



Order Staging

Purpose of this document

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

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

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Overview

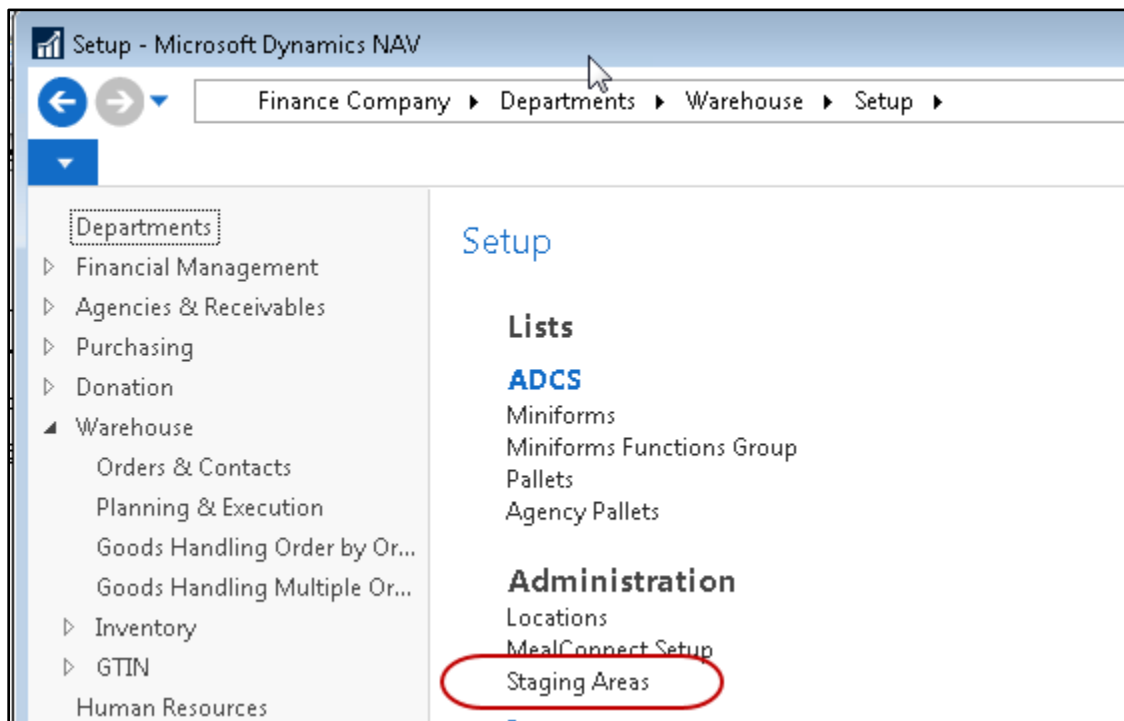
The staging functionality in Ceres was enhanced to support multiple workflow models by tracking as much information as possible within Ceres.

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

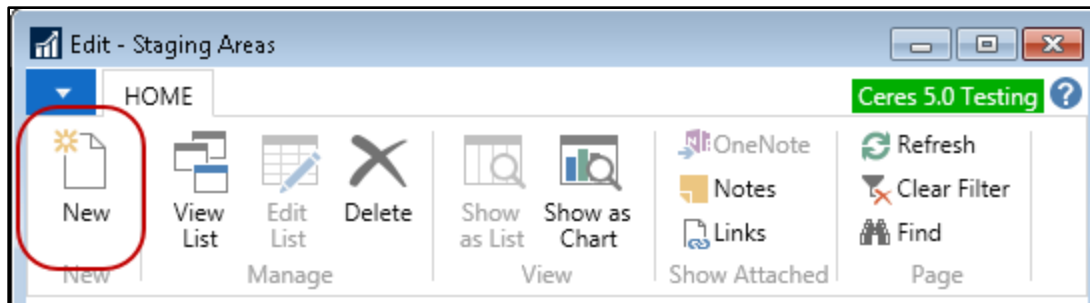
1. Default Staging Area – Standard pre-defined staging areas that can be linked to an Agency, Zones and FBC Storage Requirement. The default staging areas flow when the Inventory Pick is generated based on the “Create Pick By” field on the Location Card
2. Staging Areas – Free form staging areas that 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.

