
MEMBER BUSINESS
SOLUTIONS



Full Pallet Order Handling

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Purpose of this document

This document illustrates the Full Pallet Order Handling functionality in Ceres.

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Purpose

Many food banks encourage large agencies, PDO's/RDO's etc. to order from the food bank in full pallet quantities. These full pallet quantities can be picked with a forklift directly from a Put Away (Storage) Bin, and need not be dropped to a Put Pick (Pick) Bin prior to selecting for an Agency Order.

There are two manners in which a full pallet order may be generated:

1. A food bank user adds a designed pallet to an Agency Order line manually, indicating that a full pallet is desired and that the food bank has designated a specific pallet to be shipped to the receiving Agency. This is common in disaster relief and some commodities distribution.
2. When the Agency order demand is large enough to be fulfilled using full pallets of an Item for that one order.

Full Pallet Order Handling is only available for Ship Option 2 and 3 (as defined in the Inventory Process Flow Procedure).

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

Setting up Full Pallets

1. To allow full pallets to be picked from a storage bin, the functionality must be enabled. This can be done on a location by location basis. To enable, go to Departments → Warehouse → Administration → Setup → Locations.
2. Select the proper Location, on the Warehouse FastTab update the following fields as required.

The screenshot shows the 'Warehouse' configuration window. The 'Warehouse' section on the left includes options like 'Require Receive', 'Require Shipment', 'Require Put-away', 'Use Put-away Worksheet', 'Require Pick', 'Enable Invt. Pick Shorts/Cuts', 'Bin Mandatory', 'Directed Put-away and Pick', 'Use ADCS', 'Default Bin Selection' (set to 'Last-Used Bin'), 'Outbound Whse. Handling Time', 'Inbound Whse. Handling Time', 'Base Calendar Code', 'Customized Calendar' (set to 'No'), 'Use Cross-Docking', and 'Cross-Dock Due Date Calc.'. The 'Ceres' section on the right includes 'Directed Picking Option' (set to 'Base'), 'Abandoned Pick Handling Method', 'WAP Template', 'Existing WAP Deletion Method', 'Palletized Items Only (WAP)', 'Create Pick by', 'Pick Creation Sort Order', 'Require Inv. Pick on Transfers', 'Movement Xfer. Template Name' (set to 'TRANSFER'), 'Movement Xfer. Batch Name' (set to 'KAN'), 'ADCS Phys. Inv. Jrnl. Template' (set to 'PHYS. INVE'), 'ADCS Phys. Inv. Jrnl. Batch' (set to 'KAN'), 'Shorts Cuts Template Name', 'Shorts Cuts Batch Name', 'Sug. Full Pallet from Put Away' (checked), 'Drop Full Pallet to Pick' (checked), and 'Exclude from Voxware'.

a. **Directed Picking Option**

- i. **Base** – Pick lines are suggested as per current base functionality
- ii. **Drop on Demand (ADCS)** - This option (when using ADCS) suggests a single pick document line per item with direction at the Bin level only. The selector scans any pallet in the directed bin and enters a quantity. The submission of the scan creates a new pick document line complete with pallet, lot, quantity, etc. The selector repeats this process until the original line’s quantity has been fulfilled.
- iii. **Drop on Demand (Manual)** - This option suggests pick lines as per current base functionality with the only exception being that the Pallet and Lot are withheld from the pick document lines and picking list report.

b. **Sug. Full Pallets from Put Away** – This field must be activated when using Warehouse Activity Planning (WAP), and if you would like the worksheet to consider full pallets in the calculations. The Warehouse Activity Plan procedure has more information on this setup.

c. **Drop Full Pallets to Pick** - This field must be enabled if you want the WAP line and the Agency Order line relationship to be created for the default picking bin to be specified on the WAP. The Warehouse Activity Plan procedure has more information on this setup.

