



Grocery Rescue CSV Import

Purpose of this document

This document explains how to collect data from Grocery Rescue Routes into Ceres via import of a CSV file.

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

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Overview

Many food banks work to collect food from grocery stores in their communities. This collection process takes three primary forms:

1. The food bank sends a truck out to collect a grocery store route, and the food is brought back to the food bank. The driver then provides information about the product and donor to receiving and multiple similar donation orders are needed.
2. The food bank collects the food from the grocery donor and drops it off at an agency site before returning to the food bank. The food bank then needs to create multiple donation orders and agency orders in Ceres to track this work.
3. The food bank connects one or more agencies with the grocery donors, and the agency picks up the food from the donor and reports the transactions to the food bank in a designated time interval. This requires the creation of both donation orders and agency orders to record the transactions in Ceres.

These processes have been automated in Ceres, allowing the food bank to collect data from grocery rescue routes. The process described in this procedure documents a process where the agency can submit their grocery rescue pickup transactions via a web portal external to Ceres. The web portal then exports a defined CSV file of the transactions for the food bank to import. This is only used for option 3 above. This process is separate from the Feeding America Online Marketplace initiative, which covers a similar purpose but with a different approach. This is designed to support food banks who have created their own web portal via SharePoint, Google Forms or similar.

Description of the Import

This functionality imports a csv (comma separated value) file created from a 3rd party entry system (web portal). The file is processed by Ceres to create donation orders and agency orders. Each record (line) in the file represents a donor, an agency, and the item and the quantity of the item picked up from the donor by the agency.

For donation orders, all lines in the file for the same donor, posting date and FBC Product Source Code, will be combined onto one donation order. If any of those three key fields are different, a separate donation order will be created. In any case each line will represent one line on a donation order even if they have the same item number, as will occur when a donor sends the same product to more than one agency on the same date.

Likewise, agency orders will also combine lines for the same agency, posting date and FBC Product Source Code onto a single agency order. If any of those three key fields are different a separate agency order will be created, however, lines for like items will not be combined.

Limitations

If any lines in the file generate an error, the process will report the error, ignore the line and continue with processing. Lines with errors should be handled manually. Repeating the process with the same file will result in duplicate postings for any records that can be processed successfully.

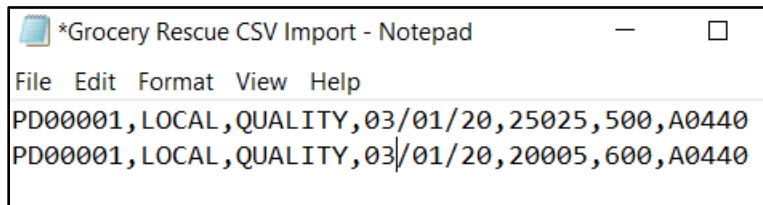
The file format is fixed and must be in the proper format to function with this import procedure. A copy of the file layout is available on HungerNet, or from your Ceres VAR. The specifications of the file are as follows. An example file layout is provided as a procedure as well.

1. CSV (Comma Separated Value) file type.
2. Each record will contain 7 fields as defined here. Certain fields are required, others are optional but if optional fields are omitted, there must still always be 7 values in each record even if the value is Null or Blank.