Staging Areas Setup

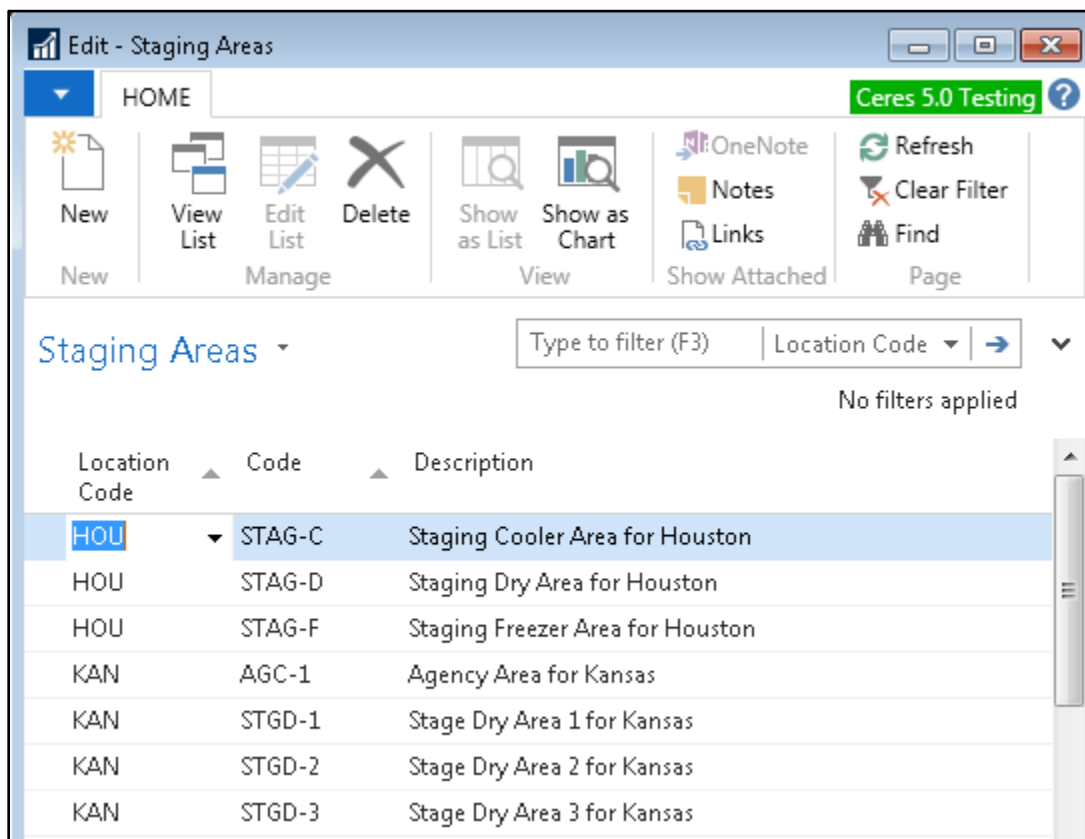
1. The setup of default Staging Areas starts with defining Agency Pallet Staging Areas. Staging Areas can be accessed from Departments → Warehouse → Setup → Staging Areas.



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

Edit - Agency Card - B0129 · Safehome, Inc.

HOME ACTIONS NAVIGATE REPORT

View Edit New Delete Manage Process Resend Agency Account Detail Open Agency Entries Report Agency Order Agency Return Order Agency Invoice Agency Credit Memo New Document Ship-to Addresses Contact D

B0129 · 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 s...

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

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 Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Zones

