AE3 Agencies/Shoppers/Items

Owner of this document is: Scott Wiacek – swiacek@feedingamerica.org

Purpose of this document

This document is a supplement to the overview documents for Agency and Item setup and Agency Groups with Agency Express 3 and Ceres 4.

Table of Contents

Purpose

The purpose of this document is to explain the setup of Agencies, Shoppers, and Items to support the use of Agency Express 3 with Ceres 4. This document is a supplement to the overview documents for Agency and Item setup and Agency Groups.

Ceres Object release 4.50.00 is required for the functionality described in this document.

Agency/Shopper Setup

Before utilizing Agency Express online ordering, web enabled Agencies, Shoppers and Items must be set up. The following sections will outline this process. There are many other steps to properly establishing communication between Agency Express 3 and Ceres, and assistance from both aidmatrix and your Ceres provider is required.
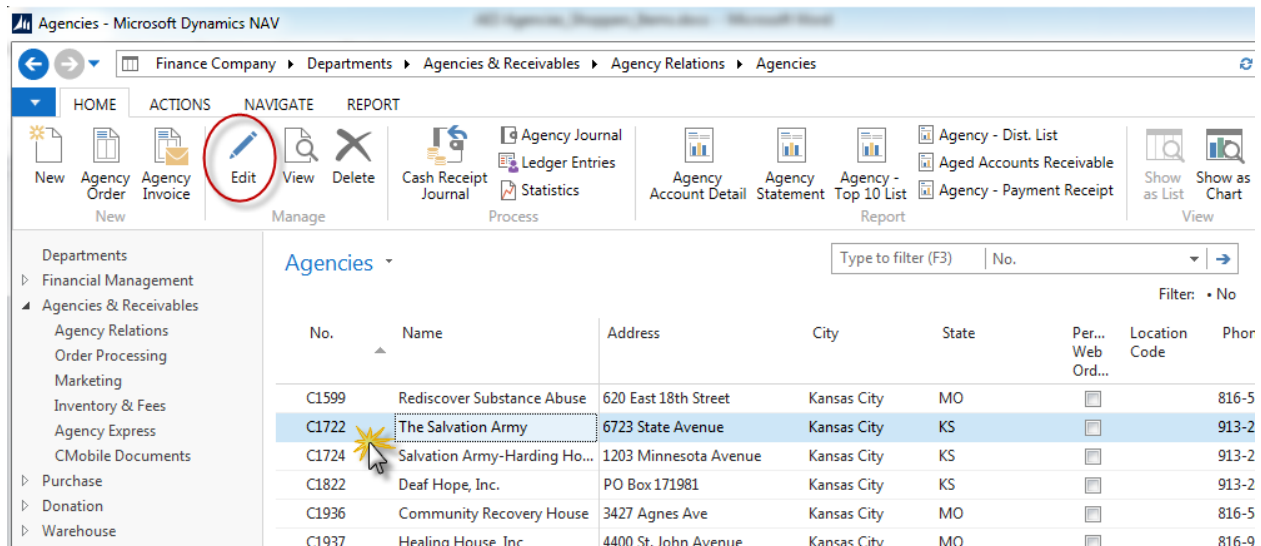
Agency Setup – Web Enabling

The following set of steps outlines the process of setting up an Agency for web ordering.

1. To access Agencies navigate to Departments → Agencies & Receivables → Agency Relations → Agencies.
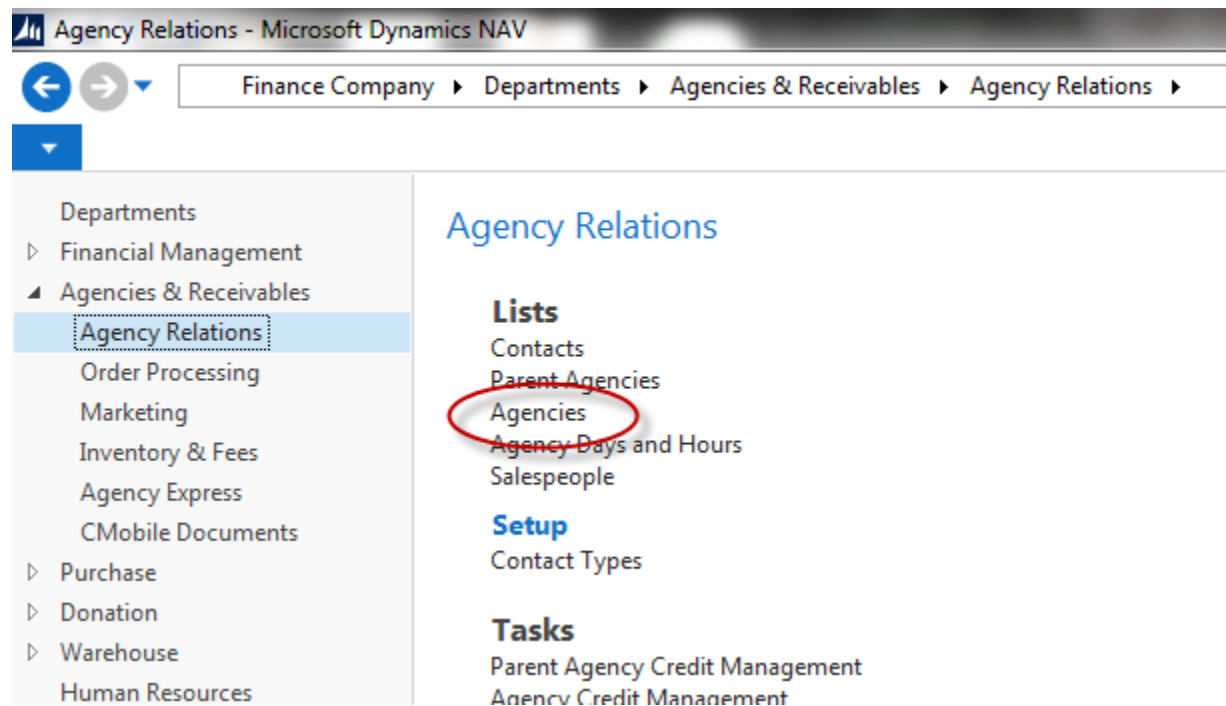
2. This will open the Agency List Page where you can select the desired Agency. Double-click on the Agency you wish to edit (or select Home → Manage → Edit).

