

Agency Express Item Validate and Reservation Revisions

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

Purpose of this document

This document describes the issues and code updates in Ceres 4 related to Item Validate and Reservation Revisions with Agency Express 3 web orders.

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Purpose

This document describes the issues and updates in Ceres 4 related to Item Validate and Reservation Revisions with Agency Express 3 web Orders.

The reason for the changes stemmed from issues arising from Web orders that apparently did not validate upon editing by an Agency and re-submission. The orders had previously been submitted and validated, but possibly due to changes to the Agency or Item, the revisions did not validate when the shopper edited the order and resubmitted.

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

Issue Descriptions & Resolution

Issue 1: Incorrect Shipment Method Code on Web Order Prevents Auto-validation

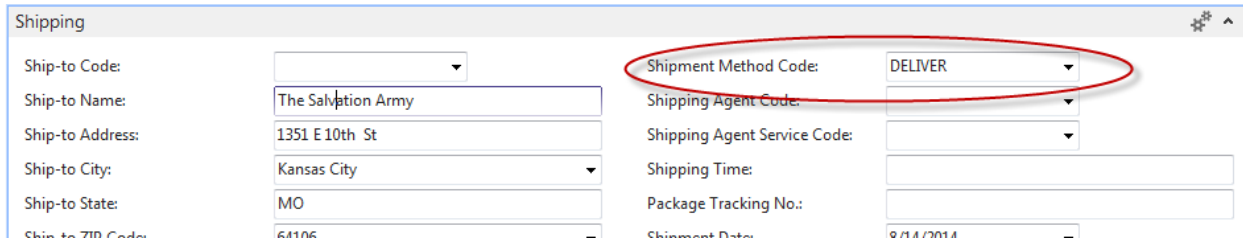
Description of Issue: Previously, if an Agency was setup with a default Shipment Method Code of PICKUP (for example) and a web order was placed where the Shopper selected a different method (i.e. DELIVER), the order would not validate in Ceres because the default Shipment Method Code on the Agency (PICKUP) was expected, but DELIVER was on the inbound file. This caused a disconnection between the PO file and the default Shipment Method Code on the Agency and validation failed.

Resolution Solution: Now, the Shipment Method Code on the inbound PO file is the only one that matters. Regardless of the default Shipment Method Code on the Agency card, the value in the PO file will be used.

C1722 · The Salvation Army

| | | | | | |
|--------------------------|--------------------------|--------------------|---------------------------------|-----------------------|---|
| General | C1722 | The Salvation Army | 66102 | Majors William Heaver | ▼ |
| Communication | 913-232-5400 | 913-232-5442 | wheaver@usc.salvationarmy.org ▼ | | |
| Invoicing | GENERAL | | | ▼ | |
| Payments | ▼ | | | | |
| Shipping ▲ | | | | | |
| Location Code: | ▼ | | Shipping Advice: | Partial ▼ | |
| Zone Code: | ▼ | | Shipment Method Code: | PICKUP ▼ | |
| Territory Code: | ▼ | | Shipping Agent Code: | ▼ | |
| Delivery Zone Code: | ▼ | | Shipping Agent Service Code: | ▼ | |
| Delivery Info.: | ▼ | | | | |
| Default Ship-to Code: | ▼ | | 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: | ▼ | |

Agency Order



The screenshot shows a 'Shipping' form with two columns of fields. The left column includes 'Ship-to Code:', 'Ship-to Name:', 'Ship-to Address:', 'Ship-to City:', 'Ship-to State:', and 'Ship-to ZIP Code:'. The right column includes 'Shipment Method Code:', 'Shipping Agent Code:', 'Shipping Agent Service Code:', 'Shipping Time:', 'Package Tracking No.:', and 'Shipment Date:'. The 'Shipment Method Code:' field is circled in red and contains the value 'DELIVER'. The 'Ship-to Name:' field contains 'The Salvation Army', 'Ship-to Address:' contains '1351 E 10th St', 'Ship-to City:' contains 'Kansas City', 'Ship-to State:' contains 'MO', 'Ship-to ZIP Code:' contains '64106', 'Shipping Agent Code:' is empty, 'Shipping Agent Service Code:' is empty, 'Shipping Time:' is empty, 'Package Tracking No.:' is empty, and 'Shipment Date:' contains '9/14/2014'.

