# Allocated Agency Orders Overview

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**Purpose of this document**

This document will discuss creating Allocated Agency Orders and also sending allocated orders to Agency Express. It will also cover processing edited and rejected allocated orders.

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## Purpose

Allocation Journals may be used to efficiently allocate item quantities to specific agencies and build Agency Orders as a group. Once an item is allocated in the Allocation Journal, the quantity allocated for that item cannot be distributed to another agency.

Allocations can be created in several ways.

1. Manually
2. Via percentages set on the Item Allocation Group.
3. Import from an Excel Allocation spreadsheet

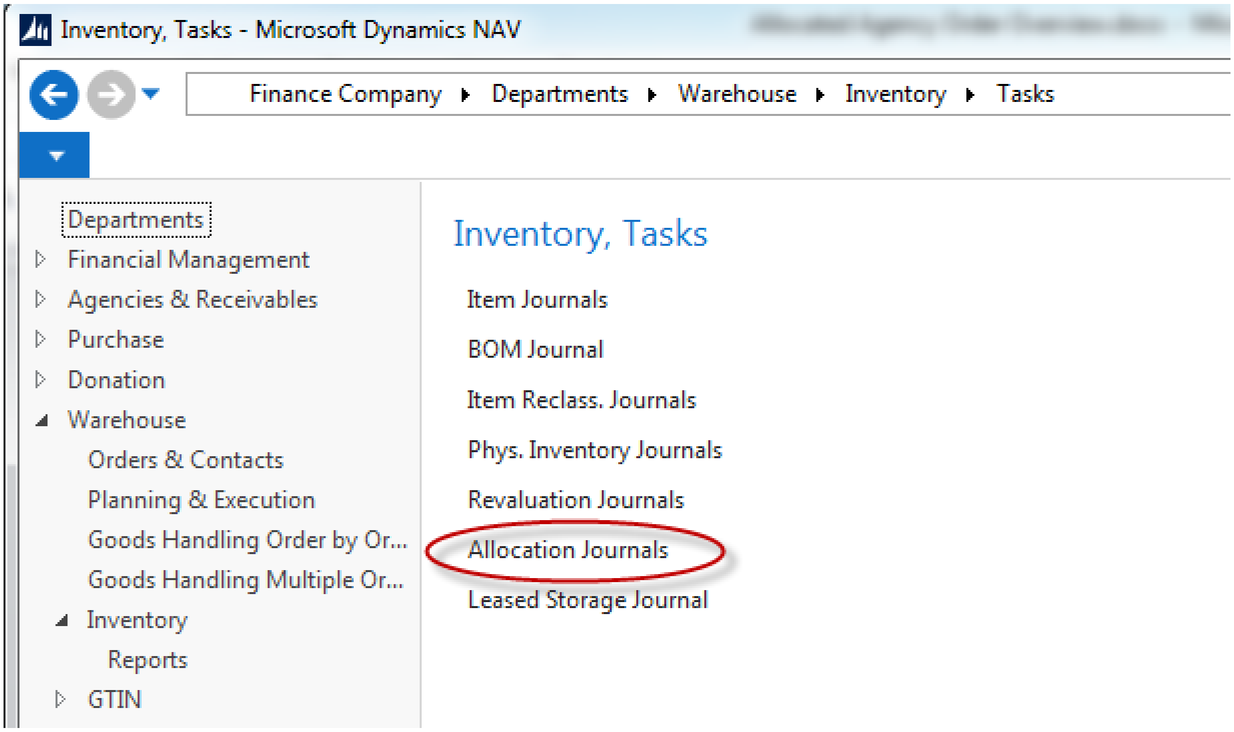
This document will also discuss sending allocated orders to Agency Express and processing edited or rejected allocated orders.

Ceres allows for the balance of Quantity to Allocate to remain in the Allocation Journal if its entirety is not allocated. The balance can be subsequently and repeatedly consumed as desired (full balance, partial balance) via the Get Allocations function on the Agency Order or the Create Orders function on the Allocation Journal.

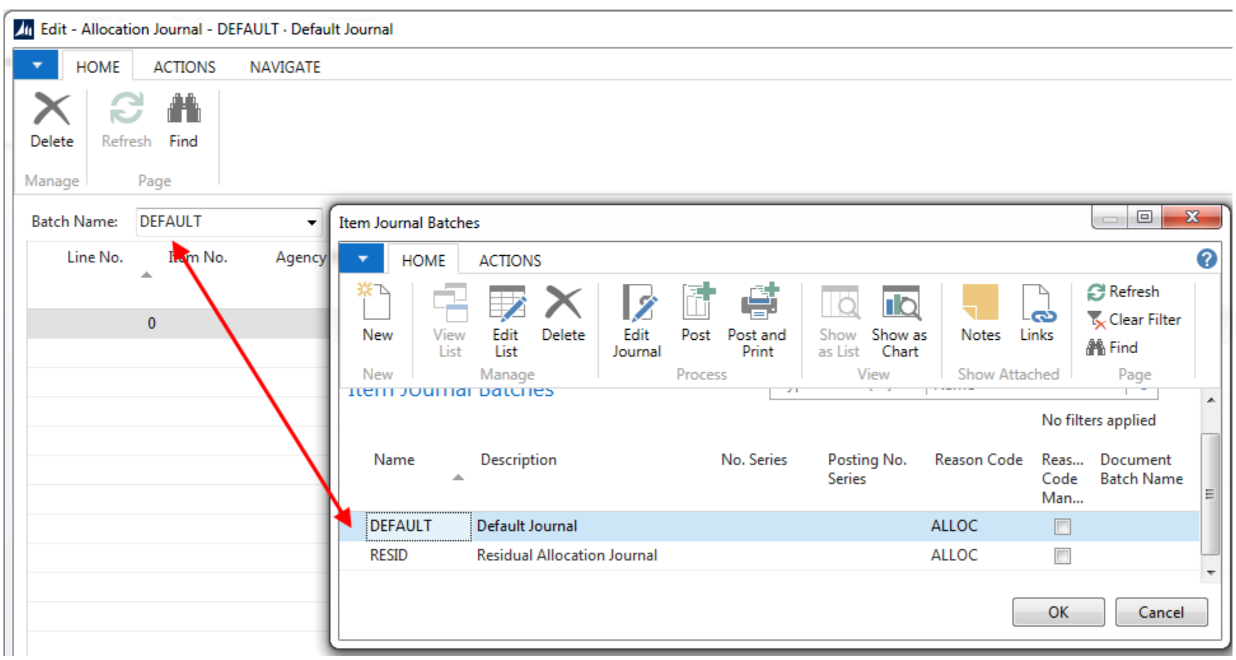
*Ceres Object release 4.00.00 is required for the functionality described in this document.*

## Creating Manual Allocation Journal Entries

1. The Allocation Journals can be accessed from the Departments → Warehouse → Inventory → Tasks menu.




2. If using multiple Allocation Journal batches, select your Batch from the dropdown (F4) found in the Batch Name field.



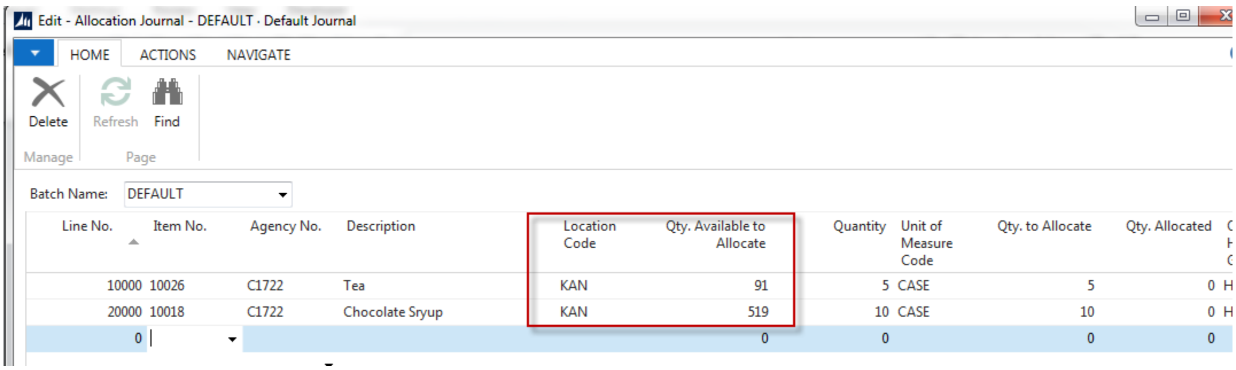

Each batch has a field called Document Batch Name. It will be populated on the Allocation Journal Line when a new line is created. This field will be used on Agency Orders to have the ability to link allocations to a specific Agency Order batch.  In this manner, allocated orders can be sent to Agency Express as a batch instead of an order by order basis.

3. Click OK to select the batch

4. Enter or select the Item No. to allocate.

5. Enter or select the Agency No. for which you are allocating the item.

6. In the Location Code field, enter or select the Location Code from which the product will be retrieved. This will determine the Available Quantity for allocation.




7. In the Quantity field, enter the quantity to allocate for this Agency. The Quantity to Allocate field will update with this value.