3. On the Information FastTab, select an Agency Group Code. You will need to select a Code that corresponds to the Location assigned to the Agency you are web-enabling. The Agency Group's Location is used to limit the Agency to only inventory available in that Location as well as any other qualifiers associated with that group. Inventory in other locations will not be available to this Agency during on-line ordering.
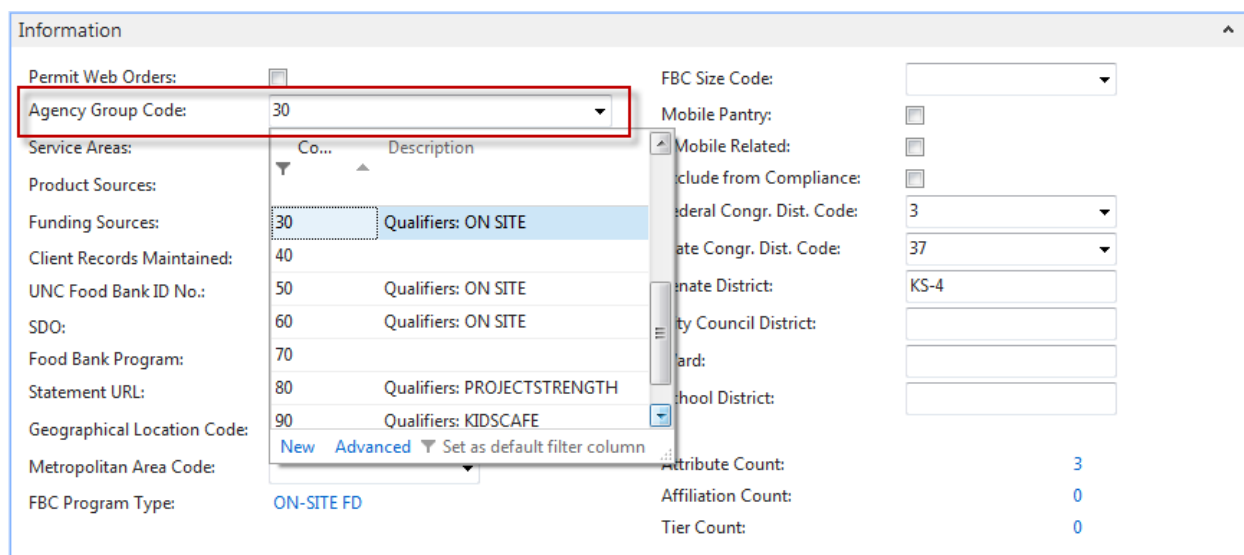
4. Click on the drop down arrow in the Agency Group Code field to select the proper Code for this Agency. Assigning an Agency to an Agency Group will also assign the associated qualifiers to the Agency. The Agency will inherit the qualifiers from the Agency Group's Qualifiers.

Code	Location Code ▲	Description	Max Qty. Count	Agency Count	Qualifier Count
10	KAN		0	4	0
100	MOBILE	Qualifiers: KIDSCAFE	0	12	1
110	MOBILE	Qualifiers: ON SITE	0	10	1
120	MOBILE		0	9	0
130	KAN	Qualifiers: KIDSCAFE,MEAL,ON S...	0	1	3
140	LS-DRY		0	1	0
20	KAN	Qualifiers: ON SITE	0	4	1
30	KAN	Qualifiers: ON SITE	0	435	1
40	KAN		0	1997	0
50	CA	Qualifiers: ON SITE	0	1	1
60	HOU	Qualifiers: ON SITE	0	4	1
70	TOP		0	1	0
80	HOU	Qualifiers: PROJECTSTRENGTH	0	250	1
90	KAN	Qualifiers: KIDSCAFE	0	56	1

5. Place a checkmark in the Permit Web Orders field. Checking this box will cause Ceres to verify several additional fields are filled in for the Agency you are working with. If Ceres determines that a required field is not filled in, you will receive an error. You must go back and fill in the required field and check Permit Web Orders again. Repeat this process until all required fields have been populated with data. Once example is provided below.

