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.

Table of Contents

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.
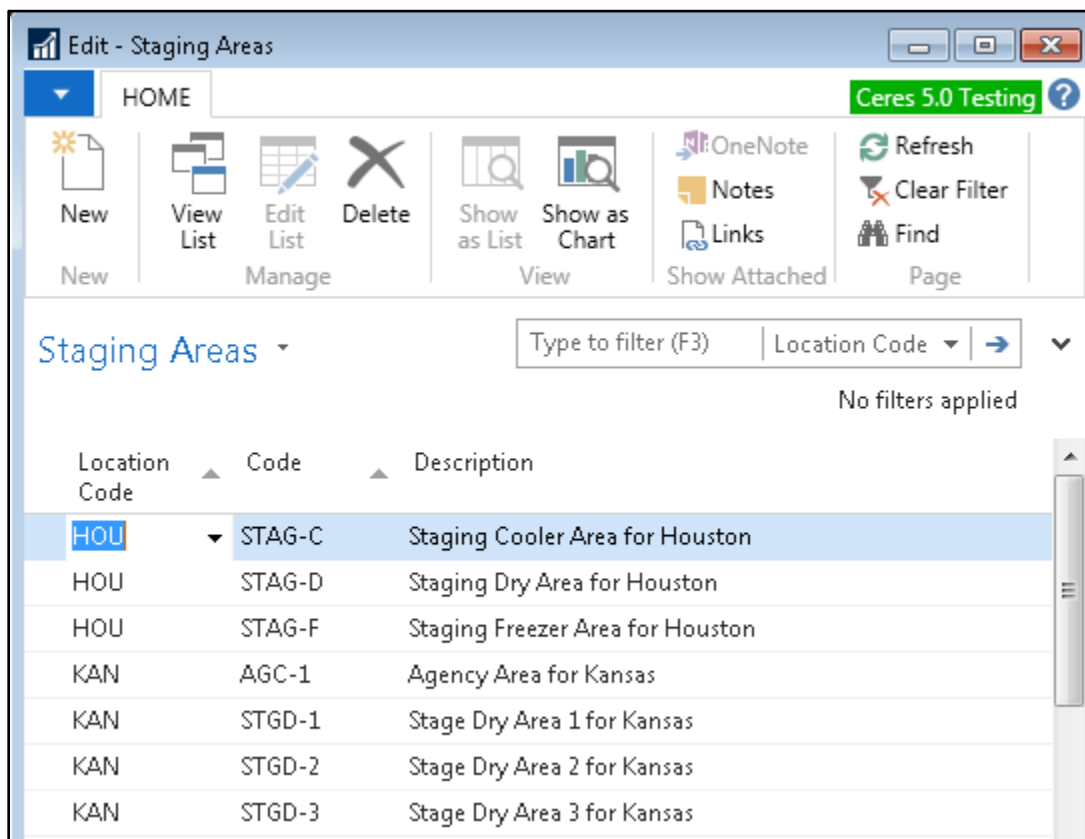
Staging Areas Setup

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.
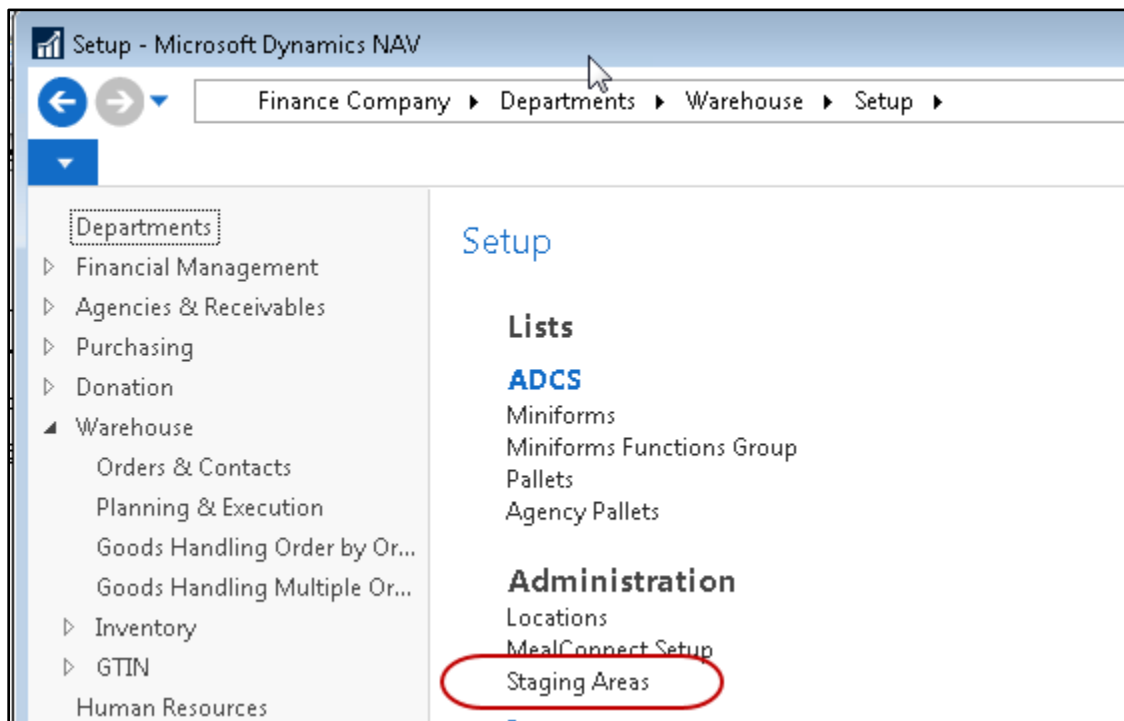
2. To create a new Staging Area select Home → New.
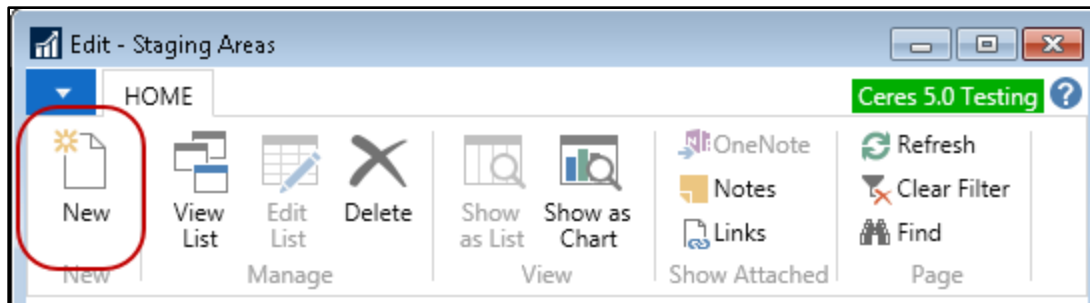
3. Then update the fields as follows.

