

Agency Shipment Method Code

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Purpose of this document

This document discusses some advanced options of the Agency Shipment Method Code functionality in Ceres.

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Purpose

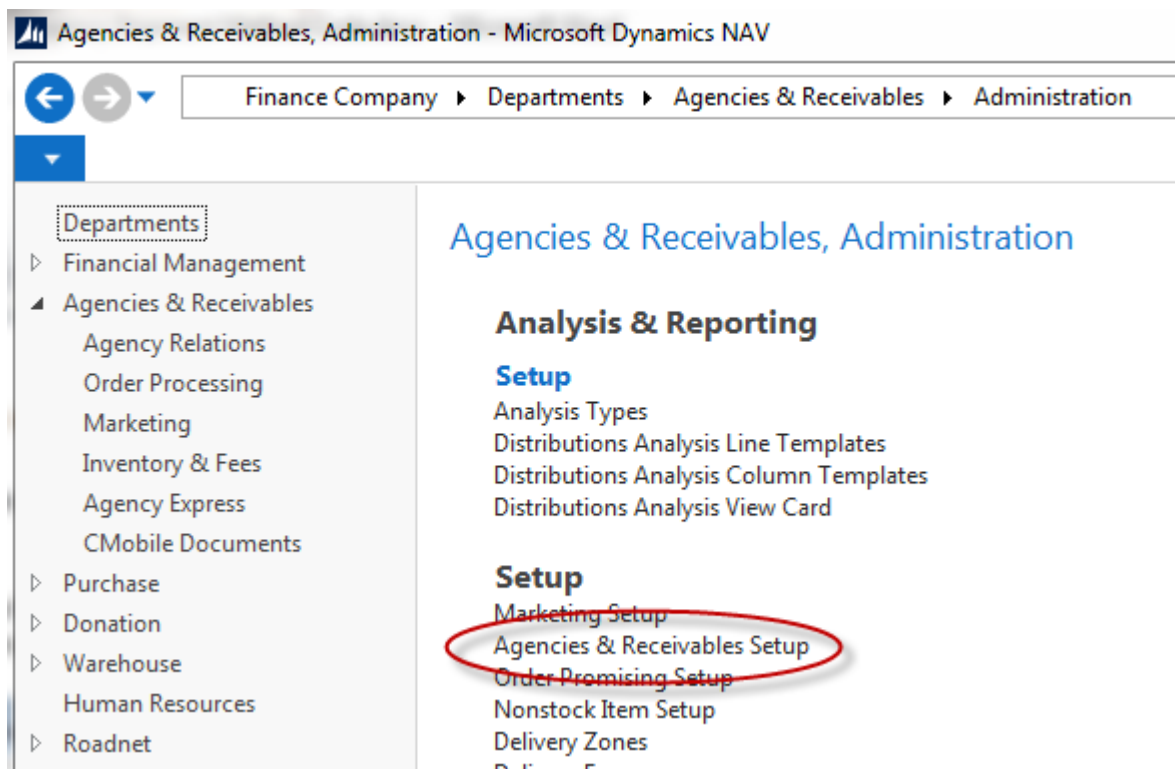
The Shipment Method Code advanced features described here are designed to reduce errors related to handling Agency Orders. Specifically, the Shipment Method Code can be made a required field when setting up an Agency and subsequently creating Agency Orders. Additionally, this update provides the ability to specify via setup how differences in Shipment Methods should be handled for Web orders received from Agency Express as compared to the Shipping Method specified for the related Agency. The core functionality for Shipment Methods are defined in the Agency Overview and the Agency Express Agencies, Shoppers and Items Procedures.

Ceres Object release 4.00.00 is required for the functionality described in this document.

Requiring the use of Shipment Method Codes

Shipment Method Codes identify the manner of shipment for an Agency Order and are user defined within Ceres. Typical Examples are Deliver or Pickup.

1. To require the use of Shipment Method Codes in Ceres navigate Departments → Agencies & Receivables → Administration → Setup → Agencies & Receivables Setup.

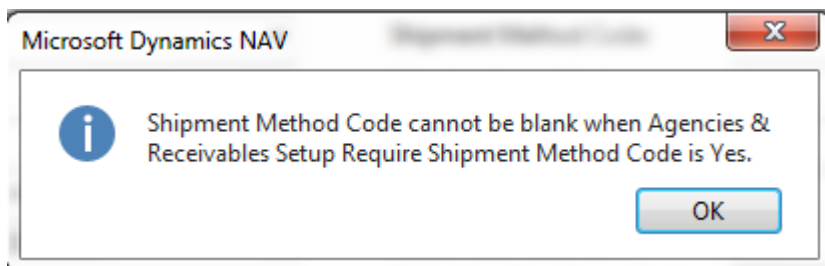


2. The Agencies & Receivables Setup Page will be displayed. Locate the Require Shipment Method Code setup option as shown below and place a checkmark in the box.