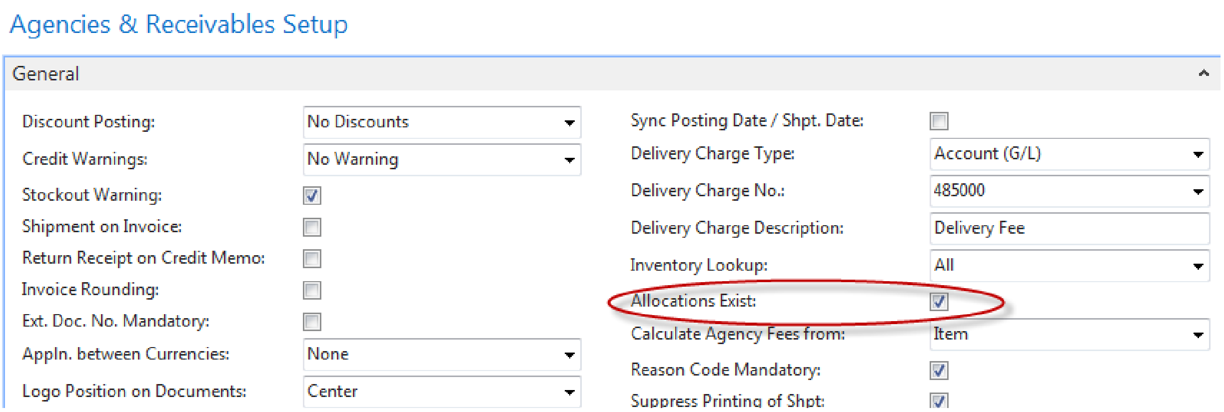
    a. When Allocations are created by running the Suggest Allocations function or entered manually in the Allocation Journal, the Send to VOX field will default as un-checked (No). The Send to VOX field can be updated by running the Toggle the Send to VOX. The Send to VOX field can be updated from Actions → Functions → Toggle Send to VOX.

8. If other items should be allocated to this Agency, or if the same item should be allocated to other Agencies, repeat Steps 4 through 7 to create the additional allocation journal entries. The Qty. Available to Allocate will update each time a quantity is entered to show the reduction in available quantity for a specific item:

9. There are now two options for placing allocated product onto Agency Orders:

    a. Generate Agency Orders from the Allocation Journal for these Items, Agencies and quantities, or
    b. Wait until an Agency places an order and then add the allocated Items to that order (if desired).

10. To receive a reminder that allocated quantities exist, the field Allocations Exist must be checked on Agencies & Receivables Setup → General FastTab. This generates a reminder when the order is placed.



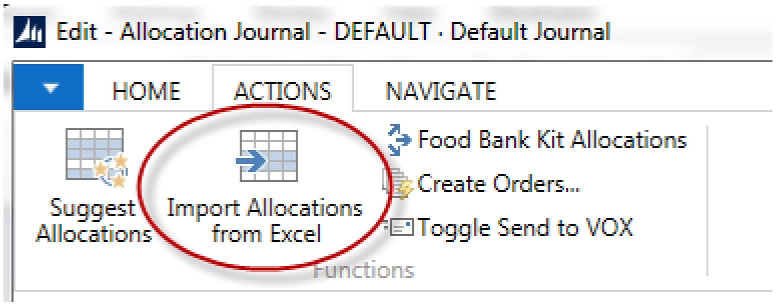

## Importing Allocation Journal Entries from Excel

Using a simple Excel spreadsheet, you may create the Allocation Journal Entries and then import those entries directly into the Allocation Journal. The design of the spreadsheet is very simple and includes three fields: the Agency Number, Item Number, and quantity to allocate.

1. Create an Excel spreadsheet with these three columns and be sure to include a header row with exact titles as shown here in this example spreadsheet:

| | A | B | C | D |
|---|---|---|---|---|
| 1 | **Agency No.** | **Item No.** | **Qty. to Allocate** | **Shipment Date** |
| 2 | A0440 | 10026 | 12 | 06/25/14 |
| 3 | A0592 | 10026 | 11 | 06/25/14 |
| 4 | B0129 | 10026 | 10 | 06/25/14 |
| 5 | B0310 | 10026 | 15 | 06/25/14 |
| 6 | B0458 | 10026 | 12 | 06/25/14 |
| 7 | B1007 | 10026 | 11 | 06/25/14 |
| 8 | A0440 | 10018 | 12 | 06/25/14 |
| 9 | A0592 | 10018 | 11 | 06/25/14 |
| 10 | B0129 | 10018 | 10 | 06/25/14 |
| 11 | B0310 | 10018 | 15 | 06/25/14 |
| 12 | B0458 | 10018 | 12 | 06/25/14 |
| 13 | B1007 | 10018 | 11 | 06/25/14 |
| 14 | | | | |
| 15 | | | | |

2. Click Actions → Functions → Import Allocations from Excel

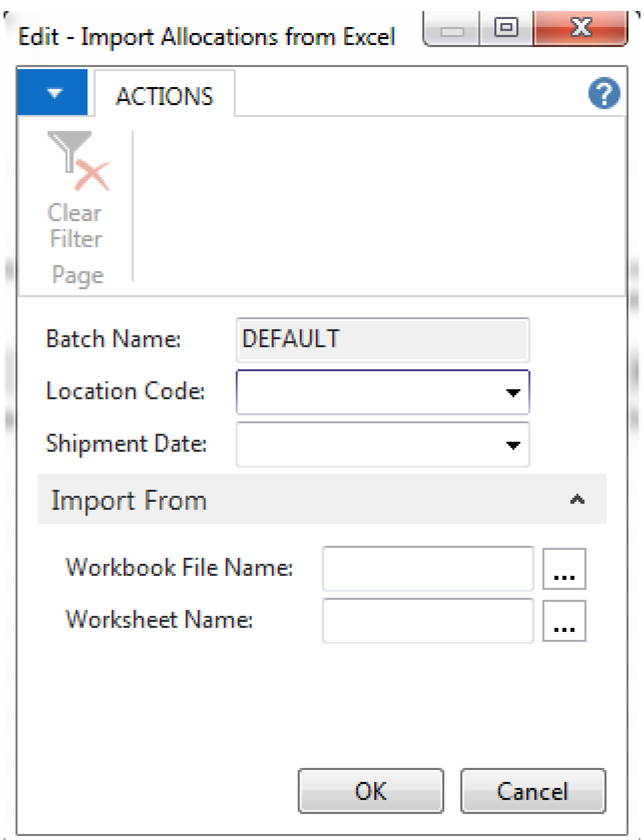



3. Enter the Branch Code if you are using branches otherwise leave this field blank. (??? Remove Branch Code)

4. Enter the Location to be used for the quantity allocations.

5. Enter the Shipment Date if you want to overwrite the imported shipment dates.

6. Next using the Workbook File Name ellipsis (...) browse to the where the allocation spreadsheet is stored and select it. Use the Worksheet Name ellipsis (...) to select the sheet on the workbook to use.




7. Click OK to import the file. The entries will show up in the Journal.

Batch Name: DEFAULT

| Line No. | Item No. | Agency No. | Description | Location Code | Qty. Available to Allocate | Quantity | Unit of Measure Code | Qty. to Allocate |
|---|---|---|---|---|---|---|---|---|
| 10000 | 10026 | C1722 | Tea | KAN | 91 | 5 | CASE | 5 |
| 20000 | 10018 | C1722 | Chocolate Sryup | KAN | 519 | 10 | CASE | 10 |
| 30000 | 10026 | A0440 | Tea | KAN | 86 | 12 | CASE | 12 |
| 40000 | 10018 | B0310 | Chocolate Sryup | KAN | 509 | 15 | CASE | 15 |
| 50000 | 10018 | B0458 | Chocolate Sryup | KAN | 494 | 12 | CASE | 12 |
| 60000 | 10018 | B1007 | Chocolate Sryup | KAN | 482 | 11 | CASE | 11 |
| 70000 | 10026 | A0592 | Tea | KAN | 74 | 11 | CASE | 11 |
| 80000 | 10026 | B0129 | Tea | KAN | 63 | 10 | CASE | 10 |
| 90000 | 10026 | B0310 | Tea | KAN | 53 | 15 | CASE | 15 |
| 100000 | 10026 | B0458 | Tea | KAN | 38 | 12 | CASE | 12 |
| 110000 | 10026 | B1007 | Tea | KAN | 26 | 11 | CASE | 11 |
| 120000 | 10018 | A0440 | Chocolate Sryup | KAN | 471 | 12 | CASE | 12 |
| 130000 | 10018 | A0592 | Chocolate Sryup | KAN | 459 | 11 | CASE | 11 |
| 140000 | 10018 | B0129 | Chocolate Sryup | KAN | 448 | 10 | CASE | 10 |

8. Once imported, you may work with these allocations similar to any other Allocation Journal entries.

9. If the Send to Voxware Default field in the Voxware Setup is checked, then the Send to VOX field will default as checked (Yes) when the Import Allocations from Excel function is run. The Send to VOX field can also be updated from Actions → Functions → Toggle Send to VOX.

## Generating Agency Orders directly from the Allocation Journal

1. Before creating orders, you may use any of the fields in the Allocation Journal to filter and create orders for selected subsets of the allocations. New fields have been added for additional filter criteria including Document Batch Name, Order Handling Group, Order Routing Group and Shipment Method Code. Only the Document Batch Name is editable, the others are flow-fields from the Agency and may not be changed on the allocation journal.

Allocation Journal

10018 | Item No.