3. Continue to the Bin Policies FastTab

Bin Policies

Special Equipment:

Bin Capacity Policy: Never Check Capacity

Allow Breakbulk:

Ceres

Consider Pallet Empty %: 10.00

Consider Pallet Full %: 90.00

Default Pallet Qty. on AO Opt.:

Put-away

Put-away Template Code:

Always Create Put-away Line:

Pick

Always Create Pick Line:

Pick According to FEFO:

Ceres

Allow Picks when WAP Exists:

Allow Default Bin Picking:

Default Pick Bin Exception: Use WAP Suggestion

No Bin Suggestion on WAP:

Allow Pick from Put-Away Bin:

Update Pick Line Bin from WAP:

ADCS Prevent Pallet Diff Items:

- a. **Allow Pick from Put-Away Bin** – Placing a checkmark here will enable pick documents to be generated for Full Pallet inventory residing in storage bins.
- b. **Consider Pallet Full %** - This field is used to determine what constitutes a full pallet for use in full pallet processing. For example, setting this field to 90% indicates that a pallet must have 90% or more of its original quantity still left to be considered full. Any quantity less than this percentage will exclude the pallet from consideration during full pallet processing.

4. Repeat the above steps for each location you want to utilize the full pallet functionality.

Manually adding a full pallet to an Agency Order (Ship Option 2)

When entering Agency Orders, it is possible to enter a specific full pallet directly on the Order Lines and that will flow to the Inventory Pick(s). The selected pallet will not be available for other Agency Orders once selected.

1. Once you have created an Agency Order, on the Lines, click the drop-down in the Pallet No. field to select a specific pallet. If you do know the Pallet No. you can enter it directly in the field.

| Line | Type | No. | Available Quantity | Description | Location Code | Pallet No. | Lot No. | Quantity | Qty. Approved for AE |
|------|------|-------|--------------------|-------------|---------------|----------------------|---------|----------|----------------------|
| Item | | 10040 | | 807 Napkins | KAN | <input type="text"/> | | | 0 |

2. From the drop-down, click Advanced

3. From the Select – Pallets page, select the pallet you wish to add to the order.

Pallets -

Type to filter (F3) | No. [dropdown] [arrow]

Filter: 10040 • KAN Limit totals: "

| No. | Lot No. | Item No. | Description | Location Code | Bin Code | Bin Type Code | Document No. | Branch Code | Qty. Avail. to Take | Quantity on Hand | Net |
|------------|-----------|----------|-------------|---------------|----------|---------------|--------------|-------------|---------------------|------------------|-----|
| 1212-00259 | LOT-00944 | 10040 | Napkins | KAN | 01-105-A | STORAGE | PO-00056-1R | | 50 | 50 | |
| 1212-00260 | LOT-00944 | 10040 | Napkins | KAN | 01-105-B | STORAGE | PO-00056-1R | | 50 | 50 | |
| 1212-00261 | LOT-00944 | 10040 | Napkins | KAN | 01-105-C | STORAGE | PO-00056-1R | | 50 | 50 | |
| 1212-00464 | LOT-01564 | 10040 | Napkins | KAN | 01-105-A | STORAGE | PO-00063-1R | | 50 | 50 | |
| 1212-00465 | LOT-01564 | 10040 | Napkins | KAN | 01-105-B | STORAGE | PO-00063-1R | | 50 | 50 | |
| 1212-00466 | LOT-01564 | 10040 | Napkins | KAN | 01-105-C | STORAGE | PO-00063-1R | | 50 | 50 | |
| 1301-00001 | LOT-02482 | 10040 | Napkins | KAN | 01-105-C | STORAGE | PO-00073-1R | | 0 | 0 | |
| 1301-00002 | LOT-02483 | 10040 | Napkins | KAN | 01-105-C | STORAGE | IGJ-00208 | | 100 | 100 | |
| 1305-00032 | LOT-02539 | 10040 | Napkins | KAN | 01-105-C | STORAGE | PO-00104-1R | | 20 | 20 | |
| 1305-00033 | LOT-02540 | 10040 | Napkins | KAN | 01-105-C | STORAGE | PO-00104-1R | | 20 | 20 | |

- The Zone Code, Bin Code and Lot No. associated with the selected pallet will fill in on the Agency Order line.
- Enter the quantity. The quantity has to be less or equal to the available quantity on the selected pallet.

| Type | No. | Available Quantity | Description | Location Code | Pallet No. | Lot No. | Zone Code | Bin Code | Quantity |
|------|-------|--------------------|-------------|---------------|------------|-----------|-----------|----------|----------|
| Item | 10040 | 100 | Napkins | KAN | 1301-00002 | LOT-02483 | DRY | 01-105-C | 100 |

- Enter the next line or release the order if it is complete.
- In the Order Header, click Create Inventory Put-away/Pick.
- You will get a confirmation that the pick document(s) have been created
- From the Agency Order, drill into the Outstanding Picks, then select Home → Card

AO-00496 · Safehome, Inc.

