

## Agency Delivery Zones/Delivery Fees

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### **Purpose of this document**

This document illustrates how to designate and use Agency delivery zones to calculate delivery fees on Agency Orders in Ceres.

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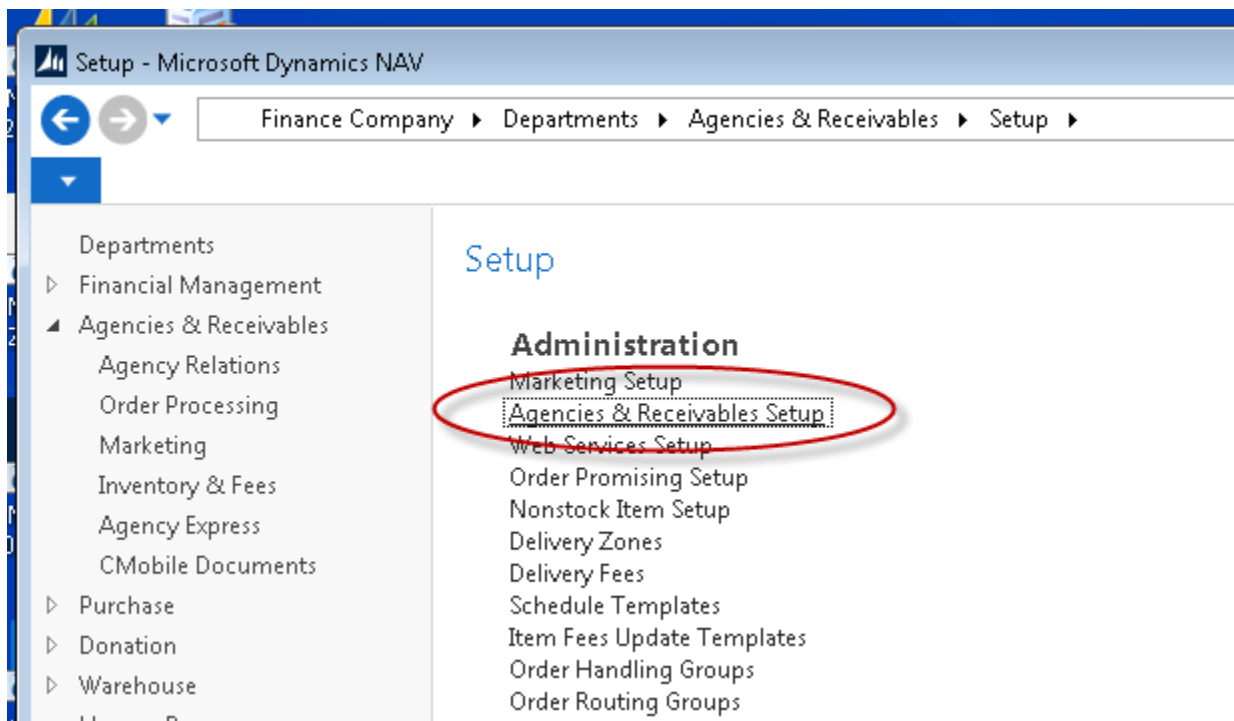
## Purpose

Agency Delivery Zones and Delivery Fees functionality in Ceres provides food banks with the ability to designate Delivery zones and subsequently calculate delivery fees associated with a given Delivery Zone. If an Agency is assigned to a Delivery Zone, Delivery Fees will be calculated and charged to the Agency on Agency Orders. Ceres provides the ability to use flat rates, Delivery Fees per pound of product on the Agency Order, and a Tier structure to assign different rates based on the pounds delivered to the Agency on a given order. Automatic calculation of delivery fees can be configured by selecting this option on the Agency & Receivables Setup page.

*Ceres Object release 4.00.00, 4.00.01 & 4.01.41 are required for the functionality described in this document*

## Agency & Receivable Setup

1. Go to Departments → Agency & Receivables → Administration → Setup → Delivery Zones. You will see the listing of Delivery Zones.