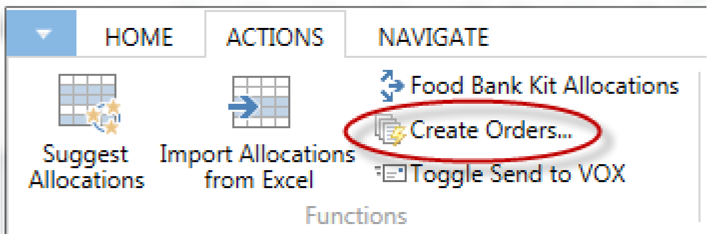
Batch Name: DEFAULT

| Line No. | Item No. | Agency No. | Description | Location Code | Qty. Available to Allocate | Quantity | Unit of Measure Code | Qty. to Allocate | Qty. Allocatec |
|---|---|---|---|---|---|---|---|---|---|
| 20000 | 10018 | C1722 | Chocolate Sryup | KAN | 519 | 10 | CASE | 10 | |
| 40000 | 10018 | B0310 | Chocolate Sryup | KAN | 509 | 15 | CASE | 15 | |
| 50000 | 10018 | B0458 | Chocolate Sryup | KAN | 494 | 12 | CASE | 12 | |
| 60000 | 10018 | B1007 | Chocolate Sryup | KAN | 482 | 11 | CASE | 11 | |
| 120000 | 10018 | A0440 | Chocolate Sryup | KAN | 471 | 12 | CASE | 12 | |
| 130000 | 10018 | A0592 | Chocolate Sryup | KAN | 459 | 11 | CASE | 11 | |
| 140000 | 10018 | B0129 | Chocolate Sryup | KAN | 448 | 10 | CASE | 10 | |

2. Set filters such as Shipment Method Code, Order Handling, etc.

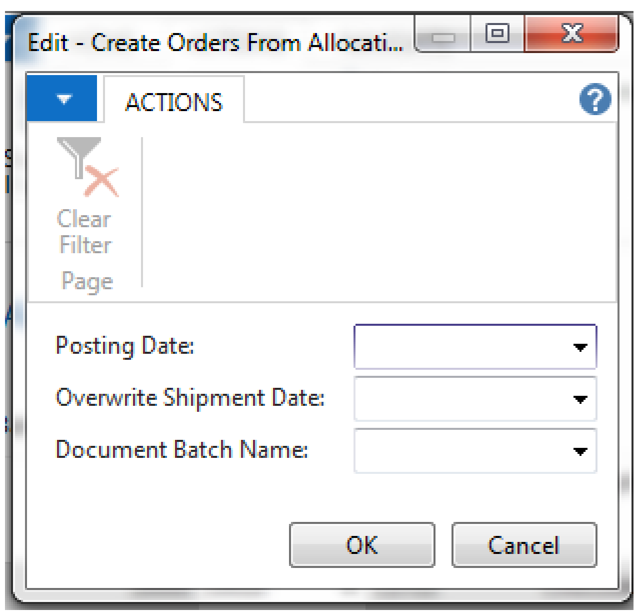
**Note**: Voxware users will want to pay special attention to the Send to VOX field and set it accordingly before creating agency allocated orders. Please refer to the Voxware section of this document for more information.

3. Click on Create Orders function once the Allocation Journal list is properly filtered for the desired records.




4. Enter the Posting Date and Shipment Date for the orders to be created. If you are using Document Batches, then you may select the Agency Order Document Batch you wish the orders to be created in. The Document Batch Name will default from the Template Batch and can be used to override the existing Document Batch Name field on the Journal Lines.

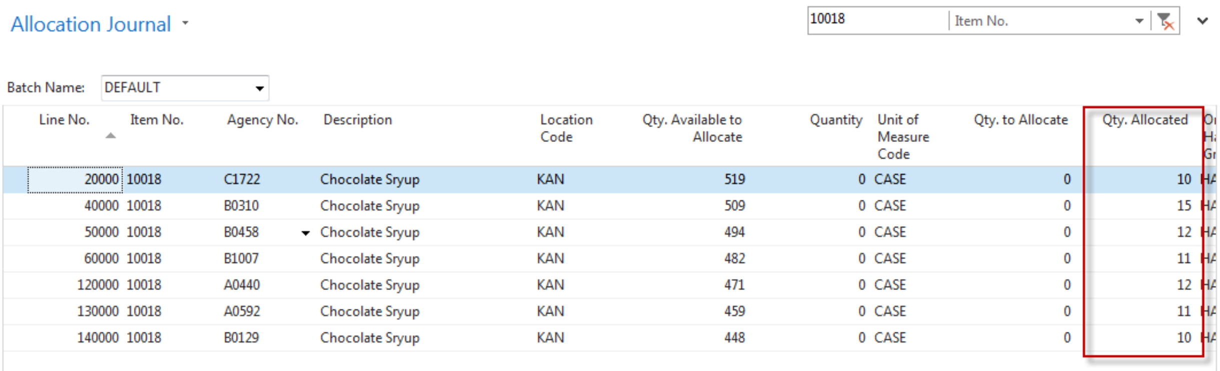
**Note**: A blank Document Batch Name is a valid value. The Posting Date will be filled in with the current work date if it is left blank. If the Overwrite Shipment Date is left blank it will use the existing Shipment Date on the Allocation Line.




**Note:** Since Allocation Lines can have different Shipment Dates, the 'Create Orders' process will create Allocation Orders by Shipment Date (with the Shipment Date on the Request Page as blank).

5. Click OK to create the orders.

6. The Allocation Journal will be updated to show the quantities allocated.



Allocation Journal

10018 Item No.

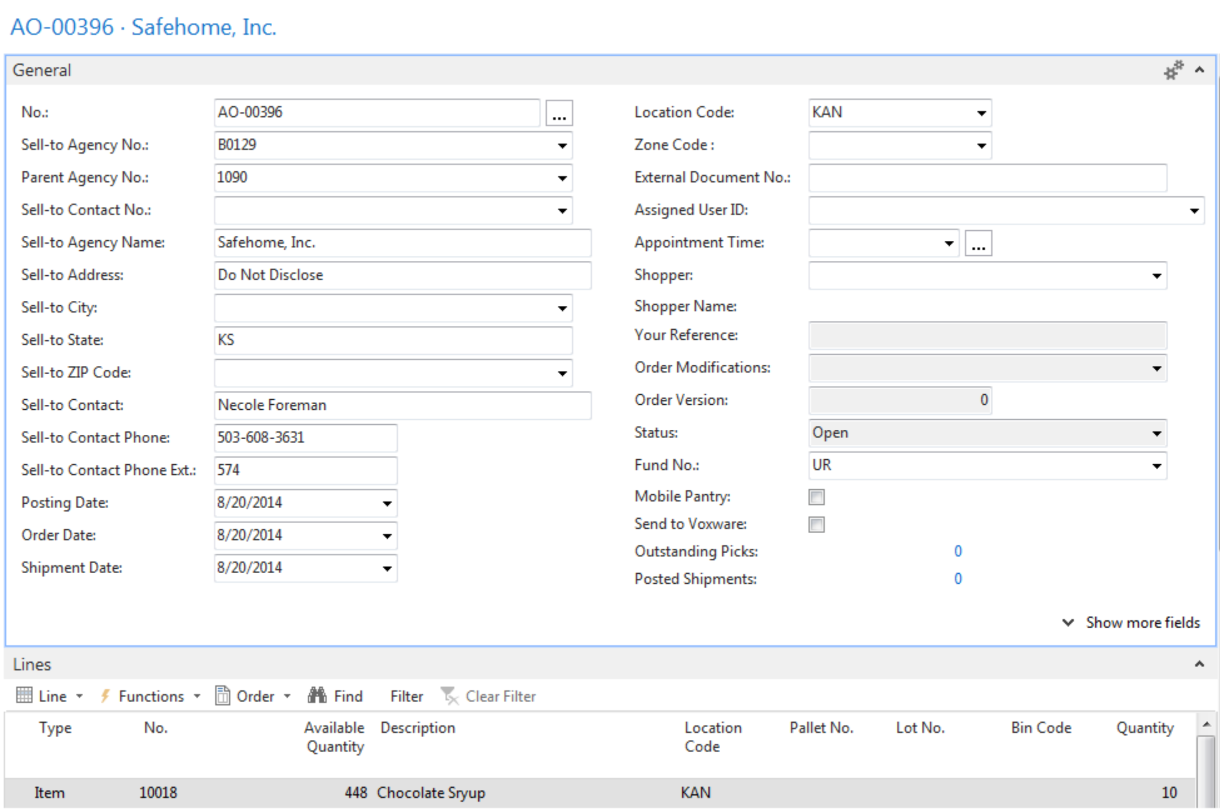
Batch Name: DEFAULT

| Line No. | Item No. | Agency No. | Description | Location Code | Qty. Available to Allocate | Quantity | Unit of Measure Code | Qty. to Allocate | Qty. Allocated |
|---|---|---|---|---|---|---|---|---|---|
| 20000 | 10018 | C1722 | Chocolate Sryup | KAN | 519 | 0 | CASE | 0 | 10 |
| 40000 | 10018 | B0310 | Chocolate Sryup | KAN | 509 | 0 | CASE | 0 | 15 |
| 50000 | 10018 | B0458 | Chocolate Sryup | KAN | 494 | 0 | CASE | 0 | 12 |
| 60000 | 10018 | B1007 | Chocolate Sryup | KAN | 482 | 0 | CASE | 0 | 11 |
| 120000 | 10018 | A0440 | Chocolate Sryup | KAN | 471 | 0 | CASE | 0 | 12 |
| 130000 | 10018 | A0592 | Chocolate Sryup | KAN | 459 | 0 | CASE | 0 | 11 |
| 140000 | 10018 | B0129 | Chocolate Sryup | KAN | 448 | 0 | CASE | 0 | 10 |

7. Orders will be created based upon the number of Agencies in the Allocation Journal. There will be one order per Agency.

8. If the Send to Voxware Default field in the Voxware Setup is checked, then the Send to VOX field will default as checked (Yes) when the Suggest Allocations function is run. The Send to VOX field can also be updated from Actions → Functions → Toggle Send to VOX

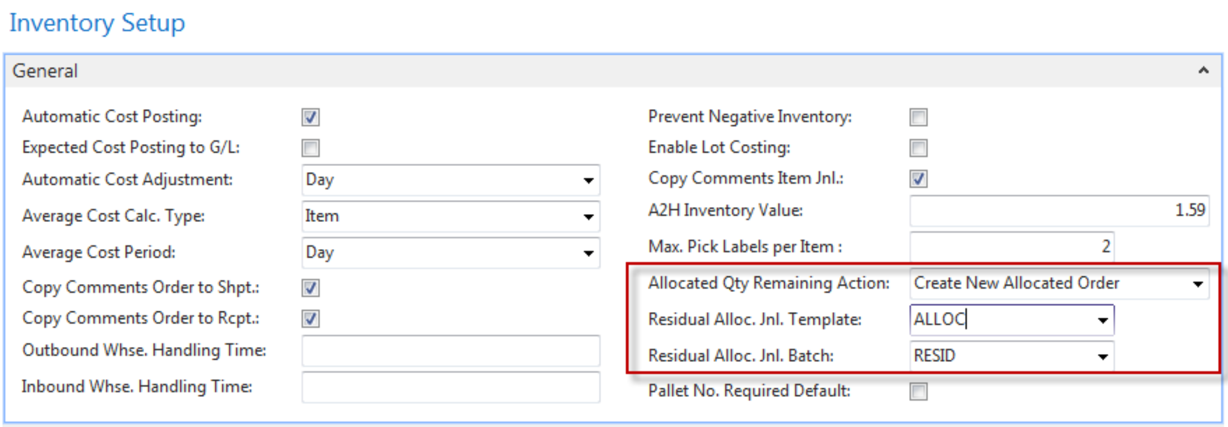
Example order created from this function:




**9.** At this point the Allocation Journal can be cleared (if the next allocation will involve different Items/Agencies) by highlighting the lines, right-clicking and choosing Delete Line. The lines can also be left intact and the Quantity can be updated by Agency Express to show the Quantity to Allocate for the next time.

