

MEMBER BUSINESS
SOLUTIONS



Roadnet Donation Pickup Exports

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Purpose of this document

This document outlines the Donation Pickup portion of the Roadnet Export.

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Table of Contents

PURPOSE.....	3
ENABLING ROADNET INTEGRATION.....	3
Roadnet Donor Pickup Batches	4
Roadnet Location Types	5
Preparing Donors	6
Donor Pickup Specification	7
EXPORTING PICKUPS	9
Creating Donation Orders	11
RELATED TOPICS:.....	13

Purpose

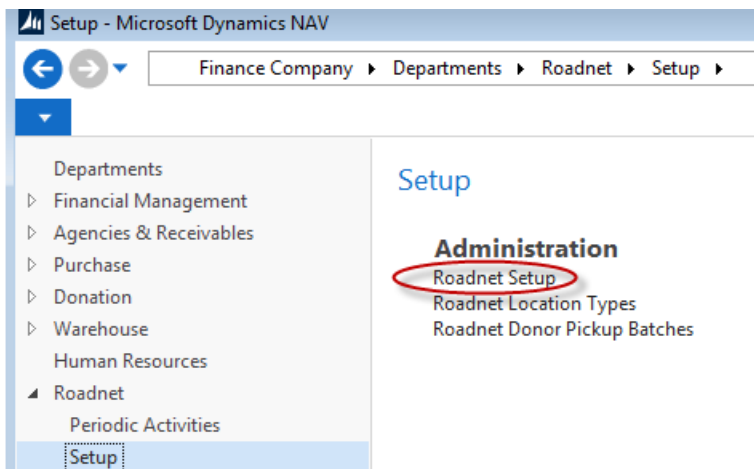
There are two external Routing tools that are used in conjunction with Ceres, Roadnet and Appian. The Roadnet routing system is used by many food banks, and daily transactions can be sent to Roadnet to assist with dynamic routing. Ceres can export donation pickup times, Agency deliveries, and transfers between food bank locations (buildings). This document outlines the Donation Pickup portion of the Roadnet Export.

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

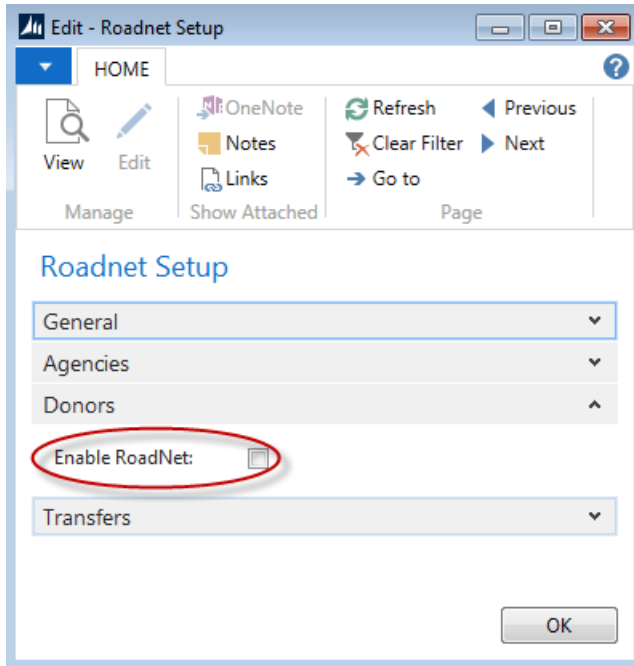
Enabling Roadnet Integration

Food banks may choose if the Roadnet integration is enabled for deliveries, pickups, or both depending on their routing needs. Enabling the functionality for donation pickups allows users the ability to route and schedule donation pickups.