The Shipment method on the Order will carry through to the Agency Order. If you allow Agencies to choose both options, make sure to check Shipment methods as part of the Order fulfillment process.

Issue 2: Activity Statuses that do Not Allow Posting Preventing Auto-Validation

Description of Issue: Previously, if a user changed the UNC Activity Status on an Agency to one that did not allow posting while an existing web order was in Ceres; this opened up the potential for a shopper to edit this order which did not validate upon submission because the agency now had an Activity Status that does not allow posting (such as Accounting Hold).

Resolution: Now if a user attempts to change the UNC Activity Status on an Agency that has open orders in the system, they will get a hard warning message and will not be allowed to make the change at this time.

UNC Activity Status ▾

Type to filter (F3)

Code ▾



No filters applied

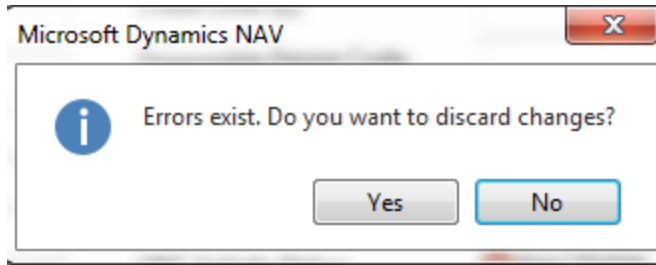
| Code | Error Message | Allow Posting | E-Mail Notification ▲ |
|---------------|---|-------------------------------------|--------------------------|
| ACTIVE | Active | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HOLD501C3 | Temporary Hold - Expired 501 c3 Adva... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HOLDCOM | Temporary Hold - Compliance Issue | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HOLDCR | Temporary Hold - Credit Limit Exceeded | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HOLDDIST | Temporary Hold - Distribution Hold | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HOLDFN | Temporary Hold - Payment Past Due | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HOLDMAR | Temporary Hold - Delinquent Monthly ... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HOLDMTV | Temporary Hold - Past Due Monitoring... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HOLDMULT | Temporary Hold - Multiple Reasons | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| HOLDRETCK | Temporary Hold - Returned Check | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| INACTIVEAG | Inactive at Agency's Request | <input type="checkbox"/> | <input type="checkbox"/> |
| INACTIVEFB | Inactive at Food Bank's Request | <input type="checkbox"/> | <input type="checkbox"/> |

C0416 · The Salvation Army

✖ Open orders exist for Agency C0416. You cannot change UNC Activity Status to a status which does not allow posting until all open orders have been pro...

| General | |
|---------------------------|--------------------------|
| No.: | C0416 |
| Parent Agency No.: | 1884 |
| Name: | The Salvation Army |
| Name 2: | |
| Address: | 1351 E 10th St |
| Address 2: | |
| ZIP Code: | 64106 |
| City: | Kansas City |
| State: | MO |
| Country/Region Code: | |
| Dormant: | <input type="checkbox"/> |
| Search Name: | SALVATION ARMY-ADULT |
| Balance (\$): | -817.93 |
| Credit Limit (\$): | 3,000.00 |
| Responsible Person Code: | |
| Fund No.: | UR |
| FBC County Code: | MO-JACKSON |
| FBC Agency Category Code: | SUBSTANCE |
| UNC Activity Status: | ✖ INACTIVEFB |
| Agency Approval Date: | 5/1/1992 |

When attempting to move on or leave the window, you will receive the following message and the UNC Activity Status will revert to the status that was previously assigned to the Agency:



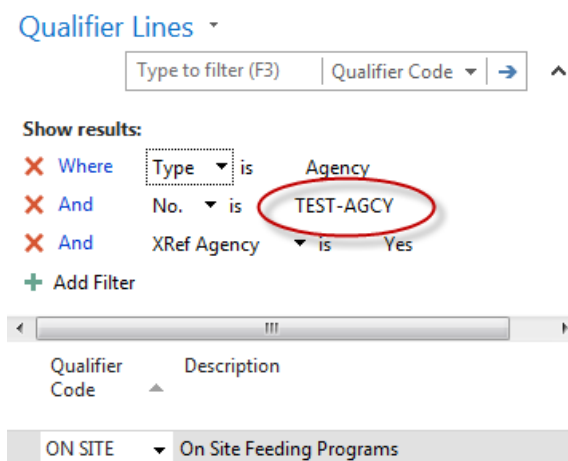
Note: If an Agency has no outstanding orders, it is possible to change the status to one that does not allow posting.

