

Customer Step By Step Instructions

Step 1: Login

- Visit www.orthoney.com
- Click “Customer Login” in the top right and enter your username and password
- If you forgot your password, you can also use passwordless login or gmail login (this will then prompt you to login with your gmail login and password)

Login To Your Customer Account

Email *

Password *

[Forget password?](#)

☐ Keep me logged in

Login

Click Here to Create an Account

or

 Login/Register with Google



Passwordless Login

Step 2: Dashboard

- This is your home page where you have access to
 - 1. Placing an order
 - 2. Everything involving your orders through the tabs (Orders, Incomplete Orders, Failed Receipts, Recipient Lists, Associated Organizations and My Profile)

- A limited breakdown of each tab is listed on the dashboard but to view the full list you'll have to press the "see all" button
- If your window is not big enough across your screen, click on the 3 bars next to the Admin Menu to see the various tabs
- **NOTE:** When some of the data was transferred from the old website to the new website, they found it was corrupt with no way to retrieve it properly, so that data was lost. This means you can view orders placed from previous years on your dashboard but you can only complete reorder forms for orders placed in 2024



[ABOUT](#)
[OUR HONEY](#)
[FUNDRAISING](#)
[SHIPPING](#)
[RETURNS](#)
[FAQS](#)
[CONTACT US](#)

[Dashboard](#)
[Orders](#)
[Incomplete Orders](#)
[Failed Recipients](#)
[Recipient Lists](#)
[Associated Organizations](#)
[My Profile](#)

Hi, F. [REDACTED]
Customer Area
Logout
Switch Back to [REDACTED]

ORDER NOW

Welcome to the Customer Dashboard

Place Order

ORDER NOW

A Jar of Honey, A World of Meaning
Every jar helps fund meaningful programs and spread holiday joy!

My Orders

SEE ALL

Order ID	Date	Billing Name	Organization Code	QTY	Price	Actions
2024 [REDACTED]	2024-07-10 16:20:31	[REDACTED]	ATL	16	\$232.00	View
2023 [REDACTED]	2023-08-04 16:55:35	[REDACTED]	ATL	14	\$294.00	View
2022 [REDACTED]	2022-07-12 01:46:02	[REDACTED]	Honey from the Heart	12	\$162.50	View
2021 [REDACTED]	2021-07-07 12:33:49	[REDACTED]	Honey from the Heart	2	\$26.00	View
2021 [REDACTED]	2021-06-24 13:47:56	[REDACTED]	Honey from the Heart	7	\$91.00	View

Incomplete Orders

SEE ALL

ID	Name	Date	Action
No incomplete orders available.			

Failed Recipients

ID	Name	Date	Action
No failed recipients found.			

Recipient List

SEE ALL

ID	List Name	Date	Action
No Recipient List available.			

Associated Organizations

SEE ALL

Token	Name	Action
ATL	[REDACTED]	Block

Step 3: Orders

- Click on the Order tab
- This page gives access to all your orders placed
- Your list can be sorted by **Order Number** or **Recipient Number**
 - There are drop down menus that will make it easier to help find a specific order - if you know the information put as much in as you can
 - Order Year - can set to all years if looking for past orders in general
 - Organization
 - Status
 - Quantity
 - When using filters in the drop down menu make sure to push “filter” to apply it and then if wish to look up another customer, push the purple “reset” button
- Every order will have the date it was placed, the organization code, and the quantity
 - Specifically in “Order list by number” tab → you can find billing name
 - Specifically in “Order list by recipient number” tab → you can find Recipient name and Jar Tracking #
- There is also the option to download a PDF list of your orders in the “Order list by number” tab
 - You can select individual orders by clicking in the white box on the left side of the order number (a check mark will fill the box when it is selected)
 - If you would like to download all orders you can click on the white box next to the heading “order number” in the grey background (same check mark will fill box)
 - You must click on the drop down menu labeled PDF types and choose whether you would like
 - 2P = online & paper orders (print version)
 - 2E = online & paper orders (email version)
 - 4P = online & paper orders (print version)
 - 4E = online & paper orders (email version)
 - Then push export PDF and it should download to your computer

My Orders

RETURN TO DASHBOARD

Order List by Number

Order list by Recipient Number

Show 50 entries

Search:

Order by Year:

Select organization

Order by Status:

Quantity Range:

All Years

Select organi...

