



## Order Handling Groups and Order Routing Groups

### **Purpose of this document**

This document is designed to help illustrate the setup and uses of Order Handling and Routing Groups. They can be used to facilitate grouping of orders into logical subgroups by either type of order or delivery routing information.

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

# Table of Contents

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<b>OVERVIEW .....</b>	<b>3</b>
<b>ORDER HANDLING GROUPS AND ORDER ROUTING GROUPS SETUP .....</b>	<b>3</b>
<b>USING ORDER HANDLING GROUPS AND ORDER ROUTING GROUPS.....</b>	<b>4</b>
<b>RELATED TOPICS.....</b>	<b>6</b>

## Overview

Food banks often need to group Agency Orders together for fulfillment, to make day to day processing easier. Common groupings include by Program (Kid's Café Orders for example) or by delivery area (Rural drop site etc.). To meet these needs in a flexible manner, order handling group and order routing group functionality was added to Ceres.

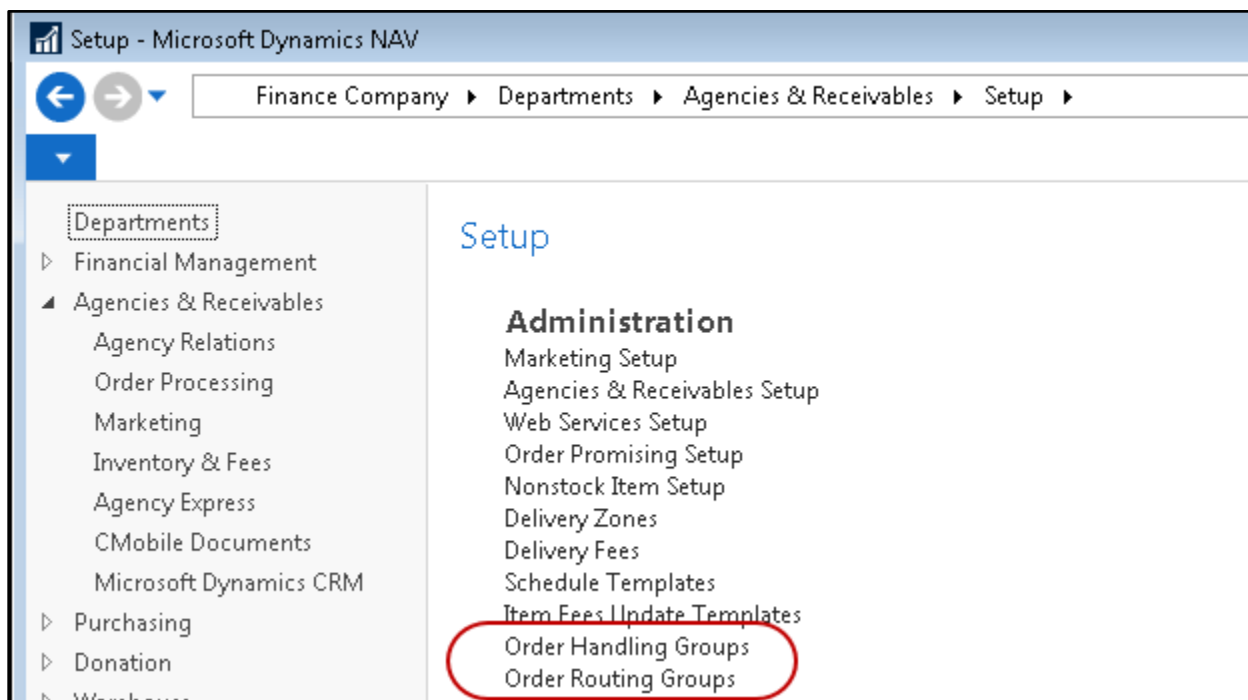
The enhancements include:

1. Order Handling Groups – Applies to Agencies, Donors, and Vendors and related documents, as well as some warehouse processes.
2. Order Routing Groups – Applies to Agencies, Donors, and Vendors and related documents, as well as some warehouse processes.

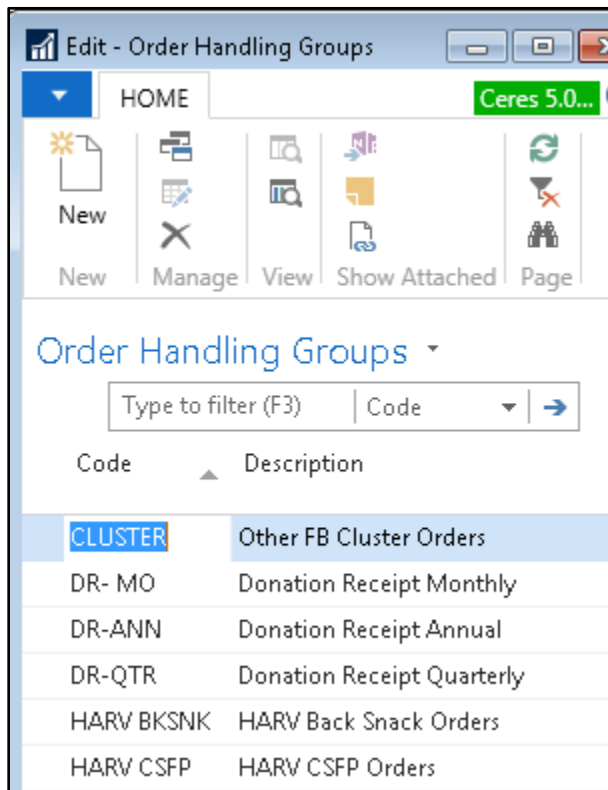
This document outlines the setup and functionality related to Order Handling Groups and Order Routing Groups only. Order grouping as it relates to Appian, CMobile, or Roadnet is covered in other documents.