General

| | | | |
|-----------------------------|-----------------|------------------------|--------------------------|
| No.: | AO-00496 | Location Code: | |
| Sell-to Agency No.: | B0129 | Zone Code: | |
| Parent Agency No.: | 1090 | External Document No.: | |
| Sell-to Contact No.: | | Assigned User ID: | |
| Sell-to Agency Name: | Safehome, Inc. | Appointment Time: | |
| Sell-to Address: | Do Not Disclose | Shopper: | AGSHOPPER-0000000003 |
| Sell-to City: | | Shopper Name: | Rick Ferreira |
| Sell-to State: | KS | Your Reference: | |
| Sell-to ZIP Code: | | Order Modifications: | |
| Sell-to Contact: | Necole Foreman | Order Version: | 0 |
| Sell-to Contact Phone: | | Status: | Released |
| Sell-to Contact Phone Ext.: | 574 | Fund No.: | UR |
| Posting Date: | 8/25/2014 | Mobile Pantry: | <input type="checkbox"/> |
| Order Date: | 8/25/2014 | Send to Voxware: | <input type="checkbox"/> |
| Shipment Date: | 8/25/2014 | Outstanding Picks: | 1 |
| | | Posted Shipments: | 0 |

Show more fields

10. The Inventory Pick is displayed including the proper bin selected on the Agency Order.

Invt. Pick · PCK-01234

General

| | | | |
|----------------------------|----------------------|-------------------------|-----------|
| No.: | PCK-01234 | Posting Date: | 8/25/2014 |
| Location Code: | KAN | Shipment Date: | 8/25/2014 |
| Source Document: | Agency Order | External Document No.: | |
| Source No.: | AO-00496 | External Document No.2: | |
| Agency No.: | B0129 | Assigned User ID: | |
| 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: | 0 |
| Order Handling Group Code: | WEB | Start Date: | |
| Order Routing Group Code: | HARV WEB | Start Time: | |
| No. of VOX Errors: | | End Date: | |
| Default Staging Area: | | End Time: | |
| Staging Areas: | | | |

Lines

Functions Line Find Filter Clear Filter

| Item No. | Description | Pack Size | Pallet No. | Lot No. | Zone Code | Bin Code | Current Bin |
|----------|-------------|--------------------|------------|-----------|-----------|----------|-------------|
| 10040 | Napkins | 24 / 6 packs of 16 | 1301-00002 | LOT-02483 | DRY | 01-105-C | 01-105-C |

It is possible for the order picker to override the suggested pallet if it's deemed not viable or is unavailable.

Manually adding a full pallet to an Agency Order (Ship Option 3)

When entering Agency Orders, it is possible to enter a specific full pallet directly on the Order Lines. The selected pallet will not be available for other Agency Orders once selected.

1. Once you have created an Agency Order, on the Lines, click the drop-down in the Pallet No. field to select a specific pallet. If you do know the Pallet No. you can enter it directly in the field.

| Type | No. | Available Quantity | Description | Location Code | Pallet No. | Lot No. | Zone Code | Bin |
|------|-------|--------------------|-------------|---------------|-------------------------------|---------|-----------|-----|
| Item | 10040 | 807 | Napkins | KAN | <input type="text" value=""/> | | | |

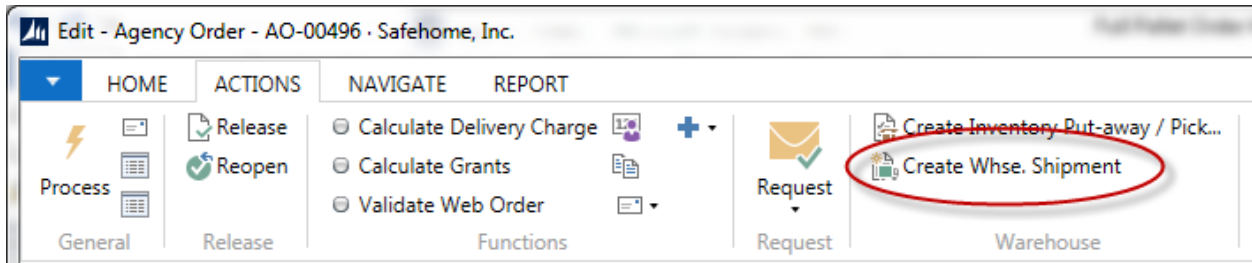
2. From the drop-down, click Advanced
3. From the Select – Pallets page, select the pallet you wish to add to the order.