Locat... Code	Code	Description	Bin Class Code	B... T...	Zone Ranking	Max. Pallets	Exclude from Whse. Doc.	Lo... Re...	Inv... Nos.	Inv... Pick Printing...	New Pag...	Staging Area	Exclude from Inventory	Not Avail...
KAN	COOLER	Cooler Zone	CLR		0	1	<input type="checkbox"/>	Yes	I-PICKR	Both (Pick a...	<input checked="" type="checkbox"/>	STGR-1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
KAN	DRY	Dry Zone	DRY		0	1	<input type="checkbox"/>	Yes	I-PICKD	Both (Pick a...	<input checked="" type="checkbox"/>	STGD-1	<input type="checkbox"/>	<input type="checkbox"/>
KAN	FREEZER	Freezer Zone	FRZ		0	1	<input type="checkbox"/>	Yes	I-PICKZF	Both (Pick a...	<input checked="" type="checkbox"/>	STGF-1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
KAN	FREEZER2	Freezer Zone 2	FRZ		0	1	<input type="checkbox"/>	Yes		Both (Pick a...	<input checked="" type="checkbox"/>	STGF2-1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
KAN	GR	Grocery Rescue Zone	ALL	S...	0	1	<input checked="" type="checkbox"/>	Yes		Both (Pick a...	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
KAN	KIT END	Completed Kits	ALL	PL...	0	1	<input type="checkbox"/>	Yes		Both (Pick a...	<input checked="" type="checkbox"/>	STGD-1	<input type="checkbox"/>	<input type="checkbox"/>
KAN	KITTING	Kitting Zone	ALL		0	1	<input type="checkbox"/>	Yes		Both (Pick a...	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
KAN	RECEIVE	Receiving	ALL	RE...	0	1	<input type="checkbox"/>	Yes		Both (Pick a...	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
KAN	SHOP	Shopping Zone	ALL	S...	0	1	<input type="checkbox"/>	Yes		Both (Pick a...	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
KAN	STAGE	Staging Zone	ALL	S...	0	1	<input type="checkbox"/>	Yes		Both (Pick a...	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input 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...	Inv... Pick Nos.	Inv... Pick Printing...	New Pag...	Excl... fro...	Sorting Sequenc...	Staging Area
DRY	Dry	DRY	I-PICKD	Both (Pick a...	<input type="checkbox"/>	<input type="checkbox"/>	0	STGD-1
FROZEN	Frozen	FROZEN	I-PICKZF	Pick Docum...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	STGF-1
REF	Cooler	REF	I-PICKR	Wave Pick D...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	STGR-1
XSALVAGE	Salvage, unsorted	DRY		Both (Pick a...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	

5. 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.

The screenshot shows the 'Edit - Location Card - MAIN - MAIN WHSE' window. The 'Warehouse' tab is selected, displaying various settings. A red circle highlights the 'Create Pick by:' dropdown menu, which is set to 'FBC Storage Requirement'.

Field	Value
Require Receive:	<input type="checkbox"/>
Require Shipment:	<input type="checkbox"/>
Require Put-away:	<input type="checkbox"/>
Use Put-away Worksheet:	<input type="checkbox"/>
Require Pick:	<input checked="" type="checkbox"/>
Inv. Short Handling Method:	Clear to Item Journal
Bin Mandatory:	<input checked="" type="checkbox"/>
Directed Put-away and Pick:	<input type="checkbox"/>
Use ADCS:	<input type="checkbox"/>
Enable Agency Pallet Tracking:	<input type="checkbox"/>
Default Bin Selection:	Last-Used Bin
Directed Picking Option:	Base
WAP Template:	KAN
Existing WAP Deletion Method:	Delete Existing WAP Lines
Palletized Items Only (WAP):	<input type="checkbox"/>
Create Pick by:	FBC Storage Requirement
Pick Creation Sort Order:	
Pick Line Sort Order:	
Require Inv. Pick on Transfers:	<input type="checkbox"/>
Movement Xfer. Template Name:	TRANSFER

- 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.

The screenshot shows the 'Edit - Inventory Pick - Invt. Pick - IPD-02661' window. The 'General' tab is selected, displaying various fields. A red circle highlights the 'Default Staging Area' field, which is set to 'STGD-1'.

Field	Value
No.:	IPD-02661
Location Code:	KAN
Source Document:	Agency Order
Source No.:	AO-01091
Agency No.:	B0129
Agency Name:	Safehome, Inc.
Shopper:	AGSHOPPER-0000000003
Shopper Name:	Rick Ferreira
Shopper Email:	rickf@esopro.com
Order Handling Group Code:	HARV KSDE
Order Routing Group Code:	CLUSTER
No. of VOX Errors:	
Default Staging Area:	STGD-1
Staging Areas:	STGD-1
Posting Date:	11/15/2018
Shipment Date:	11/15/2018
External Document No.:	
External Document No.2:	
Assigned User ID:	WWH
Picked By:	
Shipment Method Code:	PICKUP
Appointment Time:	
Pallet Count:	2
Start Date:	12/12/2019
Start Time:	5:30:11 PM
End Date:	12/12/2019
End Time:	5:34:46 PM

