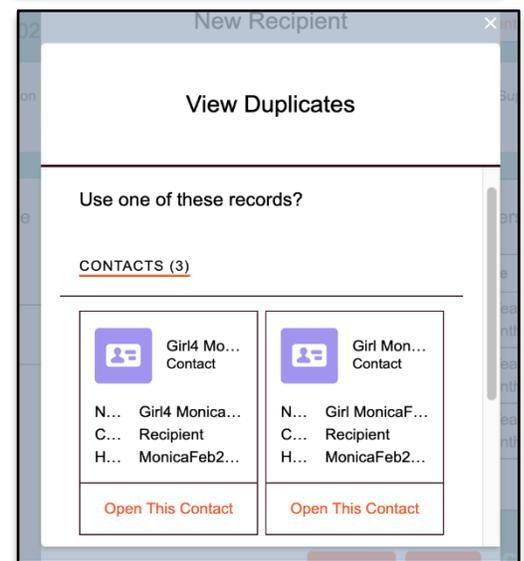
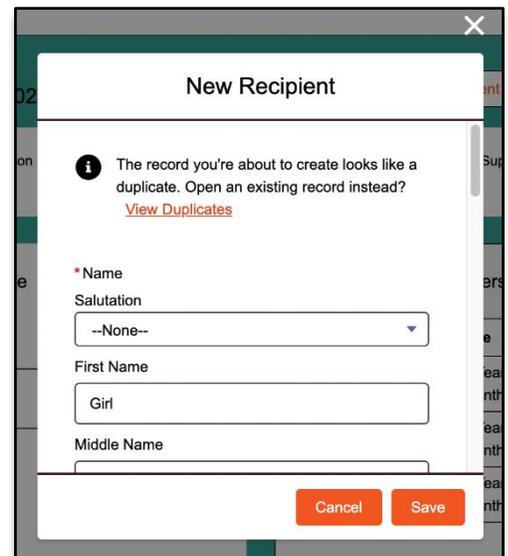
Duplicate Client in the System

When creating a new recipient record, the system looks at the recipient’s first and last name, household, and birth month and year to look for potential duplicates.

In order to serve the most children in our community, we provide goods for a recipient through one organization only. Many of the items we distribute are purchased to make sure kids have all the essentials, including formula & baby food, diapers, wipes, car seats, and Pack ‘N Plays. Please make sure to engage with the caregiver to confirm that you are the only source for receiving children’s items through KidVantage.

A duplicate within your organization:

If the new recipient’s information matches an existing record within your organization, an alert will appear at the top of the Create New Recipient popup, with a link to the potential duplicate record. You can click **Cancel** to back out, or Click **View Duplicates** to see a list of possible matching records.





In the View Duplicates popup, click **Open this Contact** to see if it's a duplicate. If it is not a duplicate, go ahead and register the recipient as usual. We may contact you to verify that the recipient is unique.

A duplicate outside your organization, but within the KidVantage database:

In the event a possible duplicate was created outside your own organization, but within the KidVantage database (the recipient is being served by another organization), the **View Duplicates** popup might not display any names (because their information is private). Go ahead and register the recipient as usual; we may contact you to determine which provider the recipient will be ordering through. We can reassign the existing recipient's record to your organization, while retaining all their past ordering information if they've decided to switch providers.

Updating a Recipient Record

The ordering system uses the recipient's birth month & year to automatically calculate their current age, but providers **need to verify and update current height, weight, and clothing and shoes sizes**. This can be done by finding and editing the recipient record directly or by updating their information on the ordering screen when placing an order.

As per the partnership agreement, KidVantage requires providers to update anthropometric measurements (height, weight, clothing size, and shoe size) monthly for children 0-5 years old and every other month for children 6-12 to ensure child safety and correct sizing for order fulfillment.

Please pay attention to the **smiley faces** under **Sizing Update Status** fields to help you know when you are required to updated a record.

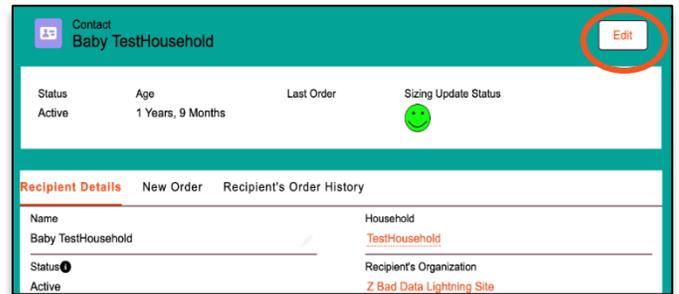
- **Green smiley faces** = recently updated record
- **Yellow smiley faces** = record needs to be updated within 45 days in order to be able to still actively order for the recipient



- **Red smiley faces** = the system will automatically erase all sizing fields and you will not be able to place orders for that recipient until the sizing is updated

To edit a Recipient record:

1. [Find and open the recipient's record.](#)
2. Click the **Edit** button at the top-right.
3. Update any relevant fields and click **Save**.