2. To setup the parameters for delivery fees, enter the correct values for the following fields:
  - a. Delivery Charge Type – choose from G/L Account, Item or Resource
  - b. Delivery Charge No. – enter the appropriate value based on the delivery charge type selected.

- c. **Delivery Charge Description** – Enter the description you wish to appear on Agency Invoices assessed a delivery fee.
- d. **Automatic Delivery Charge Calc.** – Check this box if you wish to have delivery fees automatically calculated on agency invoices. Automatic calculation of the delivery fee will be based on the agency invoice having the correct delivery zone entered. Leave this field unchecked to force manual calculation of delivery fees.

## Agencies & Receivables Setup

General	
Discount Posting:	No Discounts
Credit Warnings:	No Warning
Stockout Warning:	<input type="checkbox"/>
Shipment on Invoice:	<input checked="" type="checkbox"/>
Return Receipt on Credit Memo:	<input type="checkbox"/>
Invoice Rounding:	<input type="checkbox"/>
Ext. Doc. No. Mandatory:	<input type="checkbox"/>
Appln. between Currencies:	None
Logo Position on Documents:	Center
Company Position on Documents:	Left
G/L Freight Account No.:	
Default Posting Date:	Work Date
Default Quantity to Ship:	Remainder
Copy Comments Blanket to Order:	<input checked="" type="checkbox"/>
Copy Comments Order to Invoice:	<input checked="" type="checkbox"/>
Copy Comments Order to Shpt.:	<input checked="" type="checkbox"/>
Copy Cmts Ret.Ord. to Cr. Memo:	<input type="checkbox"/>
Copy Cmts Ret.Ord. to Ret.Rcpt:	<input type="checkbox"/>
Allow Tax Difference:	<input checked="" type="checkbox"/>
Calc. Inv. Discount:	<input checked="" type="checkbox"/>
Calc. Inv. Disc. per VAT ID:	<input checked="" type="checkbox"/>
Tax Bus. Posting Gr. (Price):	
Exact Cost Reversing Mandatory:	<input type="checkbox"/>
Check Prepmnt. when Posting:	<input checked="" type="checkbox"/>
Archive Quotes and Orders:	<input checked="" type="checkbox"/>
Sync Posting Date / Shpt. Date:	<input checked="" type="checkbox"/>
Delivery Charge Type:	Account (G/L)
Delivery Charge No.:	485000
Delivery Charge Description:	Delivery Fee
Inventory Lookup:	Qualified Not Zero
Allocations Exist:	<input checked="" type="checkbox"/>
Calculate Agency Fees from:	Lot
Reason Code Mandatory:	<input checked="" type="checkbox"/>
Suppress Printing of Shpt:	<input checked="" type="checkbox"/>
Use Parent Agency:	<input type="checkbox"/>
Shopper Mandatory:	<input checked="" type="checkbox"/>
Same Fund on Sales Lines:	<input type="checkbox"/>
Always Show Available Quantity:	<input checked="" type="checkbox"/>
Show Requested Qty. Message:	<input type="checkbox"/>
Agency Top Off Text Code:	TOPOFF
Require Shipment Method Code:	<input type="checkbox"/>
Default 501(c)(3) from Parent:	<input checked="" type="checkbox"/>
Appointment Consumption Method:	Both Order Types
Confirm App. Consumption:	Both Order Types
Delivery Consump. Lead (Hours):	4
Pickup Consump. Lead (Hours):	3
Exclude Item from CM:	<input type="checkbox"/>
Allow Pallet No. Change CM/RTO:	<input checked="" type="checkbox"/>
Automatic Delivery Charge Calc:	<input checked="" type="checkbox"/>

## Delivery Zones Setup

1. Go to Departments → Agency & Receivables → Administration → Setup → Delivery Zones. You will see the listing of Delivery Zones.

