

Preferred Pickup Days & Times

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Purpose of this document

This document explains how to use the Donor Preferred Pickup Days & Times functionality in Ceres.

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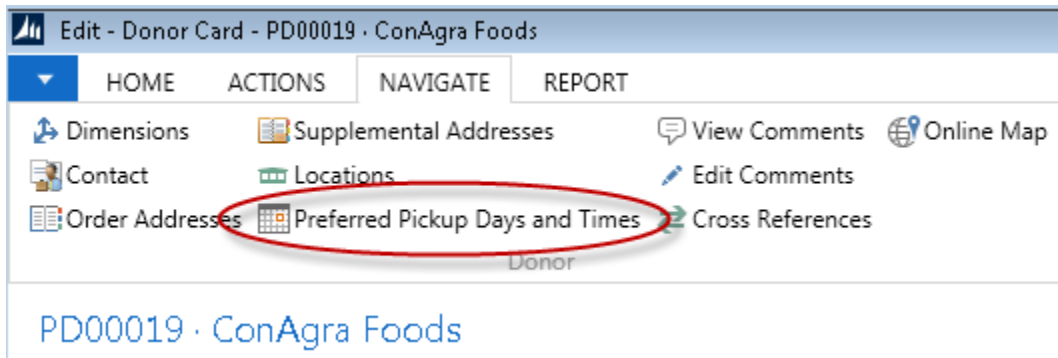
Purpose

The Preferred Pickup Days & Times functionality provides for the specification of the days of the week and their associated times for which a Vendor or Donor prefers pickups to occur. Though the process works for both Donors and Vendors, it is used primarily for managing pickups from Donors. During purchase order and donation order entry, Ceres will attempt to assign the next valid pickup date and time based on the setup defined for the vendor or donor. Please note that donor pickup days and times for Roadnet routing is described in the Roadnet Procedures.

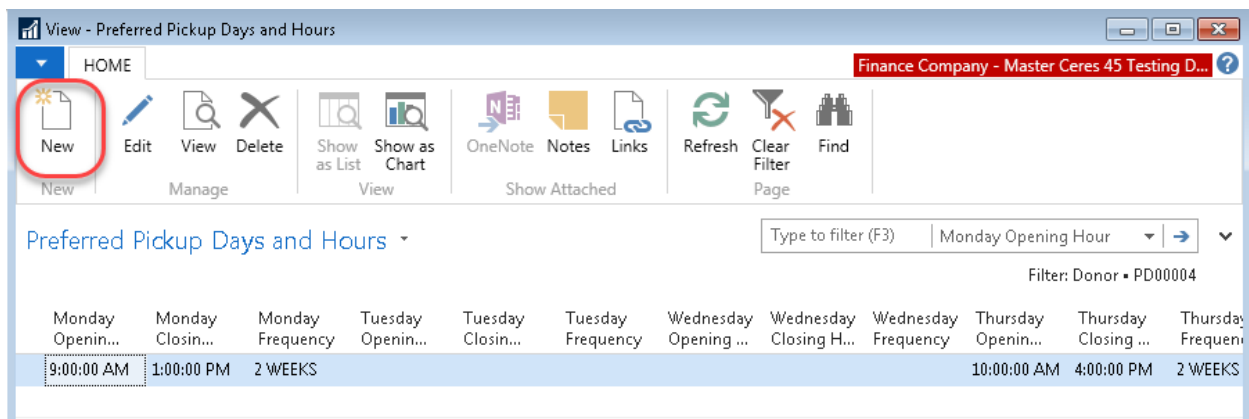
Ceres object release 4.01.79 is required for some of functionality described in this document.

Setting up and Editing Preferred Pickup Days & Times

1. The setup of Preferred Pickup Days & Times begins with the specification of preferred times. To display the setup page navigate on a Vendor or Donor Page → Navigate → Preferred Pickup Days & Times.