- 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 aisle

The screenshot shows the 'Edit - Inventory Pick - Invt. Pick - IPD-02661' window. The 'General' tab is selected, displaying the following fields:

No.:	IPD-02661	Posting Date:	11/15/2018
Location Code:	KAN	Shipment Date:	11/15/2018
Source Document:	Agency Order	External Document No.:	
Source No.:	AO-01091	External Document No.2:	
Agency No.:	80129	Assigned User ID:	WWH
Agency Name:	Safehome, Inc.	Picked By:	
Shopper:	AGSHOPPER-0000000003	Shipment Method Code:	PICKUP
Shopper Name:	Rick Ferreira	Appointment Time:	
Shopper Email:	rickf@esopro.com	Pallet Count:	2
Order Handling Group Code:	HARV KSDE	Start Date:	12/12/2019
Order Routing Group Code:	CLUSTER	Start Time:	5:30:11 PM
No. of VOX Errors:		End Date:	12/12/2019
Default Staging Area:	STGD-1	End Time:	5:34:46 PM
Staging Areas:	back east wall; center aisle		

- 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.

- 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).
- 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-01091

B0129 - Safehome, Inc.

PICKUP / 11-15-18

back east wall; center aisle / Picked by:
ESOPRO\KJK

Pallet 1 of 2

3. 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.

View - Posted Invt. Pick - PCK+-00010

HOME ACTIONS NAVIGATE REPORT

View Navigate Shipping Tag (11 x 8.5) Shipping Tag (6 x 4) OneNote Notes Links Refresh

Manage Process Report Show Attached

PCK+-00010

General

No.:	PCK+-00010	External Docum...	
Location Code:	KAN	External Docum...	
Source No.:	AO-00006...	Assigned User ID:	
Agency No.:	F0941	Picked By:	
Agency Name:	Kingsway Mi...	Shipment Meth...	
Order Handling Gro...		Appointment Ti...	
Order Routing Grou...		Pallet Count:	0
Default Staging Area:		Start Date:	
Staging Areas:		Start Time:	
Posting Date:	7/19/2012	End Date:	
Shipment Date:	7/27/2012	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.

Edit - Updt. Posted Pick Pal...

ACTIONS Ceres... ?

