

## Agency Pallets

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### **Purpose of this document**

This document will illustrate how to use the Agency Order/ Agency Pallets functionality in Ceres.

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## Purpose

Once an Agency order has been picked, food banks need to keep track of the number of pallets and where those agency pallets are stored. Agency Pallets helps with the creation of the agency pallets and the administration of those pallets.

The staging functionality in Ceres was enhanced to support multiple workflow models by tracking as much information as possible within Ceres.

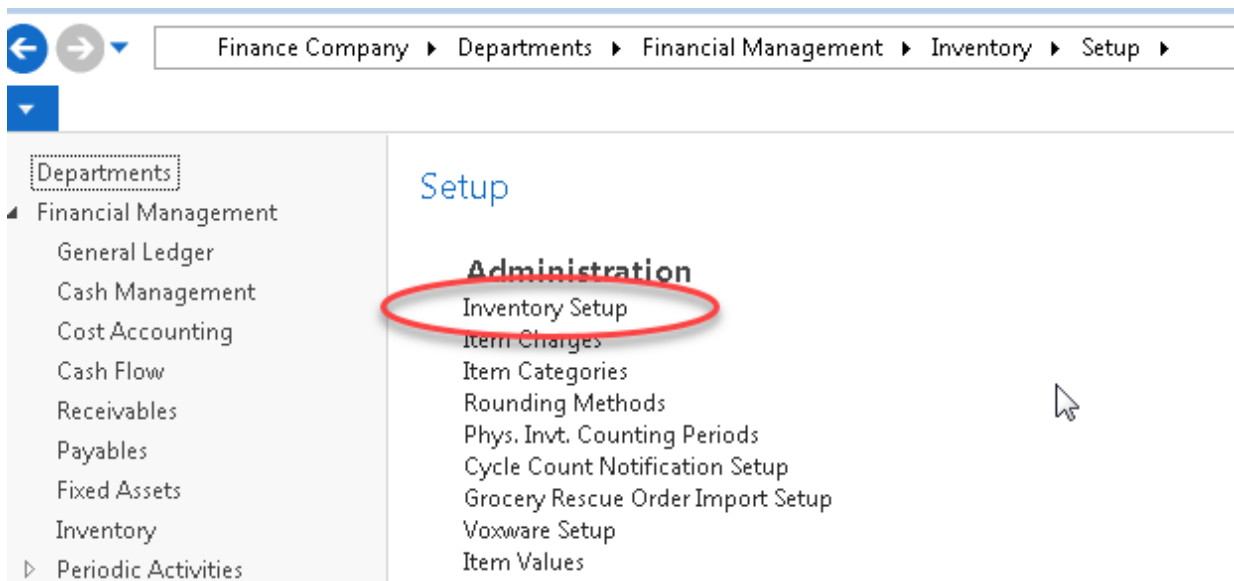
The staging enhancements are based on Inventory Picks (Ship Option 2) and include:

1. Default Bin Location – Standard pre-defined bin location for agency pallets created. Bin Locations can be setup by zone for clients that create picks by zone or with a single default agency pallet bin for clients that do not create separate picks by zone.
2. Agency Pallet Tags – Tag that can be printed and placed on the agency pallets that are staged.
3. Agency Pallet Administration – Provides the ability to move pallets, reprint an agency pallet tag, create additional agency pallet tags and close agency pallets.

*Ceres object release 4.51.53 is required for the functionality documented in this procedure.*

## Inventory Setup

1. The setup of default Staging Areas starts with defining Agency Pallet Staging Areas. Staging Areas can be accessed from Departments → Financial Management → Inventory → Setup → Inventory Setup.



2. Enable Agency Pallet Tracking by checking the appropriate checkbox on the location tab.

The screenshot shows the 'Edit - Inventory Setup' window. The 'Location' tab is selected. The 'Enable Agency Pallet Tracking' checkbox is checked and circled in red. Other checkboxes include 'Location Mandatory' (checked) and 'Use Pick Creation Sort Order' (unchecked).

Field	Value
Location Mandatory:	<input checked="" type="checkbox"/>
Enable Agency Pallet Tracking:	<input checked="" type="checkbox"/>
Use Pick Creation Sort Order:	<input type="checkbox"/>

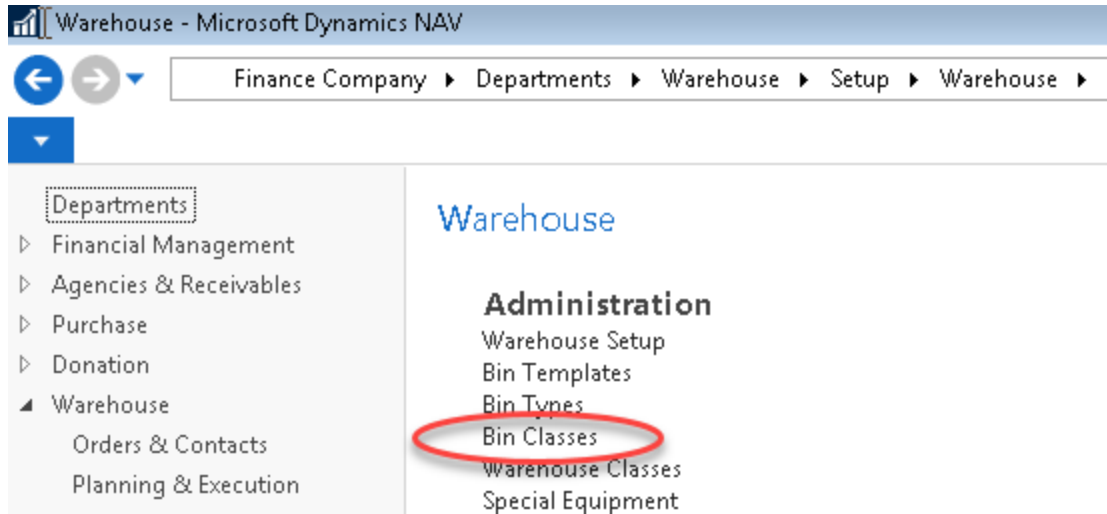
3. Navigate to the Numbering FastTab on Inventory Setup. Create and assign a number series for the agency pallet nos.