Agencies & Receivables Setup

General			
Discount Posting:	No Discounts	Sync Posting Date / Shpt. Date:	<input checked="" type="checkbox"/>
Credit Warnings:	Both Warnings	Delivery Charge Type:	Account (G/L)
Stockout Warning:	<input checked="" type="checkbox"/>	Delivery Charge No.:	485000
Shipment on Invoice:	<input type="checkbox"/>	Delivery Charge Description:	Delivery Fee
Return Receipt on Credit Memo:	<input type="checkbox"/>	Inventory Lookup:	All
Invoice Rounding:	<input type="checkbox"/>	Allocations Exist:	<input checked="" type="checkbox"/>
Ext. Doc. No. Mandatory:	<input type="checkbox"/>	Calculate Agency Fees from:	Lot
Appln. between Currencies:	None	Reason Code Mandatory:	<input checked="" type="checkbox"/>
Logo Position on Documents:	Left	Suppress Printing of Shpt:	<input checked="" type="checkbox"/>
Company Position on Documents:	Center	Use Parent Agency:	<input checked="" type="checkbox"/>
G/L Freight Account No.:		Shopper Mandatory:	<input checked="" type="checkbox"/>
Default Posting Date:	Work Date	Same Fund on Sales Lines:	<input type="checkbox"/>
Default Quantity to Ship:	Remainder	Always Show Available Quantity:	<input checked="" type="checkbox"/>
Copy Comments Blanket to Order:	<input checked="" type="checkbox"/>	Show Requested Qty. Message:	<input type="checkbox"/>
Copy Comments Order to Invoice:	<input checked="" type="checkbox"/>	Clear Back Orders:	<input checked="" type="checkbox"/>
Copy Comments Order to Shpt.:	<input checked="" type="checkbox"/>	Agency Top Off Text Code:	TOPOFF
Copy Cmts Ret.Ord. to Cr. Memo:	<input checked="" type="checkbox"/>	Require Shipment Method Code:	<input checked="" type="checkbox"/>
Copy Cmts Ret.Ord. to Ret.Rcpt:	<input checked="" type="checkbox"/>	Default 501(c)(3) from Parent:	<input checked="" type="checkbox"/>
Allow Tax Difference:	<input type="checkbox"/>	Appointment Consumption Method:	Both Order Types
Calc. Inv. Discount:	<input type="checkbox"/>	Confirm App. Consumption:	Both Order Types
Calc. Inv. Disc. per VAT ID:	<input type="checkbox"/>	Delivery Consump. Lead (Hours):	4
Tax Bus. Posting Gr. (Price):		Pickup Consump. Lead (Hours):	3
Exact Cost Reversing Mandatory:	<input checked="" type="checkbox"/>	Exclude Item from CM:	<input checked="" type="checkbox"/>
Check Prepmnt. when Posting:	<input type="checkbox"/>	Allow Pallet No. Change CM/RTO:	<input checked="" type="checkbox"/>

3. With this option selected users will be required to specify a Shipment Method Code on the Agency Card under two conditions.
 - a. Creating a new Agency when closing the Agency Card.
 - b. Navigating off of an Agency (e.g. closing the Agency Card).
4. If the user fails to specify a Shipment Method for the Agency, Ceres will present an error similar to the one shown below.



5. To correct this, navigate to the Shipping FastTab for the Agency. Locate and specify the applicable Shipment Method Code as shown below.

Shipping			
Location Code:	<input type="text"/>	Shipping Advice:	Partial
Zone Code:	<input type="text"/>	Shipment Method Code:	DELIVER
Territory Code:	<input type="text"/>	Shipping Agent Code:	<input type="text"/>
Delivery Zone Code:	<input type="text"/>	Shipping Agent Service Code:	<input type="text"/>
Delivery Info.:	cell 913-314-0322	Shipping Time:	<input type="text"/>
Default Ship-to Code:	DEFAULT	Customized Calendar:	No
Combine Shipments:	<input type="checkbox"/>	Order Handling Group Code:	HARV WEB
Roadnet Location Type:	<input type="text"/>	Order Routing Group Code:	HARV WEB
Preferred Delivery Time:	<input type="text"/>	Staging Area:	<input type="text"/>
Preferred Pickup Time:	<input type="text"/>		

6. With Ceres configured in the manner we have shown here, the requirement to specify a Shipment Method Code on an Agency will also be enforced on Agency Orders under one condition so that the Agency's Shipment Method can default to the order. Creating a new Agency Order when closing the Agency Order document. If a Shipment Method Code has not been specified for the order's related Agency, Ceres will present an error similar to the one shown below.