To update a recipient's zip code:

You must find and edit the Household record that they are associated with. See [Updating a Household](#).

Inactivating a Recipient

Once a Recipient record is created, it cannot be deleted by a provider. **If the recipient (and entire household) is no longer receiving services from your organization, please [inactivate their Household record](#).** You cannot inactivate a recipient only. If just one recipient within the family is no longer receiving services through KidVantage or you created a Recipient record by mistake and need to delete it, please send a request to OrderSupport@KidVantageNW.org.

1. [Find and open the recipient's Household record.](#)
2. Click the **Edit** button at the top-right.
3. From the **Status** drop-down menu, select **Inactive**.
4. Click **Save**.



Viewing Recipient's Order History

Before ordering for a recipient, we highly recommend you view the **Recipient's Order History** – especially if you are new to ordering for families. This will provide you with a historical record of what the recipient has ordered, when, the quantity and the value.

1. [Find and open the recipient's record.](#)
2. Click the **Recipient's Order History** tab
3. Click **View All** to see entire history – once in this view, you can click on any of the headers and re-sort the columns like you would in Excel.

[Contacts](#) > [BabyBoy Test2](#)

Ordered Items Received by Recipient

14 items • Sorted by Ordered Product

	Pickup Date	Ordered Product	Order Item Status	Quantity of Items	Total Value
1	3/23/2023	*Car Seat Visual Education Book	Canceled	1	\$2.92
2	3/23/2023	*NEW* COVID-19 Vaccine COLORING BOOK	Canceled	1	\$1.20
3	3/2/2023	*NEW* COVID-19 Vaccine COLORING BOOK	Delivered	1	\$1.20
4	3/2/2023	Baby Food Maker	Canceled	1	\$10.00
5	3/2/2023	Baby Monitor	Canceled	1	\$21.50
6	3/9/2023	Bedding Set - Crib/Toddler (13mos+) *B*	N/A- Specific Request	1	\$65.72
7	3/23/2023	Bedding Set - Crib/Toddler (13mos+) *B*	Canceled	1	\$65.72
8	3/9/2023	Bedding Set - Full Size *B*	Delivered	1	\$61.25

Orders



- All orders must be associated with a recipient. Contact us directly for large quantity program orders that are not for individual recipients.
- We accept just one order per recipient per week. To [order more items for a recipient during the same week, edit the existing order instead of creating a new one.](#)
- Orders cannot be edited once they lock on Thursday of the previous week at 3:00 pm.
- The system does not currently support recurring orders. A new order must be created each time.

Placing an Order

1. [Find and open the Recipient record.](#)
2. From the Recipient record, click the **New Order** tab.



Contact: Baby TestHousehold [Edit]

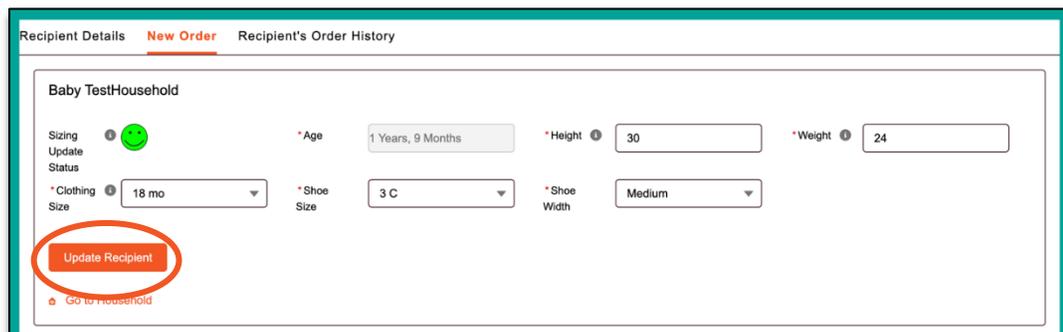
Status	Age	Last Order	Sizing Update Status
Active	1 Years, 9 Months		✔

Recipient Details **New Order** Recipient's Order History

Name	Household
Baby TestHousehold	TestHousehold

Status Recipient's Organization

3. On the new order page, **before placing the order, if needed, update the recipient's sizing information:**



Recipient Details **New Order** Recipient's Order History

Baby TestHousehold

Sizing Update Status ✔ *Age 1 Years, 9 Months *Height 30 *Weight 24

*Clothing Size 18 mo *Shoe Size 3 C *Shoe Width Medium

Update Recipient

[Go to Household](#)

Enter the current height, weight, and

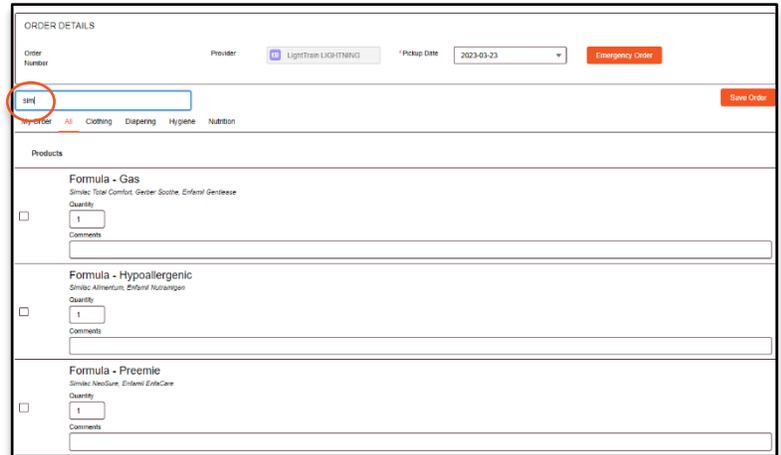
clothing and shoe size; and click the **Update Recipient** button. The sizing that appears in this box when you click save is the size that the orders will be processed with.