Issue 3: Agencies are Able to Place Orders for Items for which they are Not Qualified Preventing Auto-Validation

Description of Issue: There have been occasional mismatches of Agency Group and Agency Qualifier information due to changes to the Agency's assigned Agency Group and/or creation of a new Agency where the order in which set up must be completed caused the Agency Group Qualifiers not to properly update. One way this could happen is that before you can permit an Agency for Web Ordering, the Agency must first be assigned an Agency Group Code...however, the appropriate qualifier records were not being created because the Agency wasn't yet permitted for web ordering.

Resolution: The assignment of Agency Group Code can now be completed without Permit Web Orders being flagged for the Agency. This will generate the appropriate link of the Agency Group Qualifiers to the Agency. In addition, a routine has been created and placed in the Periodic Activities menu option that allows the food bank administrator to periodically update Agency Group qualifiers.

Go to Navigate → Distributions → Qualifiers and confirm that the qualifiers assigned match those of the Agency Group Code selected:



Qualifier Lines ▾

Type to filter (F3) | Qualifier Code ▾ → ^

Show results:

✗ Where Type ▾ is Agency Group

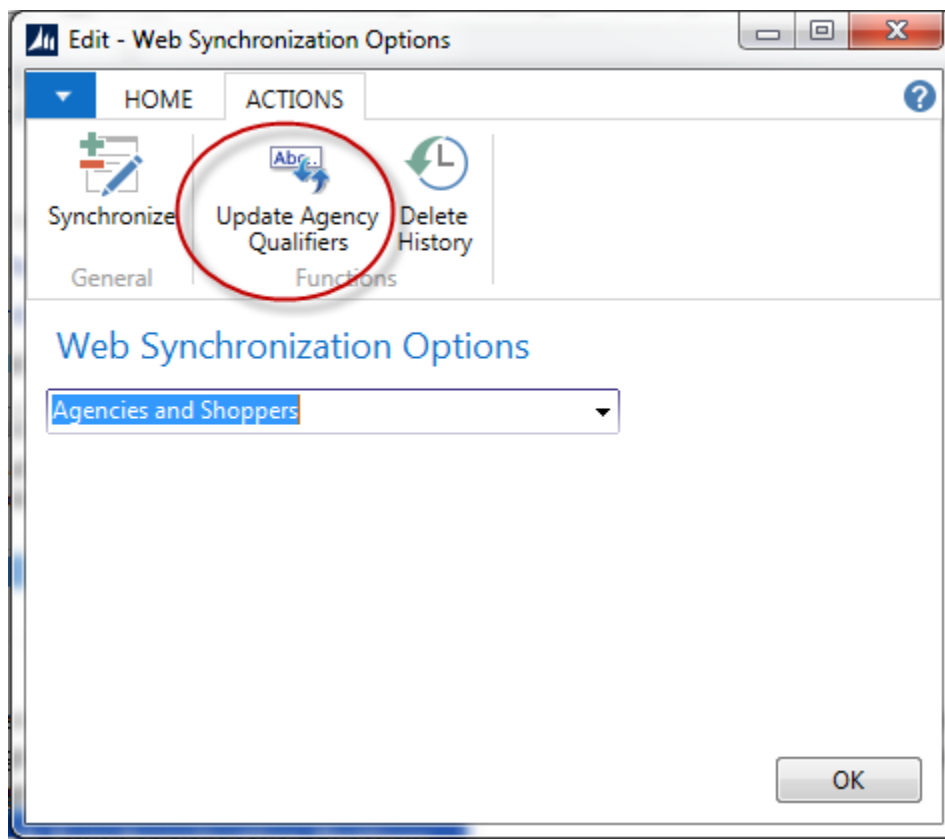
✗ And No. ▾ is 30

+ Add Filter

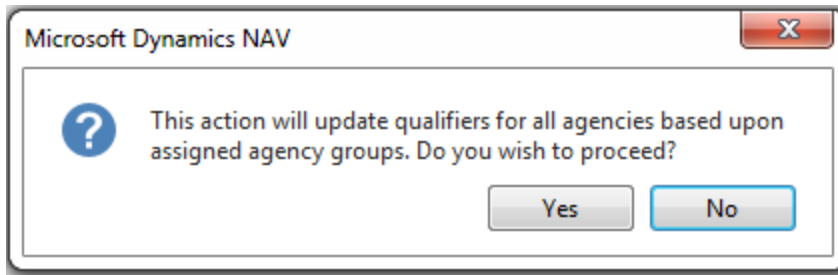
Qualifier Code Description

ON SITE ▾ On Site Feeding Programs

1. If you have reason to believe that qualifiers are no longer operating properly for one or more Agencies, go to Agency Express → Administration → Web Synchronization Options and select "Update Agency Qualifiers" from the Actions Ribbon:



2. The following prompt will appear:



3. If YES is selected, all Qualifiers will be deleted and re-created based upon the Agency Group Code assigned to the Agency – which will generate update files (ITI) to send to Agency Express. This functionality should not be needed on a regular basis, but only if there appears to be a disconnect between what the Agency sees in their shopping list on the web and what the Agency should be allowed to see in the shopping list.

Note: If changing the Agency Group Code on an existing agency that is permitted for web ordering, the new qualifiers will be updated and any existing COUNTY qualifiers will remain.

Issue 4: Enhance the Processing so that Inventory is Not Re-Released when an Order Does Not Auto-Validate upon Resubmission

(Maintain historically accepted/allocated product on web orders between edits)