AOR-0727

General			
No.:	AOR-0727	Shipment Date:	11/14/2012
Sell-to Agency No.:	A-0004	Assigned User ID:	<input type="text"/>
Parent Agency No.:	<input type="text"/>	Appointment Time:	<input type="text"/>
Sell-to Contact No.:	<input type="text"/>	Shopper:	<input type="text"/>
Sell-to Agency Name:	<input type="text"/>	Shopper Name:	<input type="text"/>
Sell-to Address:	<input type="text"/>	Your Reference:	<input type="text"/>
Sell-to Address 2:	<input type="text"/>	Order Modifications:	<input type="text"/>
Sell-to City:	<input type="text"/>	Order Version:	0
Sell-to State:	<input type="text"/>	Status:	Open
Sell-to ZIP Code:	<input type="text"/>	Fund No.:	<input type="text"/>
Sell-to Contact:	<input type="text"/>	Branch Code:	<input type="text"/>
Sell-to Contact Phone:	<input type="text"/>	Mobile Pantry:	<input type="checkbox"/>
Sell-to Contact Phone Ext.:	<input type="text"/>	Send to Voxware:	<input checked="" type="checkbox"/>
Posting Date:	11/14/2012	Outstanding Picks:	0
Order Date:	11/14/2012	Posted Shipments:	0

7. To correct this, navigate to the Shipping FastTab for the Agency referenced in the error message and specify the applicable Shipment Method Code as shown in the example above. Upon the creation of new Agency Orders for the Agency, Ceres will default the value of the Agency's Shipment Method Code to the order. User can override the Shipment Method Code at the Agency Order header level if desired. However, the Shipment Method Code for the Agency Order Lines is not editable.

Establishing the Web Order Shipment Method Priority

The Web Order Shipment Method Priority functionality facilitates priority handling of the Shipment Method in cases where a Web order is received from Agency Express 3 and the Shipment Method specified for the imported Web Order differs from the Shipment Method specified for the related Agency. This option allows the food bank to define which Shipment Method flows to the Agency Order – the one from the Web Order or the default from the Agency.

Note: The use of this functionality does not require Ceres to be configured for Require Shipment Method Code; it is independent functionality.

1. Navigate to Agencies & Receivables Setup as described above.
2. The Agencies & Receivables Setup Page will be displayed. Locate the Web Shipment Method Priority setup option as shown below and specify the desired option from the available List.

Order – The shipment method from the Web Order (PO file) will be used.

Agency – The shipment method from the Agency will be used.

Web Exception – Ceres will update the web processing queue entry as having an error and create an Agency Comment Line entry for the Web Order. Ex. Shipment Method Code conflict; PO file: DELIVER, Agency: PICKUP.

The screenshot shows the 'Web Ordering' configuration window. The 'Web Shipment Method Priority' dropdown is circled in red and set to 'Order'. Other visible settings include:

- Enable Web Ordering: ☒
- Web File Path: C:\SyncV2009\
- Web Processing Method: Navision Application Server
- ProcessInboxNAS: ☒
- ProcessOutboxNAS: ☒
- Debug: ☐
- Processing Interval (Min.): 5
- Number of Times to Retry: 5
- Temp PO File Handling: Process
- Delete Queue After: 1W
- Auto-Validate Web Order: If No Errors
- Bypass Credit Warnings: ☒
- Auto-Accept Web Orders: ☒
- Enable Synch. Server Notify: ☒
- No. of Cycles without Notify: 1
- Synch. Serv. Email Delay (Min): 0
- Synch. Serv. Email Addr.: williamh@esopro.com
- Synch. Serv. Email Addr. 2:
- Inbound File Nos: WEB-IN
- Outbound File Nos: WEB-OUT
- Web Ordering Batch Name:
- Web Location Filter:
- Web Delivery Shipment Method: DELIVER
- Web Pickup Ship. Method: PICKUP
- E-Statement Root Directory: n:\eDocuments
- Enable Online Statements: ☒
- Enable Online Invoices: ☒
- Enable Online Credit Memos: ☒
- Allow Modify of Web Orders: ☒
- Allow Allocation Orders Online: ☒
- Synchronize Schedules to Web: ☒
- Sync Past Appointments:
- Sync Extended Item Text: ☒
- No Sat. or Sun. in Schedules: ☒
- Web Shipment Method Priority: Order

Related Topics:

1. [Agency Overview](#)
2. [AE3 Agencies, Shoppers & Items](#)
3. [Agency Express Managing Web Orders](#)
4. [Agency Order Overview](#)