The screenshot shows the 'Numbering' FastTab. It contains two columns of dropdown menus for assigning number series to different inventory transactions.

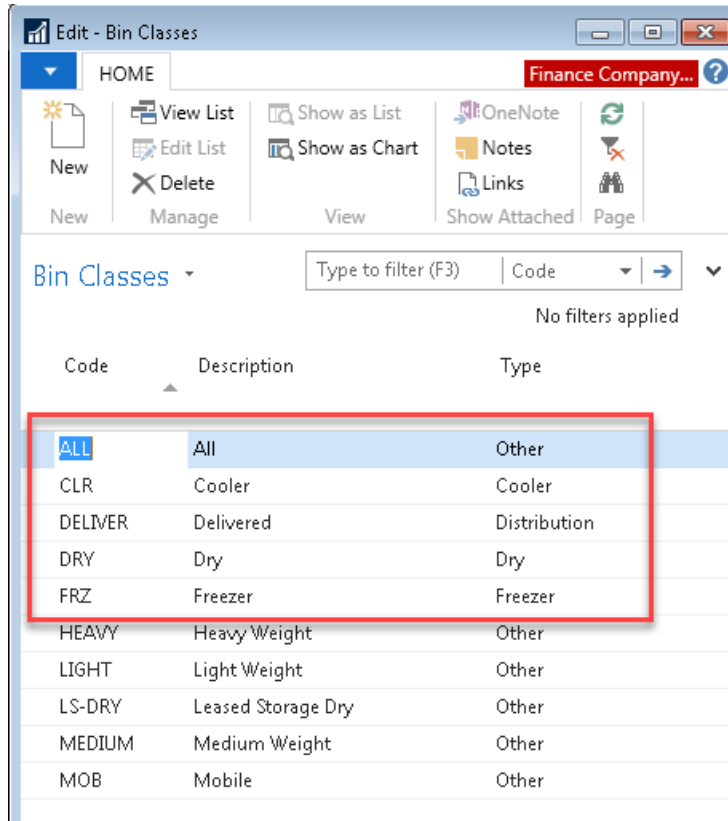
Field	Value	Field	Value
Item Nos.:	I-ITEM	Posted Invt. Pick Nos.:	I-PICK+
Non-stock Item Nos.:	I-ITEMNS	Inventory Movement Nos.:	
Transfer Order Nos.:	I-TRANORD	Registered Invt. Movement Nos.:	
Posted Transfer Shpt. Nos.:	I-TRANSHPT	Internal Movement Nos.:	
Posted Transfer Rcpt. Nos.:	I-TRANRCPT	Pallet Nos.:	I-PALLET
Inventory Put-away Nos.:	I-PUT	Agency Pallet Nos.:	I-APALLET
Posted Invt. Put-away Nos.:	I-PUT+	Allocation Nos.:	I-ALLOC
Inventory Pick Nos.:	I-PICK		

## Bin Classes

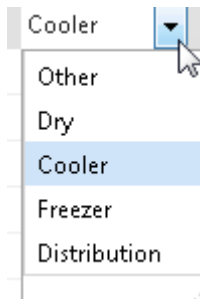
1. If you are creating picks by zone, you must identify a bin class for each zone.
2. Access Bin Classes from Departments → Warehouse → Setup → Warehouse → Bin Classes.



3. You should setup 5 bin classes, one for each zone, and other class for picks not assigned to a zone and lastly a distribution class that will be used once the agency pallet is either picked up or delivered to an agency.



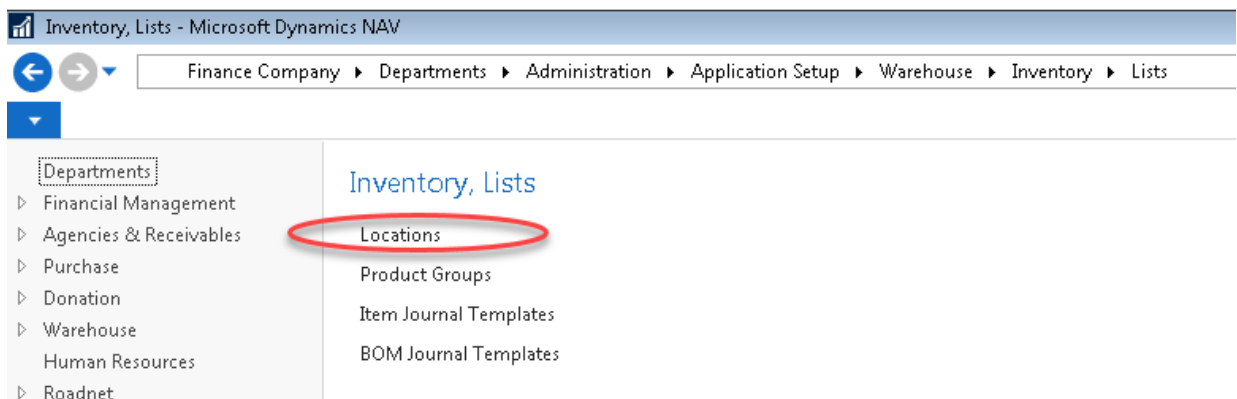
4. In the type field for each Bin Class, choose the appropriate type from the choices.