## Handling Remaining Quantity via Agency Express Setup

Once the order is submitted back to Ceres, the Quantity difference between Allocated and Requested Quantity or Remaining Amount can be handled in several ways. The Agency Express Import process is taking this in consideration based on Allocation specific setup options on the Inventory Setup:




**Allocated Qty. Remaining Action**. Select one of the options

**Blank** - This is the default setting. No action is taken. The Remaining Amount is put back into regular inventory to be placed on another order. This is how all earlier versions are handling the remaining quantity.

**Update Allocation Journal -** Ceres locates the corresponding Journal Line and updates the Qty. to Allocate as the remainder between the Allocated Quantity and Requested Quantity. An Allocation No. from the No-Series, specified in the Inventory Setup, is created and populated on the line. If the line no longer exists in the Journal, Ceres will create a new line for the remaining Quantity.

**Create New Allocation Journal** - Ceres will create a new Allocation Journal
Line entry in the Allocation Journal Template and Batch as specified in the “Residual Alloc. Jnl. Template” and the “Residual Alloc. Jnl.Batch” fields specified on the General FastTab of the inventory Setup Page.

**Create New Allocated Order** - Ceres will create a new Allocated Order with a single line for the remaining Quantity.

**Create New Allocated Order and Send to Web** - Ceres will create a new Allocated Order, same as above, but will also automatically send this order back up to the web.

**Note:** For the “Create New Allocated Order” and “Create New Allocated Order and Send to Web” options, Ceres will create only one Agency Order document which will contain all Web Order lines (per Web Order) for which the Quantity was reduced.

**Residual Alloc. Jnl. Template** and **Residual Alloc. Jnl. Batch:** These two fields determine which Template and Batch will be used when an Allocation Journal line needs to be updated but is missing or a new allocation journal is specified for the remaining amounts.

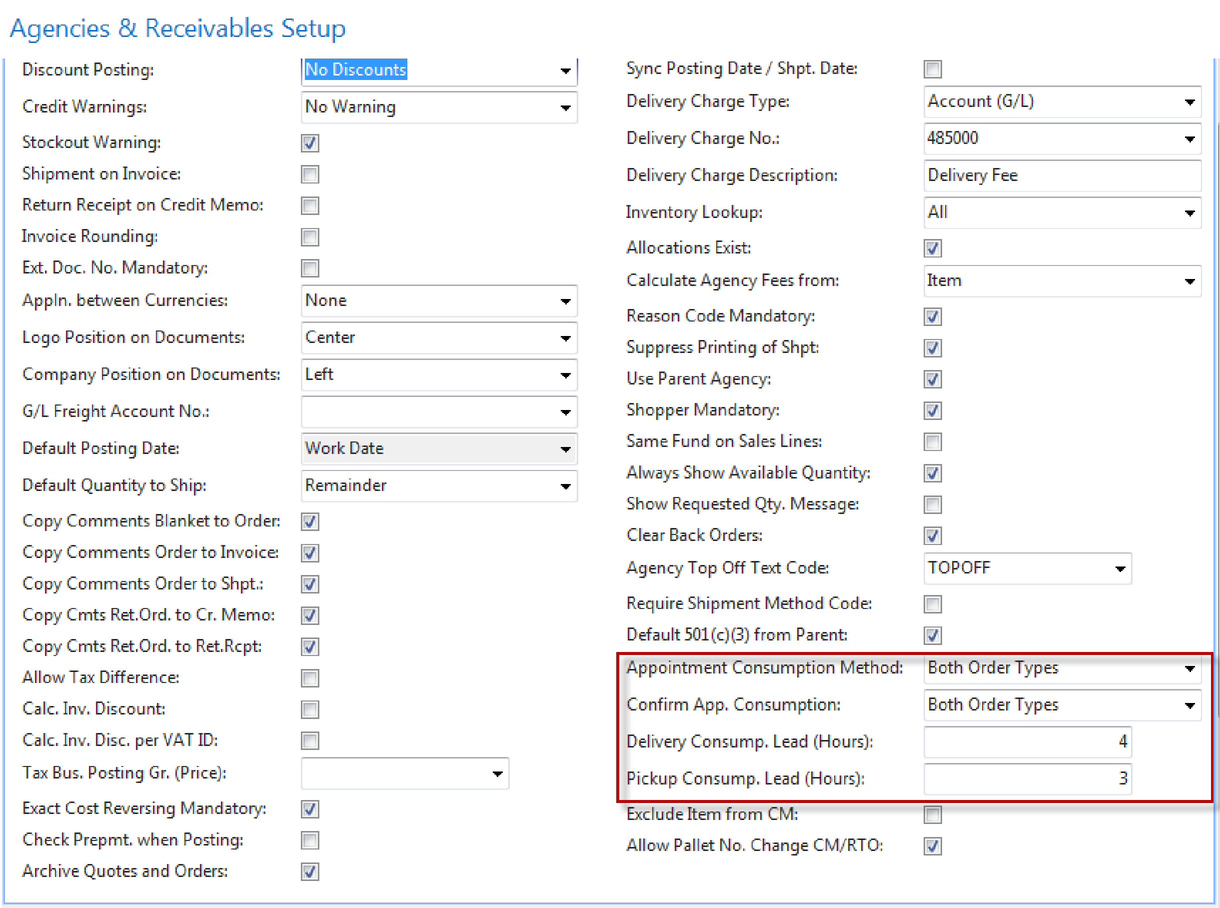
**Allocation Nos**: The Allocation Nos. series are used for creating a unique Allocation No. for having a link between an Allocation Order and the Allocation Journal Line for update purposes.

When Allocation Journal Lines are completely allocated, they can be removed from the Journal. This can be done by highlighting the line, right-clicking and choosing Delete Line.

## Appointment Consumption Setup

When allocated orders are created for Agencies with standing appointments, Ceres can be configured to use those appointments for the created allocated order. There are two parameters on the Agency & Receivable setup page called Appointment Consumption Method and Confirm App. Consumption.

Based on the setting of these parameters Ceres may use standing appointments for the allocated the order. Refer to the General FastTab of the Agency & Receivables Setup:




**Appointment Consumption Method:** Select one of the options.

**Blank** - This setting will not consume any appointments for created allocation orders.

**Manual Orders Only** - This setting will not consume any appointments for created allocation orders. It only affects manually created agency orders.

**Allocation Orders Only** - This setting will direct the system to search for a standing appointment and/or appointment time. If a viable appointment is found (as described below), the system will attempt to use that appointment based on the logic described below.

**Both Order Types** - This setting will direct the system to search for a standing appointment and/or appointment time. If a viable appointment is found (as described below), the system will attempt to use that appointment based on the logic described below.

**Appointment Consumption**

If a Standing Appointment exists for the combination of Agency, Shipment Template (based on Shipment Method), and Shipment Date, the Appointment Time on the Standing Appointment will be selected for the Order. If no Appointment Time exists for that Shipment Date, but there is a Shipment Date in the future available, the Shipment Date and Appointment Time from the Standing Appointment will be used.

If no Standing Appointment can be found or used, the system will then try to find an Appointment Line to use. To do this, two new fields ("Preferred Delivery Time" and "referred Pickup Time") added to the agency card will be used to determine the agencies preferred time. Using the appropriate time based on shipment method of the order the system will search for an Appointment Line for the Order's Shipment Template, Shipment Date, and Preferred Time (based on Shipment Method). If an appointment is found then that Appointment Time will be used. If no Appointment Line can be used for the Shipment Date, the system will look for the next available date at the Agency's Preferred Time.

**Confirm App. Consumption**: Select one of the options

**Blank** - This setting will not prompt the user when an appointment will be consumed for the created allocation orders.

**Manual Orders Only** - This setting will not prompt the user when an appointment will be consumed for the created allocation orders.

**Allocation Orders Only** - This setting will prompt the user to confirm the usage of an appointment line before it is used. If the user does not confirm the appointment, then Ceres will not consume the appointment time and use it.