2. The Preferred Pickup Days & Times list page will display in the view mode. If days and times have not yet been specified for this Vendor/Donor the list will be empty as shown below.



- To specify Days and Times, click the **New** action. The Preferred Pickup Days & Times card page will be displayed in the Insert mode. Specify the preferred pickup time opening and closing times for any and all days as applicable to this Vendor/Donor. If the Vendor/Donor generally prefers previous notification prior to a pickup being scheduled, specify the previous notification in the Pickup Lead-time (Days) control. Enter the Frequency by specifying a valid value from the table of user-defined frequency codes.

Donor · PD00004

General

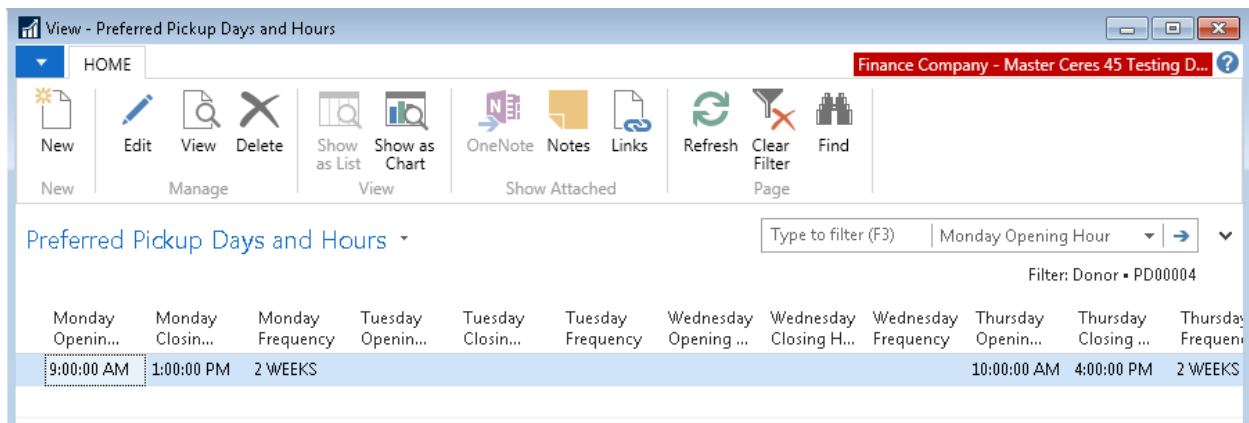
Pickup Lead-time (Days): Variance (Minutes):

