



Agency Shipment Method Code

Purpose of this document

The Shipment Method Code advanced features described here are designed to reduce errors related to handling Agency Orders. Specifically, the Shipment Method Code can be made a required field when setting up an Agency and subsequently creating Agency Orders. Additionally, this update provides the ability to specify via setup how differences in Shipment Methods should be handled for Web orders received from Agency Express as compared to the Shipping Method specified for the related Agency. The core functionality for Shipment Methods are defined in the Agency Overview and the Agency Express Agencies, Shoppers and Items Procedures.

Ceres Object release 5.00.00 is required for the functionality described in this document.

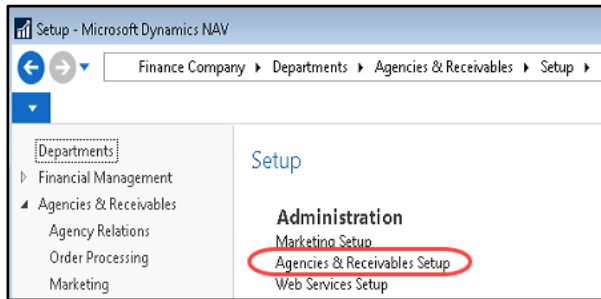
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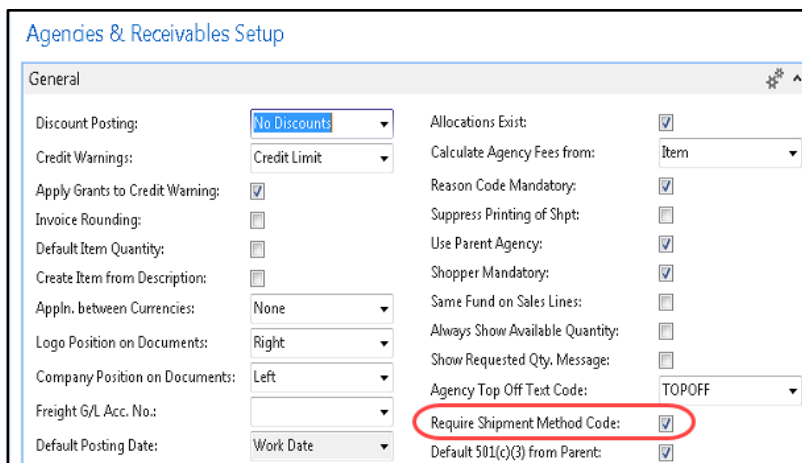
Requiring the use of Shipment Method Codes

Shipment Method Codes identify the manner of shipment for an Agency Order and are user defined within Ceres. Typical Examples are Deliver or Pickup.

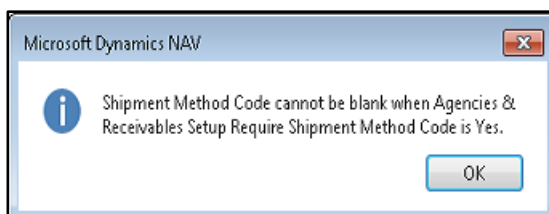
1. To require the use of Shipment Method Codes in Ceres navigate Departments → Agencies & Receivables → Setup → Agencies & Receivables Setup.



2. The Agencies & Receivables Setup Page will be displayed. Locate the Require Shipment Method Code setup option as shown below and place a checkmark in the box.



3. With this option selected users will be required to specify a Shipment Method Code on the Agency Card under two conditions.
 - Creating a new Agency when closing the Agency Card.
 - Navigating off of an Agency (e.g. closing the Agency Card).
4. If the user fails to specify a Shipment Method for the Agency, Ceres will present an error similar to the one shown below.



5. To correct this, navigate to the General or Shipping FastTab for the Agency. Locate and specify the applicable Shipment Method Code as shown below.

The screenshot displays the 'A0442 · Synergy Services-2' form. The 'General' tab is active, showing fields for Agency No. (A0442), Parent Agency No. (442), Name (Synergy Services-2), Address (Do Not Disclose), City, State (MO), ZIP Code, Country/Region Code, Balance (\$), and Credit Limit (\$). The 'Shipping' tab is also visible, showing Location Code (KAN), Zone Code, and Delivery Zone Code (ZONE 1). Both tabs have a 'Shipment Method Code' dropdown menu set to 'DELIVER', which is circled in red. Other fields include Fund No. (UR), Location Code (KAN), FBC County Code (MO-LAFAYET), FBC Agency Category Code (ABUSED), UNC Activity Status (HOLDMULT), Agency Approval Date (2/26/1996), Agency First Order Date (8/3/2012), Monitoring Expiration Date (5/30/2014), Last Date Modified (6/18/2019), Last Modified By (ESOPRO/CJW), Blocked, and Dormant.