←

→

▼

Finance Company ▶ Departments ▶ Agencies & Receivables ▶ Administration

Departments

▶ Financial Management

▲ Agencies & Receivables

Agency Relations

Order Processing

Marketing

Inventory & Fees

Agency Express

CMobile Documents

▶ Purchase

▶ Donation

▶ Warehouse

Human Resources

▶ Roadnet

▶ Appian

▶ Administration

Matriks Doc

Agencies & Receivables, Administration

Analysis & Reporting

Setup

Analysis Types

Distributions Analysis Line Templates

Distributions Analysis Column Templates

Distributions Analysis View Card

Setup

Marketing Setup

Agencies & Receivables Setup

Order Promising Setup

Nonstock Item Setup

Delivery Zones

Delivery Fees

Schedule Templates

Item Fees Update Templates

Order Handling Groups

Order Routing Groups

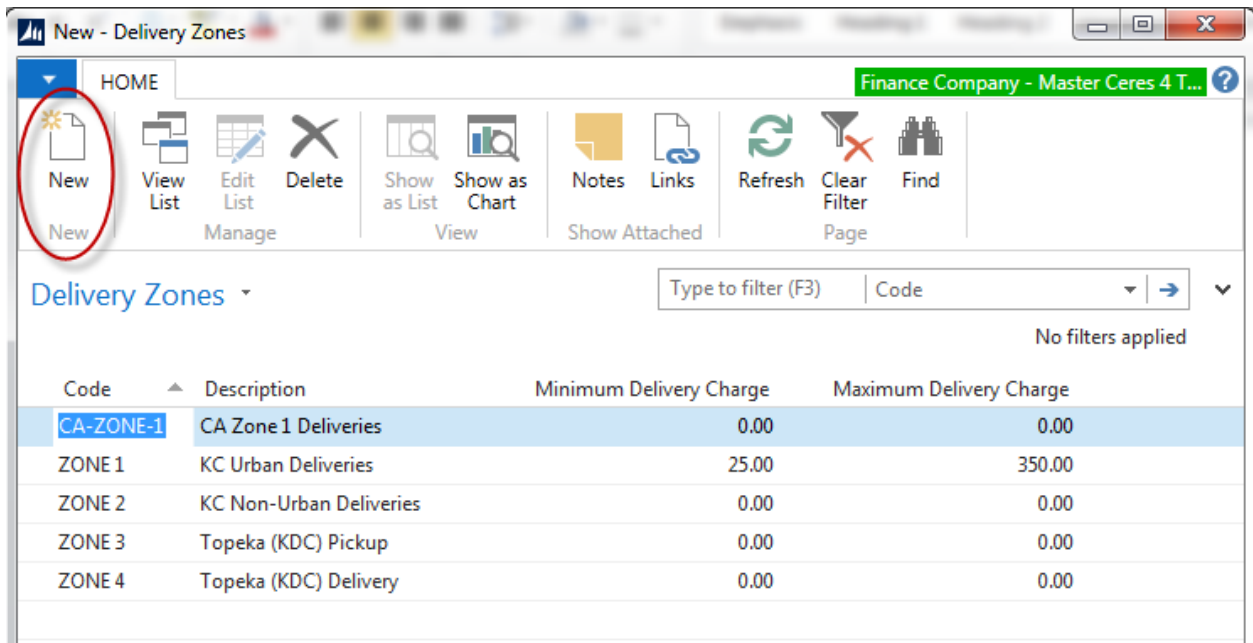
Company

Business Relations

Industry Groups

Web Sources

3. To enter a new record click on New from the Home ribbon. To edit an existing record click on the line you wish to change.



4. Enter a unique code for the Delivery Zone.
5. Enter the description of the Delivery Zone.
6. Enter a Minimum Delivery charge amount if you would like Ceres to apply a minimum delivery charge. Leaving the Minimum Delivery Charge equal to zero indicates no minimum delivery charge (CERES4.00.01).
7. Enter a Maximum Delivery charge amount if you would like Ceres to limit the delivery charge to a maximum amount. Leaving the Maximum Delivery Charge equal to zero indicates no maximum delivery charge (CERES4.00.01).
8. Once Delivery Zones are created, you will need to assign your Agencies to the correct Delivery Zone in order to have their delivery fee calculated on Agency Orders. Refer to the Agency Overview procedure for more information on Agency setup. The default Delivery Zone on the Agency will be copied to the Agency Order when the Agency is selected. You can override the default Delivery Zone on an Agency Order if needed. This next screen shows an example of the Delivery Zone on the Shipping FastTab of the Agency Card.