Days and Hours

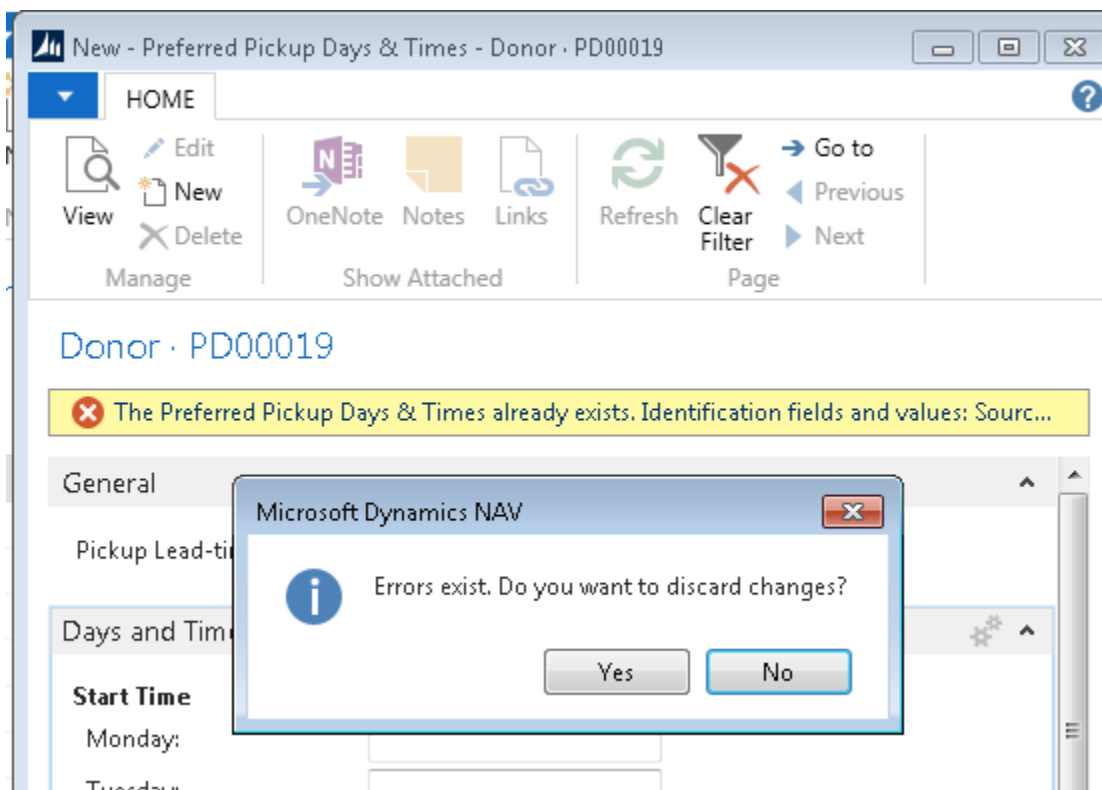
	Opening Hour	Closing Hour	Frequency
Monday:	9:00:00 AM	1:00:00 PM	2 WEEKS
Tuesday:			
Wednesday:			
Thursday:	10:00:00 AM	4:00:00 PM	2 WEEKS
Friday:			
Saturday:			
Sunday:			

OK

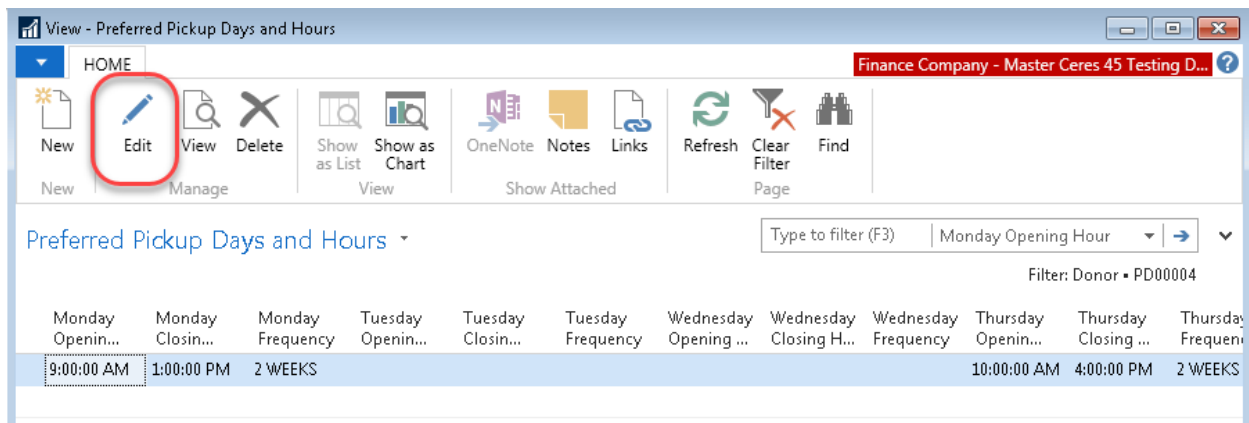
- Once you are satisfied with the established days and times, click the OK button to close the page.
- You will be returned to the Preferred Pickup Days & Times list page will display in the view mode. Notice however, that the days and times you specified are now displayed. If at this point, you wish to change any of the information you specified navigate Actions → Edit.