- a. The Ordering System uses these values to validate certain items that have height, weight, or age restrictions and to designate the appropriate clothing and shoe sizes. Modifying these fields will automatically update the Recipient record as well.

4. Find items to order.

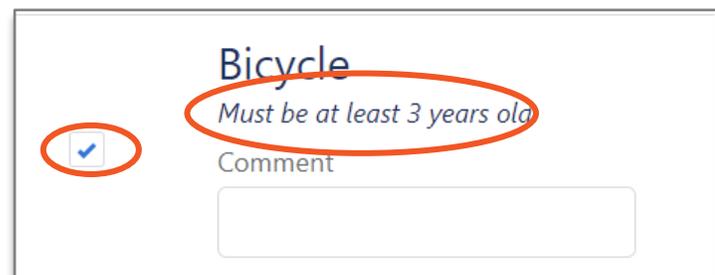
By default, the full item catalog is listed in alphabetical order on the **All** tab with car seats at the top.

- If you know the name of the product you're looking for, type the product name in the **Search Products** text box. The list will automatically be limited to products with that keyword as you type (at least 3 characters).
- Browse for items by category by selecting one of the other tabs (Diapers, Formula, etc.).



5. Select items to add to the order:

- Select the checkbox next to the item you want to order.
(To remove an item from the order, deselect the checkbox)
- Enter any special requests in the item's **Comment** field.
Examples: half shoes sizes, culturally sensitive items to exclude, gift preferences.



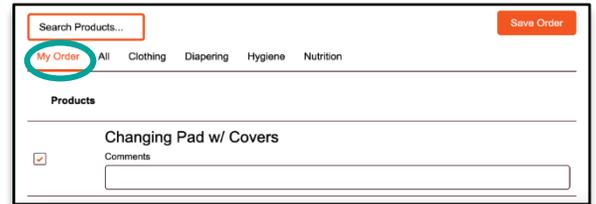
Comments will print out on the item's label (up to 30 characters) *and can be viewed by the recipient.*

- Enter a quantity if applicable. Quantities will be "1" by default. If no quantity is shown, then it is an item you can only order 1 of.
 - A product such as "Clothes – Pants" will contain multiple pairs of pants, even though the quantity says "1" order.

- d. If the item has special ordering instructions or restrictions, that information will display in italics under the item's product name.

6. When you have finished adding items, review your order by selecting the **My Order** tab.

This will display your "Shopping Cart". **These items will not be ordered until you save the order.**

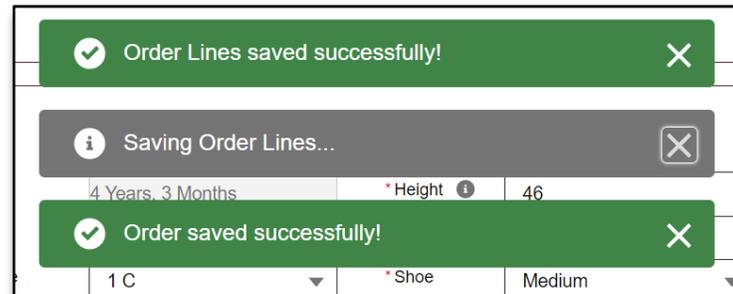


7. Click **Save Order**.

You may save the order multiple times to continue adding or removing items as you wish.

8. **Verify that the order was created and contains all the selected items.**

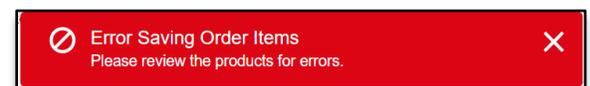
You should see a set of confirmation messages that your order was created/updated and that all ordered items (order lines) were saved.



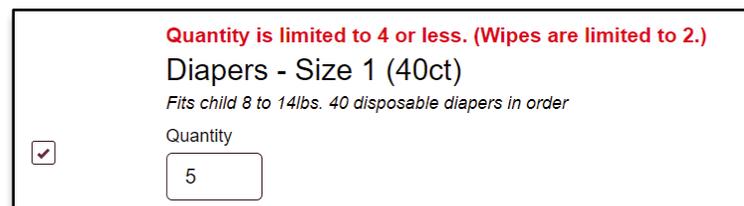
The first time you successfully save the order, an order number will appear in the Order Details section.