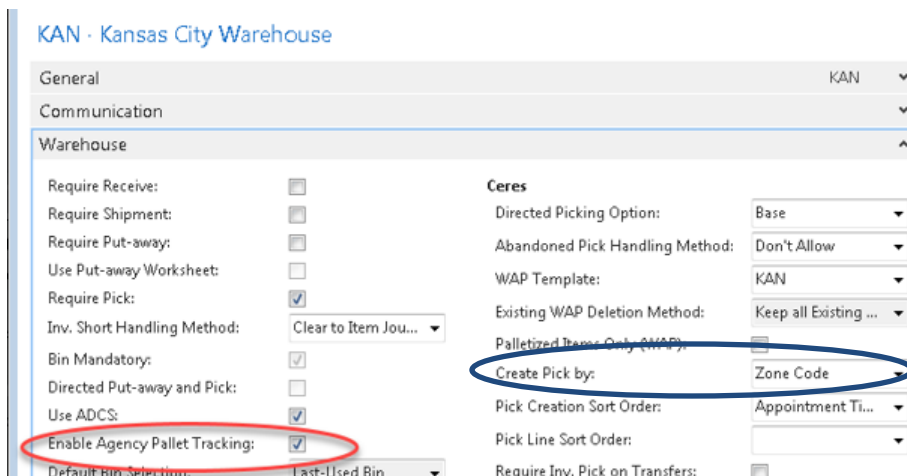
5. Once the Bin Classes have been created and linked to a type, the Location can be setup and the default agency pallet bins can be assigned.

## Location

1. Access Locations from Departments → Administration → Application Setup → Warehouse → Inventory → Lists → Locations.



2. On the location card enable agency pallet tracking by checking the appropriate checkbox on the Warehouse tab.



3. Based on the setting of the Create Pick by field, the system will enable/disable fields on the Bins Tab.
  - a. If the field is set to Zone as shown above, the bin fields shown on the Bins tabs are active and need to be filled in: (Directions in Step 4)

#### KAN · Kansas City Warehouse

The screenshot shows the configuration for the KAN Warehouse. The 'Bins' tab is selected, and the 'Create Pick by' field is set to 'Zone'. This enables the following fields:

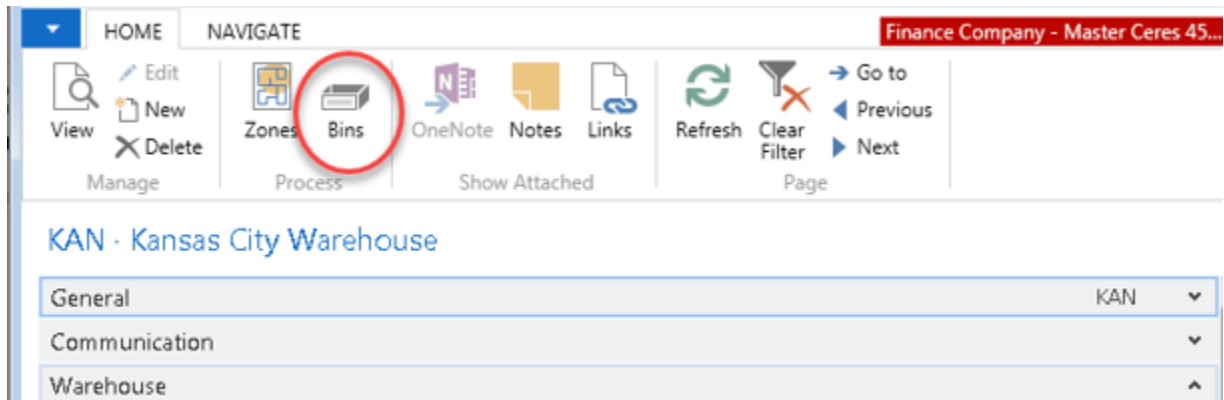
- Receipt**
  - Receipt Bin Code: [Text Field]
- Shipment**
  - Shipment Bin Code: [Text Field]
- Production**
  - Open Shop Floor Bin Code: [Text Field]
  - To-Production Bin Code: [Text Field]
- Agency Pallets**
  - Staging Bin Code (DRY): AP-DRY [Dropdown]
  - Staging Bin Code (COOLER): AP-COOL [Dropdown]
  - Staging Bin Code (FREEZER): AP-FRZ [Dropdown]
  - Staging Bin Code (OTHER): AP-OTH [Dropdown]
  - Default Agency Pallet Bin Code: [Text Field]

- b. If the field is not set to Zone as shown here, Only “Default Agency Pallet Bin Code” is active and needs to be filled in:

The first screenshot shows the configuration for the HOU Warehouse. The 'Create Pick by' field is set to 'None' (indicated by a red circle). This disables all other bin fields except for the 'Default Agency Pallet Bin Code' field, which is highlighted with a purple box.

The second screenshot shows the same configuration for the HOU Warehouse, but with the 'Create Pick by' field set to 'Zone'. This enables all the bin fields shown in the first screenshot, which are now active and need to be filled in.

- Defining the bins for the location. Prior to completing the bins tab with the default agency pallet bins, you must first define the bins for the location. Click on the Bins icon on the location to access the bin list.



- In the bin list, create the agency pallet bins if needed and assign each to the correct bin class. In this example we have created 5 bins, 1 for each zone (AP-COOL, AP-DRY an AP-FRZ) each set in the corresponding Bin Class code. We have defined an AP-OTH bin for any pallets where the zone could not be identified and lastly the DELIVERED bin used when the agency pallet is delivered or picked up by an agency.

**Bins** ▾

Locat... Code	Zone Code	Code	Alt Code	Row No.	Description	Bin Class Code
KAN	COOLER	AP-COOL		0	Agency Pallet Cooler	CLR
KAN	DRY	AP-DRY		0	Agency Pallet Dry	DRY
KAN	FREEZER	AP-FRZ		0	Agency Pallet Freezer	FRZ
KAN	DRY	AP-OTH		0	Agency Pallet Other	ALL
KAN	STAGE	DELIVERED		0	Delivered	DELIVER



6. Now that the bins have been created we can complete the bins tab on the location code.

KAN · Kansas City Warehouse

The screenshot shows the 'Bins' tab for the 'KAN' location. The 'Agency Pallets' section is highlighted with a red circle. It includes the following fields:

- Staging Bin Code (DRY): AP-DRY
- Staging Bin Code (COOLER): AP-COOL
- Staging Bin Code (FREEZER): AP-FRZ
- Staging Bin Code (OTHER): AP-OTH
- Default Agency Pallet Bin Code: (empty)

Other sections visible include Receipt, Shipment, Production, ADCS, Grocery Rescue, Adjustment, Cross-Dock, and Assembly.