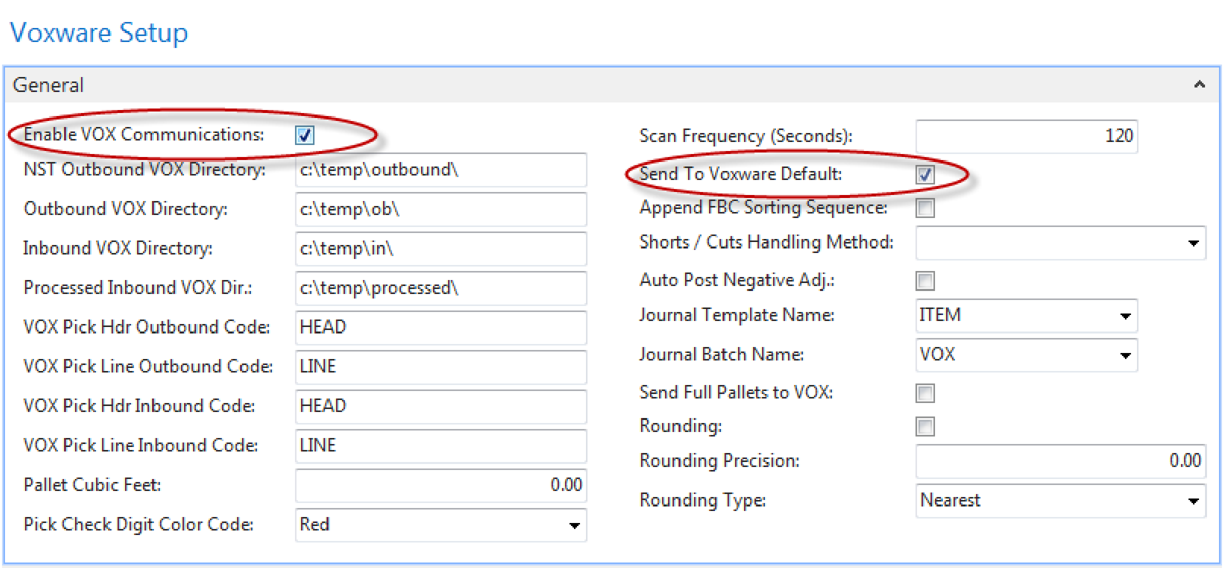
**Both Order Types** - This setting will prompt the user to confirm the usage of an appointment line before it is used for both manual orders and allocated orders. If the user does not confirm the appointment, Ceres will not consume the appointment time and use it.

## Voxware

Voxware is used by some food banks to facilitate the order fulfillment process. If you are using Voxware, it is important to decide whether or not, orders created via the allocation process are to be sent to Voxware for picking.

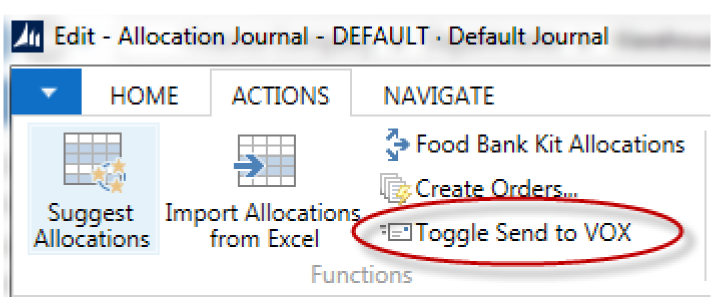
When using both Suggest Allocation and Import from Excel automated functions to create allocation journal lines, the field on the allocation line called Send To Vox is set by default based on two parameters. These parameters are on the Vox Setup Page shown below.

The two parameters are Enable VOX Communications and Send To Voxware Default. If both of these parameters are checked as shown below, then by default, the Suggest Allocations and Import from Excel functions will both set the Send to Vox field to Yes (checked). If either of these parameters or both are unchecked, then by default the Send to Vox field is set to No. It should be noted that even if the Send to Vox field is set to Yes and Vox is not installed at your food bank, then the field is simply ignored.




1. Once the allocation lines have been created on the Allocation Journal, there is a function that allows you to toggle the Send to Vox field on all the allocation journal lines on and off.

2. To toggle the Send to VOX field, selection Actions → Functions → Toggle Send to VOX

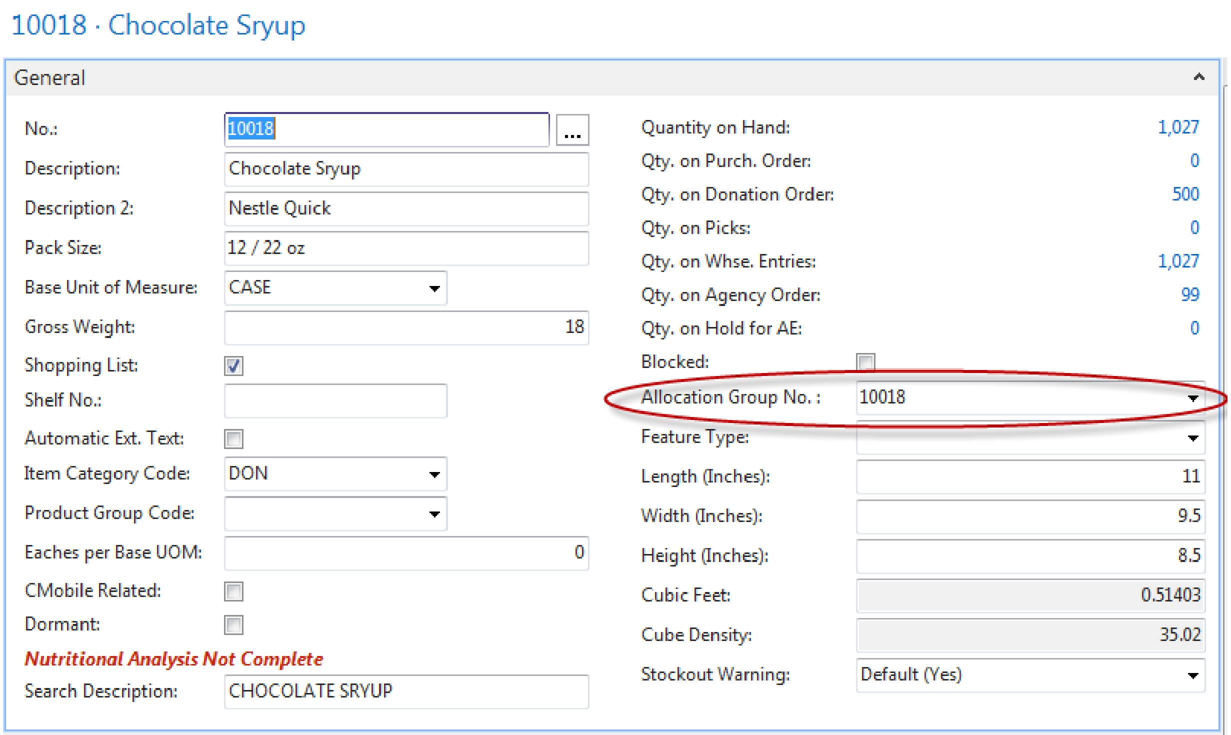



3. This will change the Send to VOX field to the opposite value, either On to Off or Off to On.

## Automating the Creation of Allocation Journal Entries

If the item quantities to be allocated to each Agency are based on a fixed percentage of the total quantity available, you can automate the creation of the allocation journal entries without importing from Excel. This streamlines the allocation process when product is ready to distribute.

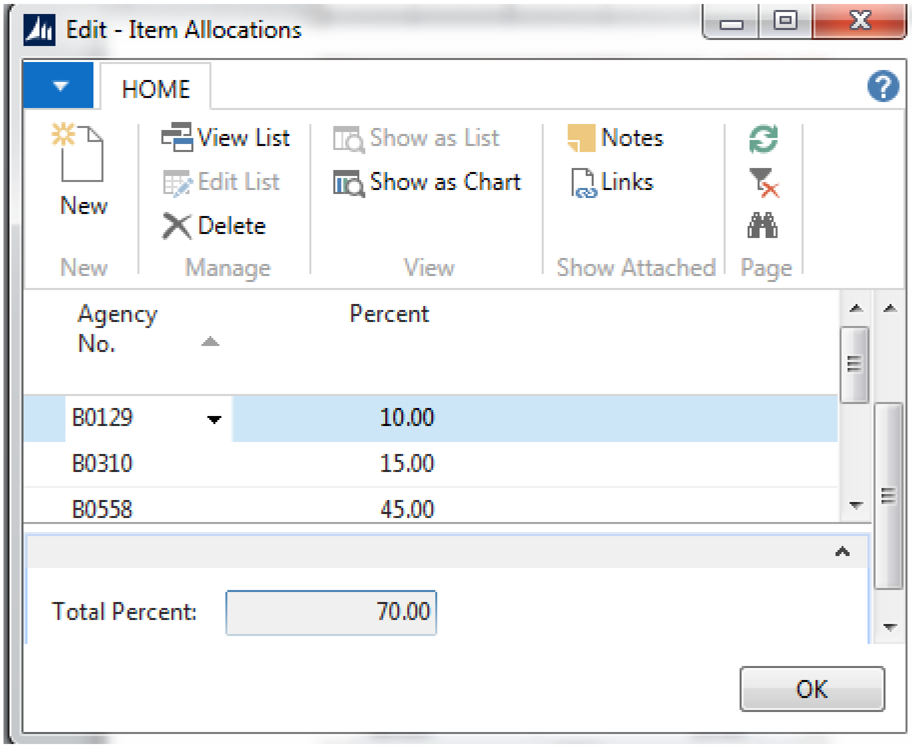
1. Go to the Item Card for the item to be allocated. Confirm that an Allocation Group No. has been assigned to the Item (this can be the Item No., or may be another Item No. where the allocations have already been assigned).




2. Go to Navigate → Master Data → More → Allocations. This brings up the Item Allocations Page.

3. In the Agency No. field, enter (or select using F4 or the dropdown) the Agency No.

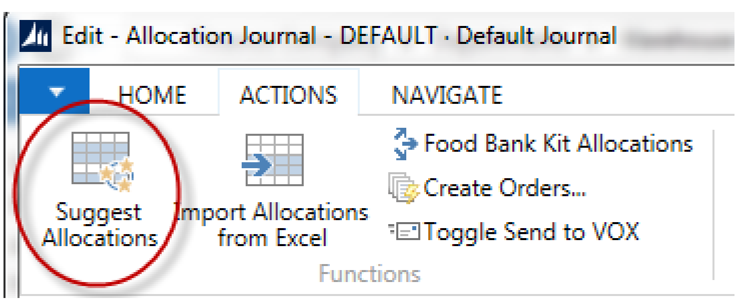
4. Enter the percentage of the total quantity available that should be allocated to this agency. The percent allocated can never be more than 100%, but can be less. To refresh the Total Percent calculation at the bottom of the Page, press F5.