C1722 · The Salvation Army

⊗ UNC Activity Status must have a value in Agency: No.=C1722. It cannot be zero or empty. (Select Refresh to discard errors)   1 \ 2 ▼

General

No.:	C1722 ...	Dormant:	☐
Parent Agency No.:	1884 ▼	Search Name:	SALVATION ARMY WYANDOTTE
Name:	The Salvation Army	Balance ($):	0.00
Name 2:		Credit Limit ($):	1,000.00
Address:	6723 State Avenue	Responsible Person Code:	▼
Address 2:		Fund No.:	UR ▼
ZIP Code:	66102 ▼	FBC County Code:	MO-JACKSON ▼
City:	Kansas City ▼	FBC Agency Category Code:	SUBSTANCE ▼
State:	KS	UNC Activity Status:	⊗ ▼
Country/Region Code:	▼	Agency Approval Date:	4/13/1994 ▼
Phone No.:	913-232-5400 🔄	Agency First Order Date:	1/10/2014
Phone Ext. No.:		Monitoring Expiration Date:	4/23/2012 ▼
Primary Contact No.:	▼	Blocked:	▼
Contact:	Majors William Heaver	Last Date Modified:	8/15/2014
		Last Modified By:	WWH

∧ Show fewer fields

6. Once Permit Web Orders is checked, the Agency is web-enabled.

Information

Permit Web Orders:	☑	FBC Size Code:	▼
Agency Group Code:	30 ▼	Mobile Pantry:	☐
Service Areas:		CMobile Related:	☐
Product Sources:		Exclude from Compliance:	☐
Funding Sources:		Federal Congr. Dist. Code:	3 ▼
Client Records Maintained:	☐	State Congr. Dist. Code:	37 ▼

There are several other fields of interest with regard to ordering online. The following section describes these fields and how they are used:

Credit Limit: This is a base Ceres field used to govern customer credit limits. This value is also transmitted to the web and utilized for credit monitoring online.

UNC Activity Status: This field dictates whether an Agency is able to order online. Agencies with an Activity Status that allows posting will be able to order online if Permitted. Agencies that have an Activity Status which does not allow posting will not be able to order online. They will, however, still be able to log in perform other activities.

Agency Fee Group: This is assigned to all Agencies that will use item fees (special item pricing). This field should not be populated if item fees will not be applied to a particular agency.

Note: Filling this field in without item fees being set up will cause an agency not to see inventory online. Be very careful here.

Location Code – This plays a role in item availability. This does not need to be filled in but must be accurate if it is. The Location Code must coincide with Agency Group Code as described in the previous section.

Delivery Zone Code: This can be used in conjunction with online delivery fees. Filling in this field, when delivery fees have been set up and transmitted to the web, will allow Agency Express to assign a delivery fee to all online orders for a particular Agency. The fee shown in Agency Express is an estimate, the actual delivery fee will be calculated by Ceres at invoice generation time. Agencies should be aware that the delivery fees shown during on-line ordering are estimates.

Default Ship-to Code: A required field. This determines which contact information to display online. Ceres has a function on the Agency to automatically create a default ship-to code for the agency. Using this function will copy the Agency's address to the default ship-to address information and keep the two addresses in synchronization. Any changes made to the Agency address will automatically update the Default Ship-to Address.

Shipment Method Code: This is used for scheduling in Ceres. If an Agency will be using both Delivery and Pickup appointments online, this field should be left blank. Otherwise web orders will have trouble auto-validating on a consistent basis. For example, if Agency A-001 is setup with a Shipment Method Code of "Deliver", and a Pickup order comes from the web, auto-validate will fail because it will see that the Agency is a Delivery Agency.

Statement URL: Used for online statements. This field will fill in automatically once online statements are turned on.

Shopper Setup – Web Enabling

The next step is to set up a Shopper. If a Shopper already exists then you will simply need to activate it for web ordering by checking the Permit Web Orders checkbox. For this example, we will assume no Shoppers exist for the Agency we just activated for web ordering. The following steps outline the process of creating a web-enabled shopper:

1. From the Agency Card, select Navigate → Agency → Shoppers to open the Shopper List.
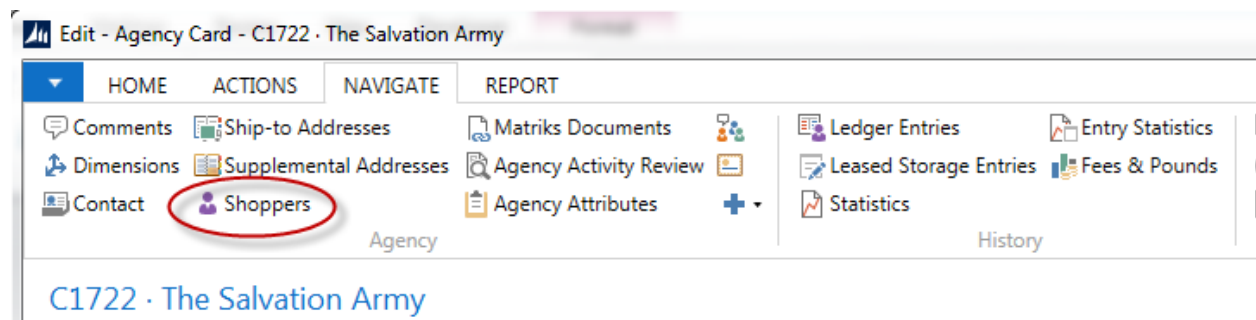
2. Fill in the following fields:

       Name: Shopper Name (required)

       E-mail Address: Used for auto-generated emails in Ceres. (required)

       Web Login: The login used to access Agency Express. (required)

       Permit Web Order: Once checked, this field enables a shopper for web ordering.