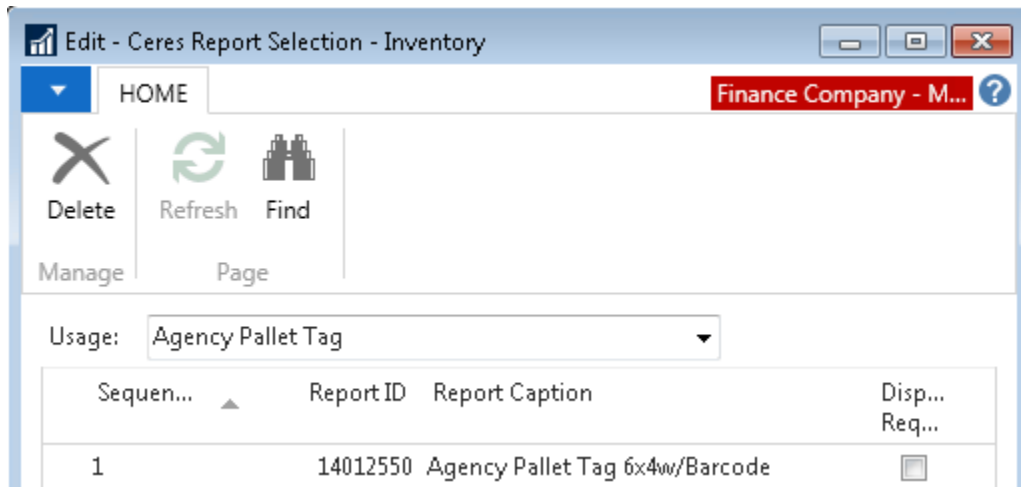
8. If we are not using create picks by zone, only the Default Agency Pallet Bin code would be filled in.

This screenshot shows the 'Bins' tab with the 'Default Agency Pallet Bin Code' field filled with the value '01-101-A'. This field is circled in red. The other staging bin codes remain empty.

9. This completes the setup and agency pallets are now ready to be utilized.

## Ceres Report Selection

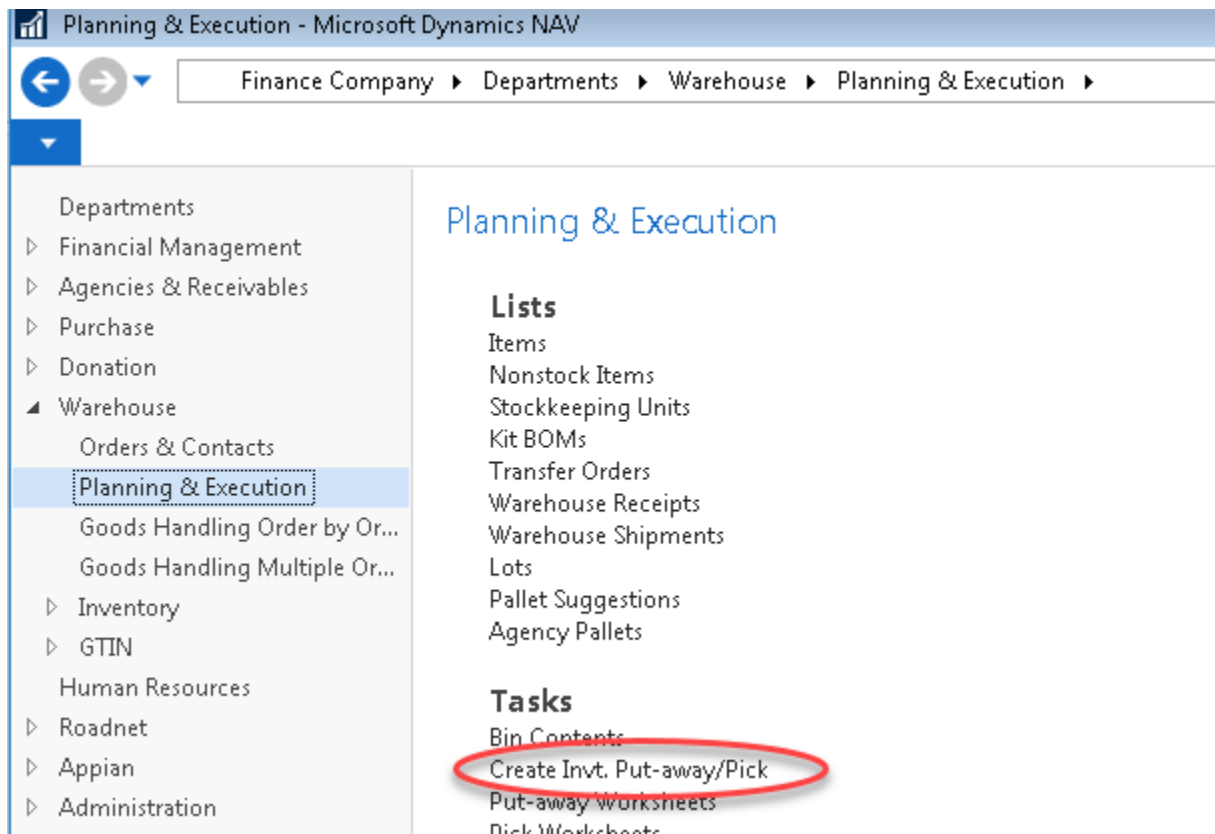
Navigate to Departments → Administration → Application Setup → Warehouse → Inventory → Tasks and run the Ceres Report Selection – Inventory page.