If the order did not go through, you will see an error message. Click the **X** to close the error message and revise the order as prompted.



If you selected an item that conflicts with the ordering guidelines, an error message will appear in red above the product name explaining why the order could not go through.





Click the checkbox next to the item to uncheck it (or adjust the quantity), then click the **Save Order** button again to update your order. To learn more about suggested guidelines for ordering items, please refer to ordering guidelines document.

Recipient's Order History tab



Providers **MUST** use recipient order history tab to ensure they are following suggested guidelines for ordering products. This is critical for equitable distribution of resources/ goods to children and families within our community.

Emergency Orders

Emergency orders are available for families in crisis. If the deadline for placing orders has past, but you have an emergency, you can contact corib@kidvantage.org and get an emergency authorization code that will allow you to place the order for the upcoming pickup date. Emergency orders must be placed by 10:00am on Wednesday (the day before pickup).

Please note that the following items are the only items available for emergency orders:

1. Baby Food
2. Bedding
3. Car Seats
4. Clothing Bundles & Layettes
5. Diapers
6. Formula
7. Pack 'N Plays
8. Wipes

To place an emergency order:

1. Please email the System Administrator (corib@kidvantagesw.org) to get an authorization code. All orders must be placed into the system **by 10:00 am on Wednesday**

2. On the ordering screen, click the **Emergency Order** button.

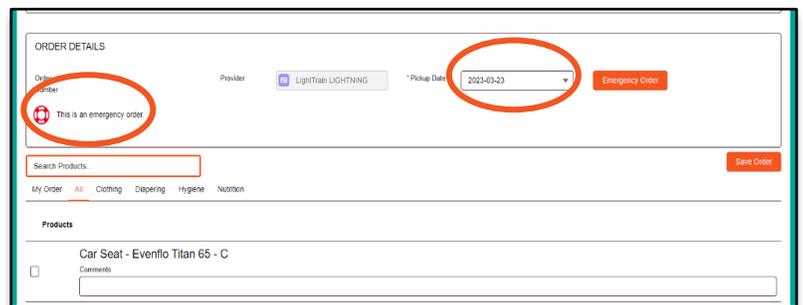


ORDER DETAILS

Order Number: Provider: Cori LIGHTNI *Pickup Date: 2023-03-09 **Emergency Order**

3. In the pop-up window, enter the emergency code and click **Validate**.
If the emergency code is active, the order will automatically be assigned to the current pickup date (same week's Thursday).

4. Ensure that the emergency order is assigned a special symbol to highlight it as an emergency order.



ORDER DETAILS

Order Number: Provider: LightTrain LIGHTNING *Pickup Date: 2023-03-23 **Emergency Order**

This is an emergency order

Search Products: **Save Order**

My Order: All Clothing Diapering Hygiene Nutrition

Products

Car Seat - Evenflo Titan 65 - C

Comments

5. Proceed with the order.
6. Send an email to

corib@kidvantagesw.org to let her know the order has been placed.

Car Seat & Booster Seat Orders

The ordering system uses the recipient's age, height, weight, and the vehicle's seat belt type to automatically assign the appropriate type of car seat.

To order a car seat:

1. Follow the instructions for placing an order, taking extra care to enter the recipient's current height and weight and click **Update**.



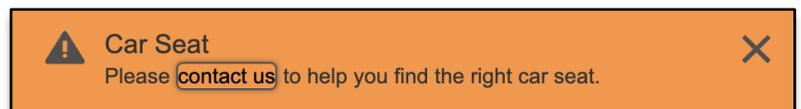
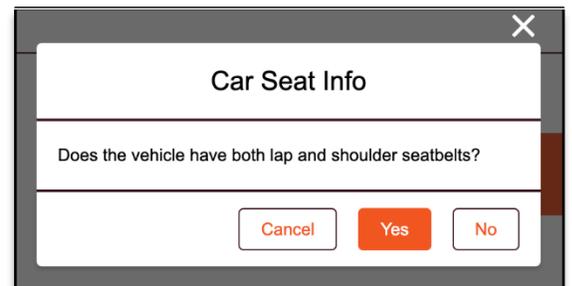
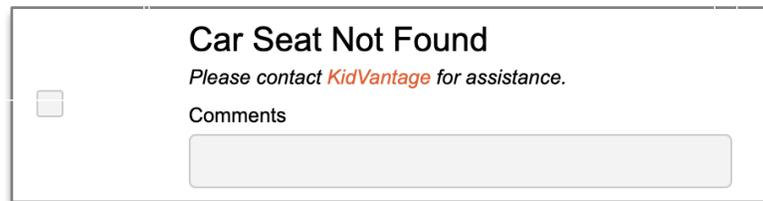
- The appropriate car seat will automatically appear at the top of the product list under the **All** tab. Check the box next to the car seat and click the **Save** Order button.

If the recipient's age, height and weight do not match any available car seats, this item will be greyed out and you will be prompted to email corib@KidVantageNW.org for assistance.

- In the pop-up window, select **Yes** or **No** to indicate whether the car has both lap and shoulder seatbelts.

