
Order Staging

Owner of this document is: Scott Wiacek – swiacek@feedingamerica.org

Purpose of this document

This document will illustrate how to use the Agency Order/ Pick staging functionality in Ceres.

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Purpose

Once an Agency order has been picked, food banks need to keep track of the number of pallets and where the product is staged, by agency by order. Staging helps to find the Shipping Pallets and ensure that no pallets are missed during truck loading.

The staging functionality in Ceres was enhanced to support multiple workflow models by tracking as much information as possible within Ceres.

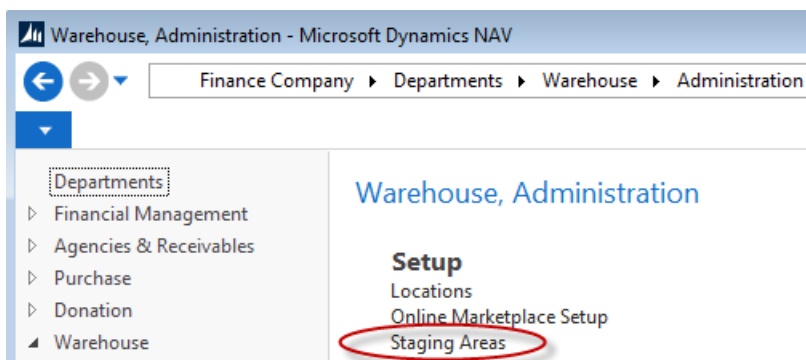
The staging enhancements are based on Inventory Picks (Ship Option 2) and include:

1. Default Staging Area – Standard pre-defined staging areas that can be linked to an Agency, Zones and FBC Storage Requirement. The default staging areas flow when the Inventory Pick is generated based on the “Create Pick By” field on the Location Card
2. Staging Areas – Free form staging areas that can be entered manually on the Inventory Pick. This field will default from the Default Staging Area field but can be overridden.
3. Shipping Pallet Tags – Tag that can be printed and placed on the agency pallets that are staged.
4. Shipment Report – Report that lists the Agency Orders that have been shipped but not invoiced.

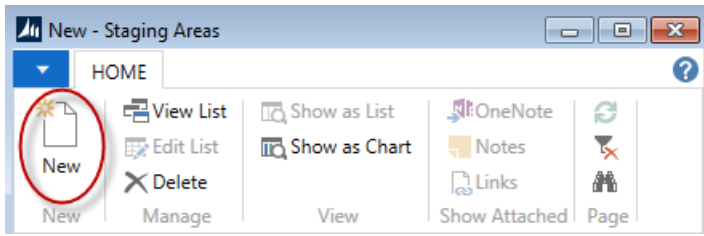
Ceres object release 4.00.00 is required for the functionality documented in this procedure.

Staging Areas Setup

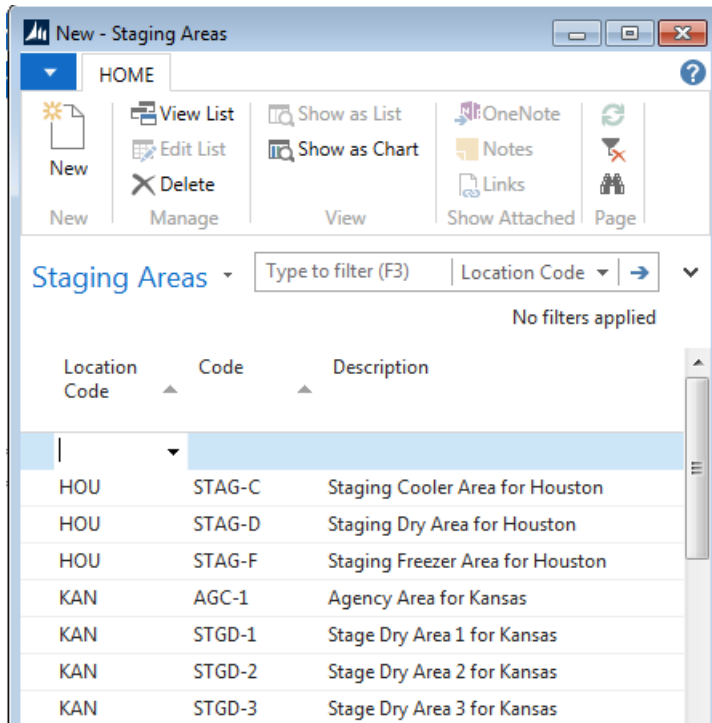
1. The setup of default Staging Areas starts with defining Agency Pallet Staging Areas. Staging Areas can be accessed from Departments → Warehouse → Administration → Setup → Staging Areas.