All

1 - 1000

FILTER

RESET

PDF Types

EXPORT PDF

	Order No	Order Date	Billing Name	Organization Code	Qty	Total Recipient	Price	Action
☒	202[REDACTED]	07/10/2024 4:20 PM	[REDACTED]	ATL	16	16	\$232.00	
☐	202[REDACTED]	08/04/2023 4:55 PM	[REDACTED]	ATL	14	14	\$294.00	
☐	202[REDACTED]	07/12/2022 1:46 AM	[REDACTED]	Honey from the Heart	12	-	\$162.50	
☐	202[REDACTED]	07/07/2021 12:33 PM	[REDACTED]	Honey from the Heart	2	-	\$26.00	
☐	202[REDACTED]	06/24/2021 1:47 PM	[REDACTED]	Honey from the Heart	7	-	\$91.00	
☐	202[REDACTED]	08/17/2020 5:11 PM	[REDACTED]	ATL	1	1	\$17.50	

Showing 1 to 6 of 6 entries

Previous

1

Next

My Orders

RETURN TO DASHBOARD

Order List by Number

Order list by Recipient Number

Show 50 entries

Search:

Order by Year:

Select organization

Quantity Range:

All Years

Select organization...

1 - 1000

FILTER

RESET

Recipient No	Order Date	Recipient Name	Organization Code	Qty	Jar Tracking	Status	Action
202001	08/17/2020 5:11 PM	[REDACTED]k	ATL	1	Tracking Numbers		
202301	08/04/2023 4:55 PM	[REDACTED]	ATL	1	Tracking Numbers		
202302	08/04/2023 4:55 PM	[REDACTED]r Cohen	ATL	1	Tracking Numbers		
202303	08/04/2023 4:55 PM	[REDACTED]nd Victor	ATL	1	Tracking Numbers		
202304	08/04/2023 4:55 PM	[REDACTED]	ATL	1	Tracking Numbers		

Step 4: Incomplete Orders

- Click on the Incomplete Orders tab
- This page displays all orders that have yet to be placed and the information linked to them (name, date, etc)
 - Gives you the option to either resume the order from the step you were at or completely delete the order from the system
 - If all your orders are completed nothing will show up here

All Incomplete Orders					
RETURN TO DASHBOARD					
Search:					
Sr No	Name	Ordered By	Current Step	Date	Action
600	Recipient List 600	Self	Step 6: Pending Checkout	06/29/2025 5:48 PM	Resume Order Remove
561	Recipient List 561	Delliah Cohen	Step 4: Add/Review Recipients	06/28/2025 12:41 PM	Resume Order Remove
518	Recipient List 518	Self	Step 3: Upload Recipients	06/27/2025 12:09 PM	Resume Order Remove
370	Recipient List 370	Self	Step 3: Upload Recipients	06/26/2025 9:40 AM	Resume Order Remove

Step 5: Failed Recipients

- Click on the Failed Recipients tab
- This page will present all orders that were placed with a system error
 - **EXAMPLE** → A customer's information (such as name or address) wasn't properly completed/recognized by the website. You decide to continue with the failed recipient message and the system will still attempt to process the order
 - All of those order scenarios will appear in this tab - ideally, there should be no orders on this list
 - They're at risk of being returned or not shipping at all so it is your responsibility to review and understand the risk involved

Failed Recipients

RETURN TO DASHBOARD

Search:

Sr No	Name	Ordered By	Date	Action
No Failed Recipients list found				

Showing 0 to 0 of 0 entries

Previous

Next

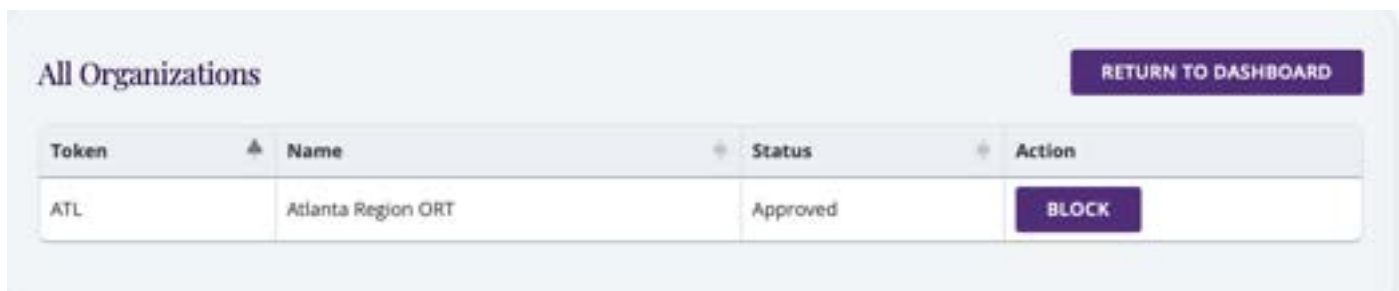
Step 6: **Recipient Lists**

- Click on Recipient List tab
- Here you will find all the information about the recipients of your orders

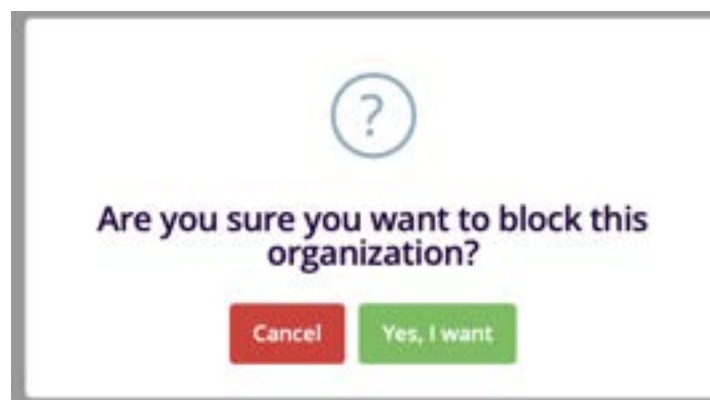


Step 7: **Associated Organization**

- Click on Associated Organization tab
- The organization you are linked to will display on this page
 - You are eligible to be connected to more than one organization but they all have to be placed as different orders
 - If you place an order, you are connected to the organization you selected and support them. You will only be able to link to a different organization when placing a new order

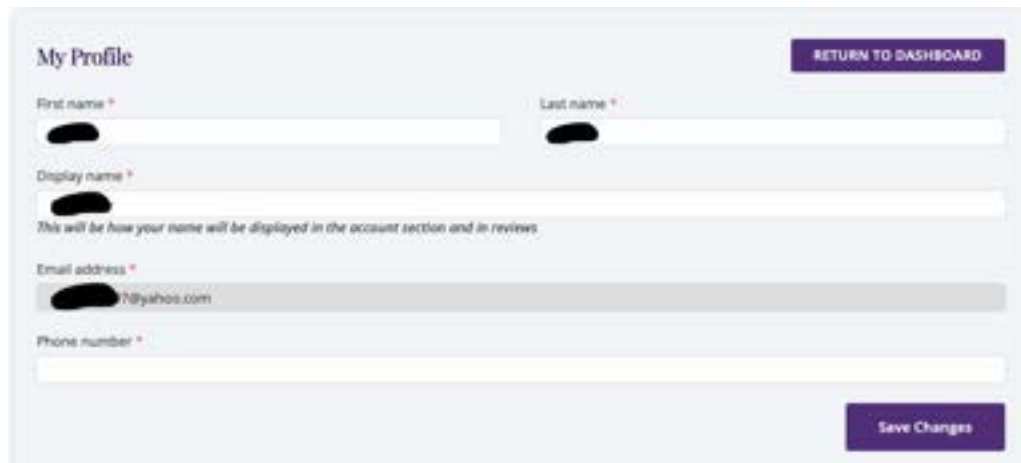


- The “Block” button is a new feature for customers
 - You are able to disaffiliate from any organization and they can no longer login to your account to fix any issues. The only way to get relinked is for the organization to request you, you accept them (have to have your approval) and then you become reconnected
 - This page will pop up when you click on the button. You can either cancel this action or proceed with blocking the organization