If the car does not have both lap and shoulder seatbelts, a car seat will not be added to the order, and you will be prompted to contact KidVantage to talk to one of our Child Passenger Safety Technicians (CPSTs). In the orange warning message, click **contact us** to initiate an email to corib@KidVantageNW.org.

[For a guide to what a lap/shoulder belt or lap only belts are see Appendix C: Car Seat Guide.](#)



- Continue to add items to your order or click **Save Order** to finish.

Edit an Order

You can continue to add or remove items from an order whose status is still “Open”. Once the ordering cut-off time (Thursday 3:00 pm) has passed (one week before the pickup date), the Order’s status automatically changes to “Locked”, and any changes to the locked order must be made by contacting

OrderSupport@KidVantageNW.org.

To edit an OPEN order:

1. On the top navigation bar, click the **Orders** tab.
From the **Open Orders (You Can Edit!)** list and click on the order number.

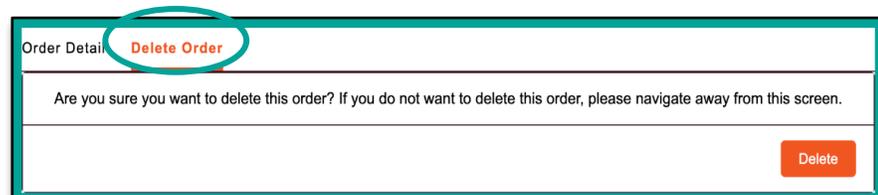
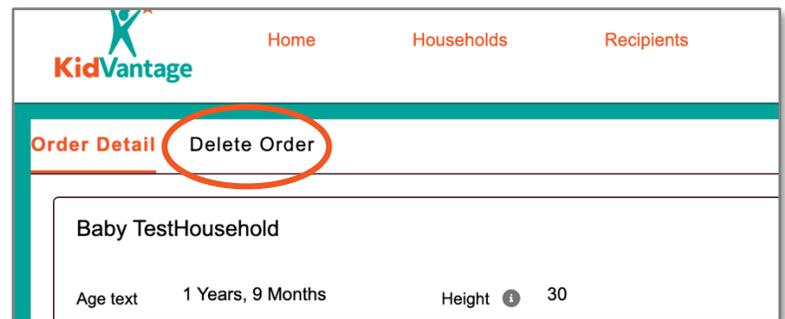


2. Add or remove items as usual and remember to click **Save**.

Cancel/Delete an Order

To cancel/delete an order:

1. Find and open the Order (see [Edit an Order](#)).
2. Inside the Order record, select the **Delete Order** tab
3. Click **Delete** to delete the order (or use your browser’s back button to exit without deleting the order, if you do not wish to delete your order).



View/Print your Weekly Orders

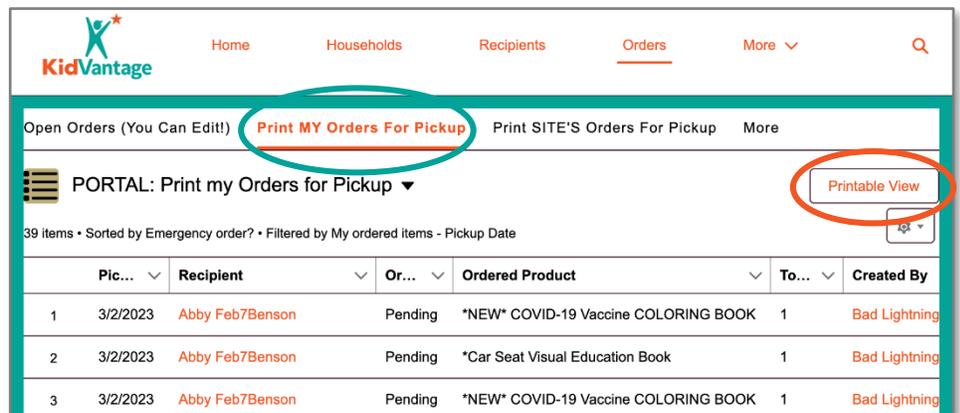
You can quickly see a list of the orders you have for pick up on Thursday and save or print out a copy for your own reference. KidVantage will still have a printout of your orders upon check-in for you to use during pick up, and we keep other copy (check-out sheet) as a confirmation of which items you have received.

To print or save a pickup list:

1. On the top navigation bar, click the **Orders** tab.
2. Select a list

- **Print MY Orders for Pickup** – Orders that you have placed.

- **Print SITE'S Orders for Pickup** – Orders placed by all Providers at your site (you and your co-workers).



3. Click **Printable View**.
4. In the Printable View, select the number of records to the largest option in the drop-down display and click **Print This Page** to open your computer's print/preview page and click **Print**. You can **save the order** by choosing the printer "Print to PDF". Click Close Window to exit.