Note: Clicking on the **New** action at this point in the setup will again display the Preferred Pickup Days & Times card page in the Insert mode and will allow you to specify information but it will display an error as shown. If you encounter this error, select Yes on the dialog to close the windows and navigate Action → Edit to update the information.



- Once satisfied with the information as you have specified it, click the Close button on the Preferred Pickup Days & Times list page. Should you wish to update the days and times information for this Vendor/Donor at any point in the future, navigate on the Vendor or Donor Page → Related Information → Vendor/Donor action → Preferred Pickup Days & Times. The Preferred Pickup Days & Times list page will display in the view mode. Navigate Actions → Edit or double click on the list page entry to display the Preferred Pickup Days & Times card page will be displayed in the Edit mode.



How Preferred Pickup Days & Times are used in Ceres

This functionality applies to Purchase and Donation Orders only. Upon specification of the Vendor/Donor number on an order Ceres will consult the Preferred Pickup Days & Times setup for the Vendor/Donor and use this information to calculate a suggested pickup date and time which can be viewed on the Receiving tab of the order. Only the day's opening hours will be used as the Pick Up Time.

Receiving			
Shipment Date:	<input type="text"/>	Load Type:	<input type="text"/>
Shipment Method Code:	<input type="text"/>	Product Description:	<input type="text"/>
Back-Haul/Pickup Toggle:	<input type="checkbox"/>	Scheduled Date:	<input type="text"/>
Receiving Date:	<input type="text"/>	Scheduled Time:	<input type="text"/>
Truck Type:	<input type="text"/>	Pick Up Date:	8/21/2014
Estimated Freight Cost:	0.00	Pick Up Time:	3:00:00 PM
Estimated Quantity:	0.00	Carrier Code:	<input type="text"/>

Ceres will use Today's date and in conjunction with the days that have preferred times specified and the specified pickup lead time days to calculate a suggested pickup date. The suggested pickup time will be the time specified for the day of the week to which the pickup date correlates.

Note: If days and times have not been setup Ceres will not suggest a pickup date or time.

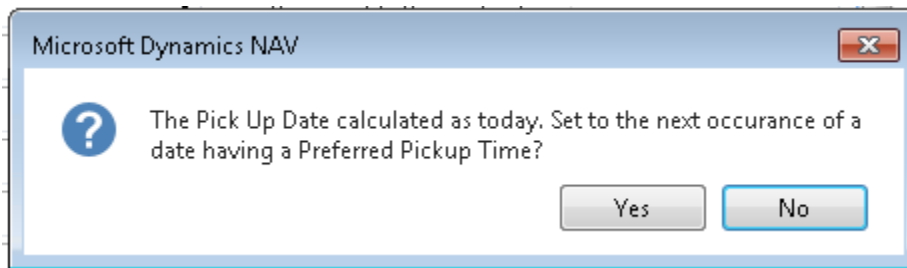
For example we have specified the days and times below for Donor number D-1000

- Monday at 9:00 AM
- Thursday at 3:00 PM
- Friday at 1:00 PM

We have also specified a Pickup Lead-time (Days) of 2 days.

If we create an order for D-1000 today (Monday 08/18/14), our next available day of the week to suggest would be Thursday (because of the 2 day lead time). The next occurrence of Thursday after Monday 08/18/14 (and accounts for the lead time) is Thursday 08/21/14. This is the date that will be suggested in the Pickup Date field on the Receiving tab of the donation order. The time suggested will be 3:00 PM because this is the time associated with Thursdays as per our Preferred Pickup Days & Times setup for this Donor.

Should Ceres Suggest a Pickup Date equal to Today's date (because there is no lead time specified and Today's day of the week has a preferred pickup time specified), a message will be presented to the user as shown below.



Click No to retain the Today's date as the order's Pickup Date or Yes to have Ceres suggest the next viable date as described above.

Related Topics:

1. [Purchase Order Overview](#)
2. [Donation Order Overview](#)
3. [Appian Overview & Integration](#)
4. [Roadnet Donor Pickups](#)