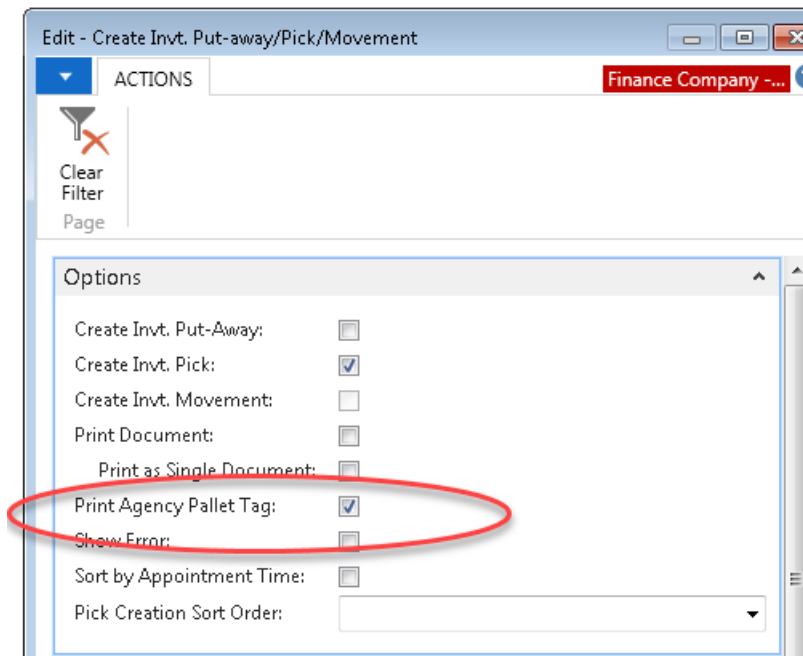
Select the Usage of Agency Pallet Tag and specify a Report ID of 14012550.

## Creation of Agency Pallets

1. Creation of agency pallets is done the Create Invt. Put-Away/Pick function. This is access from Departments → Warehouse → Planning & Execution → Create Invt. Put-Away/Pick.



2. When running the program to create picks check the box to Print Agency Pallet Tag.



Edit - Create Invt. Put-away/Pick/Movement

ACTIONS Finance Company -...

Clear Filter Page

Options

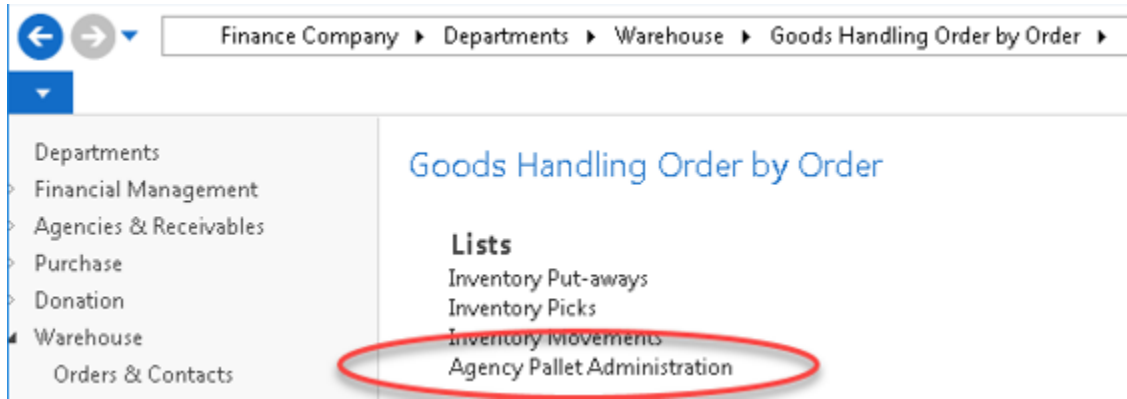
- Create Invt. Put-Away: ☐
- Create Invt. Pick: ☒
- Create Invt. Movement: ☐
- Print Document: ☐
- Print as Single Document: ☐
- Print Agency Pallet Tag: ☒
- Show Error: ☐
- Sort by Appointment Time: ☐
- Pick Creation Sort Order:

3. In addition to the picks being created and printed, the system will also create and generate agency pallet tags and print those as well. If the system is configured to create picks by zone, then you will receive one pallet tag for each zone used on the pick. Each pick generated will have one agency pallet tag generated and printed. Additional agency pallet tags for any pick can be acquired from the Agency Pallet Administration page. Below is an example of the agency pallet tag created.

<b>Pick No:</b>	IPD-02554	<b>AP-DRY</b>
<b>Shipment Date:</b>	6/19/2018	<b>DRY</b>
<b>Shipment Method:</b>	DELIVER	
<b>Order No:</b>	AO-00975	1 of 1
<b>Cookies On Demand</b>		
<b>5252 Speaker Road</b>		
<b>Kansas City KS 66106</b>		
<b>Pallet:</b>	AP-0000001	
		

## Agency Pallet Administration

1. Agency Pallet Administration is accessed from Departments → Warehouse → Goods Handling Order by Order → Agency Pallet Administration



2. The Agency Pallet Administration page will open.

Edit - Agency Pallet Administration - Microsoft Dynamics NAV

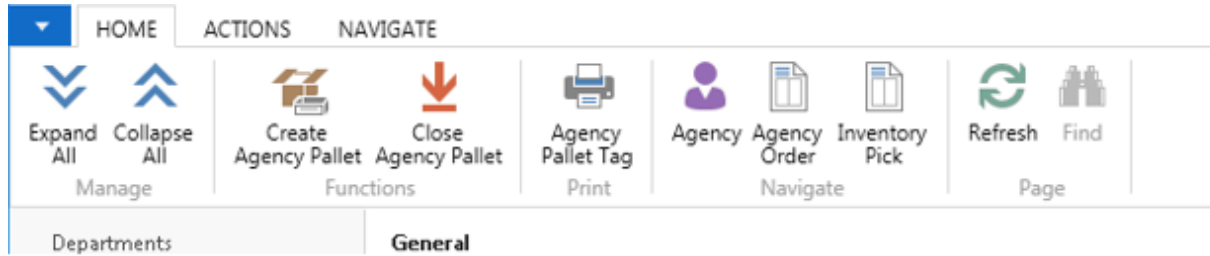
Finance Company > Departments > Warehouse > Goods Handling Order by Order > Agency Pallet Administration

