

MEMBER BUSINESS FEEDING® SOLUTIONS AMERICA

Order Handling Groups and Order Routing Groups

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Purpose of this document

This document outlines the setup and functionality related to Order Handling Groups and Order Routing Groups only.

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Purpose

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:

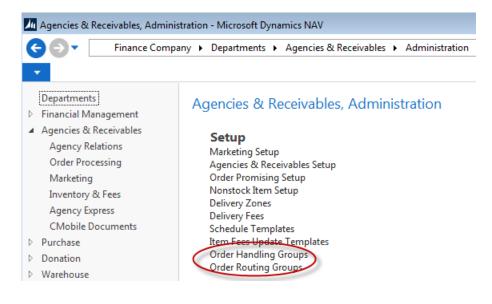
- 1. Order Handling Groups Applies to Agencies, Donors, and Vendors and related documents, as well as some warehouse processes.
- 2. Order Routing Groups Applies to Agencies, Donors, and Vendors and related documents, as well as some warehouse processes.

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.

Ceres object release 4.00.00 is required for the functionality documented in this procedure.

Order Handling Groups and Order Routing Groups Setup

The setup of Order Handling Groups and Order Routing Groups starts with defining Codes. Setup is accessed from Departments → Agencies & Receivables → Administration → 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 example, Order Handling Groups was selected.

Li Edit - Order H	andling Groups 📃 💼 💌
 HOME 	0
×~ =	ta, 🔊 🕄
New	🕰 🗧 🏹
×	
New Mana	ge View Show Attached Page
Order Hand	dling Groups 🔹
Type to f	filter (F3) │ Code 🛛 🔫 🔶 🗸
Code	Description 🔺
^	·
BKSNK	Back Snack Orders
CLUSTER	Other FB Cluster Orders
CSFP	CSFP Orders
PS	HARV Project Strength
TEFAP	TEFAP Orders
WEB	Web Orders

3. To create a new Order Handling Group, select Home \rightarrow 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

Edit - Agency Card - B0459 · Safe Home, Inc.		
HOME ACTIONS NAVIGATE REPORT		0
Image: Agency	KClear Filter ► Nex → Go to	
B0459 · Safe Home, Inc.		
General B0459 Safe Home, Inc. Rachael Beebe 💌 📤	Agency Sales Histor	* *
Communication v	Agency No.:	B0459
Invoicing GENERAL V	Orders:	0
Payments 🛛 🕹 💌 🖻	Invoices: Return Orders:	0 0 ≡
Shipping 🔹	Credit Memos:	0
Location Code: HOU HOU HOU HOU HOU HOU HOU HOU	Pstd. Shipments:	0
Zone Code:	Pstd. Invoices: Pstd. Return Rec	0
Territory Code:	Pstd. Credit Me	0
Delivery Zone Code:	Anna - Chatiatian D	8
Delivery Info.: Please use the wareh Shipping Time:	Agency Statistics - B	~
	Agency No.: Balance (\$):	B0459 0.00
	Sales	0.00
Combine Shipments: Order Handling Group Code: WEB Roadnet Location Type: PRG Vorder Routing Group Code:	Outstanding Or	0.00
Preferred Delivery Time:	Shipped Not Inv	0.00
	Outstanding Inv Total (\$):	0.00 0.00
Preferred Pickup Time:		0.00
Kitting ^	Overdue Amoun	0.00
	Total Distrubute	0.00
	The Distributed	
		OK

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

Lit - Agency Order - AO-00486 -	Safehome, Inc.							x
HOME ACTIONS NA	AVIGATE REPORT							?
🎽 🖉 📑 Post	🗈 🕃 🥖 📗 Picking	List by Order	St OneNote	🔁 Refresh	Previous			
Post and Print	🔓 💣 🖃 🛛 🖶 Order O	Confirmation	- Notes	🌄 Clear Filte	r 🕨 Next			
View 🗙 🖣 Previous	🛱 🎽 🗋		Links	→ Go to				
Manage Process	R	eport	Show Attached	Pa	ige			
AO-00486 · Safehome,	Inc.							
General		AO-00486	B0129 8/14/2	2014 0	pen 🗸 🔺	Agency Sales History	^	*
Shipping					* ^			
Shipping					*	Agency No.: Orders:	B0129 3	
Ship-to Code:	-	Shipment M	ethod Code:	PICKUP	-	Invoices:	0	
Ship-to Name:	Safehome, Inc.	Shipping Ag	ent Code:		•	Return Orders:	1	
Ship-to Address:	Do Not Disclose	Shipping Ag	ent Service Co		-	Credit Memos:	0	E
Ship-to City:		Shipping Tin	ne:			Pstd. Shipments: Pstd. Invoices:	64 62	-
Ship-to State:	KS	Package Tra	cking No.:			Pstd. Invoices: Pstd. Return Rece	2	
Ship-to ZIP Code:		Shipment Da	-	8/14/2014		Pstd. Credit Mem	5	
· · ·	• •							
Ship-to Contact:	Necole Foreman	Shipping Ad		Portial	_	Agency Line Details	^	
Ship-to UPS Zone:	C	Order Handl	ing Group Code:	WEB		Item No.:		
Late Order Shipping:	No	Order Routin	ig Group Code:		-	Substitutions:	0	
Order Email Sent:		Default Stagi	ing Area:		•	Agency Fees:	0	
Location Code:	-	Route :				Agency Line Disc	0	
Zone Code :	-	Stop :				Notes	^	
Outbound Whse. Handling T						Click here to create a new r	note.	
					*			-
						ſ	OK	
						L	UK	

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	?
Clear	
Filter	
Page	
Options	
Warehouse Request	
Show results:	
🗙 Where Location Code 🔻 is KAN	
X And Shipment Date vis 08/13/14	
X And Order Handling Group Code 🔹 is WEB	>
🗙 And Source No. 🔻 is 🗸 🗸	
+ Add Filter	
< III	
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