1. The Roadnet Setup can be accessed from Departments → Roadnet → Setup → Administration → Roadnet Setup.

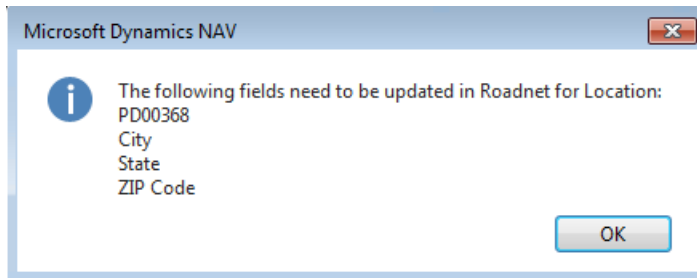


2. Place a checkmark in the Enable Roadnet field on the Donors FastTab.



Note: The General FastTab setup options do not apply to the Roadnet export of Donation Order information. The export process will include the Order Type, Date Added, and Special Instructions and is not configurable.

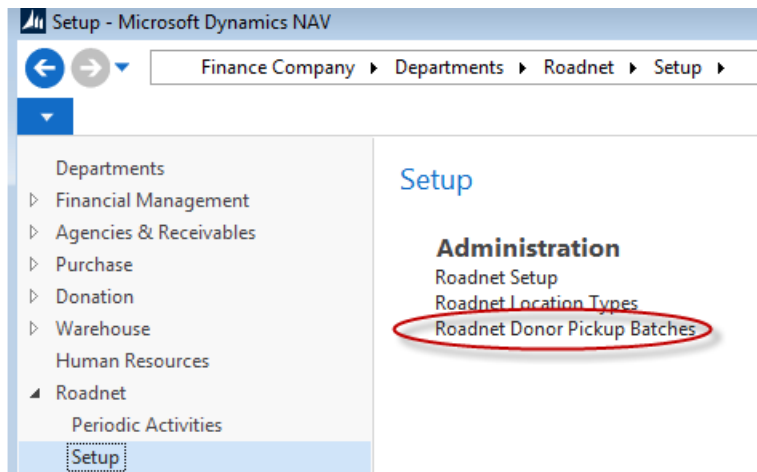
Note: When Roadnet is enabled, any changes to the Donor Card will cause Ceres to show a warning informing you that you need to update the corresponding record in Roadnet. Ceres does NOT export the master Donor record change to Roadnet at this time.



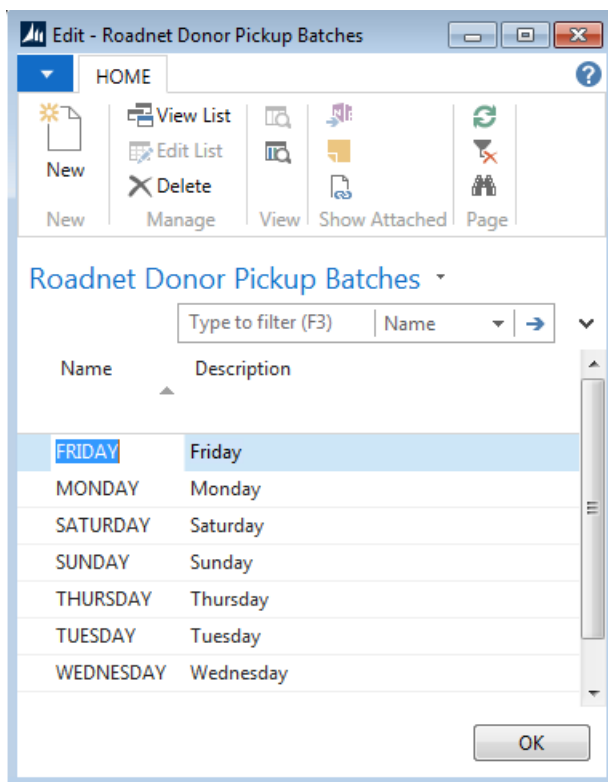
Roadnet Donor Pickup Batches

Donor Pickups are managed in batches *prior* to actually creating Donation Orders. Only one batch is necessary, but creating multiple batches may help to separate orders for exporting.

1. The Roadnet Donor Pickup Batches can be accessed from Departments → Roadnet → Setup → Administration → Roadnet Donor Pickup Batches.



