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Agency Clear Back Orders

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Purpose of this document

This document explains how to clear Agency back orders in Ceres, and to automatically update and delete warehouse documents when posted regardless of whether the quantity (shipped/handled) when the line is complete.
As of Ceres object *4.01.20,* this has been replaced with the Inventory Shorts Functionality.

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Purpose

Most food banks do not allow for back orders of products ordered by Agencies. Ordering more than the food bank has on hand is more likely via web orders than manual orders, but can happen in both cases due to timing issues. The task of deleting and cleaning up these open warehouse documents and open Agency Orders can be time consuming. The Clear Back Order functionality in Ceres will automatically update and delete warehouse documents when posted regardless of whether the quantity (shipped/handled) on the line is complete.

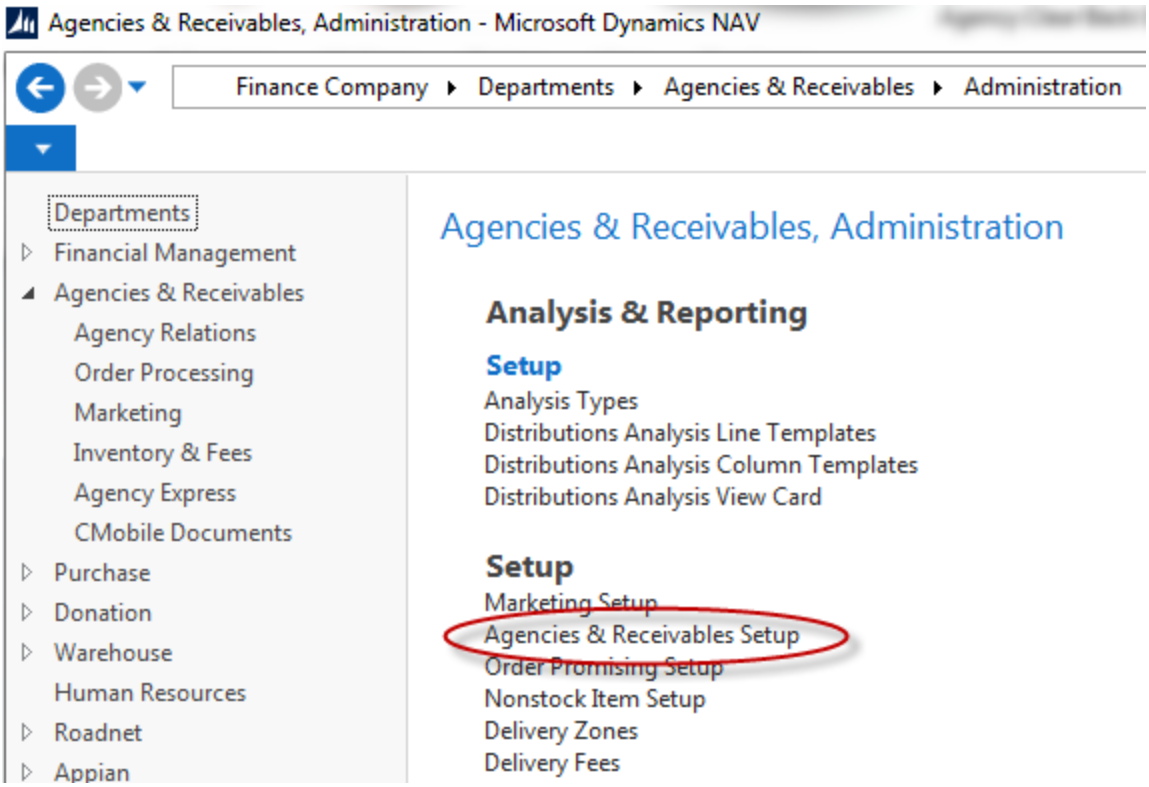
In addition to the automated feature, under certain conditions it is possible in Ceres to have a warehouse document that no longer applies to a valid Agency Order. This is considered an abandoned warehouse document. As part of the Clear Back Order functionality, a utility was created that will clear the abandoned warehouse document.

Ceres Object release 4.00.00 is required for the functionality described in this document.