2. To create a new Staging Area select Home → New.



3. Then update the fields as follows.



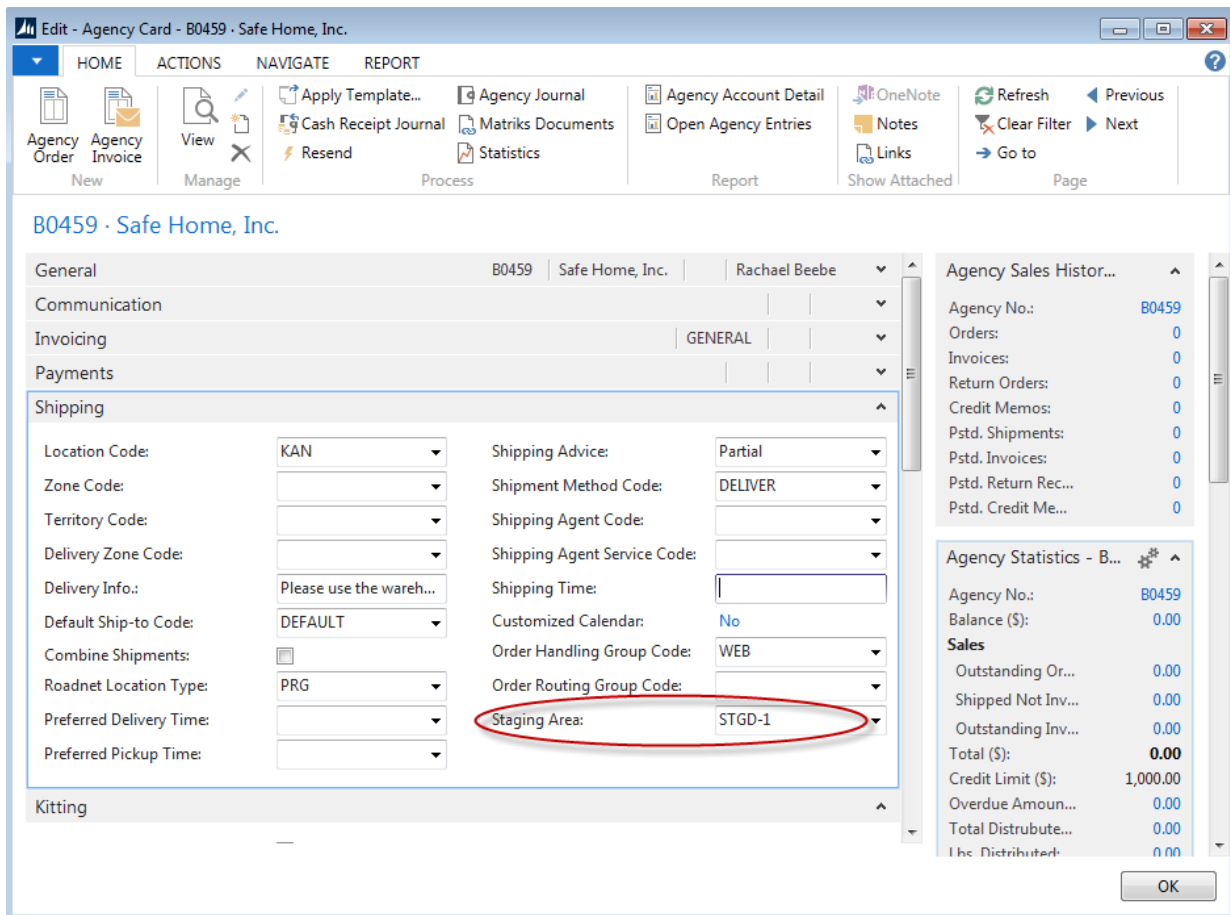
Location Code: Select the Location you are creating a new staging area for.

Code: A unique identifier for the new staging area.

Description: A brief description of the staging area.