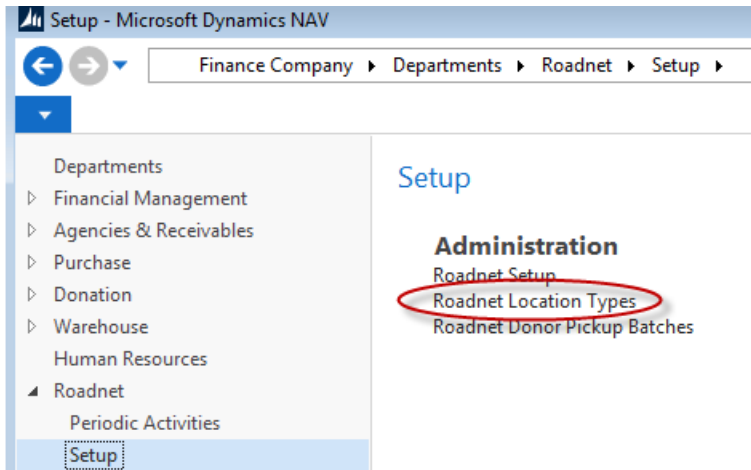
2. Specify a name and description for each batch you wish to create.



Roadnet Location Types

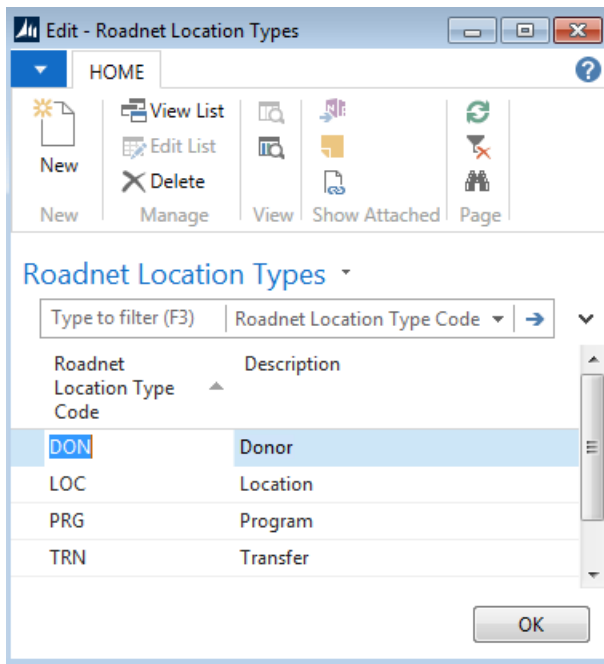
Roadnet Location Types are optional fields that can assist your food bank with filtering Donors. This can help with reporting or other informational purposes. When the actual donation pickup export is generated, the Location Type will show as 'DON' to comply with Roadnet formatting standards.

1. Roadnet Location Types can be accessed from Departments → Roadnet → Setup → Roadnet Location Types.



2. Create as many codes for the Roadnet Location Types that are applicable to your food bank

Note: Roadnet Location Types are also available for Transfer Orders and Agency Orders that are sent to Roadnet for dynamic routing