Order

PORTAL: Print MY Orders For Pickup
Displaying records 1 - 25, more records available

Number of records **25**

Pickup Date	Recipient	Order Item Status	Ordered Product	Total Quantity of Orders	Provider Name	Emergency order?
3/23/2023	John Green	Pending	Car Seat - Short Booster	1	LightTrain LIGHTNING	<input type="checkbox"/>
3/23/2023	John Green	Pending	Bedding - Blanket Infant	1	LightTrain LIGHTNING	<input type="checkbox"/>
3/23/2023	Baby TestHousehold	Pending	Baby Carrier - Back Pack	1	LightTrain LIGHTNING	<input type="checkbox"/>
3/23/2023	Baby TestHousehold	Pending	Baby Food Maker	1	LightTrain LIGHTNING	<input type="checkbox"/>
3/23/2023	Baby TestHousehold	Pending	Bedding Set - Twin Size "B"	1	LightTrain LIGHTNING	<input type="checkbox"/>
3/23/2023	Baby TestHousehold	Pending	Diaper Wipes	1	LightTrain LIGHTNING	<input type="checkbox"/>
3/23/2023	Baby TestHousehold	Pending	Diapers - Pull-Ups 2T-3T (10ct)	1	LightTrain LIGHTNING	<input type="checkbox"/>
3/23/2023	18Months Carseats	Pending	Bed - Pack 'N Play w/ Bedding (13mos+) "B"	1	LightTrain LIGHTNING	<input type="checkbox"/>
3/23/2023	John Green	Cancelled	Baby Food Maker	1	LightTrain LIGHTNING	<input type="checkbox"/>

Product Catalog

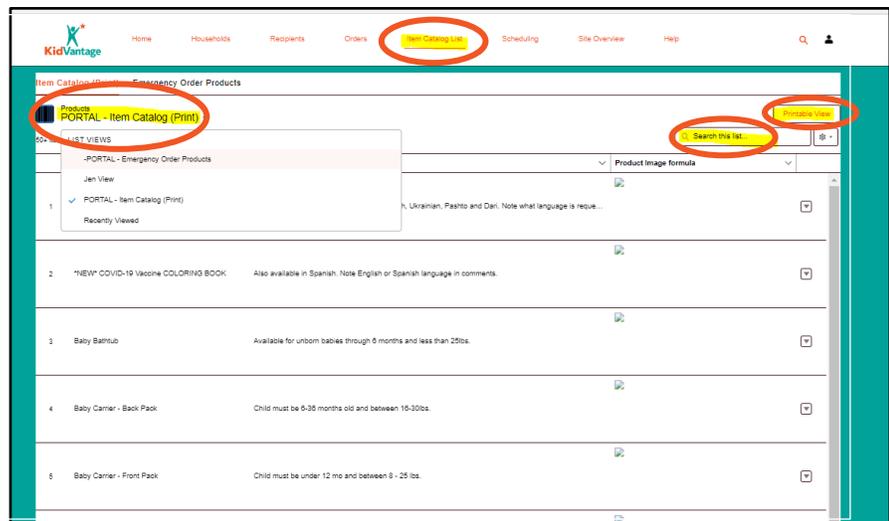
On the navigation bar there is a link to the Product Catalog. This unique document has items listed (alphabetically) along with product images and product descriptions.

**Product images are examples of the product you might receive. There is no guarantee you will receive that exact product.*

There are three different tabs, each with different views you can access:

- [Portal - Item Catalog \(ALL Products\)](#) – alphabetical list of all products
- [Portal - Emergency Order Products](#) - list of eligible emergency order products
- [Maternity Products](#) – list of products that can be ordered for expectant or new moms.

A provider has the ability to print the list by clicking on **“Printable View”**. In the Printable View, select the largest number of records to display and click **Print This Page** to open your computer’s print/preview page and click **Print**. Click Close **Window** to exit. The provider can also choose to save the catalog as a pdf document if they do not wish to print.

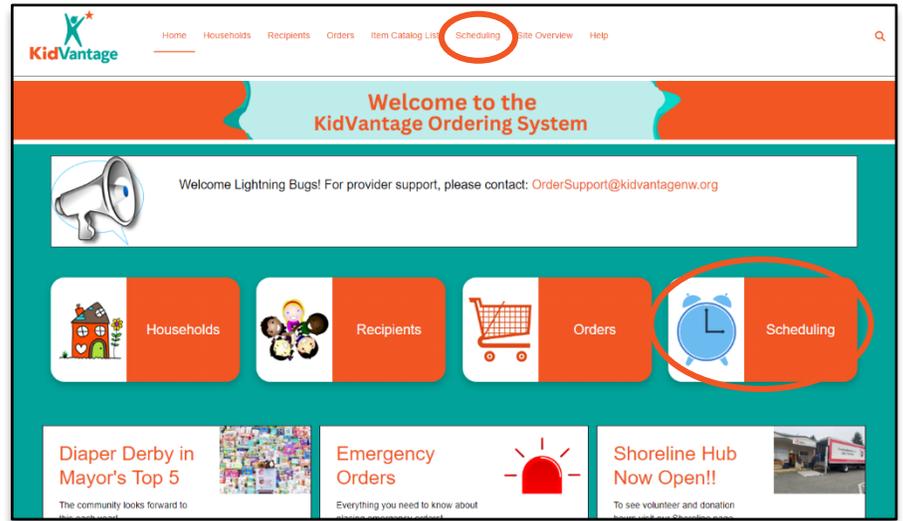


You can also **save the order** by choosing the printer “Print to PDF”.