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

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.

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

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.

6. 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.

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 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-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.

4. 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.

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

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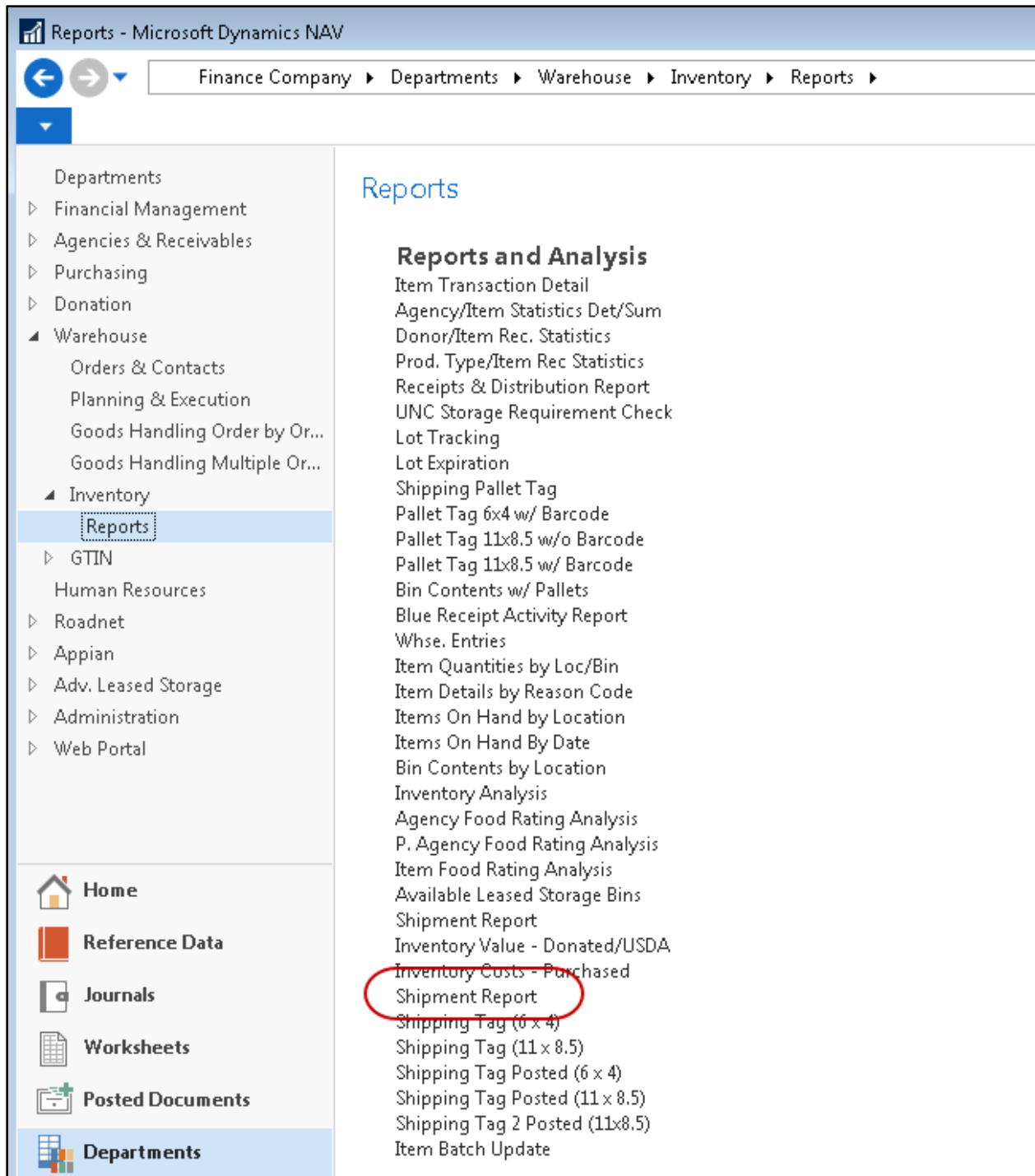
2. The Shipment Report Page will display where users can set filter criteria based on how they want to run the report, such as Shipment Date, Shipment Method, Batch Name, Order Handling Group Codes, etc.

Printing or Previewing the Report

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

Shipment Report
Finance Company

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