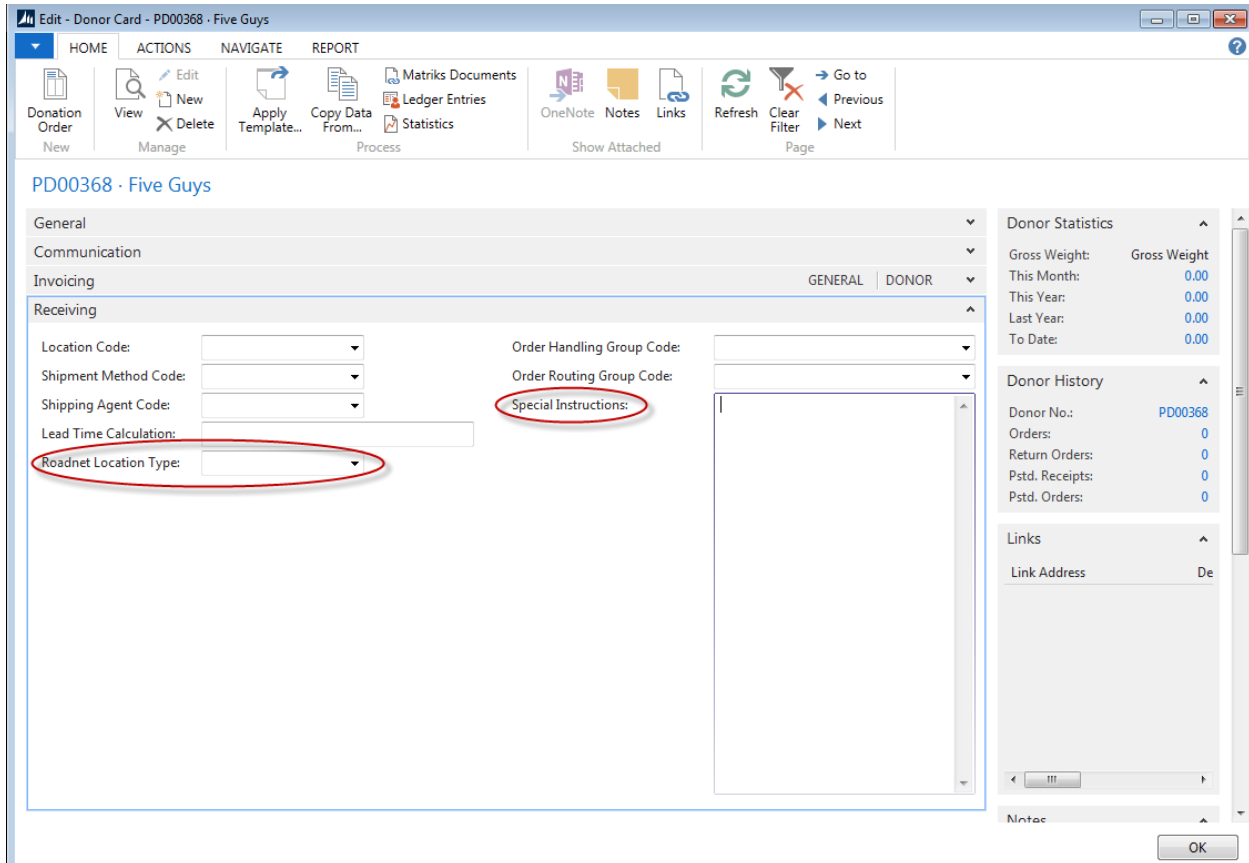


Preparing Donors

To reduce data input, users can setup pickup information and Roadnet Location Types on the donor records, which flows to new orders.

1. The Donor Card can be accessed from Departments → Donation → Planning → Lists → Donors
2. Select and open an Donor that will be routed by Roadnet

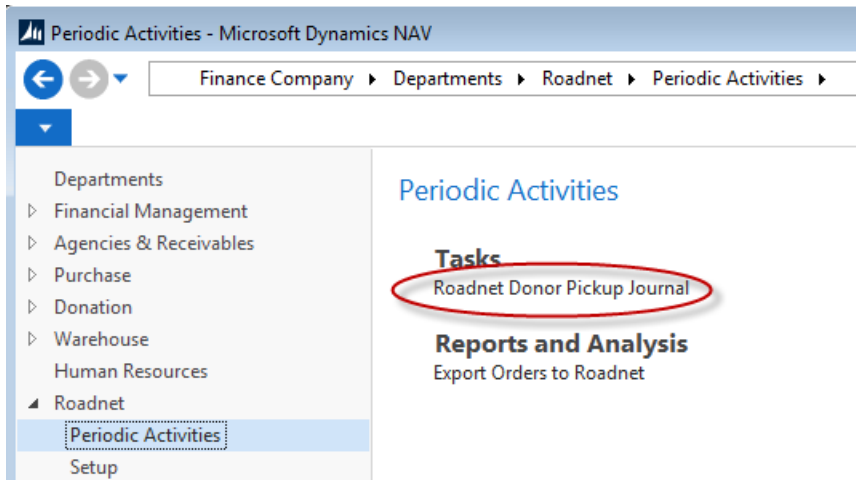
3. Expand the Receiving FastTab
4. Lookup on the Roadnet Location Type field and select a Code.
5. In the Delivery Info. field, enter any special instructions that need to be mentioned