Linking and Updating Staging Areas

1. A Staging Area can be linked to an Agency, Zone or FBC Storage Requirement.
2. Link a Staging Area to an Agency from Departments → Agencies & Receivables → Agency Relations → Lists → Agencies.
 - a. Select the Agency and then open the Card.
 - b. Open the Shipping FastTab
 - c. Select or input a value in the Staging Area field



3. Link a Staging Area to a Zone from Departments → Warehouse → Administration → Setup → Locations.
 - a. Select the Location and then open the Card.
 - b. Select Home → Zones.
 - c. Select or input a value in the Staging Area field.

Edit - Zones - KAN - Kansas City Warehouse

HOME NAVIGATE

New View List Edit List Delete Bins Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Zones

Code	Description	Location Code	Bin Type Code	Location Requires Pick	Exclude from Whse. Doc.	Exclude from Voxware	Staging Area
COOLER	Cooler Zone	KAN		Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STGR-1
DRY	Dry Zone	KAN		Yes	<input type="checkbox"/>	<input type="checkbox"/>	STGD-1
FREEZER	Freezer Zone	KAN		Yes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	STGF-1
FREEZER2	Freezer Zone 2	KAN		Yes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	STGF2-1
GR	Grocery Rescue Zone	KAN	SHOP	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
KIT END	Completed Kits	KAN	PICK	Yes	<input type="checkbox"/>	<input type="checkbox"/>	STGD-1
KITTING	Kitting Zone	KAN		Yes	<input type="checkbox"/>	<input type="checkbox"/>	
RECEIVE	Receiving	KAN	RECEIVE	Yes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
SHOP	Shopping Zone	KAN	SHOP	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
STAGE	Staging Zone	KAN	SHIP	Yes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

4. Link a Staging Area to a FBC Storage Requirement from Departments → Administration → Application Setup → Warehouse → Inventory → Food Bank Number Codes → FBC Storage Requirement.
 - a. Select or input a value in the Staging Area field

Edit - FBC Storage Requirements

HOME

New View List Edit List Delete Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

FBC Storage Requirements

Type to filter (F3) Code No filters applied

Code	Description	UNC Storage Requireme...	Invt. Pick Nos.	Invt. Pick Printing Option	New Page on ...	Staging Area	Excl... from Vox...	Sorting Sequence No.
DRY	Dry	DRY	I-PICKD	Both (Pick a...	<input type="checkbox"/>	STGD-1	<input type="checkbox"/>	0
FROZEN	Frozen	FROZEN	I-PICKZF	Pick Docum...	<input checked="" type="checkbox"/>	STGF-1	<input checked="" type="checkbox"/>	0
REF	Cooler	REF	I-PICKR	Wave Pick D...	<input checked="" type="checkbox"/>	STGR-1	<input checked="" type="checkbox"/>	0
XSALVAGE	Salvage, unsorted	DRY		Both (Pick a...	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0

- The Staging Area linked to an Agency, Zone or FBC Storage Requirement flows to the Default Staging Area field on the Inventory based on the “Create Pick by” field on the Location Card when the picks are generated. The “Create Pick by” options are:

Blank: The Staging Area field will flow from the Agency to the Agency Order and from the Agency Order to the Default Staging Area field on the Inventory Pick.

Zone: The Staging Area field will flow from Zone to the Default Staging Area field on the Inventory Pick.

FBC Storage Requirement: The Staging Area field will flow from the FBC Storage Requirement to the Default Staging Area field on the Inventory Pick.

KAN · Kansas City Warehouse

General		KAN	
Communication			
Warehouse			
Require Receive:	<input type="checkbox"/>	Ceres	
Require Shipment:	<input type="checkbox"/>	Directed Picking Option:	Base
Require Put-away:	<input type="checkbox"/>	Abandoned Pick Handling Method:	
Use Put-away Worksheet:	<input type="checkbox"/>	WAP Template:	KAN
Require Pick:	<input checked="" type="checkbox"/>	Existing WAP Deletion Method:	Keep all Existing WAP...
Enable Invt. Pick Shorts/Cuts:	<input type="checkbox"/>	Palletized Items Only (WAP):	<input type="checkbox"/>
Bin Mandatory:	<input checked="" type="checkbox"/>	Create Pick by:	FBC Storage Require...
Directed Put-away and Pick:	<input type="checkbox"/>	Pick Creation Sort Order:	
Use ADCS:	<input type="checkbox"/>	Require Inv. Pick on Transfers:	<input type="checkbox"/>
Default Bin Selection:	Last-Used Bin	Movement Xfer. Template Name:	TRANSFER
Outbound Whse. Handling Time:		Movement Xfer. Batch Name:	KAN
Inbound Whse. Handling Time:		ADCS Phys. Inv. Jnl. Template:	PHYS. INVE
Base Calendar Code:		ADCS Phys. Inv. Jnl. Batch:	KAN
Customized Calendar:	No	Shorts Cuts Template Name:	
Use Cross-Docking:	<input type="checkbox"/>	Shorts Cuts Batch Name:	
Cross-Dock Due Date Calc.:		Sug. Full Pallet from Put Away:	<input type="checkbox"/>
		Drop Full Pallet to Pick:	<input type="checkbox"/>
		Exclude from Voxware:	<input type="checkbox"/>