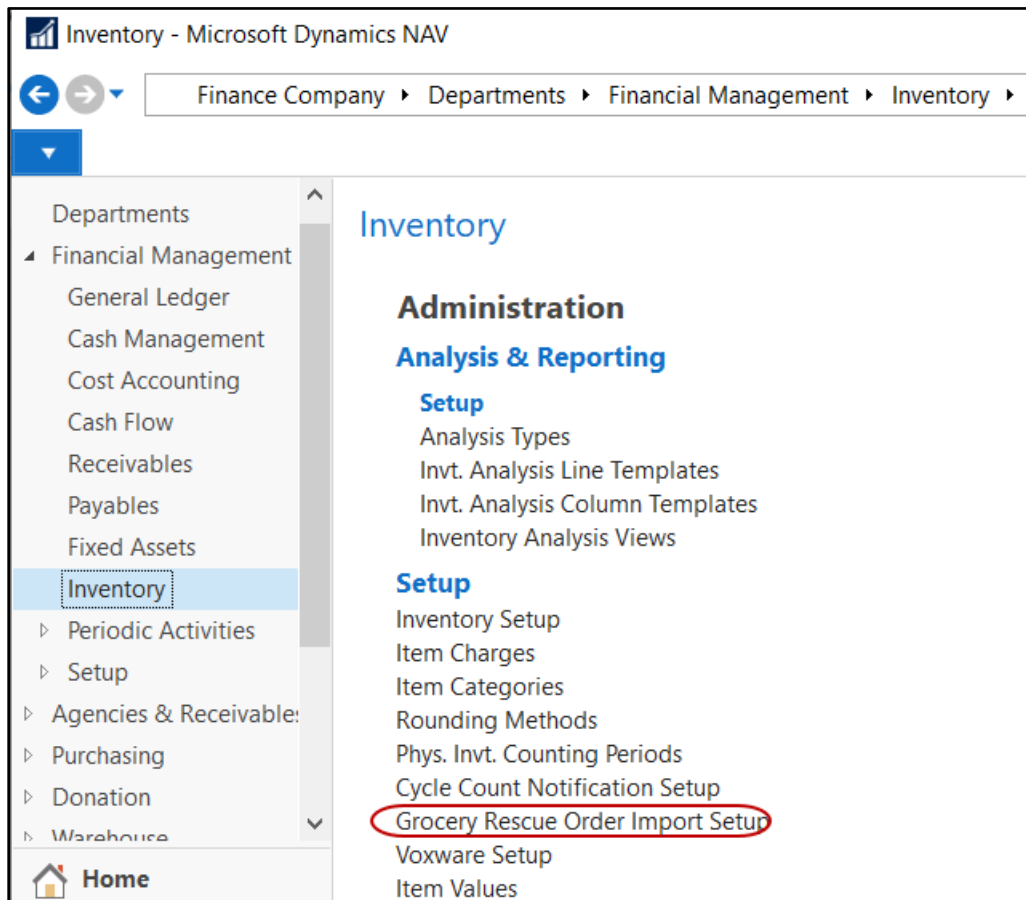
- a. **Donor ID (required):** This field must be a valid Ceres donor.
- b. **FBC Product Source Code (optional):** This field must be a valid Ceres FBC Product Source Code.
- c. **FBC Reason for Donation (optional):** This field must be a valid Ceres FBC Reason for Donation code.
- d. **Posting Date (required):** This date will be used as the posting date on the donation and agency orders created for this line.
- e. **Item ID (required):** This field must be a valid Ceres item number.
- f. **Quantity (required):** This field represents the quantity of this item donated by the donor and shipped to the agency specified on the line.
- g. **Agency ID (required):** This field must be a valid Ceres agency.

3. Below is an example what the data might look like viewed in Notepad.



Grocery Rescue Setup

1. You must setup the parameters that will control the grocery rescue CSV import functionality. This can be done from Departments → Financial Management → Inventory → Administration → Setup → Grocery Rescue Order Import Setup.



2. From the Grocery Rescue Order Import Setup Page, update the fields on the General FastTab and the Autmotation FastTab as needed.

Grocery Rescue Order Import Setup

Geneal

Batch Nos.:
Donation Order Nos.:
Agency Order Nos.:
FBC Prod. Cat. Value Source:

GR-ORDER
D-ORD
A-ORD
Item

Auto-Post Donation Orders:
Auto-Post Agency Orders:
Hide Shipment Date Warning:
Bypass Quantity Limits:
Duplicate File Handling Method:

☒
☒
☒
☒
Error

Batch Nos.: Select the No. Series you wish to use for grocery rescue batches during import.

Donation Order Nos.: Select the No. Series you wish to use for grocery rescue donation orders.

Agency Order Nos.: Select the No. Series you wish to use for grocery rescue agency orders.

FBC Prod. Cat. Value Source: Select donor or item.

Donor - The default product category source from the donor will be used to set this value on the donation order lines.

Item - The default product category source from the Item will be used to set this value on the donation order lines.

Auto-Post Donation Orders: Check this field to auto post the donation orders that are created by the import.

Checked - Ceres will create the donation orders from the donation lines on the spreadsheet and post them prior to creating the agency orders.

Unchecked - Ceres will create the donation orders from the donation lines on the spreadsheet but will not post them prior to creating the agency orders.

Note: If you do not post the donation orders prior to creating the agency orders and there is not sufficient inventory on hand to fulfill the order, the agency order will be created, but the quantity will be left blank and will require manual handling.

Grocery Rescue CSV Import

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Auto-Post Agency Orders: Check this field to auto post the agency orders that are created by the import.

Checked - Ceres will create the agency orders from the agency lines on the spreadsheet and post them.

Unchecked - Ceres will create the agency orders from the agency lines on the spreadsheet but will not post them.