## C1466 · Friendship House

General	C1466	Friendship House	64171	Matthew Fletcher	▼
Communication	816-531-7788	816-531-2457	williamh@esopro.com ▼		
Invoicing	GENERAL			▼	
Payments	▼				
Shipping ^					
Location Code:	▼		Shipping Advice:	Partial ▼	
Zone Code:	▼		Shipment Method Code:	PICKUP ▼	
Territory Code:	▼		Shipping Agent Code:	▼	
Delivery Zone Code:	ZONE 1 ▼		Shipping Agent Service Code:	▼	
Delivery Info.:	cell 913-314-0322				
Default Ship-to Code:	DEFAULT ▼		Shipping Time:	▼	
Combine Shipments:	<input type="checkbox"/>		Customized Calendar:	No	
Roadnet Location Type:	▼		Order Handling Group Code:	WEB ▼	
Preferred Delivery Time:	▼		Order Routing Group Code:	HARV WEB ▼	
Preferred Pickup Time:	▼		Staging Area:	▼	

## Delivery Fees Setup

1. Go to Departments → Agency & Receivables → Administration → Setup → Delivery Fees. You will see the menu for setting up Delivery Fees for the Delivery Zones established above.

The screenshot shows a software navigation interface. At the top, a breadcrumb trail reads: Finance Company ▶ Departments ▶ Agencies & Receivables ▶ Administration. Below this, a left-hand sidebar lists various departments. The 'Departments' header is highlighted with a dashed box. Under 'Departments', 'Agencies & Receivables' is expanded, showing a list of sub-items: Agency Relations, Order Processing, Marketing, Inventory & Fees, Agency Express, and CMobile Documents. To the right of the sidebar, the main content area is titled 'Agencies & Receivables, Administration'. Under this title, there are three main sections: 'Analysis & Reporting', 'Setup', and 'Company'. The 'Setup' section is expanded, showing a list of items: Marketing Setup, Agencies & Receivables Setup, Order Promising Setup, Nonstock Item Setup, Delivery Zones, Delivery Fees, Schedule Templates, Item Fees Update Templates, Order Handling Groups, and Order Routing Groups. The 'Delivery Fees' item is circled in red. The 'Company' section shows Business Relations, Industry Groups, and Web Sources.

Departments

- ▶ Financial Management
- ▲ Agencies & Receivables
  - Agency Relations
  - Order Processing
  - Marketing
  - Inventory & Fees
  - Agency Express
  - CMobile Documents
- ▶ Purchase
- ▶ Donation
- ▶ Warehouse
- Human Resources
- ▶ Roadnet
- ▶ Appian
- ▶ Administration
  - Matriks Doc

Agencies & Receivables, Administration

**Analysis & Reporting**

**Setup**

- Analysis Types
- Distributions Analysis Line Templates
- Distributions Analysis Column Templates
- Distributions Analysis View Card

**Setup**

- Marketing Setup
- Agencies & Receivables Setup
- Order Promising Setup
- Nonstock Item Setup
- Delivery Zones
- Delivery Fees**
- Schedule Templates
- Item Fees Update Templates
- Order Handling Groups
- Order Routing Groups

**Company**

- Business Relations
- Industry Groups
- Web Sources

2. To enter a new record click New. To edit an existing record click on the line you wish to change.



**Edit - Delivery Fees**

**HOME ACTIONS**

**New** View List Show as List Notes Refresh  
**Edit List** Show as Chart Links Clear Filter  
**Delete** Find

**Delivery Fees** Type to filter (F3) Delivery Zone Code →

No filters applied

Delivery Zone Code	Type	Tier Pounds	Rate (\$)
CA-ZONE-1	Pound		0.1
ZONE 1	Flat		70
ZONE 2	Flat		100
ZONE 3	Flat		0
ZONE 4	Flat		0