- It’s assumed that the value that flows to the Default Staging Area field on the Inventory Pick is a standard pre-defined staging area where the product is staged until it is loaded on the truck or is picked up by the Agency. Thus the Default Staging Area field is un-editable on the Inventory Pick.

Inv. Pick · IPD-02508

General			
No.:	IPD-02508	Posting Date:	8/13/2014
Location Code:	KAN	Shipment Date:	8/13/2014
Source Document:	Agency Order	External Document No.:	
Source No.:	AO-00482	External Document No.2:	
Agency No.:	C1423	Assigned User ID:	
Agency Name:	Mirror Inc.	Picked By:	
Shopper:	SH-07001	Shipment Method Code:	PICKUP
Shopper Name:	Richard Gilchrist	Appointment Time:	
Shopper Email:	rgilchrist@mirrorinc.org	Pallet Count:	0
Order Handling Group Code:	KDC WEB	Start Date:	
Order Routing Group Code:	KDC WEB	Start Time:	
No. of VOX Errors:		End Date:	
Default Staging Area:	STGD-1	End Time:	
Staging Areas:	STGD-1		

7. The Staging Areas field on the Inventory Pick defaults based on the Default Staging Area field but can be overridden. The Staging Areas field is free form filed where generic text can be inputted to indicate where the product is staged, such as: back east wall; center west wall

Inv. Pick · IPD-02508

General			
No.:	IPD-02508	Posting Date:	8/13/2014
Location Code:	KAN	Shipment Date:	8/13/2014
Source Document:	Agency Order	External Document No.:	
Source No.:	AO-00482	External Document No.2:	
Agency No.:	C1423	Assigned User ID:	
Agency Name:	Mirror Inc.	Picked By:	
Shopper:	SH-07001	Shipment Method Code:	PICKUP
Shopper Name:	Richard Gilchrist	Appointment Time:	
Shopper Email:	rgilchrist@mirrorinc.org	Pallet Count:	0
Order Handling Group Code:	KDC WEB	Start Date:	
Order Routing Group Code:	KDC WEB	Start Time:	
No. of VOX Errors:		End Date:	
Default Staging Area:	STGD-1	End Time:	
Staging Areas:	back east wall, center aisle		

8. When the Inventory Pick is posted, the Default Staging Area and Staging Areas fields flow to the Posted Inventory Pick. This way Shipping Tags can be printed from the Inventory Pick and the Posted Inventory Pick.

Shipping Tag

There are a few options for Shipping Pallet Tag reports available, with slightly different sizes and configurations. They contain most or all of these fields. Your Ceres VAR can assist you in setting up the proper report to print from the Inventory Pick page.

1. A Shipping Tag can be printed and placed on the product or pallet that is being staged to identify who it is for and where is located. The Shipping Tag can be printed from an Inventory Pick (Departments → Warehouse → Good Handling Order by Order → Inventory Picks) or from a Posted Inventory Pick (Departments → Warehouse → Archive → History → Posted Documents → Posted Invt. Pick).
2. The fields that print on the Shipping Tag are as follows

Shpt. No. = Inventory Pick No.

Order No. = Agency Order No. or Source No.

Parent Agency No. = Parent No. associated with the Agency on the Inventory Pick. This field does not display on the Inventory Pick Header

Agency No. and Name = Agency No and Name on the Inventory Pick Header

Text below the Agency No and Name = Shipment Method Code Description. Deliver in the example below.

Date = Shipment Date

Default Staging Area = Does not print since the Staging Areas field defaults based on this field.

Staging Areas = Prints based on whatever value is in this field.

Picked By = User Id.