Hide Shipment Date Warning: Check this field and Ceres will ignore the normal shipment date warning messages that occur when creating orders with shipment dates prior to the current date. Because grocery rescue transactions are often recorded after the date the actual donation and shipments occurred it is common to postdate grocery rescue orders. Checking this flag will suppress the warnings that would normally occur.

If this field is left un-checked blank, Ceres will perform the shipment date test on each agency order created and you may need to answer numerous dialog box questions regarding shipment dates, etc.

Bypass Quantity Limits: Check this field to ignore established item quantity limits during creation of the agency orders.

Duplication File Handling Method: The duplicate filing handling methods were designed for the Enhanced Grocery Rescue process only and do not apply to the Grocery Rescue csv Import.

3. If utilizing the Job Queue Automated Grocery Rescue Import, the following information will need to be provided.

Grocery Rescue Order Import Setup			
General ▼			
Automation ^			
Import Source File Directory:	<input type="text" value="C:\GR\Import"/>	Notification From Email Addr.:	<input type="text"/>
Procd Source File Directory:	<input type="text" value="C:\GR\Processed"/>	Notification To Email Addr.:	<input type="text"/>
Error Source File Directory:	<input type="text" value="C:\GR\Error"/>	Notification Email Subject:	<input type="text"/>

Note: These directories must be on the NAV middle tier.

Import Source File Directory: Enter the directory for the source of the Grocery Rescue Import files.

Procd Source File Directory: Enter the directory for the processed Grocery Rescue Import files. Once a file has been successfully processed, Ceres will move the file to this directory from the Import Source File Directory.

Error Source File Directory: Enter the directory for Grocery Rescue Import files with errors. Once a file has errors and cannot be successfully processed, Ceres will move the file to this directory from the Import Source File Directory.

Notification From Email Addr: If using error e-mail notification enter the email address the notification is sent from.

Notification To Email Addr: If using error e-mail notification enter the email address the notification is sent to.

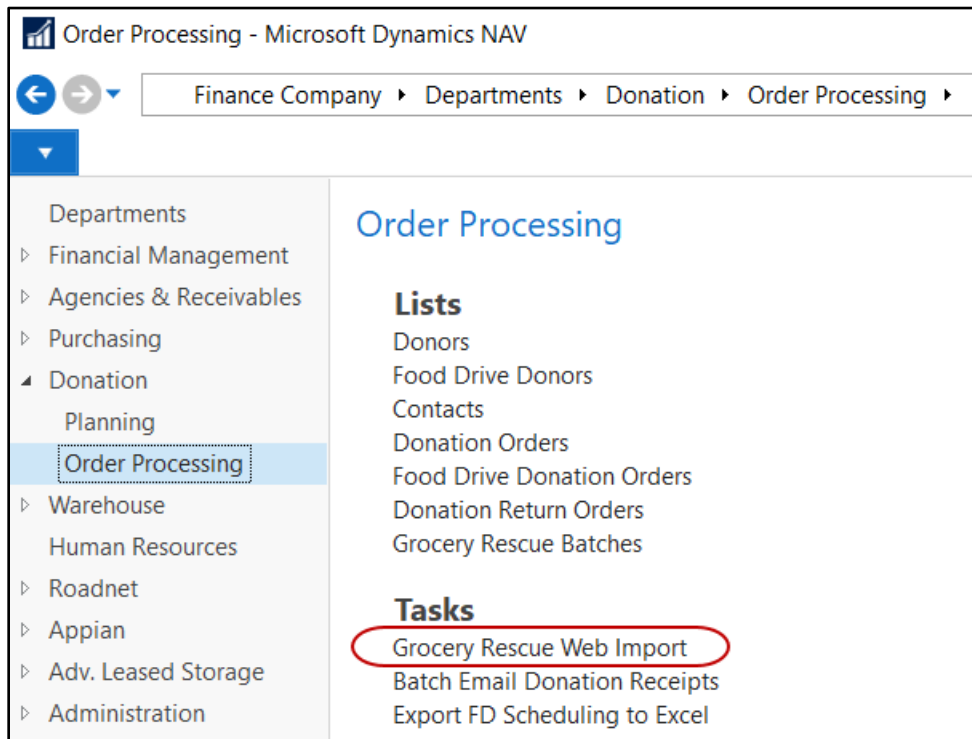
Notification Email Subject: If using error e-mail notification enter the subject line of the error email.