Step 8: **My Profile**

- Click on My profile tab
- Use this page to activate your account
 - 1. Insert all the correct information in the profile section
 - 2. Once everything is updated push the save button in the bottom right



The 'My Profile' form is displayed on a light blue background. At the top left is the title 'My Profile' and at the top right is a purple button labeled 'RETURN TO DASHBOARD'. The form contains several input fields: 'First name' and 'Last name' (both with red asterisks), 'Display name' (with a red asterisk and a note below it stating 'This will be how your name will be displayed in the account section and in reviews'), 'Email address' (with a red asterisk and a pre-filled value '7@yahoo.com'), and 'Phone number' (with a red asterisk). A purple button labeled 'Save Changes' is located at the bottom right of the form.

- 3. Enter the correct billing address before you place an order, click edit and then save changes once finished



The 'Billing address' form is displayed on a light blue background. At the top, a note states: 'This Billing Address will be filled in automatically on the checkout page, but you can change it before you place the order.' Below this is the title 'Billing address' and an orange button labeled 'EDIT BILLING ADDRESS'. The form contains two input fields for the billing address, both of which are currently empty.

- If you want to change your password, use the “Change Password” section and enter the correct information



The 'Change Password' form is displayed on a light blue background. It contains three input fields: 'Current password', 'New password', and 'Confirm new password'. A purple button labeled 'Save Password' is located at the bottom left of the form.