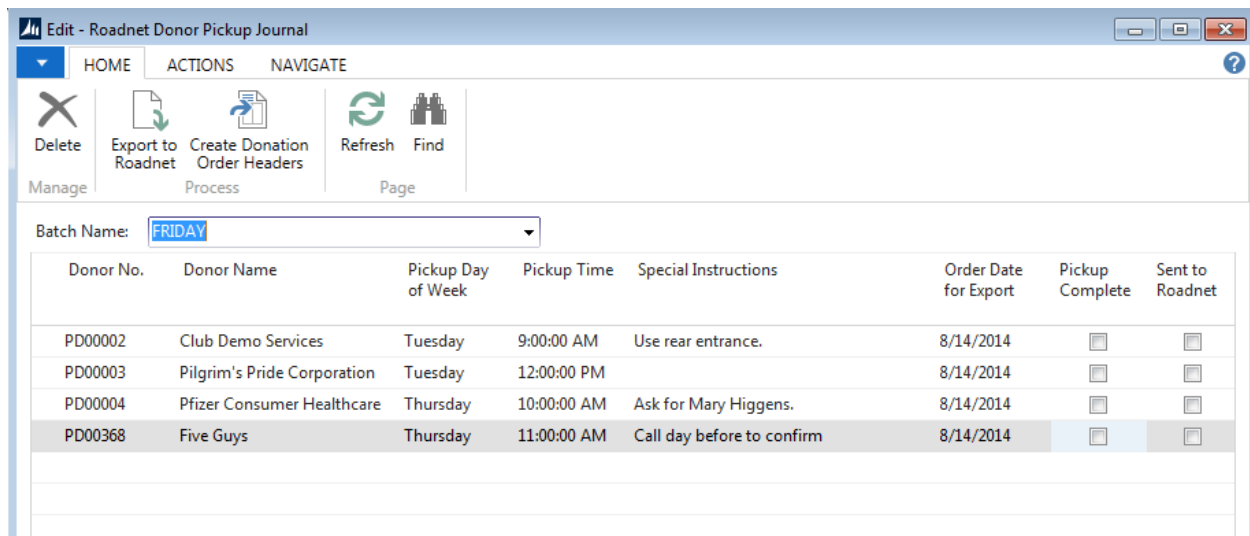
Donor Pickup Specification

Donation pickups that are being routed through Roadnet utilize the Roadnet Donor Pickup Journal as a starting template for dynamic routing. Users are able to schedule expected pickups for each donor by model day and time, and then track status for the actual day once routed. Once the information is sent to Roadnet and the pickup is complete, users are able to generate Donation Order Headers from the journal.

1. The Roadnet Donor Pickup Journal can be accessed from Departments → Roadnet → Periodic Activities → Roadnet Donor Pickup Journal.



2. Click on the Batch Name field. Select the desired batch and click OK
3. Move to the lines of the page. Here you specify the preferred information for the donation pickups.
4. In the Donor No. field, type in the donor number or use the lookup to select the donor from a list. The Donor's Donor Name and Special Instructions will flow forward to the line
5. In the Pickup Day of Week field, set the day of the week the pickup is requested to occur
6. In the Pickup Time field, set the time the pickup is requested to occur
7. In the Special Instructions field, review the instructions that flowed from the Donor Card. You may edit the field if necessary.
8. In the Order Date for Export field, set the date the pickup will occur. The Pickup Day of Week will adjust to match the date specified.
9. Repeat the steps above for each additional planned pickup




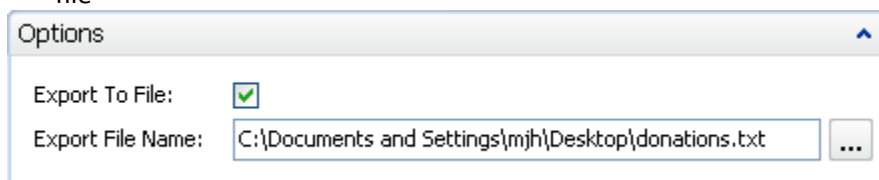
Exporting Pickups

Once donation pickups have been prepared in the journal, users will submit the information to Roadnet for routing. Ceres provides a report where users can review the information, and then export the data to a tab delimited text file for uploading.