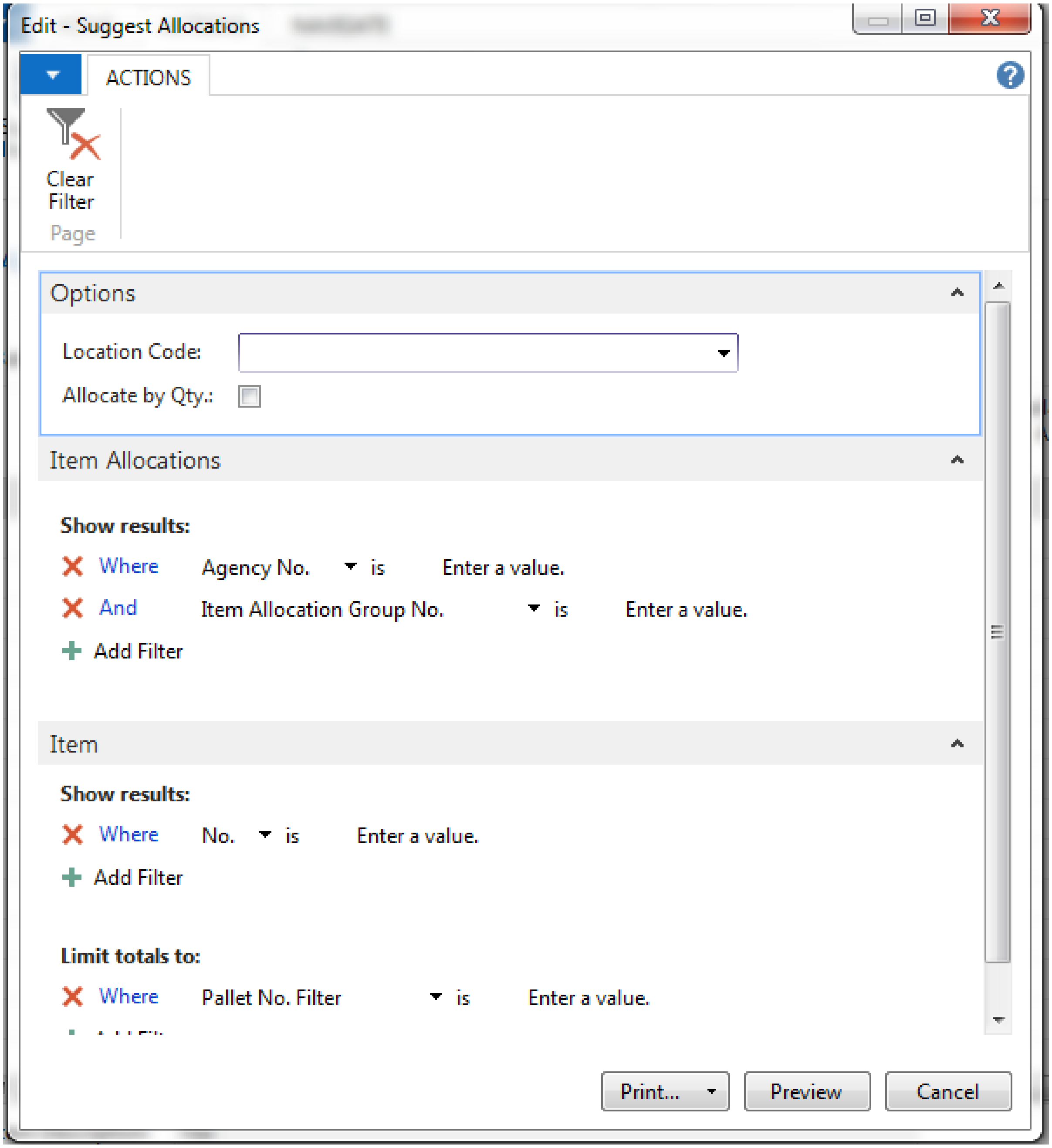

5. When finished entering all Agencies and percentages, click OK.

6. Once all of the items and percentages per Agency have been specified, the next time that allocations are ready to be distributed, the process can be run to streamline allocations.

7. When you are ready to create allocations, open the Allocation Journal via Departments → Warehouse → Inventory → Tasks (as previously described). Then Select Actions → Functions → Suggest Allocations




8. A Suggest Allocations Page will open where filters can be entered to restrict the items/agencies that will be included in the journal.

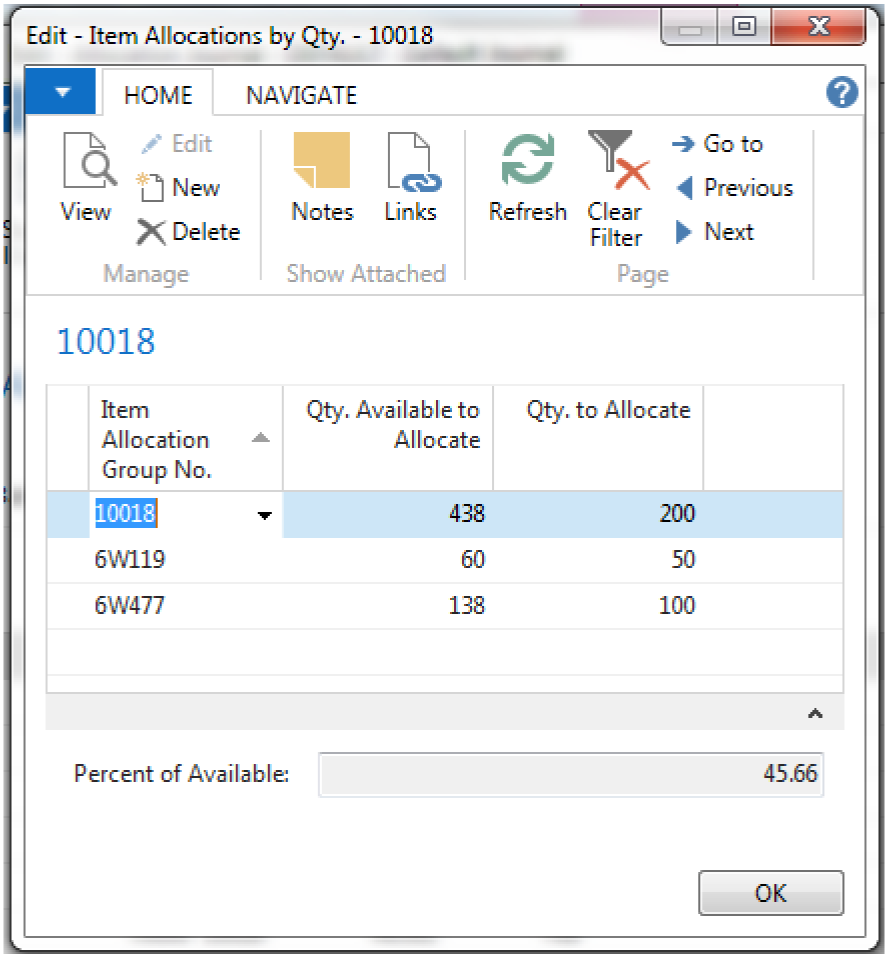



9. On the Options FastTab you can select a Location Codes to restrict the location the items will be allocated from.  If you do not wish to allocate the full Qty. Available per item, you can check the Allocate by Qty. box to specify the Qty. to Allocate for each item.

10. On the Item Allocations FastTab you can set filters to restrict the Items or Agencies included in the Journal. . If no filters are entered, all items with quantities available to allocate that have been set up with agency percentages will be included. (Unless further filters are set on the Item tab)

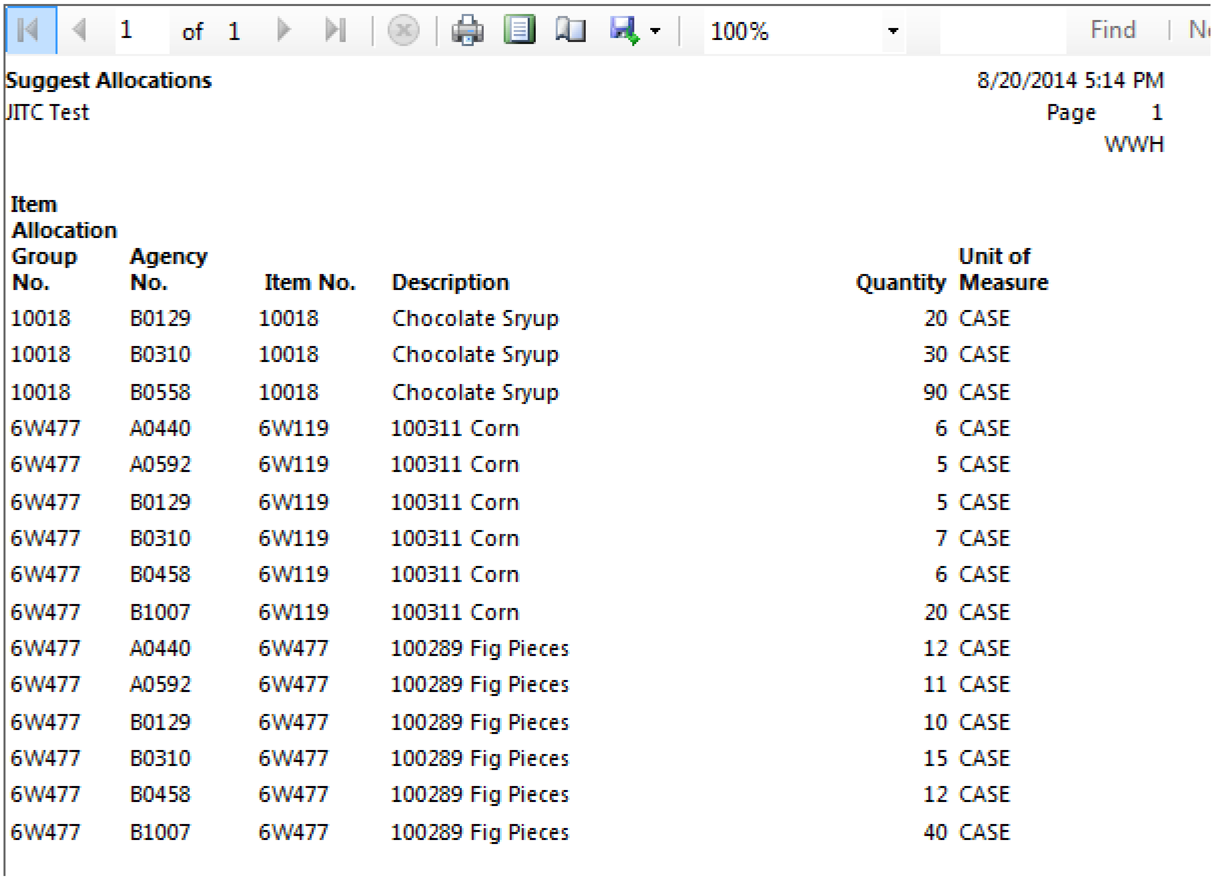
11. On the Item FastTab, you can select specific Item No's, Pallets, etc. if so desired.