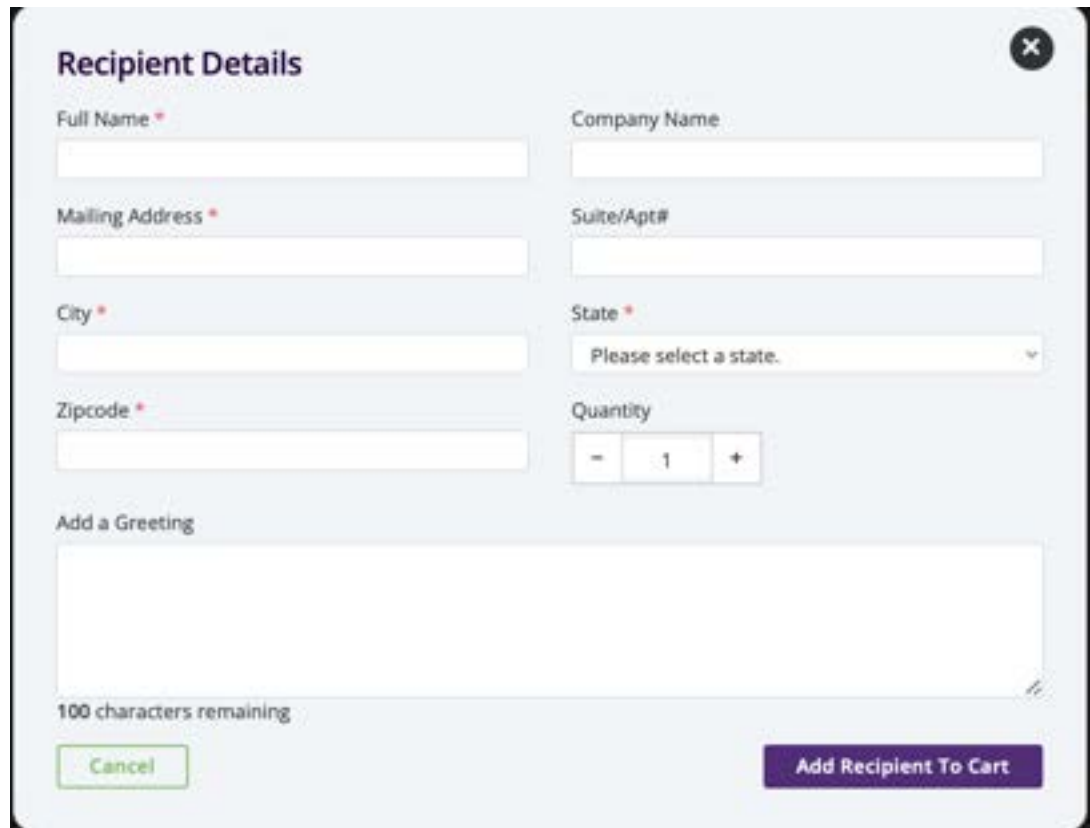
HOW TO PLACE AN ORDER

- Click “Order Now” button in top right of website, to the left of “Contact Us”
- **STEP 1 = Select an Organization**
 - Click on the drop down menu of organizations and scroll through to select the correct one, then click on “select order method” to continue with order process
 - For quickest find, type in the 3-digit code (EX: ATL) in search bar

- If you aren't associated with an organization, push “click here” and it will have you proceed onto step 2

- **STEP 2 = Order Method**
 - Option A = Select “Enter a new order”
 - 1. Must type in the name of the recipient and click “proceed with order”

- 2. It will bring you to a pop up page where you must fill in all the information with a red star next to it



Recipient Details

Full Name *

Company Name

Mailing Address *

Suite/Apt#

City *

State *

Zipcode *

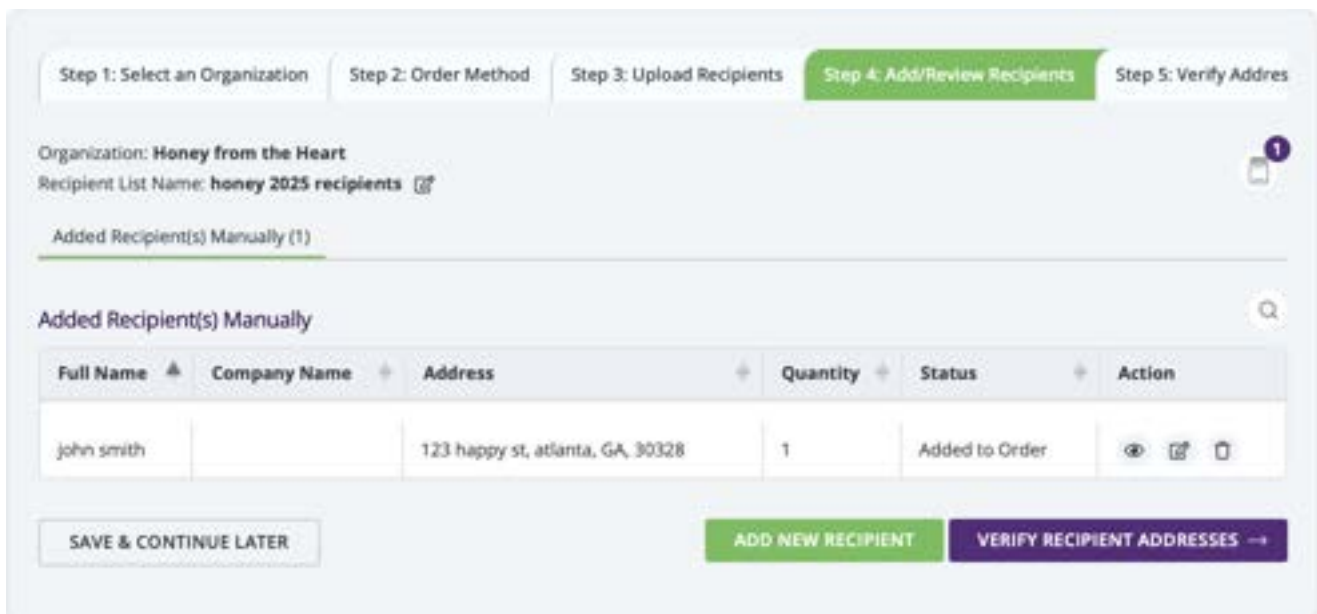
Quantity

Add a Greeting

100 characters remaining

[Cancel](#) [Add Recipient To Cart](#)