4. The Grocery Rescue Receipt Bin Code must also be specified for any location you wish to utilize for grocery rescue import transactions. This essentially represents the agency site, but since bins are required, a defined bin must be used to flow the product in and out. The receipt bin will be used for the put away of inventory via the posting of donations orders as well as the distribution of inventory via the posting of agency orders, so the bin should be designated as a PICKPUT.

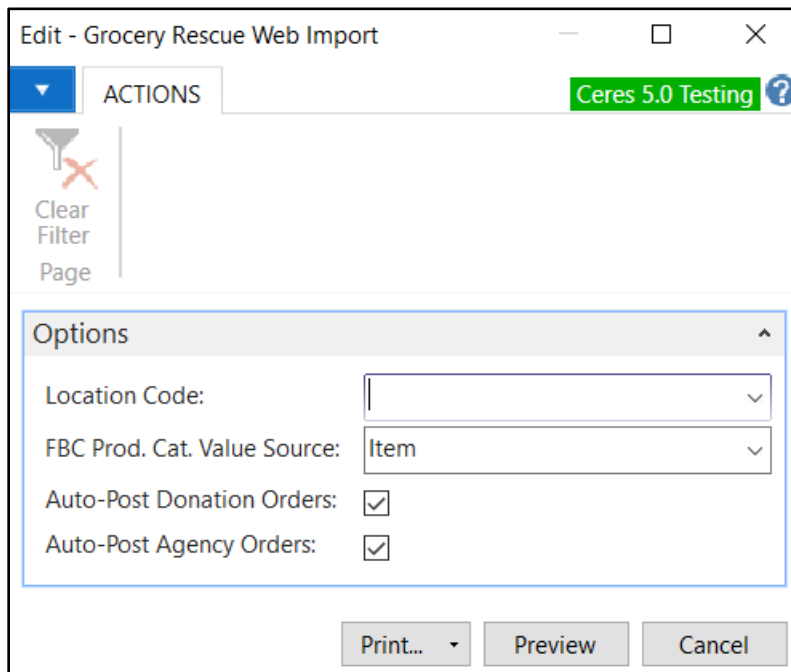
KAN - Kansas City Warehouse	
General	KAN
Address & Contact	
Warehouse	No Yes Yes
Bins	
Receipt	
Receipt Bin Code:	
Shipment	
Shipment Bin Code:	
Production	
Open Shop Floor Bin Code:	
To-Production Bin Code:	
From-Production Bin Code:	
ADCS	
Receipt Bin Code:	01
Grocery Rescue	
Receipt Bin Code:	GR
Agency Pallets	
Staging Bin Code (DRY):	AP-DRY
Staging Bin Code (COOLER):	AP-COOL
Staging Bin Code (FREEZER):	AP-FRZ
Staging Bin Code (OTHER):	AP-OTHER
Default Agency Pallet Bin Code:	
Adjustment	
Adjustment Bin Code:	
Cross-Dock	
Cross-Dock Bin Code:	
Assembly	
To-Assembly Bin Code:	
From-Assembly Bin Code:	
Asm.-to-Order Shpt. Bin Code:	

Using the CSV Grocery Rescue Functionality

1. The import can be completed from Departments → Donation → Order Processing → Tasks.



2. Click on Grocery Rescue Web Import.



3. Specify the Location to be used for this Grocery Rescue import processing.

Note: Before the import processing begins, Ceres will ensure that a location has been specified, that it is not marked as Use As In-Transit, and that a Bin has been specified as the Grocery Rescue Receipt Bin Code.

4. Select the FBC Product Category Value Source and the posting options for the order types. As a general practice, the Auto-Post Agency Order option should only be checked when also auto-posting donation orders. Otherwise it is possible to receive an error of insufficient quantity because there may not be enough product in the Grocery Rescue Receipt Bin to fulfill the agency order.

Note: The FBC Prod. Cat. Value Source, Auto-Post Donation Orders, and Auto-Post Agency Orders options will default from the Grocery Rescue Import Setup option values each time you run the import but can be overridden if desired.

5. Select Print or Preview to begin the import process batch report. Browse to where the file is saved. Select the file and then click OK. You will see processing windows display but the system will print information if there are errors that need manual handling. At completion, Ceres will report on the success or failure.
6. If you have either of the donation order or agency order parameters set to auto-post, you can go to the history for posted donation orders or agency orders to review the posted orders. If auto-post is set to no, you should review your donation and agency orders for accuracy and completeness, and then post them manually.

Related Topics

1. Grocery Rescue CSV Template
2. Enhanced Grocery Rescue Import
3. Donation Order Overview
4. Agency Order Overview
5. Item Overview
6. Location Overview
7. Bin Overview