OK

3. Enter the Delivery Zone or use the AssistButton to select from the list of available delivery zones.
4. Choose the Type of calculation from the following options:

**Pound** – define that a Rate (\$) that will be charged for each pound shipped on the agency order.

**Flat** – define a Rate (\$) will be charged as a flat rate regardless of the pounds shipped on the agency order.

**Tier** – This calculates like the Pound option, however you can specify in the Tier Pounds the minimum weight to qualify for this rate. Using this feature you can discount the delivery charge for large Agency orders to encourage delivery efficiency.

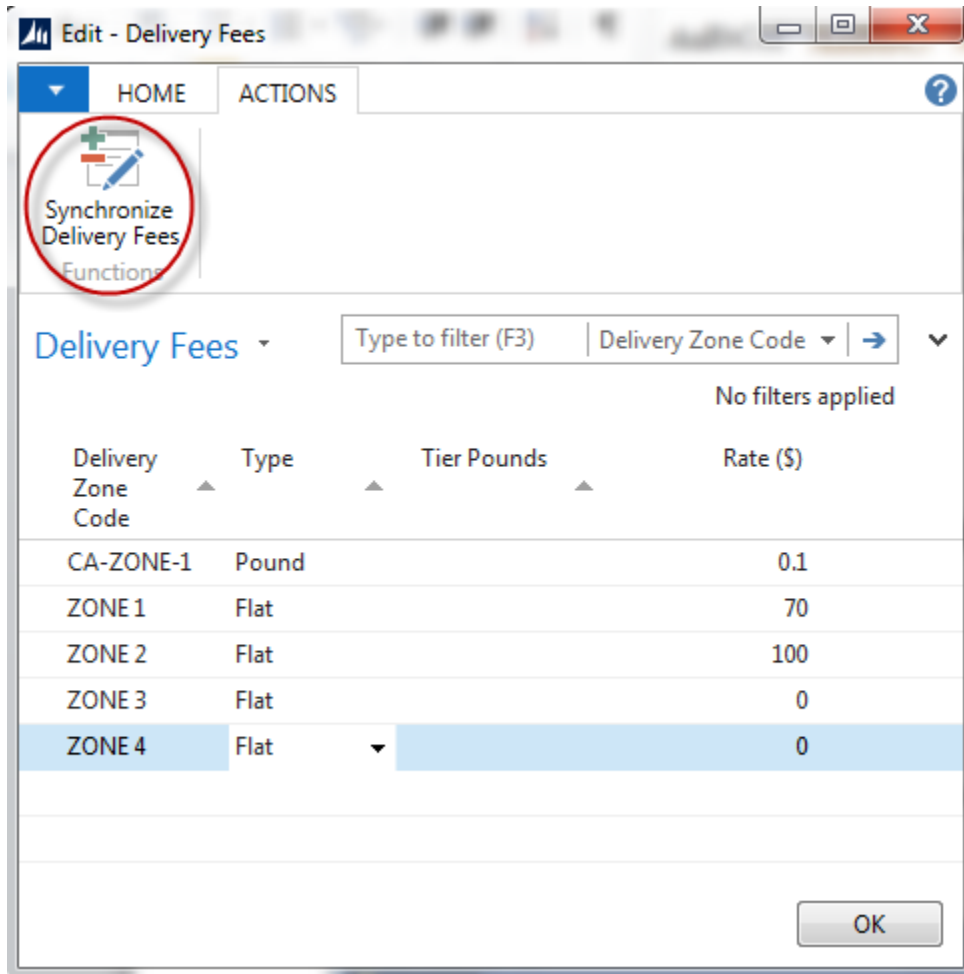
**Please note that the fees are associated with a given Zone.** In order for the fees to be calculated, a Delivery Zone assignment must be made for the Agency ordering the product.

## Synchronizing Delivery Fees with Agency Express

If you are using the Agency Express web ordering system, it is important to synchronize the delivery fees with Agency Express. This will enable an estimated calculation of the delivery fees on web orders

entered through Agency Express. You should synchronize anytime you update the delivery fees table to insure that Agency Express is using the current delivery fees.