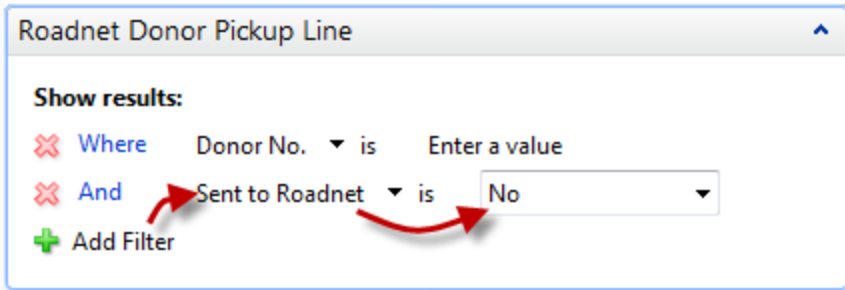
1. From the Roadnet Donor Pickup Journal, click Export to Roadnet
2. Place a checkmark in the Export to File field in order to create an export file, or leave it blank to preview the report first

Note: If Export to File is unchecked, Ceres will not update the value of the Sent to Roadnet field for the journal.

3. In the Export File Name field, use the ellipses button () to set the name and path for the export file



4. In the Roadnet Donor Pickup Line FastTab, set the filters to limit the pickups that are included in the export. To add additional filters, click the Add Filter button, pick the correct field from the dropdown, then enter the filter value



Note: You can only process one batch at a time. To process multiple batches, you must select the batch one by one from the Roadnet Donor Pickup Journal

Note: Regardless of filtering, the report only considers pickup lines where the Pickup Complete field is unchecked.

Note: The Order Date for Export maps to the Session date in the Roadnet software. When you submit an export file to Roadnet that includes multiple dates, a session in Roadnet will be created for each date.

5. Click the Print button or the Preview button

Note: If Export to file is checked and a file exists with the same name as the one specified in the Export File Name field, Ceres will send a warning message. Click Yes to overwrite the file, or click No and change the Export File Name field on the report request form.

Below is an example of the Ceres report:

Export Pickups to Roadnet		11/13/2012 2:03 PM	1/2/000
JITC for Harvesters		Page 1	SWPROS/rjb
Journal Batch Name	FRIDAY		
			Order
Location ID	Order No.	Location Type	Type Special Instructions
PD00002	10000	DON	P Use rear entrance.
PD00003	20000	DON	P
PD00004	30000	DON	P Ask for Mary Higgins.
			Date Added
			11/13/2012
			11/13/2012
			11/13/2012

Below is an example of the exported file

DONOR00002	10000	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	DONP	Use rear entrance	2011-01-10
DONOR00003	20000	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	DONP		2011-01-10
DONOR00015	30000	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	DONP	Ask for Mary Higgins	2011-01-10

Once the export file is created, the corresponding Roadnet Donor Pickup Journal lines will change so that the Sent to Roadnet field will be checked

Creating Donation Orders

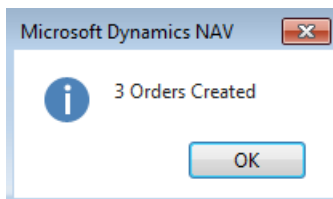
Upon completion of a Roadnet routed pickup, the user will update the Roadnet Donor Pickup Journal by placing a checkmark in the Pickup Complete field. Users will then be able to run a routine that creates the Donation Order Headers for each planned donation that was actually picked up.