       Blocked: Checking this box will prevent this shopper from on-line ordering. This can be used to disable shoppers who were previously allowed to shop on-line without actually deleting them from Ceres.

       Blocked Reason: If you decide to block a shopper you may enter a reason code indicating the reason the shopped has been blocked.

Once the above noted fields are filled in, the agency/shopper will be able to order online. To enable additional shoppers for web ordering, repeat the steps outlined in this section.

If you edit a Permitted Shopper, make sure that the shopper **always** has Name, Email and Web Login fields populated or you can create issues in importing shopper data into Agency Express 3.

Note: There are several fields that may only be edited when the shopper is not permitted for Web Orders. In order to edit these fields you must first disable web ordering for the shopper by unchecking the "Permit Web Order" box. Then the edit may be made to the fields, and once the edits are complete, you may re-check the "Permit Web Order" box. This cause Ceres to resynchronize the shopper with AE. The fields that are prevented from edit while web ordering is enables are the Search Name, Web Login, First Name, Last Name, and E-mail Address. (Requires Release Ceres 4.00.40).

Agency/Shopper – Web Disabling

To disable a shopper for web ordering, simply uncheck Permit Web Orders for the shopper in question.
To disable all shoppers, as well as the associated agency, uncheck Permit Web Order for the agency.

Item Setup

The following section outlines the process of setting up Inventory Items for web ordering and describes the fields of particular interest between Ceres and Agency Express.

1. To access Items navigate to Departments → Purchase → Planning → Items.
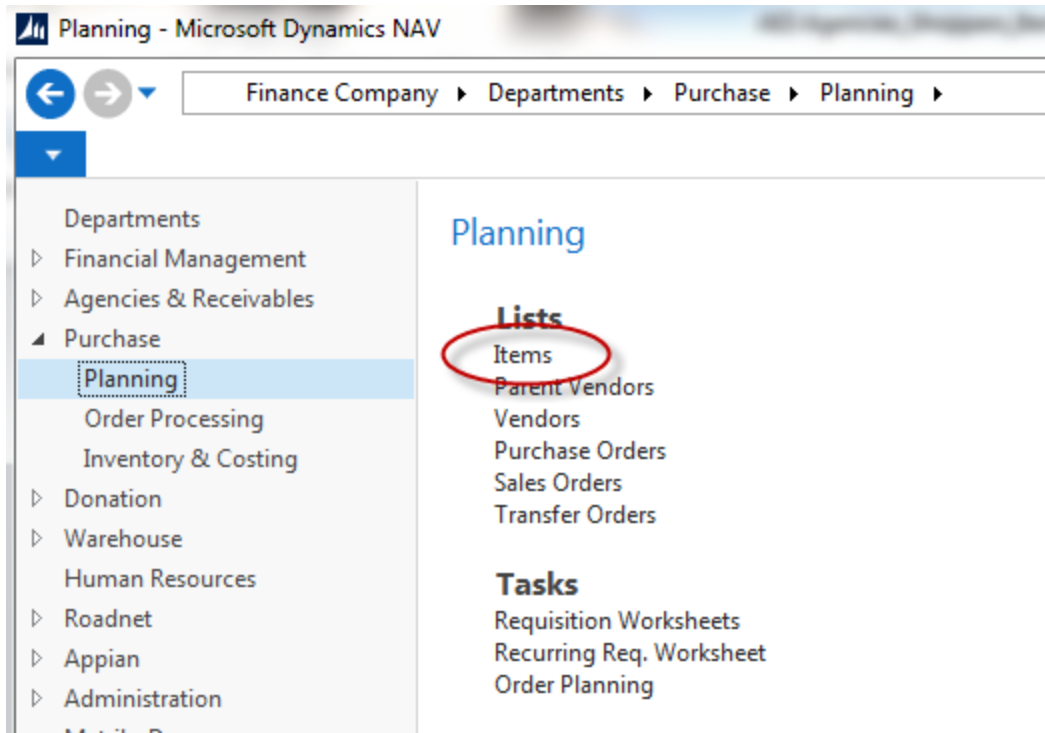
2. This will open the Item List. Select the Item to be enabled for web ordering by double-clicking on the Item (or select Home → Manage → Edit).

3. This will open the Item Card where you can make the necessary changes.

4. On the Item Tracking FastTab check the Permit Web Orders checkbox as shown above.

At this point, the item is web-enabled and can be ordered online if there is quantity on hand and quantity available for the ordering Agency. There are several other fields which impact what is displayed in the shopping list online. The following section describes these fields and how they are utilized on Agency Express:

The following fields from the General FastTab (general item information) are all transmitted via the ITM file and displayed on the Shopping List online.

No.: Item Number

Description: Item Description

Description 2: Item Description 2

Pack Size: Item Pack Size

Base Unit of Measure: Item Base Unit of Measure

Gross Weight: Item Gross Weight

Feature Type: Feature Type associated with the Item

Length (Inches): Used in the calculation of Cube size.

Width (Inches): Used in the calculation of Cube size.

Height (Inches): Used in the calculation of Cube size.

Cubic Feet (Cube Size): Automatically calculated. Used to display how much space an item would likely take up on a truck.

Cube Density: Automatically calculated. This field generates based on the length, width, height and weight fields. It is non-editable by the user and computes the relative density of an Item from the weight of the case and dimensions of the case. It is calculated by dividing the weight by the cubic feet of the Item. Higher values represent denser items which should be place at the bottom of pallets during pallet construction.