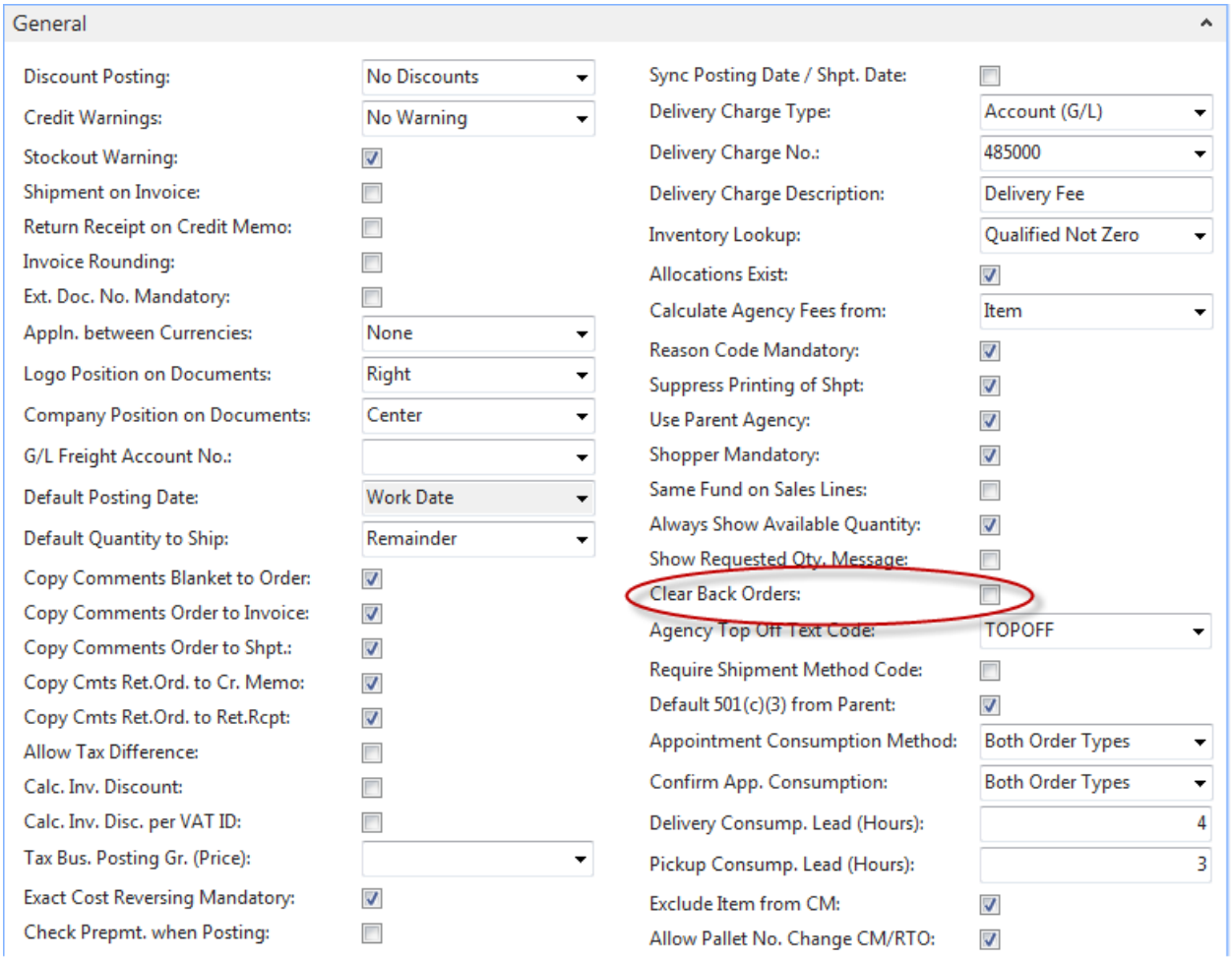
The Clear Back Order functionality was replaced with the Inventory Short Handling functionality in Ceres Object release 4.01.20. Please refer to the Inventory Short Handling Procedure Document for more information.

Accessing the Clear Back Order Functionality

1. The automatic clearing of back orders is defined in the Agency and Receivables Setup. The Agency and Receivables Setup page can be accessed from Departments → Agencies & Receivables → Administration →Setup → Agencies & Receivables Setup.

