

## Allocated Agency Orders – Update Web Allocation Status

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Owner of this document is: Scott Wiacek – [swiacek@feedingamerica.org](mailto:swiacek@feedingamerica.org)

### **Purpose of this document**

This document explains how to use the Update Web Allocation Status functionality to update the status of Allocated Agency Orders sent to Agency Express and display the results of the process. This is a supplement to the Allocated Agency Orders Procedure.

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## Purpose

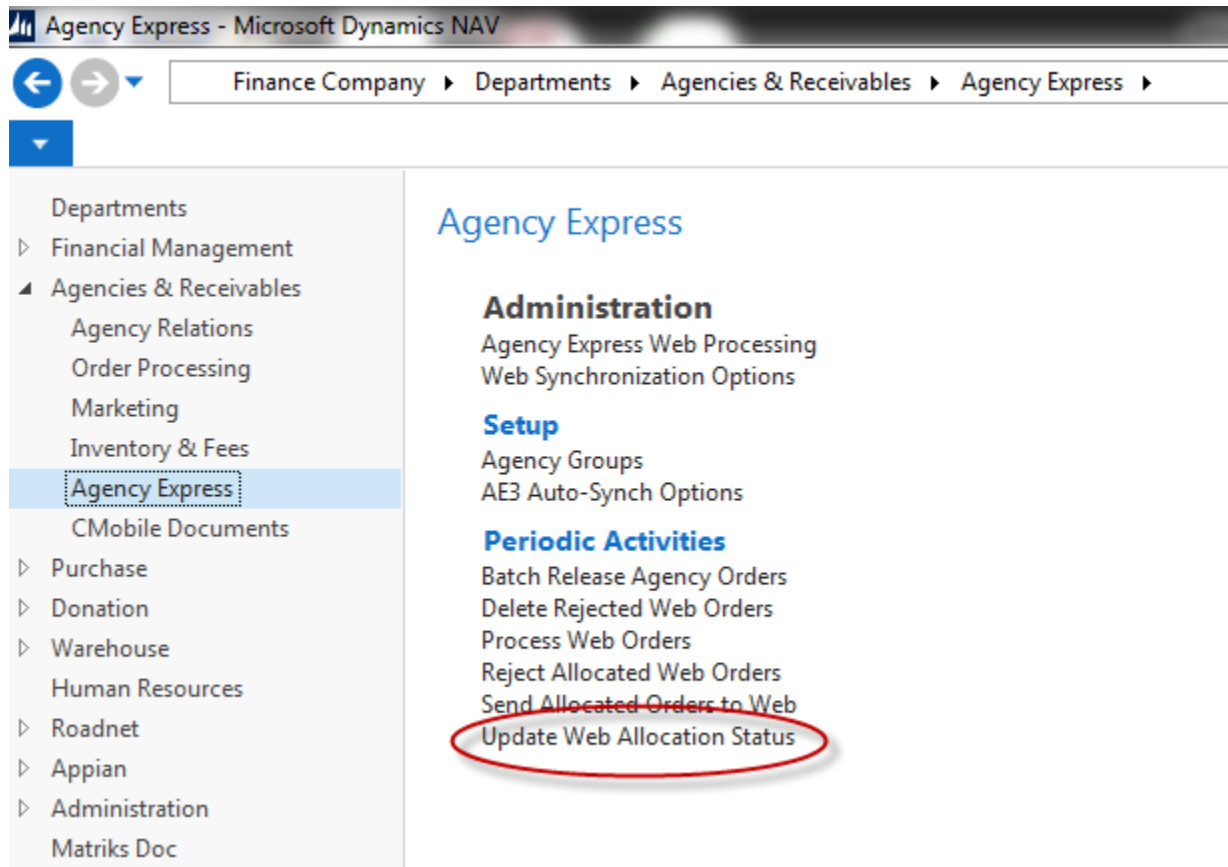
A new batch routine (report) called “Update Web Allocation Status” was created to provide a method to update the Web Allocation Status field for Allocated Orders. The most common need to change these orders stems from allocated orders that have been sent to Agency Express 3 and have not been reviewed/ submitted by the Shopper within an acceptable timeframe. Without this batch routine, if the Agency Shopper does not act on the Order, then it stays “locked” for the Shopper, unless the Food Bank directly acts on this order in Agency Express 3. This batch routine allows the food bank to manage this step in Ceres and take control of the Orders. Please note that at this time there is no warning provided to the user that an Allocated Order has been sent to Agency Express 3 and not accepted or declined in the desired time frame. The inclusion of this Allocated order review and running the status update to make the Orders actionable by the food bank must be manually coordinated and executed by the food bank staff as part of the order fulfillment process.

This batch routine (report) can be used to alleviate the situation above, but it can also be used to batch update Orders to any valid Status.

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

## Running the Update Web Allocation Batch Routine

1. The Update Web Allocation Status Report (batch data update routine) can be accessed from Departments → Agencies & Receivables → Agency Express → Periodic Activities → Update Web Allocation Status.



2. The Update Web Allocation Status request form will be displayed where users can set filter criteria based on how they want to run the report. A description of the fields follows:

Edit - Update Web Allocation Status

ACTIONS ?

Clear Filter  
Page

Options ^

New Web Allocation Status: [Dropdown]

Agency Document Header ^

Show results:

Where No. is Enter a value.

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

+ Add Filter

Limit totals to:

+ Add Filter

Print... Preview Cancel

**Note** – The Update Web Allocation Status process will filter Agency Orders for those marked as an Allocated Order and Web Transmitted. If moving an Agency Order to the Web Allocation Status of Accepted by Shopper, the process will mark the Allocated Order as a Web Order so that the Validate Web Order and Process functions will be applicable. Make sure to review and update your filters each time before running this batch update.

**New Web Allocation Status** – Select the Web Allocation Status you would like set on the selected Allocated Web Orders. The options you can select from are the same options that are available on the Allocated Web Order Status Drop down list.

**Blank**  
**New Order**  
**Sent to Web**  
**Accepted by Shopper**

**Show Results Section** – The batch update (report) is based on the Agency Order fields so any standard filtering field may be selected to refine the Agency Orders that you would like to include in the update. Standard filter fields are:

1. No.
2. Sell-to Agency No.

Others may be added as needed.

**Limit Totals To Section** – This option is not applicable as no numeric totaling is conducted.

## Printing or Previewing the Batch Update Report results

The batch update is completed using a Ceres Report as its “engine.” The Orders that will have their Allocation Status changed by the batch update can be printed or previewed for review. The Report of the results runs AFTER the status is changed.

1. The report can be printed or previewed and saved by clicking the Print or Preview button. This will provide an historical record of the Allocated Orders that were updated in case any of the updates need to be reverted.

Note that the Updated column in the report indicates whether or not the Web Allocation Status for the Allocated Order was successfully changed. The Updated column will normally report YES except in the case where the New Web Allocation Status selected on the request page matches the Old (current) Web Allocation Status and no update was made.

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No.	Sell-to Agency No.	Name	Old Web Allocation Status	New Web Allocation Status	Updated
AO-00315	B0129	Safehome, Inc.	Sent to Web	Accepted by Shopper	YES
AO-00318	B0129	Safehome, Inc.	Sent to Web	Accepted by Shopper	YES

## Related Topics:

1. Allocated Agency Order Overview
2. Agency Express Managing Web Orders