The item catalog page also gives the ability to search for a product by typing the product name in the **“Search this list”** search box.

Scheduling A Pickup Appointment

Use the scheduling tab to view all the necessary information for scheduling a pickup appointment.



Determining if you have orders to pick up:

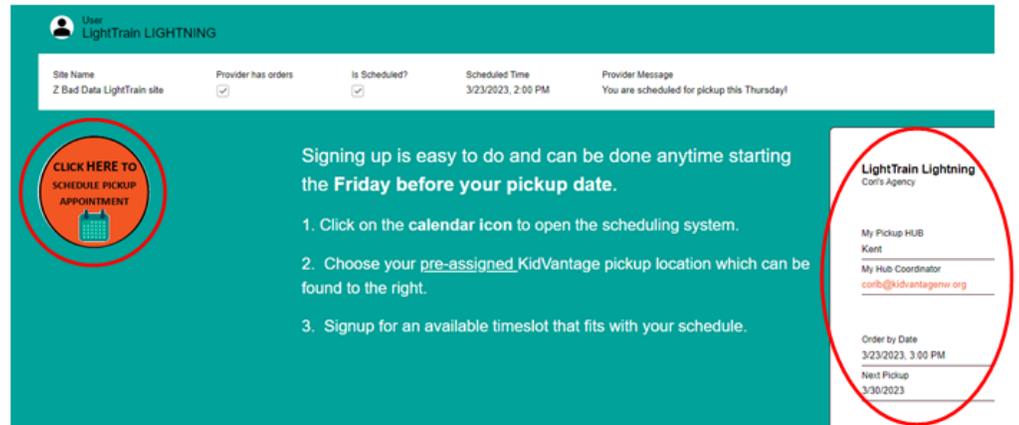
On the top of the Scheduling page, the white box will inform you if you have orders for pickup.

User LightTrain LIGHTNING				
Site Name	Provider has orders	Is Scheduled?	Scheduled Time	Provider Message
Z Bad Data LightTrain site	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3/23/2023, 2:00 PM	You are scheduled for pickup this Thursday!

- **Provider has orders** – If this is checked you have orders to pickup
- **Is scheduled?** – if this box is unchecked you need to [schedule a pickup appointment](#)
- **Scheduled Time** – If you've scheduled your pickup appointment, your date and time will appear here
- **Provider Message** – If you have an order for pick up you will see a message here

To schedule a pickup appointment:

1. Click the **Orange button** to open the scheduling system
2. Choose your preassigned KidVantage pickup Hub.

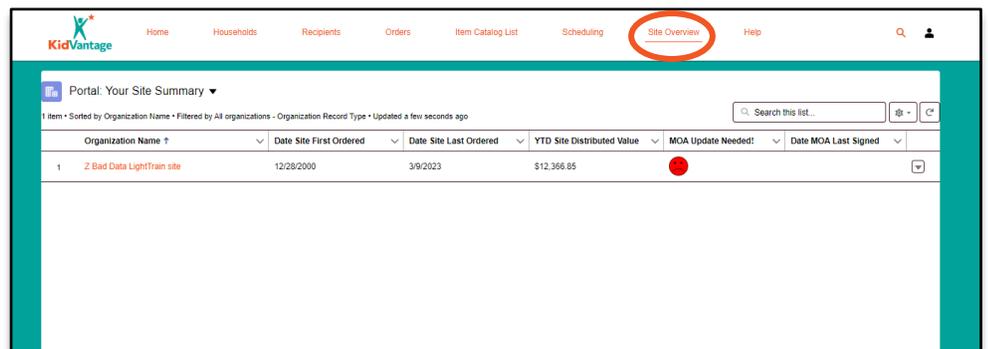


* In the event you're unsure of your pickup hub you can find it on the righthand side of the Scheduling tab.

3. Choose a pickup time that works with your schedule
4. Save.

Site Overview

The Site Overview tab on the navigation bar will provide all the necessary information about the site that you are ordering for.





Frequently Asked Questions

For technical questions about the online ordering system, contact OrderSupport@KidVantageNW.org.

1. Why can't providers share logins?

Our software license agreement with Salesforce (the platform for our Ordering System) prohibits users from sharing logins. It is critical that KidVantage remains in compliance our agreement with Salesforce, so we appreciate your adherence to this agreement. This is also outlined in your agency's contract with KidVantage. If your coworker needs to have access to the Ordering System, please reach out to Partner Services Coordinator at 425-372-7528.

2. What is a partnership agreement?

The partnership agreement is an agreement that clarifies the commitments between KidVantage and your agency as we work together to distribute the items that children need. This document is usually signed by the senior leadership, such as the Executive Director, CEO, President or Superintendent.