HOME ACTIONS NAVIGATE

Expand All Collapse All Manage Create Agency Pallet Close Agency Pallet Functions Agency Pallet Tag Print Agency Order Navigate Inventory Pick Refresh Find Page

General									
Location Code Filter: KAN									
Document No.	Agency Order No.	Shipment Date	Location Code	Zone Code	Bin Code	Agency No.	No. of Pick Lines	No. of Agency Pallets	
IPC-01017	AO-00417	8/29/2014	KAN			A0442	1	0	
IPC-01018	AO-00422	8/29/2014	KAN			A0442	1	0	
IPC-01019	AO-00432	8/29/2014	KAN			A0442	1	0	
IPC-01020	AO-00439	8/28/2014	KAN			C1722	1	0	
IPC-01021	AO-00440	8/29/2014	KAN			C1722	1	0	
IPD-02545	AO-00344	9/20/2013	KAN			B0129	2	0	
IPD-02546	AO-00417	8/29/2014	KAN			A0442	1	0	
IPD-02547	AO-00422	8/29/2014	KAN			A0442	1	0	
IPD-02548	AO-00429	8/29/2014	KAN			A0442	2	2	
IPD-02549	AO-00432	8/29/2014	KAN			A0442	1	0	
IPD-02550	AO-00439	8/28/2014	KAN			C1722	1	0	
IPD-02551	AO-00510	2/28/2017	KAN			A0442	2	0	
IPD-02552	AO-00873	2/22/2018	KAN			A0442	3	0	
IPD-02553	AO-00875	3/2/2018	KAN			B0129	1	0	
<input checked="" type="checkbox"/> IPD-02554	AO-00975	6/19/2018	KAN			A0442	3	1	
IPF-00891	AO-00417	8/29/2014	KAN			A0442	1	0	
IPF-00892	AO-00422	8/29/2014	KAN			A0442	1	0	
IPF-00893	AO-00429	8/29/2014	KAN			A0442	1	0	
IPF-00894	AO-00432	8/29/2014	KAN			A0442	1	0	
PCK-01288	AO-00874	2/26/2018	KAN			B0129	1	0	
PCK-01289	AO-00874	2/26/2018	KAN			B0129	1	0	
PCK-01303	AO-00344	9/20/2013	KAN			B0129	1	0	
PCK-01304	AO-00355	9/20/2013	KAN			B0129	1	0	
PCK-01305	AO-00396	8/21/2014	KAN			A0442	1	0	

3. The following functions are available:



- a. Expand All – this will show all agency pallets associated with each pick underneath each pick document. Most picks will have only one agency pallets associated with it unless an additional agency pallet has been created for that pick.

▲ IPD-02554	AO-00975	6/19/2018	KAN		A0442	3	2
AP-000001	AO-00975	6/19/2018	KAN	DRY	AP-DRY	0	0
AP-000004	AO-00975	6/19/2018	KAN	DRY	AP-DRY	0	0
IPF-00891	AO-00417	8/29/2014	KAN		A0442	1	0

- b. Collapse All – this will close the display of agency pallets associates with all picks.

▶ IPD-02554	AO-00975	6/19/2018	KAN		A0442	3	2
AP-000001	AO-00417	8/29/2014	KAN		A0442	1	0

- c. Individually you may use the expand/collapse icons to the left of each pick to show or hide the agency pallets associated with an individual pick document.

- d. Create Agency Pallet – Use this function to create an additional agency pallet for an individual pick. Select the pick line and click on the icon. You may create 1 or more additional agency pallets for the pick and choose whether or not to print them. If the location is configured to print picks by zone, you will not be able to specify the bin code for the pallet, they will be created in the default agency pallet bin code specified on the location card.

Edit - Create Agency Pallet

ACTIONS Finance...

Clear Filter Page

No. of Pallets to Create: 1

Action to Carry Out: Create Pallets & Pri

Staging Bin Code:

Location KAN is configured to create picks by zone. As such, Agency Pallets will be created in the Location's Staging Bins based

OK Cancel

- e. Close Agency Pallet – If the agency pallet has been picked or delivered and was not properly closed you can use this function to close the agency pallet. Also, if an agency pallet was created in error, you may also close the incorrect agency pallet with this function. The administration page is defaulted to not show closed pallets, although you may change the filter to show closed pallets. It is NOT possible to reopen a closed agency pallet; you would need to create a new agency pallet if needed. When you select this function you will be prompted to confirm the close.

? Close Agency Pallet AP-000001?