Description of Issue: Currently, for food banks using the “Allow Order Modification Online” functionality, if an Agency submits a web order and the order is auto-validated and auto-accepted, they receive confirmation of the product that they have ordered (and inventory requested was available at the time the order validated/accepted). When they re-submit the order, the process was to delete the lines of the order and recreate them based upon the new version of the order. Sometimes this caused the Agency to ‘lose’ inventory that had already been accepted/allocated for them if another order managed to grab that newly released inventory before the new order lines were built.

Resolution: Ceres will no longer delete existing sales order lines and recreate them when additional versions of a web order are received. Instead, Ceres will reconcile the accepted/allocated quantities from previous order versions that were validated/accepted and determine what changes to the order lines need to be made (i.e. add quantity to an item, remove an item, add an item, etc.) The only time quantities will be deleted is if an order has been ‘cancelled’ by the Agency online. New columns have been added to the Agency Order Form to track the quantities for Agency Express. They are: Quantity Approved for AE and Qty. on Hold for AE.

These columns will need to be displayed on the Agency Lines:

AO-00487 · The Salvation Army

| | | | | | | | | | |
|------------|--------------|------------------|-----------------|-------------------|----------------------|---------------------|-----------------------|-----------------------|----------------------|
| General | | | | | AO-00487 | C0416 | 8/14/2014 | Released | |
| Lines | | | | | | | | | |
| Line | Functions | Order | Find | Filter | Clear Filter | | | | |
| Discount % | Qty. to Ship | Quantity Shipped | Qty. to Invoice | Quantity Invoiced | Qty. Approved for AE | Qty. on Hold for AE | Planned Delivery Date | Planned Shipment Date | Shipment Method Code |
| | 10 | | 10 | | 10 | 0 | 8/14/2014 | 8/14/2014 | |
| | 20 | | 20 | | 20 | 0 | 8/14/2014 | 8/14/2014 | |

When the order has validated and accepted, the Qty Approved for AE should be set to the Qty available in the system at the time the order was processed. As long as the order does not fail validation, the Qty will display in this column. Quantities will only ever display in the Qty. on Hold for AE if a new version of the order does not auto-validate. In that case, quantities that were previously accepted/allocated for this Agency will move to the Qty on Hold for AE column **until the order can be validated** (at that point, the quantities will display again in Qty. Approved for AE). The Item Card will also display Qty. on Hold for AE if this occurs.