12. If Allocate by Qty. was checked on the Options FastTab, choosing Print or Preview will show the Item Allocations by Qty Page. This allows users to adjust the Qty. to Allocate per item. This new Qty. to Allocate will be the basis for the report to calculate the allocations.




13. Choose Print or Preview to generate the Journal. Print will provide you with a printed copy of the Suggest Allocations report, while Preview will display on screen. The report shows how many (per unit of measure) were allocated by Item and Agency No.

## Suggest Allocations



**Suggest Allocations** 8/20/2014 5:14 PM
JITC Test Page 1
WWH

| Item Allocation Group No. | Agency No. | Item No. | Description | Quantity | Unit of Measure |
|---|---|---|---|---|---|
| 10018 | B0129 | 10018 | Chocolate Sryup | 20 | CASE |
| 10018 | B0310 | 10018 | Chocolate Sryup | 30 | CASE |
| 10018 | B0558 | 10018 | Chocolate Sryup | 90 | CASE |
| 6W477 | A0440 | 6W119 | 100311 Corn | 6 | CASE |
| 6W477 | A0592 | 6W119 | 100311 Corn | 5 | CASE |
| 6W477 | B0129 | 6W119 | 100311 Corn | 5 | CASE |
| 6W477 | B0310 | 6W119 | 100311 Corn | 7 | CASE |
| 6W477 | B0458 | 6W119 | 100311 Corn | 6 | CASE |
| 6W477 | B1007 | 6W119 | 100311 Corn | 20 | CASE |
| 6W477 | A0440 | 6W477 | 100289 Fig Pieces | 12 | CASE |
| 6W477 | A0592 | 6W477 | 100289 Fig Pieces | 11 | CASE |
| 6W477 | B0129 | 6W477 | 100289 Fig Pieces | 10 | CASE |
| 6W477 | B0310 | 6W477 | 100289 Fig Pieces | 15 | CASE |
| 6W477 | B0458 | 6W477 | 100289 Fig Pieces | 12 | CASE |
| 6W477 | B1007 | 6W477 | 100289 Fig Pieces | 40 | CASE |

14. You will be returned to the Allocation Journal and can view the quantity to be allocated based upon the percentages set up on the Item:

**Note**: The Qty. Available to Allocate is reduced on each line as quantity is allocated. If another line is added to this journal, the Qty. Available to Allocate will reflect what is available.

The allocations created by this function are only suggested allocations based on the percentages assigned on the item card. If you wish, you may change the quantities as desired by updating the value in the ‘Quantity’ field.

15. Use the Create Orders process previously described to create orders from these allocations.

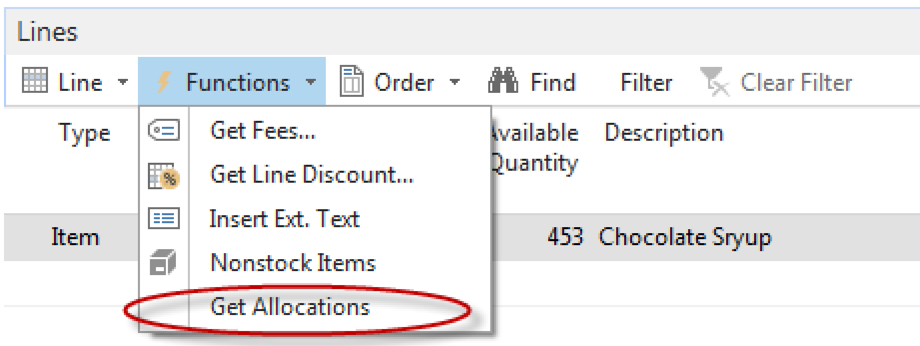
## Sending Allocated Orders to Agency Express 3

If your food bank has decided to allocate orders to Agencies via the web, by checking Allow Allocation Orders Online on the Agencies & Receivables Setup → Web Ordering FastTab, then you can push orders to Agencies regardless of whether that product is normally available to them via Agency Express.

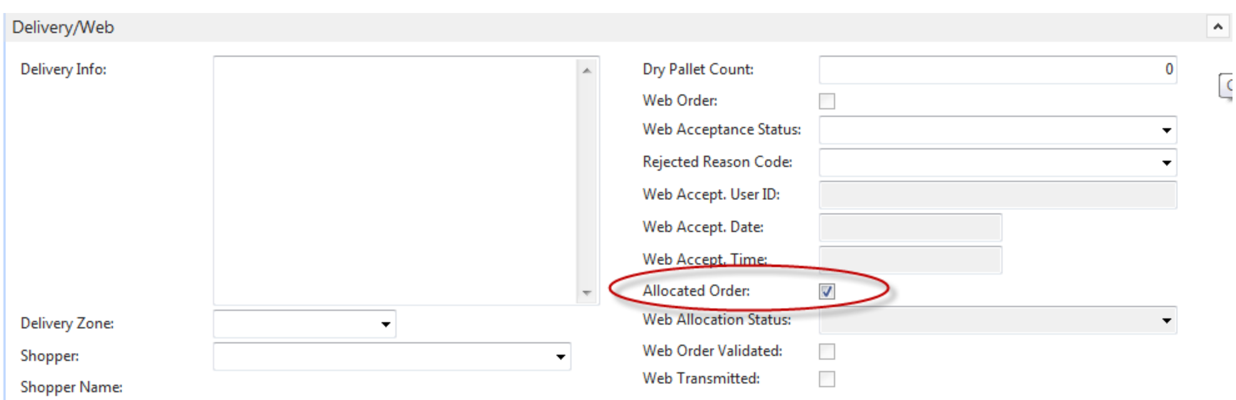
All item information is now transmitted to the web so that items that are not permitted for web ordering will still display related information on Agency Express if included in an allocated order.  As previously mentioned, if you are using batches, but do not have a customization to place allocated orders into a specific batch, then the allocated orders will be found in the blank batch.

1. If you are not using batches, simply locate your orders via Agencies & Receivables → Order Processing → Agency Orders.

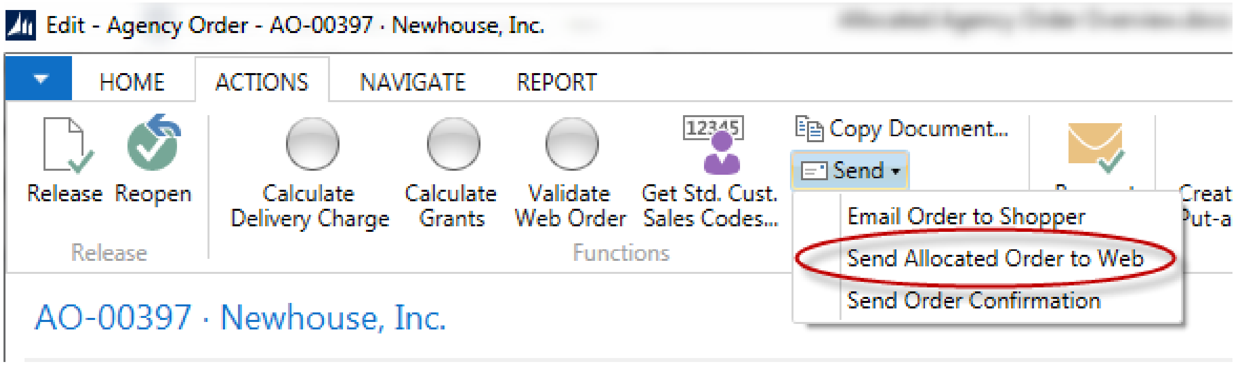
2. It is also possible to create the order and then Get Allocations from the Agency Order Lines via Functions → Get Allocations  If allocated orders are created this way, you can create them in the WEB batch in order to keep them with other Web orders



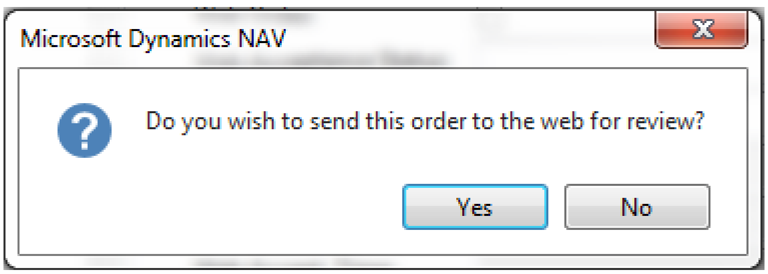

3. It is also possible to mark an existing order as an Allocated Order, by placing a checkmark in the Allocated Order field on the Delivery/Web FastTab.  This field will automatically update from the Get Allocations or the Create Allocated Order functions.



