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

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.
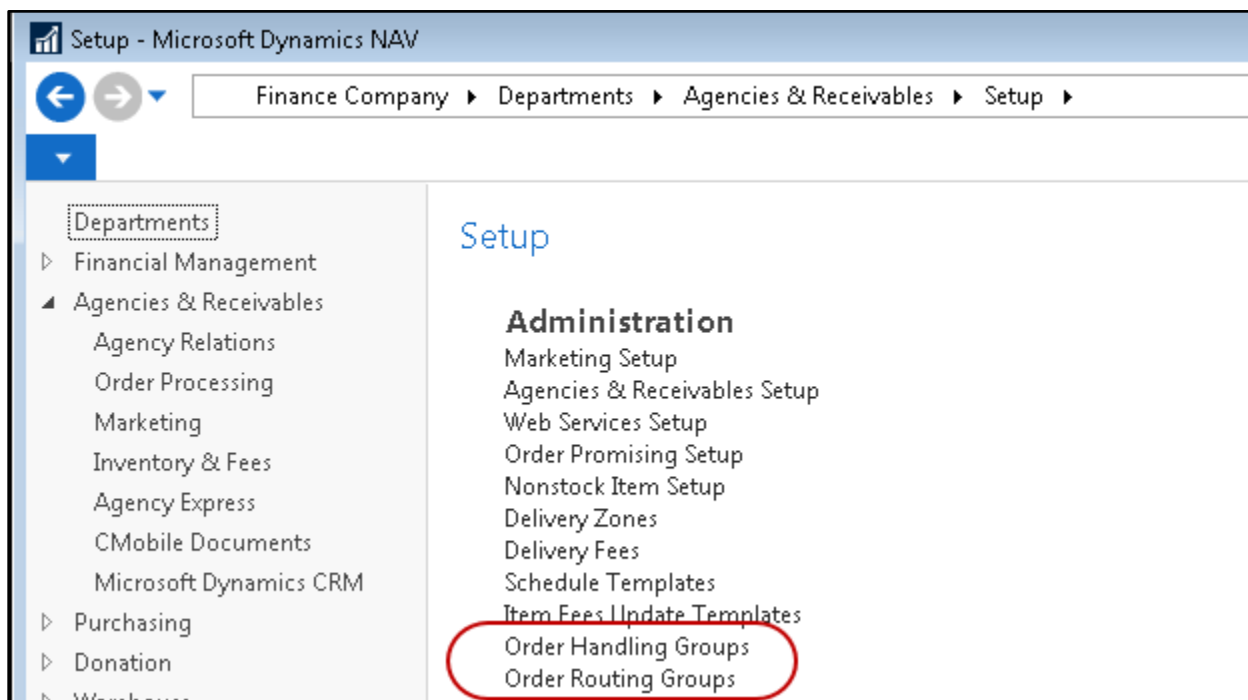
The enhancements include:

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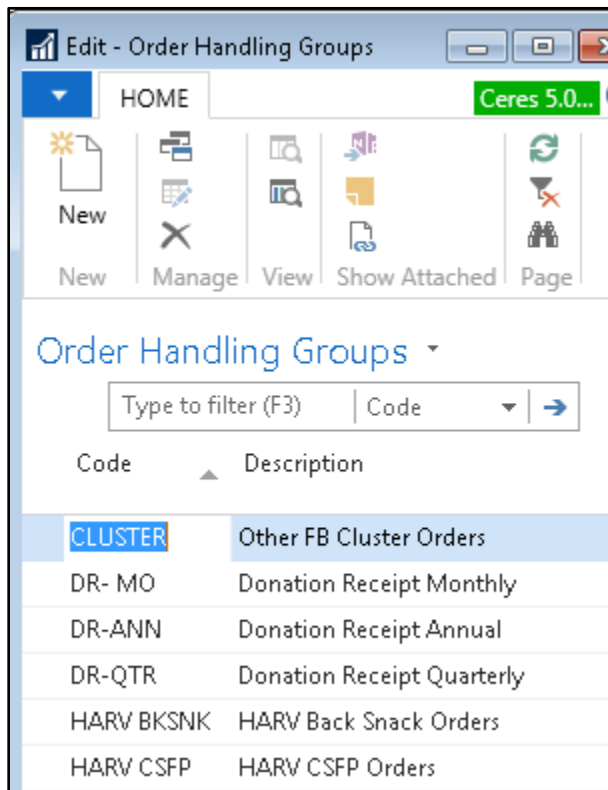
This document outlines the setup and functionality related to Order Handling Groups and Order Routing Groups only. Order grouping as it relates to Appian, CMobile, or Roadnet is covered in other documents.

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

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

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.

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