3. Can recipients be anonymous?

Yes, if this is a requirement for the program. If you need to keep the household or recipient's name anonymous, you can [enter numbers or other unique identifiers in the name fields](#), as long as you keep a private list of the keys and use them consistently so that each unique household and recipient is accurately tracked.

It is important that you provide real child information (age, height, weight, etc.) so the proper validation rules work.

4. Why are we asking for demographic information?

KidVantage uses recipient and household demographic information to apply for grants to generate community support and funding. It also helps us to better understand and serve the families we are



helping. All the demographic information shared will be used in aggregate while applying for grants or writing a donor report.

Appendix A: Height Conversions

Height conversions – All heights should be entered in **inches**.

Feet	Inches	Centimeters
1'	12	30
2'	24	61
2'1"	25	64
2'2"	26	66
2'3"	27	69
2'4"	28	71
2'5"	29	74
2'6"	30	76
2'7"	31	79
2'8"	32	81
2'9"	33	84
2'10"	34	86
2'11"	35	89
3'	36	91
3'1"	37	94
3'2"	38	97
3'3"	39	99
3'4"	40	102
3'5"	41	104
3'6"	42	107
3'7"	43	109
3'8"	44	112
3'9"	45	114

Feet	Inches	Centimeters
3'10"	46	117
3'11"	47	119
4'	48	122
4'1"	49	124
4'2"	50	127
4'3"	51	130
4'4"	52	132
4'5"	53	135
4'6"	54	137
4'7"	55	140
4'8"	56	142
4'9"	57	145
4'10"	58	147
4'11	59	150
5'	60	152
5'1"	61	155
5'2"	62	157
5'3"	63	160
5'4"	64	162
5'5"	65	165
5'6"	66	168



Appendix B: Shoe Sizing

Shoe sizes are 0-13 Children (C), 1-7 Youth (Y), and 8-12 Adult (A). If you do not know the child's shoe size, please take or ask for a foot measurement and use the tables below to determine the shoe size.

Children & Youth Sizes

Shoe Size	Foot Length	
	inches	cm
0 C	0	0
1 C	3 1/2	9
2 C	3 3/4	9.5
3 C	4 1/8	10.5
4 C	4 1/2	11.5
5 C	4 3/4	12
6 C	5 1/8	13
7 C	5 1/2	14
8 C	5 3/4	14.5
9 C	6 1/8	15.5
10 C	6 1/2	16.5
11 C	6 3/4	17
12 C	7 1/8	18
13 C	7 1/2	19
1 Y	7 3/4	20
2 Y	8 1/8	20.5
3 Y	8 1/2	21.5
4 Y	8 3/4	22
5 Y	9 1/8	23
6 Y	9 1/2	24
7 Y	9 3/4	25

Adult Sizes

Shoe Size	Women's		Men's	
	inches	cm	inches	cm
8 A	9 1/2	24.5	10	25.5
9 A	10	25.5	10 1/4	26
10 A	10 1/4	26	10 3/4	27
11 A	10 3/4	27	11	28
12 A	11	28	11 1/4	29

Average shoe sizes by age.

Please use these estimates with discretion, sizes can vary greatly between children.

Child's Age	Girl	Boy
Newborn	0 C	0 C
3 mo	1-2 C	1-2 C
6 mo	3 C	3 C
12 mo	4 C	4-5 C
18 mo	5 C	5-6 C
2 yr	6-8 C	6-8 C
3 yr	8-9 C	8-10 C
4 yr	10 C	10-11 C
5 yr	11 C	11 C
6 yr	12-13 C	12-13 C
7 yr	12-13 C	13 C - 1 Y
8 yr	1-2 Y	2-3 Y
9 yr	2-4 Y	4-5 Y
10 yr	4-6 Y	6-7 Y

Source: <http://www.shoesize.com>



Appendix C: Car Seat Guide

Our Car Seat Matrix determines the right car seat or booster seat for the child you are ordering for. After you input the recipient's accurate age, weight and height and type of seat belts the vehicle has, the system will determine the appropriate car seat for that child.

Convertible car seats are for kids 5lbs - 40lbs. If you order an infant car seat, you may get a convertible, which is also appropriate for an **infant** who weighs at least 5lbs. Make sure the family reads the manual to learn of how to adjust the car seat as the child grows.

Children must be at least 4 years old and weigh 40lbs to get a **booster** car seat.

It is helpful if you print a picture of a car with a LAP belt only and one with LAP AND SHOULDER BELTS, to make sure the family understands that this question is about the CAR (not the car seat itself) so that we can give them the correct car seat. (See photos below)

If requesting an infant car seat/stroller combo: order both and in the comments for both write "Combo".

Lap Belt Only

- Offers 2-point protection because it connects with the body in two places - at each hip.
- Does not provide upper body protection
- Cannot use a booster seat with lap belt only seatbelts



Lap-and-Shoulder Belt

- Offers 3-point protection because it connects with the body in three places - at each hip and at the shoulder.
- Provides upper body protection