| No. | Lot No. | Item No. | Description | Location Code | Bin Code | Bin Type Code | Document No. | Branch Code | Qty. Avail. to Take | Quantity on Hand | Net |
|------------|-----------|----------|-------------|---------------|----------|---------------|--------------|-------------|---------------------|------------------|-----|
| 1212-00259 | LOT-00944 | 10040 | Napkins | KAN | 01-105-A | STORAGE | PO-00056-1R | | 50 | 50 | |
| 1212-00260 | LOT-00944 | 10040 | Napkins | KAN | 01-105-B | STORAGE | PO-00056-1R | | 50 | 50 | |
| 1212-00261 | LOT-00944 | 10040 | Napkins | KAN | 01-105-C | STORAGE | PO-00056-1R | | 50 | 50 | |
| 1212-00464 | LOT-01564 | 10040 | Napkins | KAN | 01-105-A | STORAGE | PO-00063-1R | | 50 | 50 | |
| 1212-00465 | LOT-01564 | 10040 | Napkins | KAN | 01-105-B | STORAGE | PO-00063-1R | | 50 | 50 | |
| 1212-00466 | LOT-01564 | 10040 | Napkins | KAN | 01-105-C | STORAGE | PO-00063-1R | | 50 | 50 | |
| 1301-00001 | LOT-02482 | 10040 | Napkins | KAN | 01-105-C | STORAGE | PO-00073-1R | | 0 | 0 | |

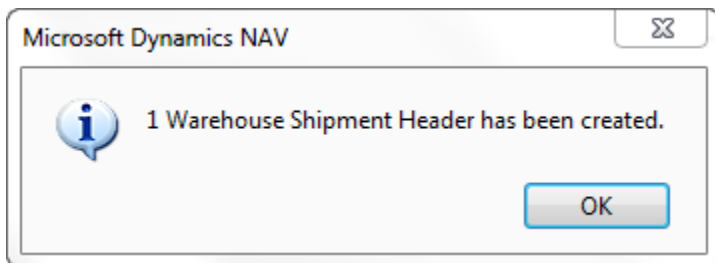
4. The Zone Code, Bin Code and Lot No. associated with the selected pallet will fill in on the Agency Order line.
5. Enter the quantity. The quantity has to be less or equal to the available quantity on the selected pallet.

| Available Quantity | Description | Location Code | Pallet No. | Lot No. | Zone Code | Bin Code | Quantity |
|--------------------|-------------|---------------|------------|-----------|-----------|----------|----------|
| 50 | Napkins | KAN | 1212-00261 | LOT-00944 | DRY | 01-105-C | 50 |

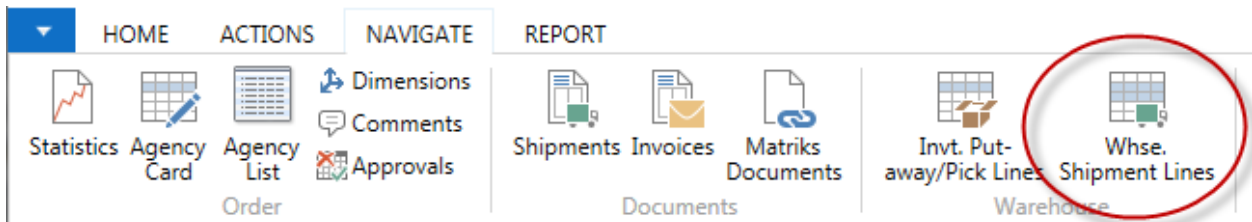
6. Enter the next line or release the order if it is complete.
7. From the Agency Order, click Actions → Warehouse → Create Whse. Shipment



8. You will get a confirmation that the Shipment Header was created.



9. The Shipment Header should open automatically, if it does not, from the Agency Order, click Navigate → Warehouse → Whse. Shipment Lines



10. From the Whse. Shipment Lines, click Home → Show Whse. Document to review the Shipment.

View - Whse. Shipment Lines

HOME NAVIGATE

Show Whse. Document Show Source Document Line Show as List Show as Chart Notes Links Refresh Clear Filter Find

Process View Show Attached Page

Whse. Shipment Lines Type to f

| Source No. | Source Line No. | Pallet No. | Lot No. | Item No. | Variant Code | Description |
|------------|-----------------|------------|-----------|----------|--------------|-------------|
| AO-00496 | 10000 | 1212-00261 | LOT-00944 | 10040 | | Napkins |

11. The Warehouse Shipment will display the pallet selected at order entry. It is possible for the order picker to override the suggested pallet if it's deemed not viable or is physically unavailable by drilling into the Pallet No. field and selecting another available pallet.