Unit Fee: The item fee displayed online (assuming Agency specific item fees are not being used).

Item Group Code: This is not displayed online. This field is used in conjunction with maximum order quantities assigned to Agency Groups.

Servings per Base UOM: Used in the calculation of Fee per Serving that displays online.

Fee per Serving: This displays the approximate cost per serving of the Item.

Product Image URL: This field is used to specify the URL of an image. When this field is filled in, shoppers will be able to view a picture of the Item online, if a picture is stored at the URL designated. This feature is designed to work with photo hosting sites like Shutterfly or similar.

General

No.:	10026	Quantity on Hand:	421
Description:	Tea	Qty. on Purch. Order:	100
Description 2:	Assorted Herbal	Qty. on Donation Order:	0
Pack Size:	24 / 3 oz	Qty. on Picks:	0
Base Unit of Measure:	CASE	Qty. on Whse. Entries:	421
Gross Weight:	3	Qty. on Agency Order:	200
Shopping List:	☑	Qty. on Hold for AE:	0
Shelf No.:		Blocked:	☐
Automatic Ext. Text:	☐	Allocation Group No. :	10026
Item Category Code:	DON	Feature Type:	
Product Group Code:		Length (Inches):	11.5
Eaches per Base UOM:	0	Width (Inches):	7.5
CMobile Related:	☐	Height (Inches):	7.5
Dormant:	☐	Cubic Feet:	0.37435
Nutritional Analysis Not Complete		Cube Density:	8.01
Search Description:	TEA	Stockout Warning:	Default (Yes)

Distribution

|			
Costing Method:	FIFO	VAP Fee ($):	0.00
Cost is Adjusted:	☐	Unit Fees:	0.50325
Cost is Posted to G/L:	Yes	Value Item By:	per Lb
Standard Cost:	0.00	Gen. Prod. Posting Group:	DON
Unit Cost:	0.20325	Inventory Posting Group:	DON
USDA Value:	0.00	Net Invoiced Qty.:	421
Overhead Rate:	0.00	Allow Invoice Disc.:	☑
Indirect Cost %:	0	Item Disc. Group:	
Last Direct Cost:	5.00	Gross Weight:	3
Handling Fee (per Lb):	0.10	Item Group Code:	
VAP Fee (per Lb):	0.00	Agency Unit of Measure:	CASE
Cost Adjustment Type:	Percent	UNC Handling Requirement Code :	DRY
Cost Adjustment Factor:	1.00	Servings per Base UOM:	40
Handling Fee ($):	0.30	Fee per Serving:	0.00

Adding Extended Item Text

Extended text may be added to any item. If enabled in Agencies and Receivables Setup, this extended text can be synchronized with the Agency Express on-line ordering system to provide on-line shoppers with more detailed information about items, such as a suggested recipe or use. To enter extended test on an item do the following.

1. From the Item Card, select Navigate → Master Data → More → Extended Text.
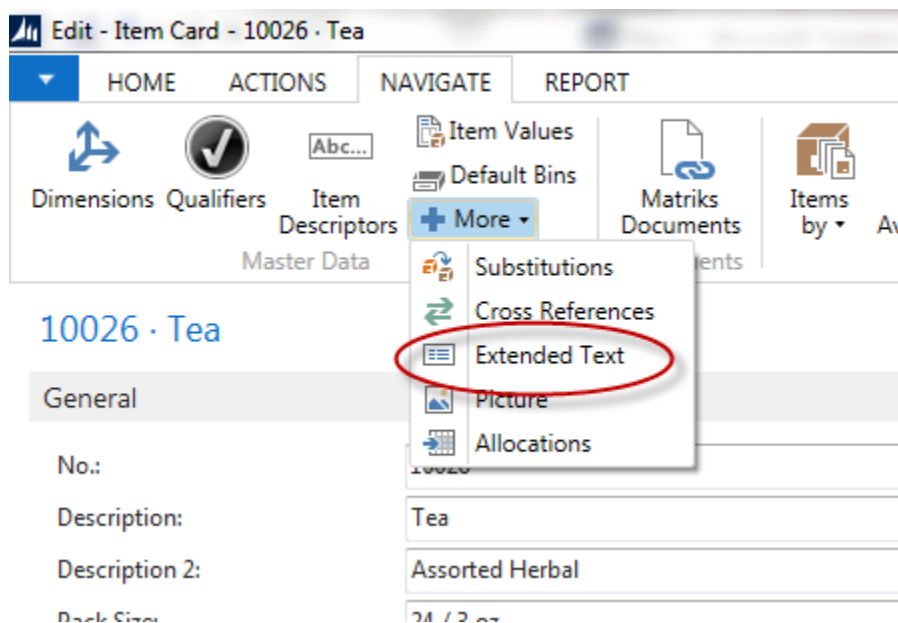
2. Click Home → New.
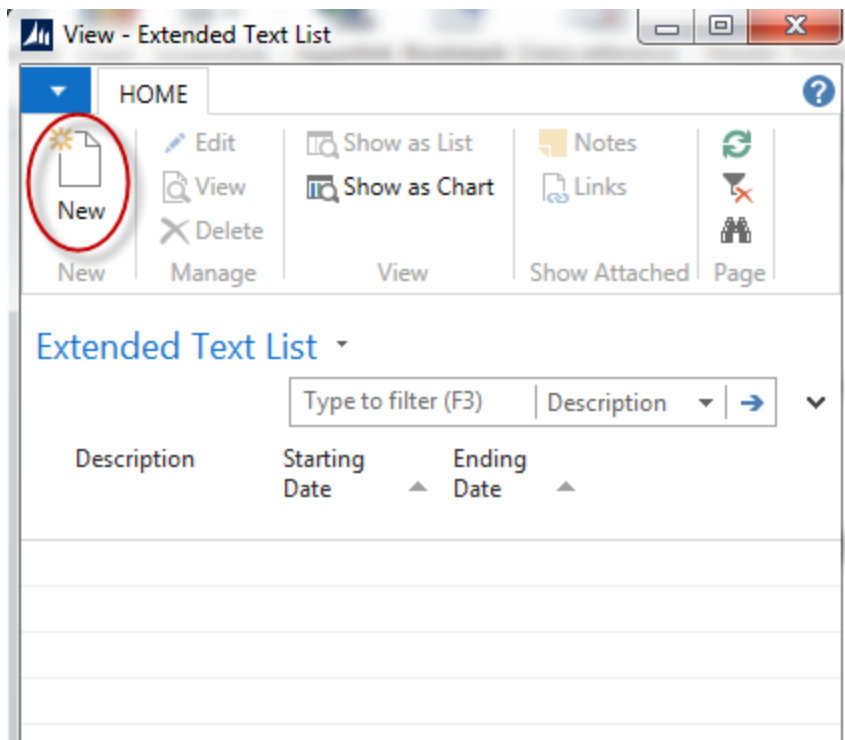
a. Move down to the Lines section and begin typing your extended text. *Only 250 characters of extended text will actually be transmitted to the web*, though you can type as much as you want in Ceres.