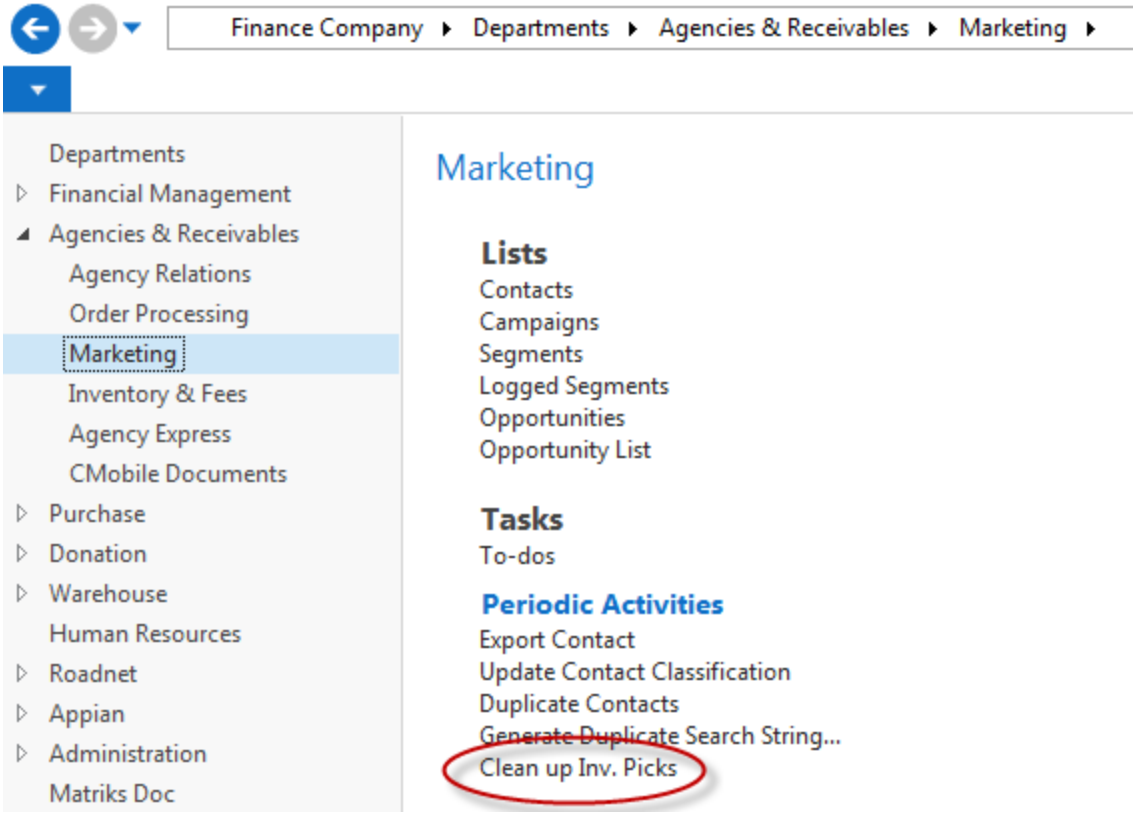


2. On the General FastTab of the Agencies & Receivables Setup Page, place a checkmark in the Clear Back Orders field to turn the feature on. This will automatically update the Qty to Ship field on the Agency Order based on the quantity that was actually shipped when the pick document or Agency Order is posted.