WSHIP-00045

General

No.: WSHIP-00045 Posting Date: 8/25/2014

Location Code: KAN Assigned User ID:

Zone Code: Assignment Date:

Bin Code: Assignment Time:

Document Status: Sorting Method:

Status: Open

Lines

Line Find Filter Clear Filter

| Line | Source Document | Source No. | Item No. | Description | Pallet No. | Lot No. | Bin Code | Quantity | Qty. to Ship |
|--------------|-----------------|------------|----------|-------------|------------|----------|----------|----------|--------------|
| Agency Order | AO-00496 | 10040 | Napkins | 1212-00261 | LOT-00944 | 01-105-C | 50 | 50 | |

Processing Full Pallets using Warehouse Activity Planning (WAP)

If you have enabled the Suggest Full Pallet from Put Away option Ceres will direct to create full pallet WAP suggestions and will do so in conjunction with default Bin Picking if that is enabled.

When running the create WAP process with the location configured to suggest full pallets, Ceres will attempt to fulfill agency order demand by first suggesting full pallets currently residing in put away bins. If sufficient inventory does not exist to satisfy agency order demand, Ceres will begin suggesting non-full pallets as normal to fulfill the remainder of the demand.

Scenario 1

In this example, an Agency Order calls for a quantity of 500 cases. The Location is set up so that full pallets should be dropped from a storage bin to a pick bin(s).

| No. | Available Quantity | Description | Location Code | Pallet No. | Lot No. | Zone Code | Bin Code | Quantity | Qt |
|-------|--------------------|-------------|---------------|------------|---------|-----------|----------|----------|----|
| 10040 | 807 | Napkins | KAN | | | | | 500 | |

807 Cases are available, but only 475 reside in a Pick Bin as shown below.

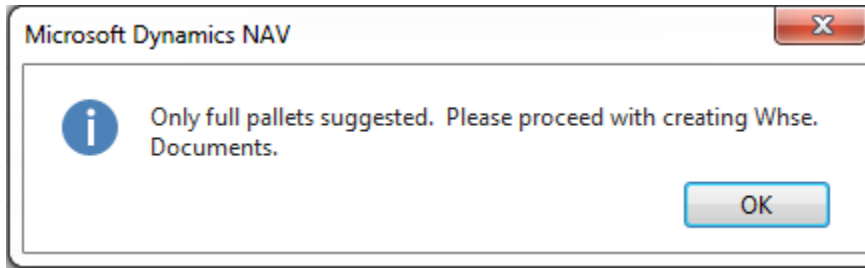
| Item Bin Contents | | | | | KAN | Location Code | | |
|-------------------|----------|-------------------------------------|---------------|--------------------------|----------|----------------------|-----------------|----------|
| Location Code | Bin Code | Fixed | Bin Type Code | Dedi... | Quantity | Unit of Measure Code | Quantity (Base) | Li Pi Bi |
| KAN | 01-100-B | <input checked="" type="checkbox"/> | PICK | <input type="checkbox"/> | 5 | CASE | 5 | |
| KAN | 01-105-A | <input checked="" type="checkbox"/> | STORAGE | <input type="checkbox"/> | 100 | CASE | 100 | |
| KAN | 01-105-B | <input checked="" type="checkbox"/> | STORAGE | <input type="checkbox"/> | 100 | CASE | 100 | |
| KAN | 01-105-C | <input checked="" type="checkbox"/> | STORAGE | <input type="checkbox"/> | 340 | CASE | 340 | |
| KAN | 01-105-D | <input checked="" type="checkbox"/> | STORAGE | <input type="checkbox"/> | 0 | CASE | 0 | |
| KAN | 01-107-A | <input checked="" type="checkbox"/> | STORAGE | <input type="checkbox"/> | 100 | CASE | 100 | |
| KAN | 03-122-A | <input checked="" type="checkbox"/> | PICK | <input type="checkbox"/> | 470 | CASE | 470 | |
| KAN | 15-108-A | <input checked="" type="checkbox"/> | PICK | <input type="checkbox"/> | 0 | CASE | 0 | |

When the WAP is created for this order, it is suggested that the additional quantity is selected from the storage bin and moved to pick bins.