15057 · Cookies

| | | |
|-----------------------|-------------------------------------|-----------------------------------|
| General | | |
| No.: | 15057 | Quantity on Hand: 10 |
| Description: | Cookies | Qty. on Purch. Order: 0 |
| Description 2: | Fruit Thin Newtons | Qty. on Donation Order: 0 |
| Pack Size: | 8 / 10.5 oz bags | Qty. on Picks: 0 |
| Base Unit of Measure: | CASE | Qty. on Whse. Entries: 10 |
| Gross Weight: | 5 | Qty. on Agency Order: 10 |
| Shopping List: | <input checked="" type="checkbox"/> | Qty. on Hold for AE: 10 |
| Shelf No.: | | Blocked: <input type="checkbox"/> |
| Automatic Ext. Text: | <input type="checkbox"/> | Allocation Group No.: 15057 |
| Item Category Code: | DON | Feature Type: |
| | | Length (Inches): 11.5 |

This value will not be included in available quantity for other orders.

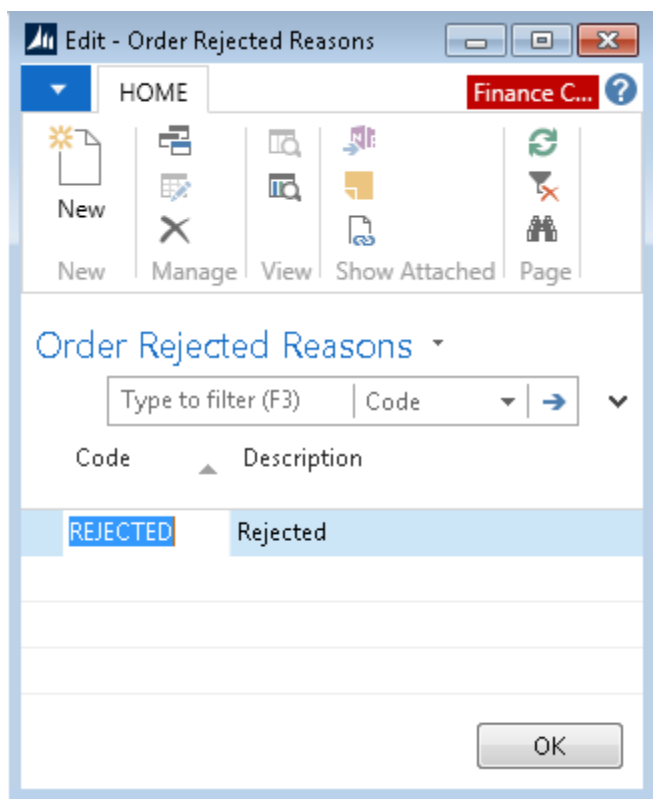
AO-00487 · The Salvation Army

| | | | | | | | | | | | | | |
|--|-------|--------------------|-------------|---------------|------------|---------|---------|----------------------|---------------------|----------|-------|-----------|----------|
| General | | | | | | | | | | AO-00487 | C0416 | 8/14/2014 | Released |
| Lines | | | | | | | | | | | | | |
| <div>Line Functions Order Find Filter Clear Filter</div> | | | | | | | | | | | | | |
| Type | No. | Available Quantity | Description | Location Code | Pallet No. | Lot No. | Quan... | Qty. Approved for AE | Qty. on Hold for AE | | | | |
| Item | 15057 | 10 | Cookies | KAN | | | 10 | 10 | 0 | | | | |
| Item | 15158 | 26 | Diapers | KAN | | | 20 | 20 | 0 | | | | |

Issue 5: Agencies are able to select rejection reason codes not available in Ceres.

Description of Issue: Currently, for food banks are required to maintain synchronization between the rejection reason codes in Ceres and AE manually. If this is not done, it is possible for agencies to submit order cancellations with a reason code that is not valid in Ceres. Prior to release Ceres 4.00.41, this would cause doubling of the agency order lines. Release 4.00.41 will cause an agency order validation failure if the order cancellation is submitted with an invalid reason code. This prevents the doubling of the agency order lines.

Resolution: Ceres will no longer validate an order with an invalid rejection reason code. Ceres and AE rejection reason codes will then need to be updated and synchronized prior to the order being validated.



Related Documents:

1. Agency Express Managing Web Orders
2. Agency Shipment Method Code
3. Agency Groups and Qualifiers
4. Agency Express Overview of File Structure and Sync
5. Agency Compliance
6. Agencies UNC Activity Status by Group