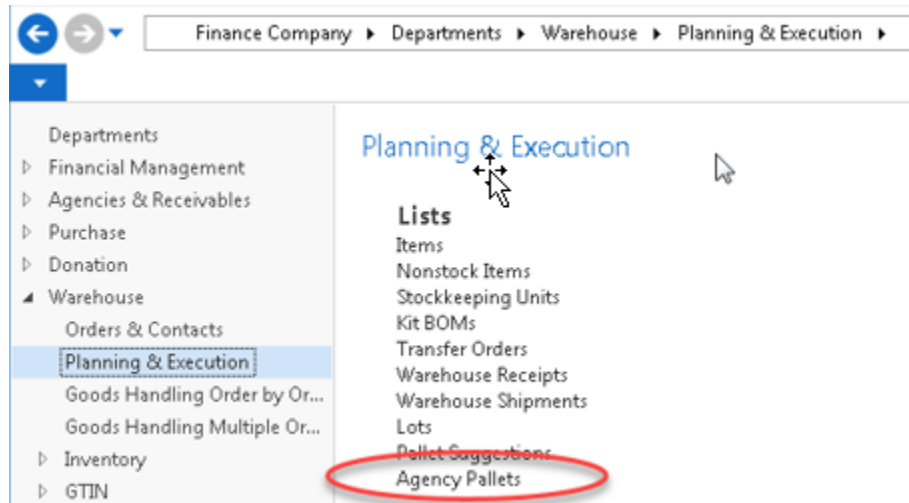
Yes No

- f. Agency Pallet Tag – this allows for the reprint on an agency pallet tag.
- g. Agency – this function will display the agency card associated with the agency pallet tag
- h. Agency Order – this function will display the agency order document associated with the agency pallet tag

- i. Inventory Pick – this function will display the inventory pick document associated with the agency pallet tag

## Agency Pallets

1. Agency Pallets is accessed from Departments → Warehouse → Planning & Execution → Agency Pallets

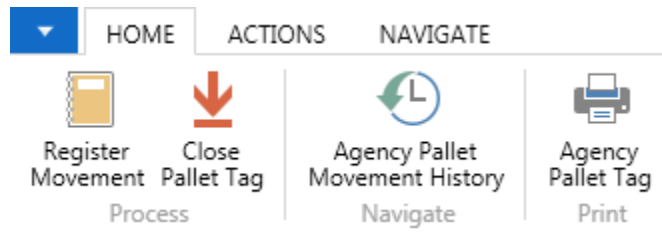


2. This will display the Agency Pallet Page.

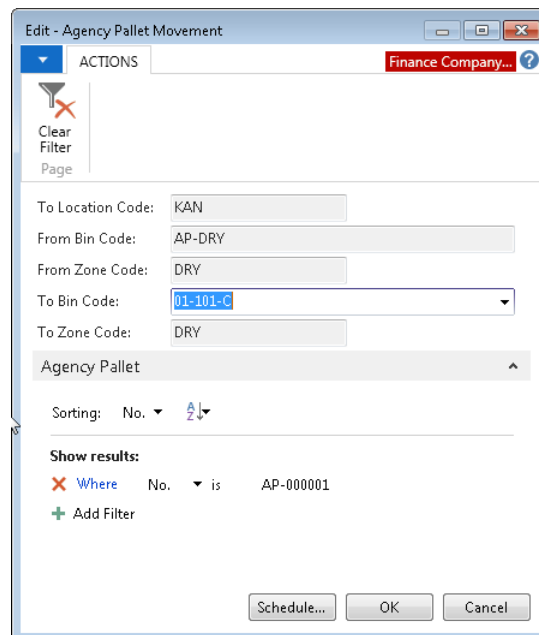
The screenshot shows the 'View - Agency Pallet Movement History' page. The title bar indicates the user is logged in as 'Finance Company - Master Ceres 45 Te...'. The page features a toolbar with icons for 'Show as List', 'Show as Chart', 'OneNote', 'Notes', 'Links', 'Refresh', 'Clear Filter', and 'Find'. Below the toolbar, the page title 'Agency Pallet Movement History' is displayed. A filter input field contains 'AP-000001'. The main content area is a table with the following data:

No.	From Location Code	From Bin Code	From Zone Code	To Location Code	To Bin Code	To Zone Code	User ID	Date	Time
AP-000001	KAN	AP-DRY	DRY	KAN	01-101-C	DRY	SWPROS\R...	10/17/2018	11:50:51 AM

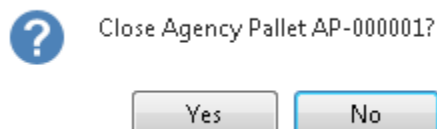
3. From the Agency Pallet Page you can perform the following functions



- a. Register Movement – Move the agency pallet to another bin or to the Distribution bin to close the pallet. Click on the Register Movement Icon and enter the To Bin Code the pallet was moved to. Then click OK to complete the movement.



- b. Close Pallet Tag - If the agency pallet has been picked or delivered and was not properly closed you can use this function to close the agency pallet. Also, if an agency pallet was created in error, you may also close the incorrect agency pallet with this function. The administration page is defaulted to not show closed pallets, although you may change the filter to show closed pallets. It is NOT possible to reopen a closed agency pallet; you would need to create a new agency pallet if needed. When you select this function you will be prompted to confirm the close.





- c. Agency Pallet Movement History – Display a page showing all movements of the agency pallet through the warehouse

Agency Pallet Movement History									
Type to filter (F3)		No.		Filter: AP-000001					
No.	From Location Code	From Bin Code	From Zone Code	To Location Code	To Bin Code	To Zone Code	User ID	Date	Time
AP-000001	KAN	AP-DRY	DRY	KAN	01-101-C	DRY	SWPROS\R...	10/17/2018	11:50:51 AM
AP-000001	KAN	01-101-C	DRY	KAN	01-103-A	DRY	SWPROS\R...	10/17/2018	1:56:37 PM
AP-000001	KAN	01-103-A	DRY	KAN	01-113-D	DRY	SWPROS\R...	10/17/2018	1:56:44 PM

- d. Agency Pallet Tag - this allows for the reprint on an agency pallet tag.

Edit - Agency Pallet Tag 6x4w/Barcode

ACTIONS Finance Company - M...