Enabling Extended Item Text

Extended text may be added to any item regardless of whether or not the Item is used Agency Express on-line ordering or not. It is important to remember that although extended text is setup for Items, you must enable Ceres to send this extended text to the Agency Express on-line ordering system. Follow these instructions to enable the synchronization of Item extended text between Ceres and the Agency Express on-line ordering system.

1. You must first enable extended item text in Agencies & Receivables Setup. To do so, from the main menu, select Departments → Agencies & Receivables → Administration → Agency & Receivables Setup.
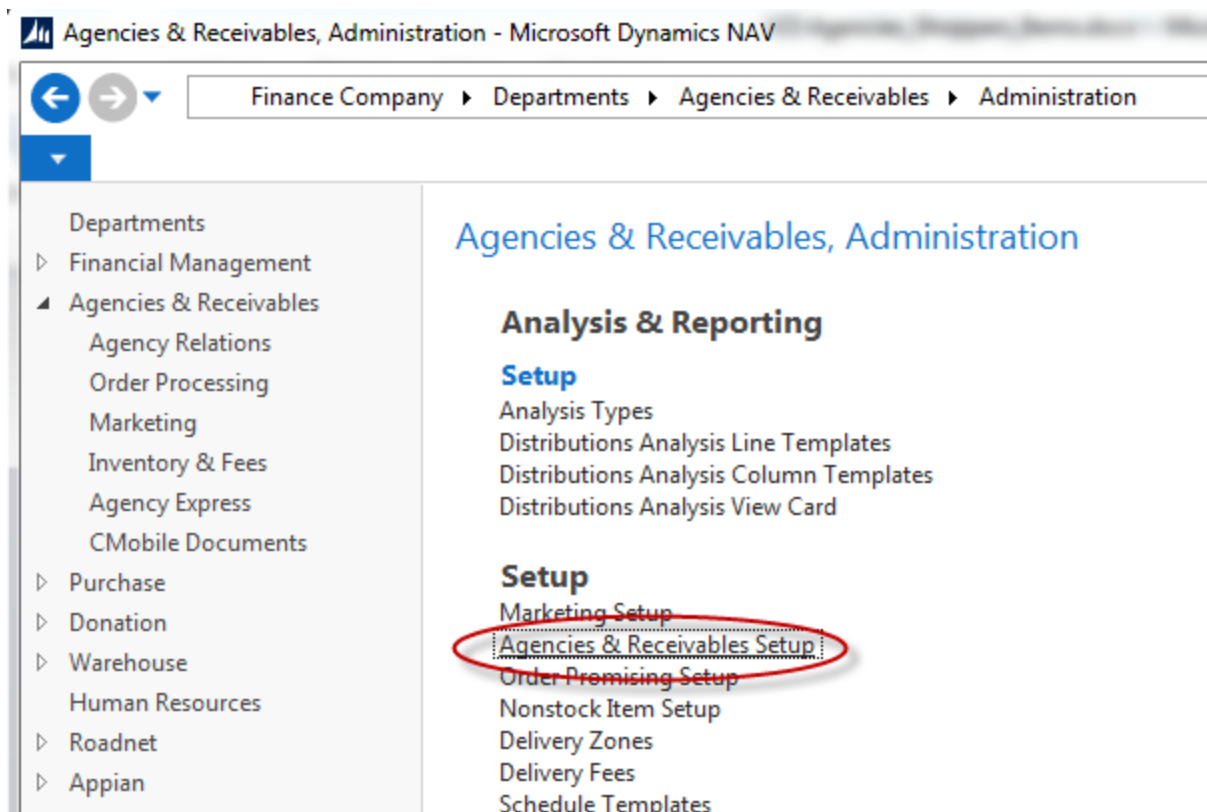
2. On the Web Ordering FastTab and check the Sync Extended Item Text field to enable extended item text.
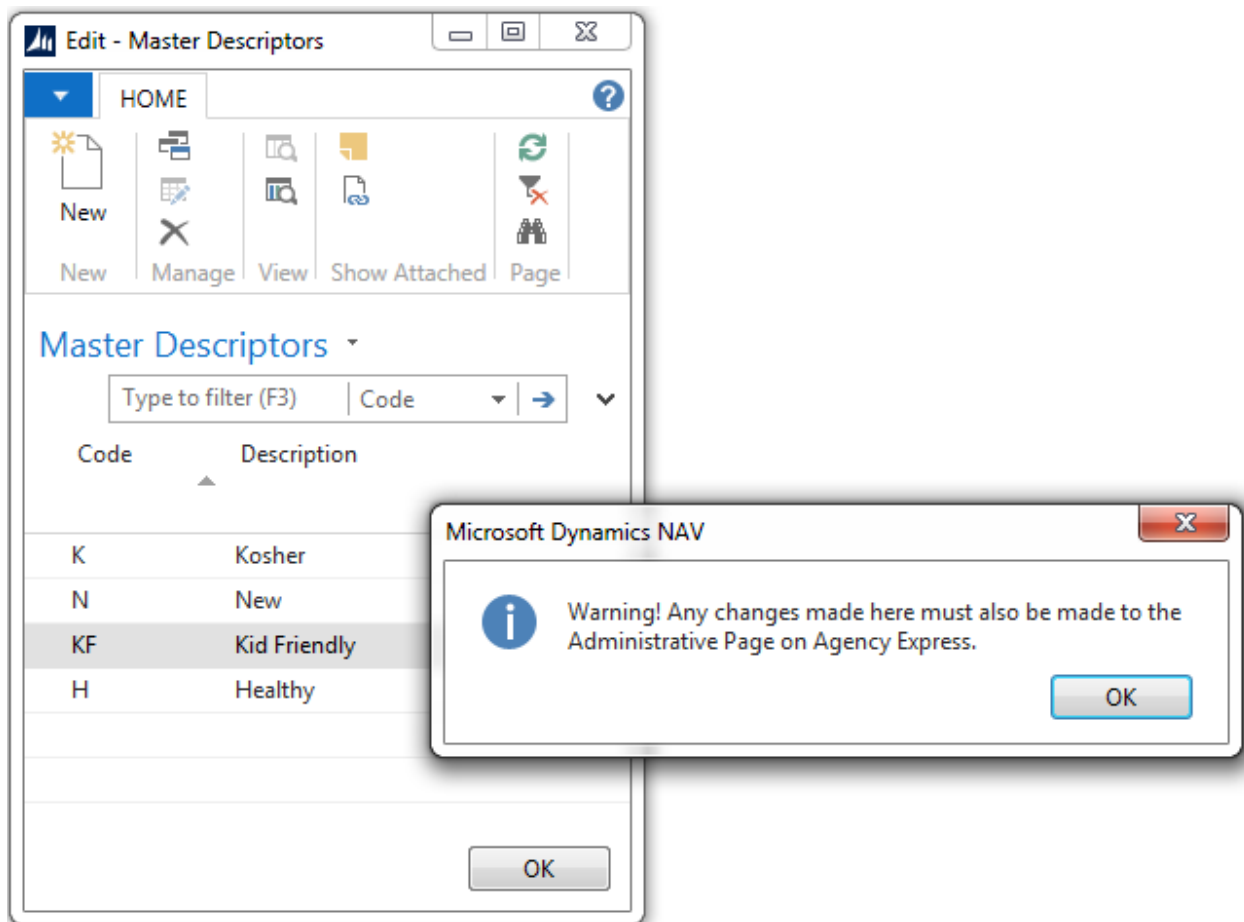

Item Descriptors

Codes linked to an item and synchronized with the web. Item Descriptors are a way to display additional information about an item at a glance. Some food banks use this for passing on nutrition assessment or other subjective factors. The following section outlines the process of setting up Item Descriptors.