Pallet Count = Must be filled in before the Shipping Tag will print. Multiple Shipping Tags will print based on the value in the Pallet Count field. On each tag the number of pallets will dynamically print as Pallet 1 of XX. For example, if a pallet count of 2 is entered then 2 Shipping Tags will print. The first tag will print Pallet 1 of 2, and the second tag will print Pallet 2 of 2.

Order No. AO-00482

C1423 - Mirror Inc.

PICKUP / KDC WEB / KDC WEB / 08-13-14

back east wall, center aisle / Picked by: KJK

Pallet 1 of 1

- If a pick document was posted with a Pallet Count of 0, the Pallet Count on the posted pick document must be updated first before a Shipping Tag can be printed. Posted pick documents can be accessed from Departments → Warehouse → History → Posted Documents → Posted Invt. Pick.

The screenshot shows a web application interface for viewing a posted inventory pick document. The title bar reads "View - Posted Invt. Pick - PCK+-00203". Below the title bar is a navigation menu with tabs for "HOME", "ACTIONS", "NAVIGATE", and "REPORT". The main area contains a grid of icons for "View", "Navigate", "Shipping Tag (11 x 8.5)", "Shipping Tag (6 x 4)", "OneNote", "Notes", "Links", "Refresh", "Clear Filter", and "Page". Below this is a section titled "PCK+-00203" with a "General" tab. The "General" tab contains a form with the following fields:

No.:	PCK+-00203	External Document No.:	
Location Code:	CA	External Document No.2:	
Source No.:	AO-00410-1S	Assigned User ID:	
Agency No.:	C1422	Picked By:	
Agency Name:	Mirror Inc	Shipment Method Code:	
Order Handling Group Code:	WEB	Appointment Time:	
Order Routing Group Code:	HARV WEB	Pallet Count:	0
Default Staging Area:	STGD-1	Start Date:	
Staging Areas:	STGD-1	Start Time:	
Posting Date:	7/11/2014	End Date:	
Shipment Date:	7/11/2014	End Time:	

- To update the Pallet Count on the Posted Inventory Pick. Find the Posted Inventory Pick you want to update from the List. From the Posted Invt. Pick Card select Actions → Update Pallet Count. In the New Pallet Count field input the number of pallets. Click the OK button to update the Posted Inventory Pick.

The screenshot shows a dialog box titled "Edit - Updt. Posted Pick Pal...". It has a "ACTIONS" tab and a "Clear Filter" button. Below the actions is an "Options" section with the following fields:

No.:	PCK+-00203
New Pallet Count:	2

At the bottom of the dialog are "OK" and "Cancel" buttons.

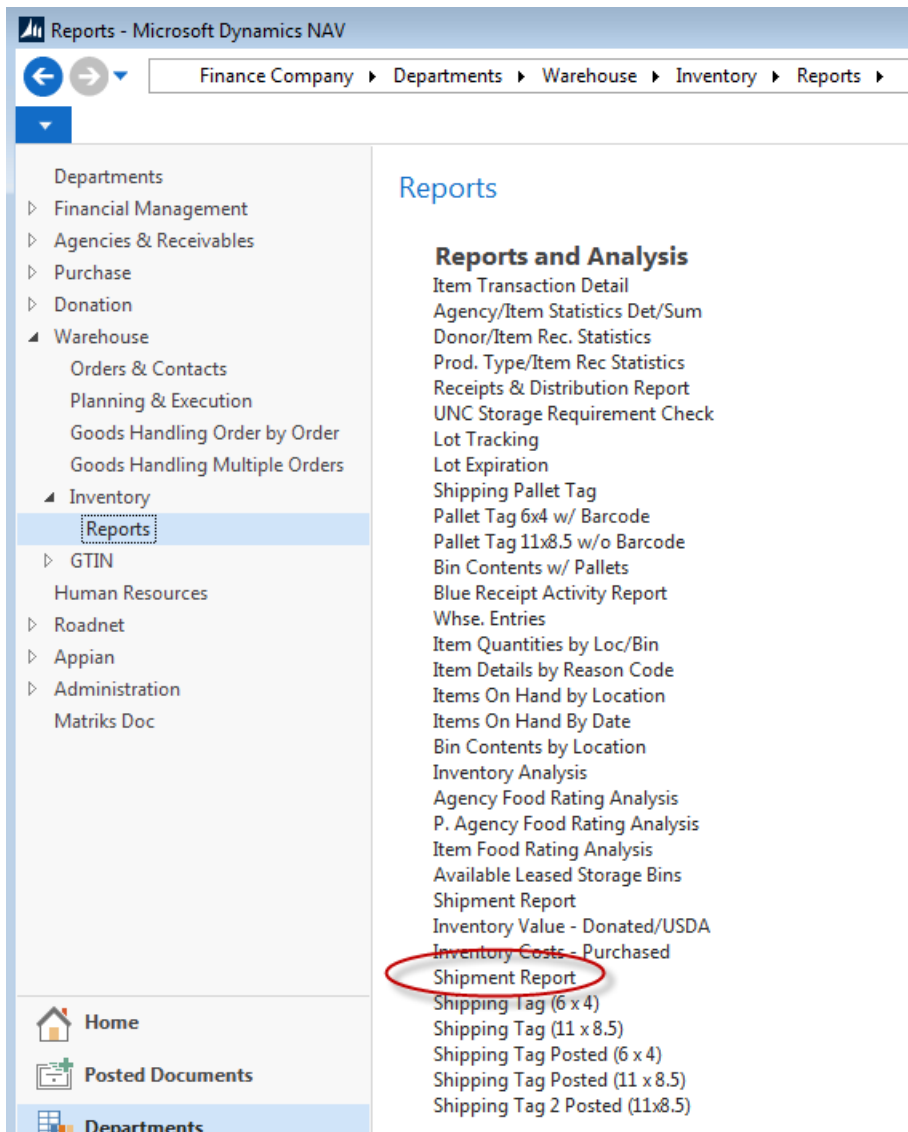
- Once the Pallet Count field has been updated on the Posted Inventory Pick, the Shipping Tag can be printed.