To accomplish synchronization select Actions → Synchronize Delivery Fees from the ribbon on the Delivery Fees Card.



The screenshot shows a software window titled "Edit - Delivery Fees". It has a ribbon interface with two tabs: "HOME" and "ACTIONS". The "ACTIONS" tab is active, and a button labeled "Synchronize Delivery Fees" is circled in red. Below the ribbon, there is a section titled "Delivery Fees" with a search bar "Type to filter (F3)" and a dropdown for "Delivery Zone Code". Below this is a table with the following data:

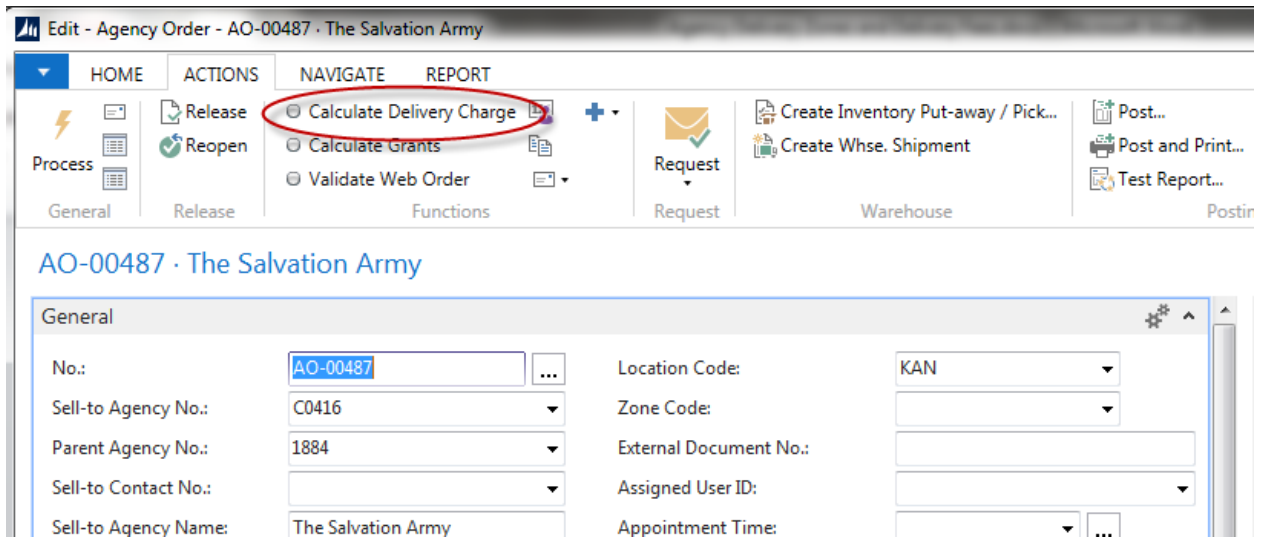
Delivery Zone Code	Type	Tier Pounds	Rate (\$)
CA-ZONE-1	Pound		0.1
ZONE 1	Flat		70
ZONE 2	Flat		100
ZONE 3	Flat		0
ZONE 4	Flat		0

An "OK" button is located at the bottom right of the window.

## Calculating Delivery Fees on Agency Orders

Delivery Fees do not automatically calculate on Agency Orders with a Shipment Method of Delivery. The order fulfillment process must incorporate this manual step if you charge delivery fees. The order must be “Open” since this will add a new line to the Agency Order.

1. To access the Calculate Delivery Charge function from within Agency Orders select Actions → Functions → Calculate Delivery Charge as shown below.



A new line with type of GL Account will be added to the Agency Order Lines and will show on the Agency Invoice. If you charge fees, ensure that this calculation is completed before posting the Agency Order and Invoicing the Agency.

## Related Topics:

1. Agency Overview
2. Agency Order Overview
3. AE3 Agencies, Shoppers and Items
4. Agency Express Managing Web Orders