Clear Filter Page

Options

No.: PCK+-00010

New Pallet Count: 2

OK Cancel

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

View - Posted Invt. Pick - PCK+-00010

HOME ACTIONS NAVIGATE REPORT

Update Pallet Count Functions

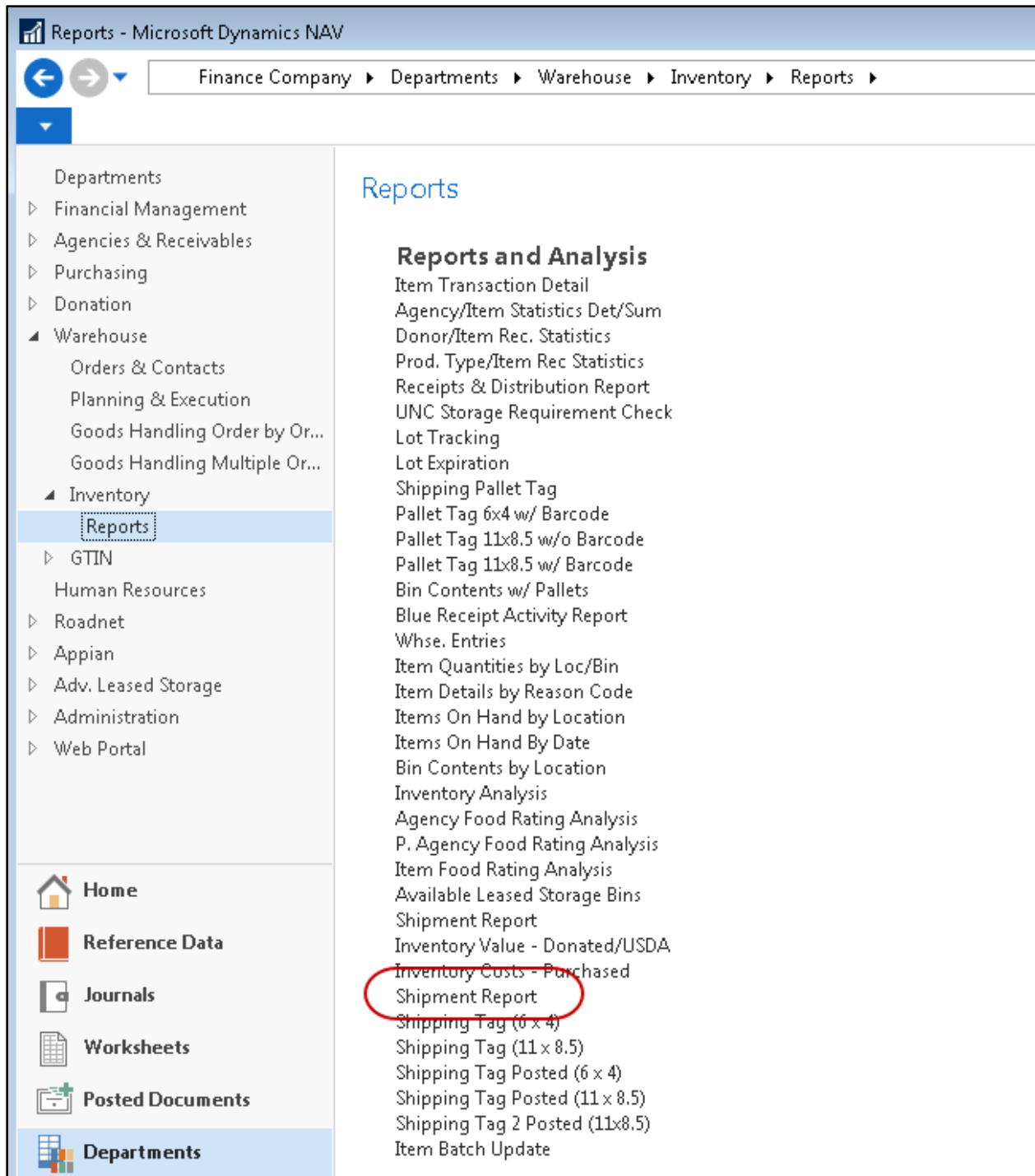
PCK+-00010

General

No.:	PCK+-00010	External Docum...	
Location Code:	KAN	External Docum...	
Source No.:	AO-00006...	Assigned User ID:	
Agency No.:	F0941	Picked By:	
Agency Name:	Kingsway Mi...	Shipment Meth...	
Order Handling Gro...		Appointment Ti...	
Order Routing Grou...		Pallet Count:	2
Default Staging Area:		Start Date:	
Staging Areas:		Start Time:	
Posting Date:	7/19/2012	End Date:	
Shipment Date:	7/27/2012	End Time:	

Shipment Report

1. 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.



- 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.

Shipment Report

Finance Company

2/28/2020 8:33 AM

Page 1

ESOPRO\RXF

Order No.	Batch Name	Sell-to Agency No.	Agency Name						
	Ship Date	Shipmt No.	Location	Staging Areas	Gross Weight	# of Pallets	Route	Stop	
AO-00320	C1422		Mirror Inc						
	9/9/2013	AO-00320-1S		STGD-1	170.00	0	0	0	
	Pickup Time:				Totals: 170.00 lbs	0 Pallet(s)			
AO-00344	B0129		Safehome, Inc.						
	9/20/2013	AO-00344-1S	KAN	STGD-1	36.00	0	0	0	
	9/20/2013	AO-00344-2S	KAN	STGD-1	6,104.00	0	0	0	
	Pickup Time:				Totals: 6,140.00 lbs	0 Pallet(s)			
AO-00377	C1722		The Salvation Army						
	1/10/2014	AO-00377-1S	KAN	STGD-1	117.00	1	0	0	
	Pickup Time:				Totals: 117.00 lbs	1 Pallet(s)			
AO-00381	B0129		Safehome, Inc.						
	1/27/2014	AO-00381-1S	KAN	STGD-1	18.00	0	0	0	
	Pickup Time:				Totals: 18.00 lbs	0 Pallet(s)			

Related Topics

1. Agency Overview
2. Agency Order Overview
3. Agency Express Managing Web Orders
4. Inventory Picks
5. Zone Overview