The screenshot shows a software window titled "View - Posted Inv. Pick - PCK+-00203". The window has a navigation bar with "HOME", "ACTIONS", "NAVIGATE", and "REPORT" tabs. Below the navigation bar is a "Functions" section with an "Update Pallet Count" button. The main content area displays the details for "PCK+-00203" under a "General" tab. The "Pallet Count" field is circled in red and contains the value "2".

General		Notes	
No.:	PCK+-00203	External Document No.:	
Location Code:	CA	External Document No.2:	
Source No.:	AO-00410-1S	Assigned User ID:	
Agency No.:	C1422	Picked By:	
Agency Name:	Mirror Inc	Shipment Method Code:	
Order Handling Group Code:	WEB	Appointment Time:	
Order Routing Group Code:	HARV WEB	Pallet Count:	2
Default Staging Area:	STGD-1	Start Date:	
Staging Areas:	STGD-1	Start Time:	
Posting Date:	7/11/2014	End Date:	
Shipment Date:	7/11/2014	End Time:	

Shipment Report

- A Shipment Report was created that is based on the Sales Shipment Header and includes Agency Orders that have been shipped (Pick Posted) but not yet invoiced. These orders are considered staged. The Shipment Report can be accessed from Departments → Warehouse → Inventory → Reports → Shipment Report.



2. The Shipment Report Page will display where users can set filter criteria based on how they want to run the report, such as Shipment Date, Shipment Method, Batch Name, Order Handling Group Codes, etc.

Edit - Shipment Report

ACTIONS

Clear Filter

Page

Agency Document Header

Show results:

Where Sell-to Agency No. is Enter a value.

+ Add Filter

Limit totals to:

+ Add Filter

Agency Shipment Header

Show results:

Where Shipment Date is Enter a value.

And Shipment Method Code is Enter a value.

And Batch Name is Enter a value.

+ Add Filter

Print... Preview Cancel

Printing or Previewing the Report

The report can be printed or previewed by clicking on the Print or Preview button.

Shipment Report

Finance Company

8/14/2014 12:54 PM

Page 1
KKK

Order No.	Batch Name	Sell-to Agency No.	Agency Name					
	Ship Date	Shipmt No.	Location	Staging Areas	Gross Weight	# of Pallets	Route	Stop
AO-00482	C1423		Mirror Inc. of Topeka					
	8/13/2014	AO-00482-15		back east wall, center aisle	400.00	1	0	0
	Pickup Time:				Totals: 400.00lbs	1Pallet(s)		

Related Topics:

1. [Agency Overview](#)
2. [Agency Order Overview](#)
3. [Agency Express Managing Web Orders](#)
4. [Inventory Picks](#)
5. [Zone Overview](#)