- 3. Click “Add Recipient to Cart” to finalize
- 4. You will automatically skip “Upload Recipients” as its not needed and then be taken to “Add/Review Recipients” tab where all the information you inserted will be shown



Step 1: Select an Organization Step 2: Order Method Step 3: Upload Recipients **Step 4: Add/Review Recipients** Step 5: Verify Address

Organization: **Honey from the Heart**

Recipient List Name: **honey 2025 recipients**

Added Recipient(s) Manually (1)

Added Recipient(s) Manually

Full Name	Company Name	Address	Quantity	Status	Action
john smith		123 happy st, atlanta, GA, 30328	1	Added to Order	View Edit Delete

[SAVE & CONTINUE LATER](#) [ADD NEW RECIPIENT](#) [VERIFY RECIPIENT ADDRESSES](#)

- Option C = Select “Upload from a previous list”
 - 1. Click “proceed with order”
 - 2. Download the sample file to understand and visualize how the list you upload will need to be formatted
 - 3. Click “choose file” button to upload your list into the website’s system
 - 4. Name your recipient list something you remember to easily reference at a later time or the following year
 - 5. Press Add Recipients in bottom right to continue on with ordering

Step 1: Select an Organization Step 2: Order Method **Step 3: Upload Recipients** Step 4: Add/Review Recipients Step 5: Verify Address

Organization: Honey from the Heart

INSTRUCTIONS

Download a sample file to see the correct format for your list.

The file must have the following columns with these exact headings:

- Full Name
- Company Name
(column is required, even if it's blank)
- Mailing address
- Suite/Apt#
(column is required, even if it's blank)
- City
- State
(2 letter abbreviation)
- Zipcode
- Quantity
- Greeting
(column is required, even if it's blank)

Save or export your list as a .csv, .xlsx, or .xls before uploading.

[Download Sample File](#)

Recipient List

Your file must include all the required columns with headings exactly matching the sample file. Please click [Download Sample File](#) and use the template.

File Upload: (Accept: .csv, .xlsx, OR .xls)

[Choose File](#) no file selected

Recipient List Name:

[← BACK](#) [SAVE & CONTINUE LATER](#) [Add Recipients →](#)

● **STEP 3 = Add/Review Recipients**

- After adding the main recipient(s) in the Order Method step (used Option A/B/C), you will see all the recipients of your order
- On this page you have the option to add more recipients that were forgotten or delete recipients you no longer want to have on your order - you can search their name using the search icon above “Action”

- Adding a new recipient is the same steps as using Option A of the Order method step (pop up menu, enter in all information, save by clicking add recipient to cart)
- You delete a recipient by clicking on the trash can icon under the heading “action” and then proceed by pressing the green button

Added Recipient(s) Manually

Full Name	Company Name	Address	Quantity	Status
john smith		123 happy st, atlanta, GA, 30328	1	Added to Order Remove Recipient

SAVE & CONTINUE LATER ADD NEW RECIPIENT VERIFY RECIPIENT ADDRESSES →

?

Are you sure?

You are removing john smith

Cancel Yes, remove the recipient

- Once complete, click verify recipient address to move on
- **STEP 4 = Verify Addresses**
 - This page displays all the addresses that were verified and rejected by the system due to errors detected
 - It's suggested if an address is rejected, you edit it based on the reason the website provides (EX: not present in USPS data)
 - To do this, click on the notepad icon displayed below and it will bring you to the same pop up tab where you originally entered the recipient details, must click update recipient details for the new information to save

ion Step 2: Order Method Step 3: Upload Recipients Step 4: Add/Review Recipients Step 5: Verify Addresses Step 6: Checkout

Organization: **Honey from the Heart**

Recipient List Name: **honey 2025 recipients**

Rejected Address(es) (1)

Rejected Address(es)

Out of 1 Recipient(s), 1 are Rejected Address(es).