Clear Filter Page

Agency Pallet

Show results:

Where Agency Order No. is AO-00975

And Inv. Pick No. is IPD-02554

And No. is AP-000001

And Closed is No

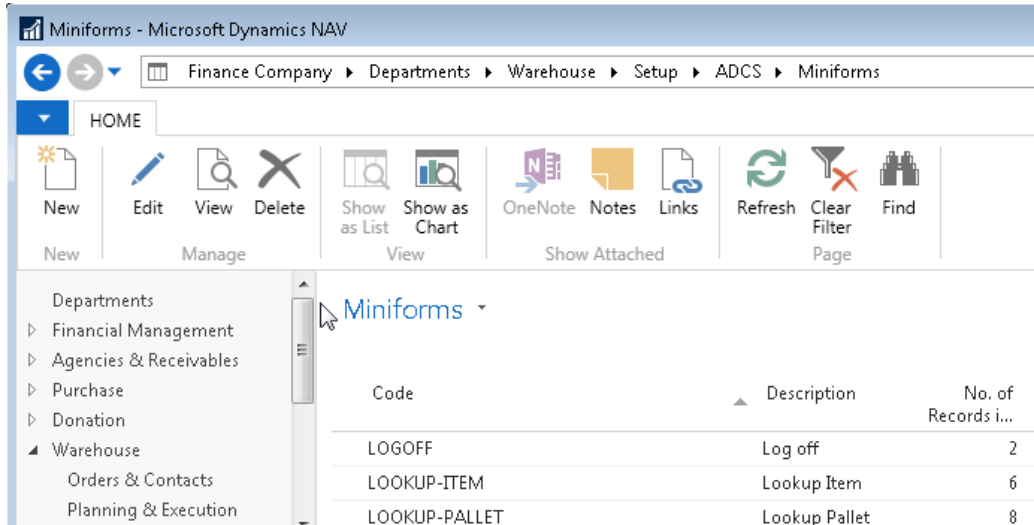
+ Add Filter

Print... Preview Cancel

<b>Pick No:</b>	IPD-02554	<b>AP-DRY</b>
<b>Shipment Date:</b>	6/19/2018	<b>DRY</b>
<b>Shipment Method:</b>	DELIVER	
<b>Order No:</b>	AO-00975	<b>1 of 1</b>
<b>Cookies On Demand</b>		
<b>5252 Speaker Road</b>		
<b>Kansas City KS 66106</b>		
<b>Pallet:</b>	<b>AP-000001</b>	
		

## ADCS Agency Pallet Movements

In order to implement that ADCS portion of Agency Pallet Tracking, a new Miniform will need to be created. Navigate to: Departments → Warehouse → Setup → ADCS → Miniforms



Select the New action and create the WA-XFERAGENCYPALLET Miniform as shown below.

Area	Field Type	Table No.	Field No.	Field Length	Text	Call Miniform
Header	Text	0	0	0	--Transfer Agency Pallet--	
Body	Input	14012323	1	20	Pallet No.	
Body	Output	14012323	2	20	Agency No.	
Body	Output	14012323	3	20	Order No.	
Body	Output	14012323	4	20	Pick No.	
Body	Output	14012323	5	20	From Bin	
Body	Input	14012323	6	20	To Bin	

Next, update the MENU-WHSE-ACT Miniform to insert the highlighted line as shown below.

**General**

Code: MENU-WHSE ACT Handling Codeunit: 7707

Description: Whse. Activity Menu Next Miniform:

Form Type: Selection List Start Miniform:

No. of Records in List: 11 Locked:

**Lines**

Area	Field Type	Table No.	Field No.	Field Length	Text	Call Miniform
Header	Text	0	0	0	--Whse Activities Menu--	
Body	Text	0	0	0	Transfer Pallet	WA-TRANSFER PALLET
Body	Text	0	0	0	Transfer Agency Pallet	WA-XFERAGENCYPALLET
Body	Text	0	0	0	Move WAP Pallet	WA-MOVE WAP PALLET
Body	Text	0	0	0	Inventory Count	WA-INV COUNT
Body	Text	0	0	0	Inventory Pick	WA-INVENTORYPICKSKIP
Body	Text	0	0	0	Transfer Shipment	WA-SHIPTRANSFER
Body	Text	0	0	0	Transfer Receipts	WA-TRANSFERLIST
Body	Text	0	0	0	Consolidate Pallets	WA-CONSOLIDATEPALLET
Body	Text	0	0	0	Donation Order	DONATIONORDER
Body	Text	0	0	0	Receiving Put-aways	RECEIVINGPUTAWAYS
Body	Text	0	0	0	Main Menu	MENU-MAIN
Footer	Text	0	0	0	Select:	

Note that in the screenshot above there are 13 lines configured. Depending upon your current ADCS configuration you may need to update the VT100 configuration file. By default, this file is located at: C:\Program Files (x86)\Microsoft Dynamics NAV\90\Automated Data Capture\System Microsoft.Dynamics.Nav.VT100Plugin.exe.config

The file can be opened with Notepad and updated to set the screen lines property as shown below. Note that the VT100 Service will need to be restarted after the configuration file is updated.

```

<?xml version="1.0"?>
<configuration>
  <configSections>
    <section name="VT100" type="Microsoft.Dynamics.Nav.AdcS.Configuration.VT100ConfigurationSection, Microsoft.Dynamics.Nav.VT100Plugin"/>
  </configSections>
  <VT100>
    <warehouse>
      <Endpoints>
        <add name="NavWSEndpoint" url="http://172.25.82.139:7047/90_47042/ws/Finance%20Company/Codeunit/ADCS"/>
        <!-- Azure deployment example: -->
        <!--add name="NavWSEndpoint" url="https://CloudService:7047/DynamicsNAV/ws/CRONUS%20International%20Ltd/Codeunit/ADCS" userName="Navuser" /-->
      </Endpoints>
    </warehouse>
    <Terminal listenPort="6666" listenIP="172.25.82.139" stylesheet="VT100_w2k_and_OtherClients.xsl" screenLines="13"/>
  </VT100>
</configuration>
  
```

## **Related Topics:**

1. [Locations](#)
2. [Bin Classes](#)
3. [Inventory Setup](#)
4. [Inventory Picks](#)
5. [Zone Overview](#)