Note: If a pickup was not completed, the Pickup Complete field should remain unchecked

1. From the Roadnet Donor Pickup Journal, select the desired batch and review the lines
2. For each line that has been picked up, place a checkmark in the Pickup Complete field

Donor No.	Donor Name	Pickup Day of Week	Pickup Time	Special Instructions	Order Date for Export	Pickup Complete	Sent to Roadnet
PD00002	Club Demo Services	Tuesday	9:00:00 AM	Use rear entrance.	8/14/2014	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PD00003	Pilgrim's Pride Corporation	Tuesday	12:00:00 PM		8/14/2014	<input type="checkbox"/>	<input type="checkbox"/>
PD00004	Pfizer Consumer Healthcare	Thursday	10:00:00 AM	Ask for Mary Higgens.	8/14/2014	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PD00368	Five Guys	Thursday	11:00:00 AM	Call day before to confirm	8/14/2014	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. Click Home → Create Donation Order Headers. A notification will display showing the number of Donation Orders created



The processed lines will reset the Pickup Complete and Sent to Roadnet fields so that users can re-use the Donor Pickup Journal entries for recurring pickups.

Donation Orders - Microsoft Dynamics NAV

Finance Company > Departments > Donation > Order Processing > Donation Orders

Search (Ctrl+F3)

HOME ACTIONS

New Edit View Delete Post... Post and Print... Print... Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Departments

- Financial Management
- Agencies & Receivables
- Purchase
- Donation
 - Planning
 - Order Processing
- Warehouse
- Human Resources
- Roadnet
- Aosian

Donation Orders

Type to filter (F3) No. Filter: 08/14/14 <->

No.	Donor No.	Donor Name	Address	City	State	ZIP Code	Posting Date	Order Date	Shipment Date	Expected Receipt Date	Rec Rec Dat
DO-00162	PD00386	Wal-Mart Supercenter #4475	395 N. K7 Highway	Olathe	KS	66061	8/14/2014	8/14/2014			
PO-00148	PD00002	Club Demo Services	19404 Valley View Parkway	Independence	MO	64055	8/14/2014	8/14/2014			
PO-00149	PD00004	Pfizer Consumer Healthcare	1350 Estes Avenue	Elk Grove Village	IL	60007	8/14/2014	8/14/2014			
PO-00150	PD00368	Five Guys	14965 W. 119th Street	Kansas City	MO	64127	8/14/2014	8/14/2014			

- From the Navigation Pane, go to Departments → Donation → Order Processing → Donation Orders
- Navigate to the newly created order headers and update them with the Items that were picked up, and process as with any other Donation Order. Notice that the Special Instructions flow in to the order.

Edit - Donation Order - PO-00149 · Pfizer Consumer Healthcare

HOME ACTIONS NAVIGATE

Edit View New Delete Post... Post and Print... Copy Document... Create Inventory Put-away / Pick... Release Create Pallets Matriks Documents OneNote Notes Links Refresh Clear Filter Go to Previous Next

Manage Process Show Attached Page

PO-00149 · Pfizer Consumer Healthcare

General

Donation Order Subform

Shipping

Ship-to Name: Kansas City Wareh... Lead Time Calculation: Requested Receipt Date: Promised Receipt Date: Expected Receipt Date: Sell-to Agency No.: Ship-to Code: Order Address Code: Shipment Method Code: Order Handling Group C... Order Routing Group Co... Receipt Email Sent:

Ship-to Address: 3801 Topping Ave... Requested Receipt Date: Promised Receipt Date: Expected Receipt Date: Sell-to Agency No.: Ship-to Code: Order Address Code: Shipment Method Code: Order Handling Group C... Order Routing Group Co... Receipt Email Sent:

Ship-to City: Ship-to State: Ship-to ZIP Code: Ship-to Contact: Ship-to UPS Zone: Special Instructions: Ask for Mary Higgins Location Code: KAN Inbound Whse. Handling Ti...

Donor Statistics

Gross Weight: Gross Weight

This Month: 0.00

This Year: 0.00

Last Year: 0.00

To Date: 31,650.00

Notes

[Click here to create a new note.](#)

- Repeat the above steps to convert the other donor pickups to orders as they become fulfilled.

Related Topics:

1. Donor Overview
2. Donation Order Overview
3. Location Overview
4. Roadnet Agency Order Exports
5. Roadnet Transfer Order Exports
6. Donor Preferred Pickup Days and Times