You must first set up a list of Master Descriptors. To do so select Departments → Warehouse → Administration → Setup → Inventory → Master Descriptors
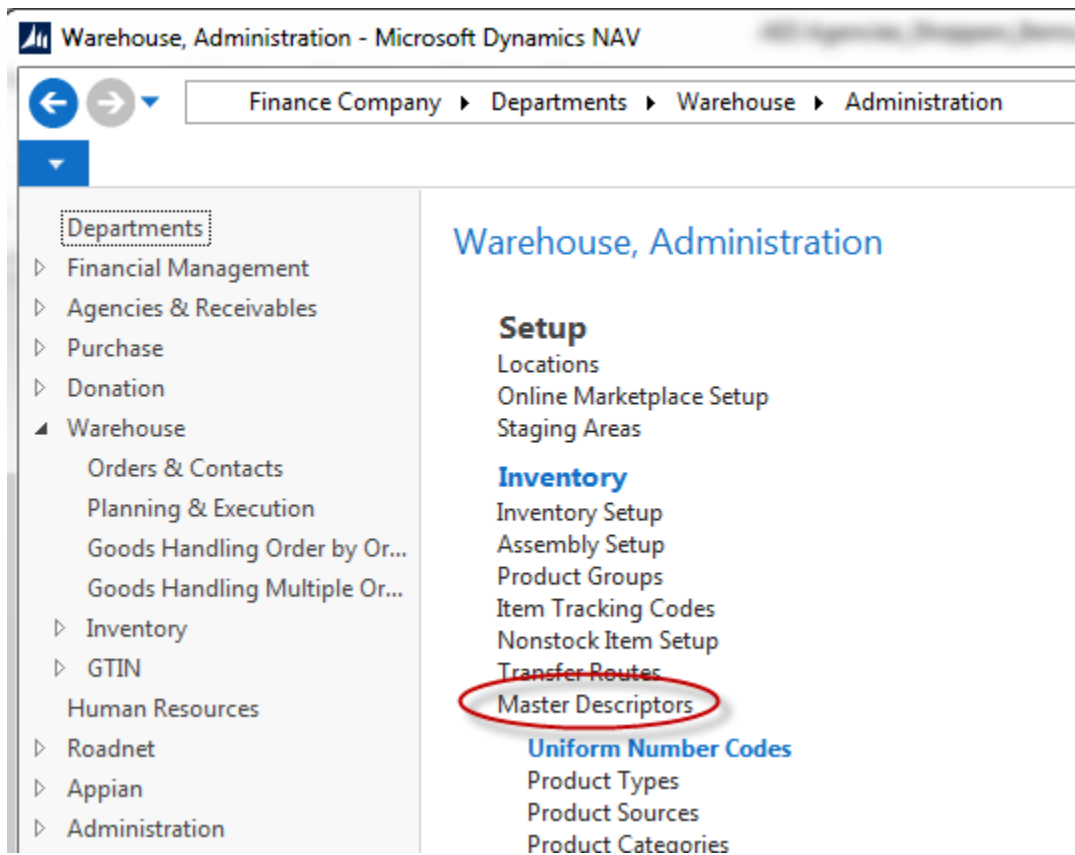
1. Enter a Code and Description for each Master Descriptor. You will receive a message each time you make a change to this form indicating you must make the same change online. That is because this list must be completely in sync with the Master Descriptor list in Agency Express. Be sure that any changes made here are also made online. Failure to do so will result in the functionality not working properly.

2. Once you have created a list of Master Item Descriptors you can assign them to items. From the Item Card, select Navigate → Master Data→ Item Descriptors to open the Item Descriptors Page.

3. Select a Code and hit enter. Repeat this process until you have added all required item descriptor codes to the Item.
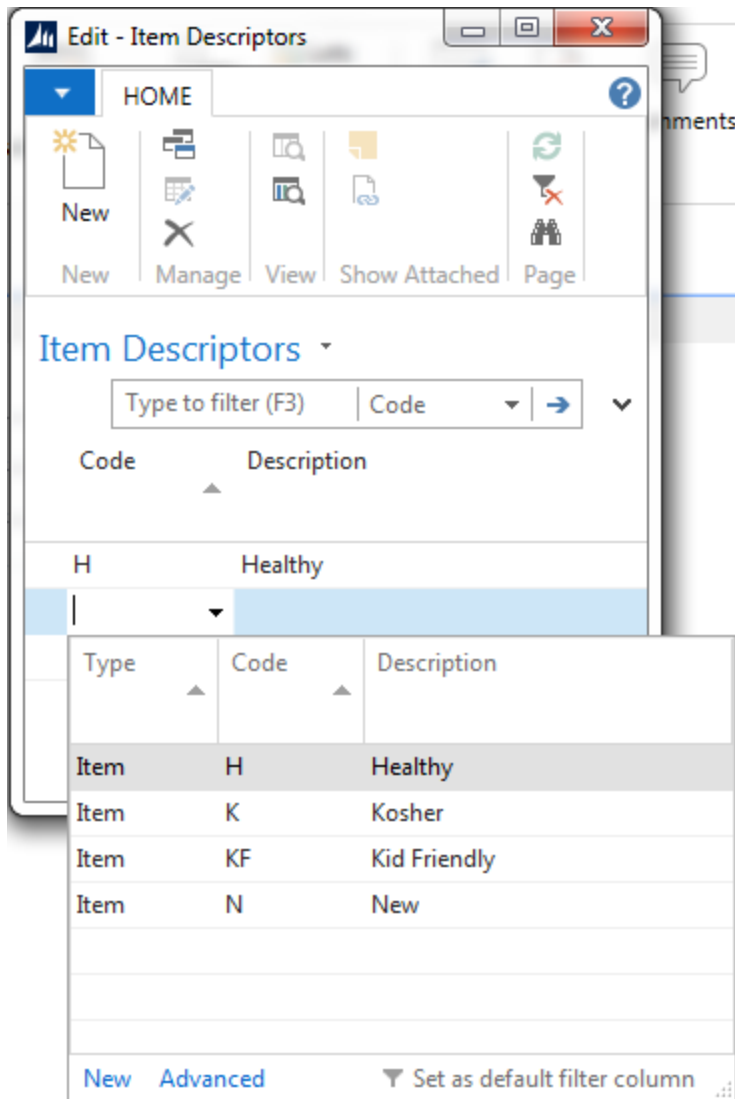
Related Topics:

1. Agency Express Overview of File Structure and Data Synching
2. Agency Scheduling
3. Agency Overview
4. Item Overview
5. Agency Groups and Qualifiers
6. Agency Fee Setup