Scenario 2

In this example, a full pallet is not suggested directly on the Agency Order. However, the quantity in the pick bin is less than what is ordered. Drop Full Pallets to Pick is **not** activated on the Location Card.

When creating the WAP, because Drop Full Pallets to Pick is not activated, the following message will appear as expected:



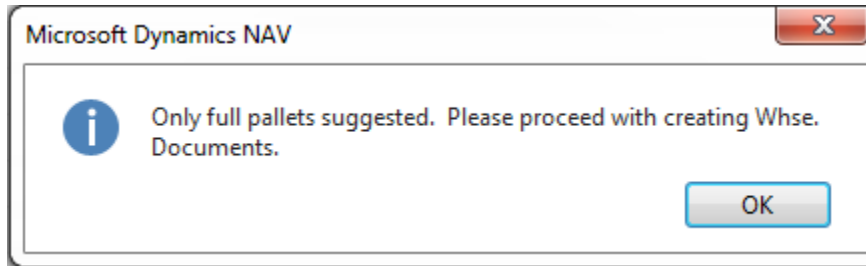
From the Agency Order, when the pick is generated, Ceres will still consider inventory in Storage Bins and suggest the full pallet to be picked directly from this bin.

| Item No. | Description | Pack Size | Pallet No. | Lot No. | Zone Code | Bin Code | Current Bin | Quantity |
|----------|-------------|--------------------|------------|-----------|-----------|----------|-------------|----------|
| 10040 | Napkins | 24 / 6 packs of 16 | 1212-00203 | LOT-00577 | DRY | 01-105-C | 01-105-C | 50 |
| 10040 | Napkins | 24 / 6 packs of 16 | 1212-00259 | LOT-00944 | DRY | 01-105-A | 01-105-A | 50 |
| 10040 | Napkins | 24 / 6 packs of 16 | 1212-00260 | LOT-00944 | DRY | 01-105-B | 01-105-B | 50 |
| 10040 | Napkins | 24 / 6 packs of 16 | 1212-00261 | LOT-00944 | DRY | 01-105-C | 01-105-C | 50 |
| 10040 | Napkins | 24 / 6 packs of 16 | 1212-00464 | LOT-01564 | DRY | 01-105-A | 01-105-A | 50 |
| 10040 | Napkins | 24 / 6 packs of 16 | 1212-00465 | LOT-01564 | DRY | 01-105-B | 01-105-B | 50 |
| 10040 | Napkins | 24 / 6 packs of 16 | 1212-00466 | LOT-01564 | DRY | 01-105-C | 01-105-C | 50 |
| 10040 | Napkins | 24 / 6 packs of 16 | 1301-00002 | LOT-02483 | DRY | 01-105-C | 01-105-C | 100 |
| 10040 | Napkins | 24 / 6 packs of 16 | 1305-00032 | LOT-02539 | DRY | 01-105-C | 01-105-C | 20 |
| 10040 | Napkins | 24 / 6 packs of 16 | 1305-00033 | LOT-02540 | DRY | 01-105-C | 01-105-C | 20 |
| 10040 | Napkins | 24 / 6 packs of 16 | 1305-00252 | LOT-02637 | DRY | 03-122-A | 03-122-A | 10 |

Scenario 3

In this example, a full pallet is not suggested directly on the Agency Order. Default Pick bin is activated, but Drop Full Pallets to Pick is **not** activated on the Location Card. The pick bin will have less quantity than needed thus requiring pick from a storage bin.

When creating the WAP, no lines will be generated for the order and the following message will appear:



Because the order quantity exceeds the quantity in the default bin, Ceres will suggest picking the full quantity from a storage bin.

Scenario 4

In this Scenario, Shipping option 3 is used. The location is set up with Drop Full Pallet to Pick and Sug. Full Pallet from Put-away both activated.

The Agency Order calls for 200 cases, but only 90 are available in a pick bin. No full pallets are specified on the order.

From the Movement Worksheet, run the Create WAP and it will create a suggestion that both pallets are moved from a Storage Bin to a Pick Bin.

Related Topics:

1. Location Overview
2. Bin Overview
3. Zone Overview
4. Warehouse Pallets and Lots
5. Warehouse Activity Plan - WAP
6. Warehouse Activity Plan and Default Bin Picking
7. Agency Order Overview