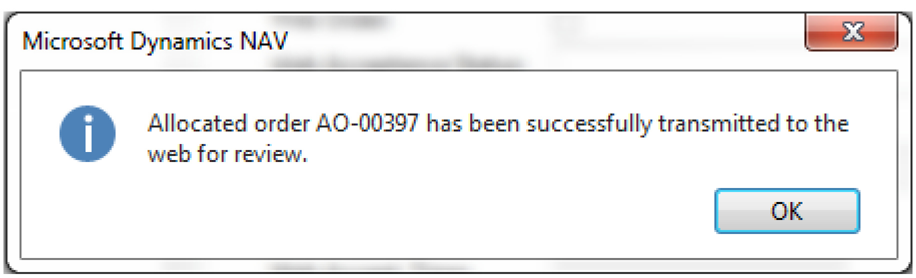

4. The orders can be pushed to the web, one at a time,  by going to Actions → Functions → Send → Send Allocated Order to Web



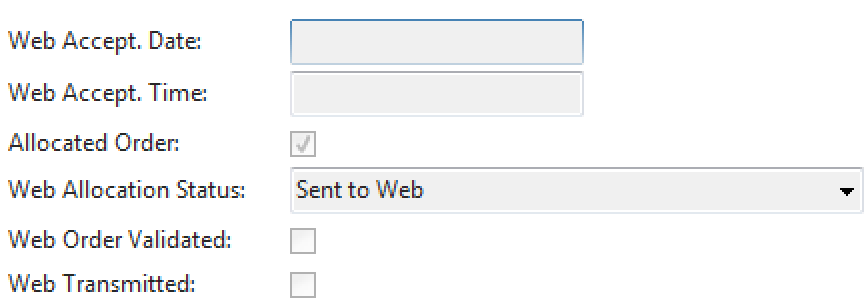

5. The user will be prompted for confirmation: Select Yes to send the order.




6. The user will receive a confirmation that the Order has been set to be transmitted (this does not indicate success of the actual file transmission):




7. The Web Allocation Status for this order will change to “Sent to Web”.



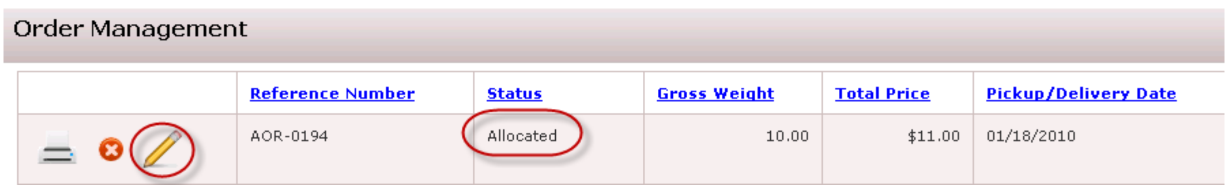
8. Once the order has been Transmitted, the Web Transmitted field will be updated.


## Processing Allocated Orders on Agency Express

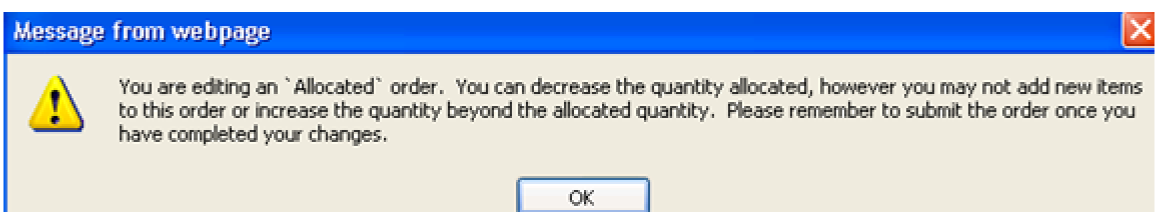
1. At this point, the shopper must do something with the order. The options are:

    a. Accept the order in full
    b. Accept a portion of the order
    c. Reject the entire allocated order

2. On Agency Express, the Shopper will see an order that has an Agency Order number instead of a PO number and the status will be ALLOCATED:




3. To edit the order, click the Pencil icon. The user will receive the following message:



4. At this point, the Shopper can:

   a. Submit the order (as it is) by clicking the ‘Submit Cart’ 

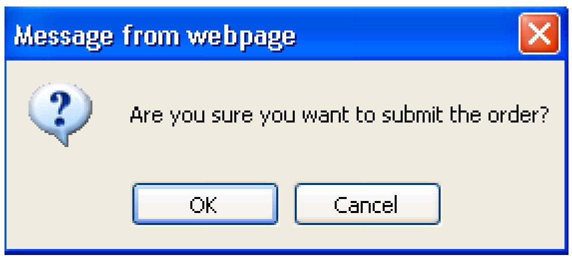
button.

   b. Reduce the quantity on any/all lines and click the ‘Submit Cart’ 

button.

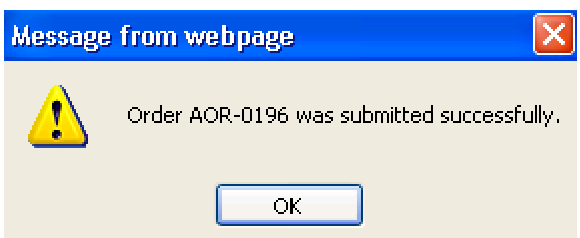
   **Note:** A Pickup/Delivery Date and Time must be selected (if using backward compatibility, it must be filled in) before submitting the order.

5. The shopper will receive the following window to decide if they wish to submit or not:

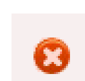


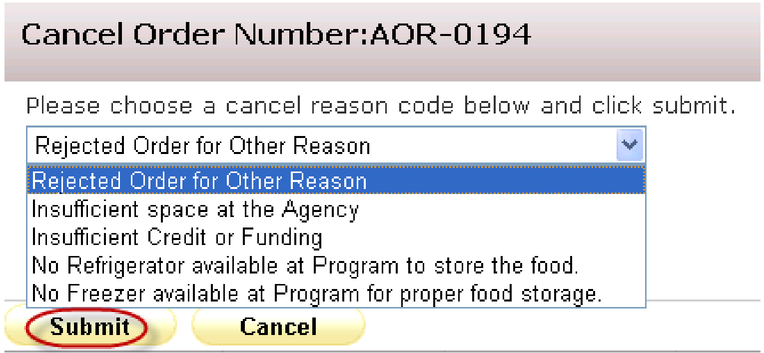

6. Select OK to submit the order. If cancel is selected, the Shopper will be returned to the order to make any adjustments, and reject or submit again.

7. If submitted, the shopper should receive the following confirmation:




8. The Order should change status from Allocated Order to New Order and the editing  icon should no longer be available. The shopper can still decide to reject the order at this time. See instructions on next page to reject orders.

9. To Reject the order: instead of clicking the Pencil Icon, the Shopper should click the  icon and choose a Cancel Reason Code from the drop-down list (this is just an example list) and click Submit to send the rejection notice to the food bank:




10. Click Cancel to return to the Order Management window without rejecting the order.

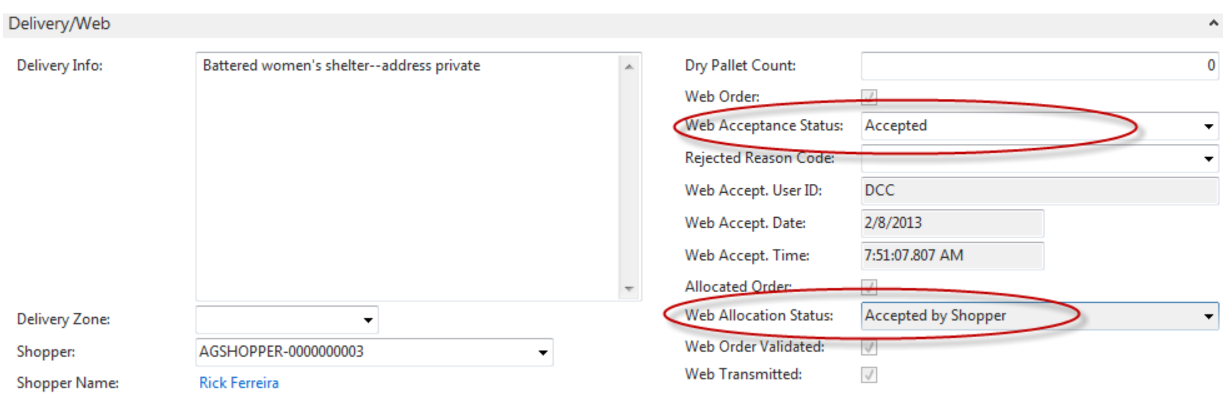
    **Note:** The rejected reason codes above must match those in Ceres exactly for the order to process in Ceres.

11. If the order is submitted as Rejected, the status will now show as "Cancelled" in Order Management:


## Processing Submitted (or Rejected/Cancelled) Allocated Orders

1. Once the Allocated Order has been submitted by the shopper, it should be handled like any other web order.

2. If the order has met the validation/auto-accept criteria, then it will be marked as Accepted. Note that the order is now marked as a Web Order as well.




3. The Shopper will now see the status changed to "Released" once the acceptance status has been transmitted to the web:

| | Reference Number | Status | Gross Weight | Total Price | Pickup/Delivery Date |
|---|---|---|---|---|---|
| | AOR-0196 | Released | 15.00 | $5.40 | 01/20/2010 |

4. If the order has been rejected, it will display the Rejected Reason Code when viewed from the Agency Orders List:

| No. | Sell-to Agency No. | Sell-to Agency Name | Location Code | Posting Date | Web Status | Web Transm... | Rejected Reason Code | Web Order |
|---|---|---|---|---|---|---|---|---|
| AOR-0194 | A-002-1 | United Methodist Church - Se... | NOPP | 1/18/2010 | | ☑ | INSUFFICIENT SPACE | ☐ |

5. Until the order has been changed to Food Bank order processing status, the shopper will still be able to reduce the allocated order quantity or Reject the order entirely.
6. If the shopper neglects to ever submit or cancel the order, see Allocated Agency Orders – update Web Allocation Status Procedure.

## Related Topics:

1. Allocated Agency Orders – Update Web Allocation Status
2. Agency Order Overview
3. Agency Express Managing Web Orders
4. Physical Inventory Counts and Inventory Journals
5. Inventory Revaluation Journal
6. Voxware Overview and Integration
7. AE3 Agencies, Shoppers & Items
8. Agency Scheduling