Full Name	Company Name	Address	Quantity	Reason	Action
john smith		123 happy st, atlanta, GA, 30328	1	Address not present in USPS data.	update Recipient Details

SAVE & CONTINUE LATER PROCEED TO CHECKOUT →

Recipient Details ✕

Address not present in USPS data.

Full Name * Company Name

Mailing Address * Suite/Apt#

City * State *

Zipcode * Quantity

Add a Greeting

100 characters remaining

- There is the option to override and proceed to checkout with a flawed recipient address but we advise you to only do this if you are 100% confident the address imputed is correct
 - The warning will look like this - to go back and fix click “I want to update” and to override click “proceed with all”

All submitted address(es) Rejected

Some addresses are unverified. Please correct them before proceeding. Honey From The Heart cannot guarantee delivery to unverified addresses.

Verified Address(es): 0

Rejected Address(es): 1

- When you have finished changing or checking addresses, click on the button “proceed to checkout”
- It will then prompt you to click “I want to update” if you realized you need to go back or proceed with the addresses listed (it will have the number in parenthesis)

All submitted address(es) verified

Verified Address(es): 1

Rejected Address(es): 0

- **STEP 5 = Checkout**

- The last step is to review everything in checkout
 - 1. Your contact information
 - 2. Your billing address
 - 3. Order Summary
- Once that is completed you can enter in your credit card information and click “place order” which indicates you have finished the process successfully

Checkout

Contact Information

We'll use this email to send you details and updates about your order.

Email address

██████████@yahoo.com

Billing Address

Enter the billing address that matches your payment method.

██████████ Kay Edit
 ██████████ NY 13214, United States (US)
 (315) ██████████

Payment Options



Credit card



Card number

MM/YY

CVC



By proceeding with your purchase you agree to our [Terms and Conditions](#) and [Privacy Policy](#)

Place Order

Order summary

Qty: 1
Total Recipient(s): 1
Price per Jar: \$18.00

[View All Recipients Details](#)

Admin Voucher

Subtotal \$18.00
Delivery FREE
Free shipping

Total \$18.00

How to Generate Reorder Forms

Whether you're getting ready for this year's honey fundraiser or just want to make reordering easy for your supporters, follow these simple steps to generate and send reorder forms to your customers.

Step-by-Step Instructions

Step 1: Sign In

- Visit www.orthoney.com
- Click “Organization Login” and enter your admin username and password

Step 2: Go to the Orders Section

- Once signed in, you'll be in the Organization Area
- Click the “Orders” tab from the navigation menu

Step 3: Adjust the Filter

- At the top of the Orders screen, locate the Year filter
- Select “All Years” to include all past orders (from 2021 onward)

Step 4: Apply the Filter

- Click the green “Filter” button
- A table with past customer orders will appear

Step 5: Select Orders

- On the left side of the table, you'll see checkboxes
- Select:
 - One customer (for testing)
 - Multiple customers
 - Or Select All if you're ready to send to everyone
-

Step 6: Choose PDF Format

- A drop-down menu labeled “PDF Format” will appear above the table
- Choose one of the following options:
 - 2E — Send an individual email to each customer with their reorder form attached
 - 2P — Create one large PDF file containing all reorder forms, which you can download and distribute manually

Step 7: Export

- After choosing 2E or 2P, click the “Export” button
 - If you selected 2E, emails will be automatically sent to each customer
 - If you selected 2P, the PDF will be downloaded to your Downloads folder



Pro Tip: Test Before Sending to All

Before emailing all your customers, we highly recommend testing the 2E function:

1. Use the filter to find your own or a trusted contact’s order from a previous year
2. Select only that one order
3. Choose 2E and press Export
4. Confirm that the email and PDF are received correctly

If you have any questions or run into issues, feel free to reach out to our support team at support@orthoney.com.