6. With Ceres configured to require Shipment Method Code, the requirement to specify a Shipment Method Code on an Agency will also be enforced on Agency Orders under the condition that the Agency's Shipment Method will default to the order. If the Agency does not have a Shipment Method Code when the order is created, Ceres will present an error similar to the one shown below.

Note: If the Shipment Method Code is removed after order creation, no further check on SMC is made by the system

AOR-0727

✖ Shipment Method Code cannot be blank when Agencies & Receivables Setup Require Shipment Method Code is Yes in Agency No.='A-0004'. (Select Refresh to disca...

General

No.:	AOR-0727	...	Shipment Date:	11/14/2012
Sell-to Agency No.:	✖ A-0004	▼	Assigned User ID:	
Parent Agency No.:		▼	Appointment Time:	
Sell-to Contact No.:		▼	Shopper:	
Sell-to Agency Name:			Shopper Name:	
Sell-to Address:			Your Reference:	
Sell-to Address 2:			Order Modifications:	
Sell-to City:		▼	Order Version:	0
Sell-to State:			Status:	Open
Sell-to ZIP Code:		▼	Fund No.:	
Sell-to Contact:			Branch Code:	
Sell-to Contact Phone:			Mobile Pantry:	<input type="checkbox"/>
Sell-to Contact Phone Ext.:			Send to Voxware:	<input checked="" type="checkbox"/>
Posting Date:	11/14/2012	▼	Outstanding Picks:	0
Order Date:	11/14/2012	▼	Posted Shipments:	0

- To correct this, navigate to the Shipping FastTab for the Agency referenced in the error message and specify the applicable Shipment Method Code as shown in the example above. Upon the creation of new Agency Orders for the Agency, Ceres will default the value of the Agency's Shipment Method Code to the order. User can override the Shipment Method Code at the Agency Order header level if desired. However, the Shipment Method Code for the Agency Order Lines is not editable.

Establishing the Web Order Shipment Method Priority

The Web Order Shipment Method Priority functionality facilitates priority handling of the Shipment Method in cases where a Web order is received from Agency Express 3 and the Shipment Method specified for the imported Web Order differs from the Shipment Method specified for the related Agency. This option allows the food bank to define which Shipment Method flows to the Agency Order – the one from the Web Order or the default from the Agency.

Note: The use of this functionality does not require Ceres to be configured for Require Shipment Method Code; it is independent functionality.

- Navigate to Agencies & Receivables Setup as described above.
- The Agencies & Receivables Setup Page will be displayed. Locate the Web Shipment Method Priority setup option as shown below and specify the desired option from the available List.

Order – The shipment method from the Web Order (PO file) will be used.

Agency – The shipment method from the Agency will be used.

Web Exception – Ceres will update the web processing queue entry as having an error and create an Agency Comment Line entry for the Web Order. Ex. Shipment Method Code conflict; PO file: DELIVER, Agency: PICKUP.

The screenshot shows the 'Web Ordering' configuration window with various settings. The 'Web Shipment Method Priority' dropdown is circled in red and set to 'Order'. Other settings include 'Enable Web Ordering' checked, 'Web File Path' as 'C:\SyncV2009\', 'Web Processing Method' as 'Navision Application Server', 'ProcessInboxNAS' and 'ProcessOutboxNAS' checked, 'Debug' unchecked, 'Processing Interval (Min.)' as 5, 'Number of Times to Retry' as 5, 'Temp PO File Handling' as 'Process', 'Delete Queue After' as '1W', 'Auto-Validate Web Order' as 'If No Errors', 'Bypass Credit Warnings' checked, 'Auto-Accept Web Orders' checked, 'Enable Synch. Server Notify' checked, 'No. of Cycles without Notify' as 1, 'Synch. Serv. Email Delay (Min)' as 0, and 'Synch. Serv. Email Addr.' as 'williamh@esopro.com'. On the right side, 'Synch. Serv. Email Addr. 2' is empty, 'Inbound File Nos' is 'WEB-IN', 'Outbound File Nos' is 'WEB-OUT', 'Web Ordering Batch Name' is empty, 'Web Location Filter' is empty, 'Web Delivery Shipment Method' is 'DELIVER', 'Web Pickup Ship. Method' is 'PICKUP', 'E-Statement Root Directory' is 'n:\eDocuments', 'Enable Online Statements', 'Enable Online Invoices', 'Enable Online Credit Memos', 'Allow Modify of Web Orders', 'Allow Allocation Orders Online', 'Synchronize Schedules to Web', 'Sync Past Appointments', 'Sync Extended Item Text', and 'No Sat. or Sun. in Schedules' are all checked, and 'Web Shipment Method Priority' is 'Order'.

Related Topics

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