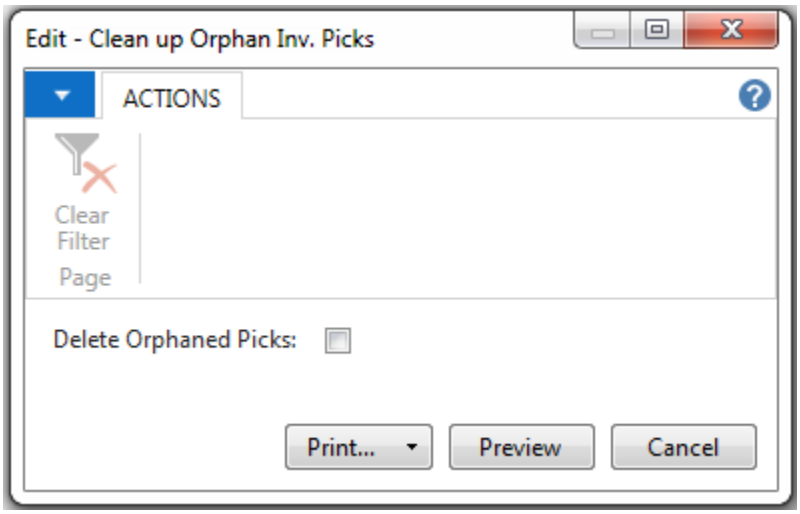
Accessing the Abandoned Warehouse Document Cleanup Utility

1. To access the abandoned warehouse document cleanup utility select Departments → Agencies & Receivables → Marketing → Periodic Activities → Clean Up Inv. Pick

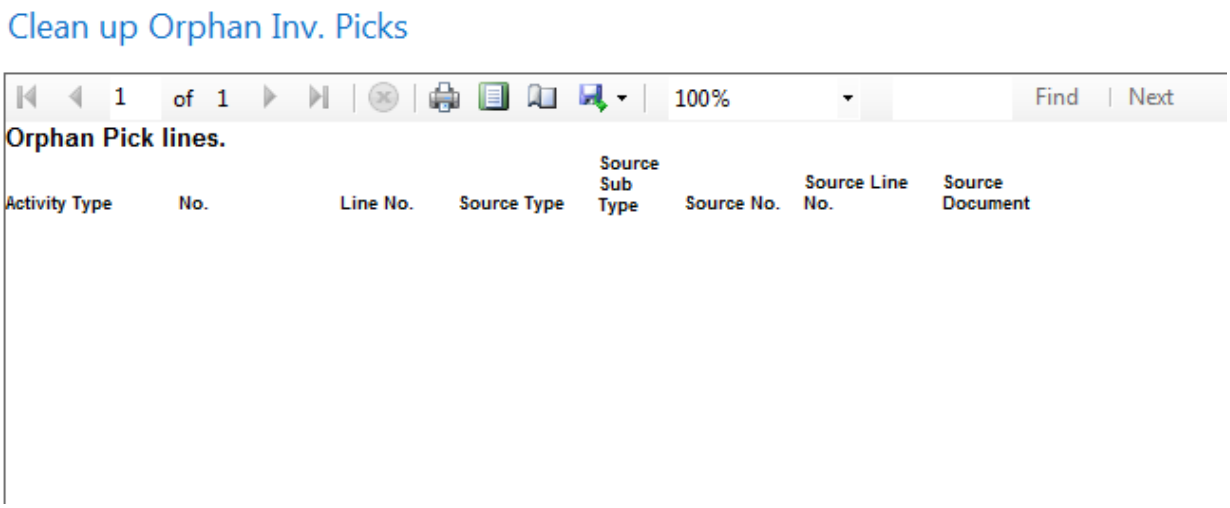


2. The Utility Page will open. There are two options for this Utility, the first is simply to list the pick documents that are abandoned without updating (deleting) them, and the second option will actually delete the pick documents.

3. If you want to delete the abandoned pick documents, place a checkmark in the Delete Orphaned Picks field and then select Print to run the utility. All abandoned warehouse documents will be deleted and shown on the report. If this box is left unchecked the utility will simply show the pick documents that are abandoned.



4. The generated report will look similar to the one shown here. The report will show if you have any open warehouse documents even if none are abandoned. However, the report will only show the abandoned documents. In this example shown we have open warehouse documents, none are abandoned; therefore we see the report showing the header with no detail information.



Note: With the Clear Back Order functionality turned on, no abandoned warehouse documents should be created through the normal Agency Order processing functions. Under certain situations, users may be able to create an abandoned warehouse document. If you are using advanced warehousing, it is recommended that this utility be used periodically to view/clean-up these abandoned warehouse documents to maintain proper inventory control and availability.

Related Topics:

1. Agency Order Overview
2. Agency Orders with Grants
3. Agency Express Managing Web Orders
4. Cancelling and Archiving Agency Orders
5. Inventory Short Handling