## Order Handling Groups and Order Routing Groups Setup

1. The setup of Order Handling Groups and Order Routing Groups starts with defining Codes. Setup is accessed from Departments → Agencies & Receivables → Setup → Order Handling Groups or Order Routing Groups.



2. Select Order Handling Groups or Order Routing Groups and a List will display in edit mode. In the below examples, Order Handling Groups was selected.



3. To create a new Order Handling Group, select Home → New. Complete the required fields.

**Code:** A unique identifier for the new Order Handling Group.

**Description:** A brief description of the Order Handling

4. Repeat the steps above to create a new Order Routing Group. You do not need to use both options, unless that level of order grouping is desired.

## Using Order Handling Groups and Order Routing Groups

A default Order Handling Group Code and/or Order Routing Group Code can be established as a default value on an Agency, Donor, Food Drive Donor, or Vendor by selecting or inputting a value. The fields are located:

**Agency Card:** Shipping FastTab

**Donor and Food Drive Donor Card:** Receiving FastTab

**Vendor Card:** Receiving FastTab

80129 · Safehome, Inc.

General	Safehome, Inc.   76677
Address & Contact	John Smith   karenk@esopro.com
Invoicing	GENERAL   GENERAL
Payments	30
Information	
Shipping	

Location Code: KAN  
Zone Code:  
Delivery Zone Code: ZONE 1  
Delivery Info.: Battered women's shelter--address private

**Shipment**  
Shipment Method Code: PICKUP  
Order Handling Group Code: HARV KSDE  
Order Routing Group Code: CLUSTER  
Default Ship-to Code: DEFAULT  
Preferred Delivery Time:  
Preferred Pickup Time:  
Staging Area: STGD-2

Once linked, the default Order Handling Group Code and/or Order Routing Group Code flows from the Agency, Donor, Food Drive Donor, or Vendor to the order or other document. The default can be overridden by inputting or selecting a new value. The fields are located:

**Agency Documents:** Shipping FastTab  
**Donation Documents:** Receiving FastTab  
**Purchase Documents:** Receiving FastTab

Edit - Agency Order - AO-01309 · Safehome, Inc.

HOME	ACTIONS	NAVIGATE	REPORT
------	---------	----------	--------

View  
New  
Delete  
Manage

Process  
E-mail  
Release  
Reopen  
Create Inventory Put-away/Pick...  
Process

Email Confirmation...  
Print Confirmation...  
Statistics

Ceres Picking List By Order  
Order Pick Ticket  
Report

Post...  
Post and New...  
Post and Send...  
Posting

OneNote  
Notes  
Links  
Show Attached

Refresh  
Clear Filter  
Page

Go to  
Previous  
Next

AO-01309 · Safehome, Inc.

General	3/31/2020   3/31/2020   4/30/2020   Released
Lines	
Invoice Details	30
Shipping and Billing	

Ship-to: Alternate Shipping Address  
Parent Agency No.: 1090  
Code: DEFAULT  
Name: Safehome, Inc.  
Address: 1000 Main Street  
Address 2:  
City: Topeka  
State: KS  
ZIP Code:

Location Code: KAN  
Zone Code:  
Shipment Date: 3/31/2020  
Order Handling Group Code: HARV KSDE  
Order Routing Group Code: CLUSTER  
Default Staging Area: STGF-1  
Route:  
Stop:

The Order Handling Group Codes and Order Routing Group Codes can be used as filters when processing orders, when creating the Warehouse Activity Plan (WAP), generating Allocated Orders or when generating Inventory Picks.

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

**ACTIONS** Ceres 5.0 Testing ?

**Saved Settings** ▼

**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:

**Warehouse Request** ▲

**Show results:**

✗ Where Source No. ▼ is Enter a value.

✗ And Source Document ▼ is Agency Order

✗ And Location Code ▼ is KAN

✗ And Order Handling Group Code ▼ is CLUSTER

✗ And Order Routing Group Code ▼ is

+ Add Filter

Schedule... OK Cancel

When the order or transaction is posted, the Order Handling Group Code and Order Routing Group Code flow to the posted document.

## Related Topics

1. Agency Overview
2. Agency Order Overview
3. Appian Overview and Integration
4. Donor Overview
5. Donation Order Overview
6. Inventory Picks
7. Purchase Order Overview
8. Vendor Overview
9. Voxware Overview and Integration

10. Warehouse Activity Plan –WAP

11. Warehouse Activity Plan and Default Bin Picking