

MEMBER BUSINESS
SOLUTIONS



Roadnet Transfer Order Exports

Owner of this document is: Scott Wiacek – swiacek@feedingamerica.org

Purpose of this document

This document outlines the Transfer Order portion of the Roadnet Export.

Copyright © Feeding America 2014, All Rights Reserved.

This document may be printed and reproduced only by Feeding America and member organizations.

Table of Contents

- PURPOSE..... 3**
- ENABLING ROADNET INTEGRATION 3**
 - Roadnet Setup..... 3
 - Roadnet Location Types..... 5
 - Preparing Locations 6
 - Preparing Transfer Orders 7
- EXPORTING TRANSFER ORDERS 8**
- RELATED TOPICS..... 12**

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 Transfer Order portion of the Roadnet Export.

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

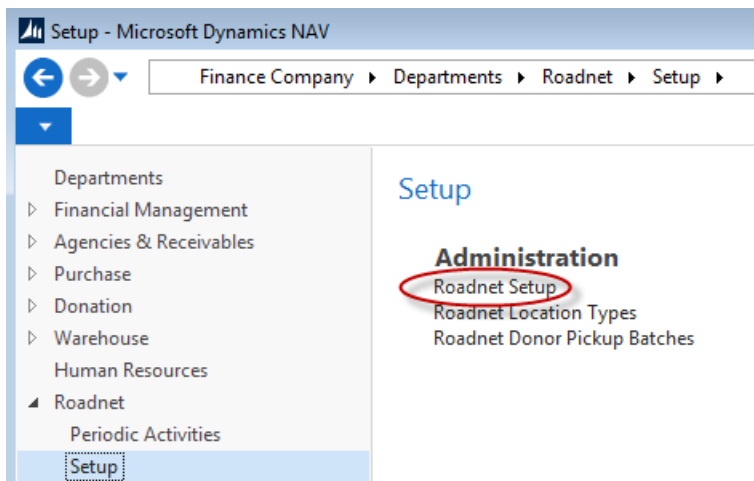
Enabling Roadnet Integration

Unlike Agency Orders and Donation Pickups, there is no need to turn on Roadnet integration specifically for transfers.

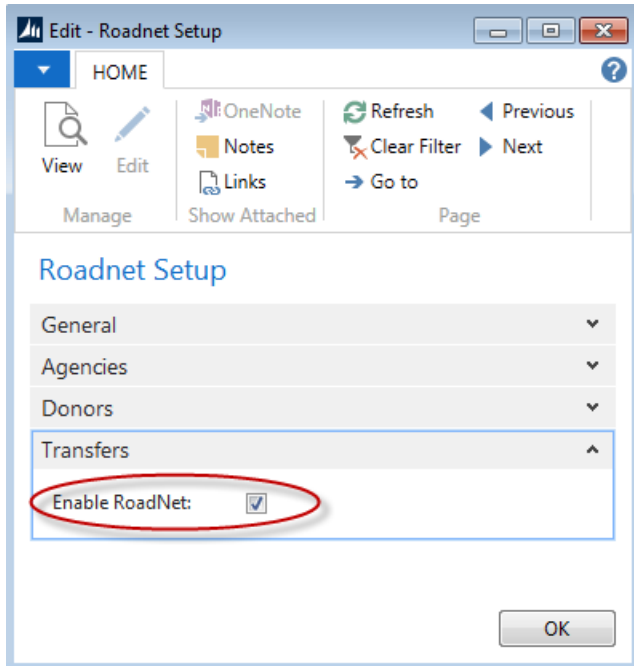
Roadnet Setup

The transfer routing is sent to Roadnet via an export. Users are able to define the level of information sent.

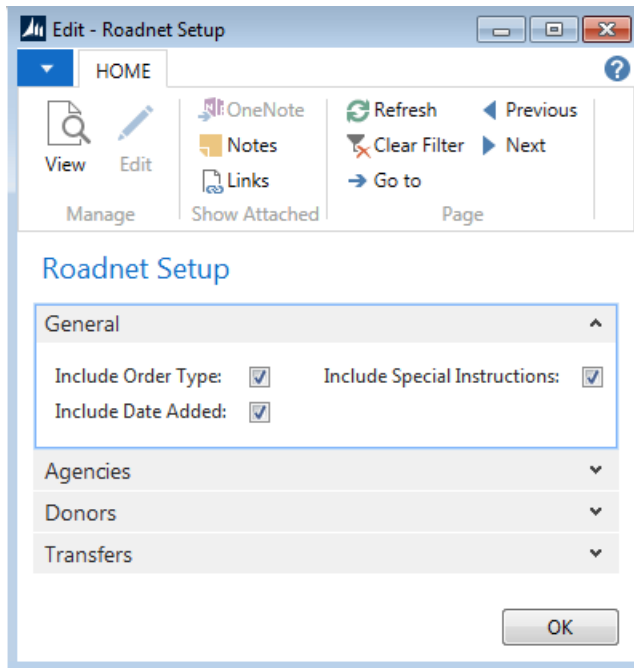
1. The Roadnet Setup can be accessed from Departments → Roadnet → Setup → Roadnet Setup.



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



3. Select the information that should be reported to Roadnet by placing checkmarks in the appropriate fields.



Include Order Type: The export will show a 'T' to indicate a transfer

Include Date Added: The export will relay the posting date from the Transfer Order

Include Special Instructions: Users may enter information in the Special Instructions field on a Transfer

Order to indicate delivery rules, contact information, or other information that is pertinent to the transfer. An example might be, "When you arrive, ask for Joe". The export can relay this information.

Note: Currently, Order Type and Date Added are mandatory information for Roadnet to process information from Ceres. Leaving these fields unchecked may lead to undesired results.

4. Click OK when you have made your selections

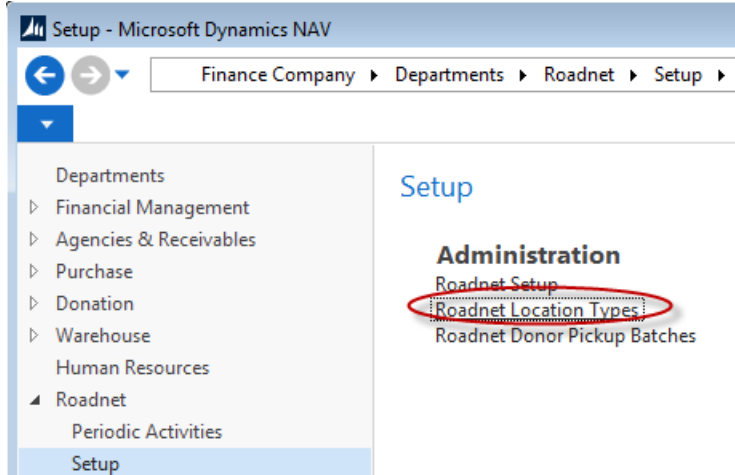
Roadnet Location Types

Roadnet Location Types are optional fields that can assist your food bank with filtering Transfer Orders that are included in an export. This can help with grouping orders or segregating which orders should be part of Roadnet.

Once the Roadnet Location Types are created, they can be added to Location Cards, which act as the 'customer' that receives product. This information will flow to new Transfer Orders.

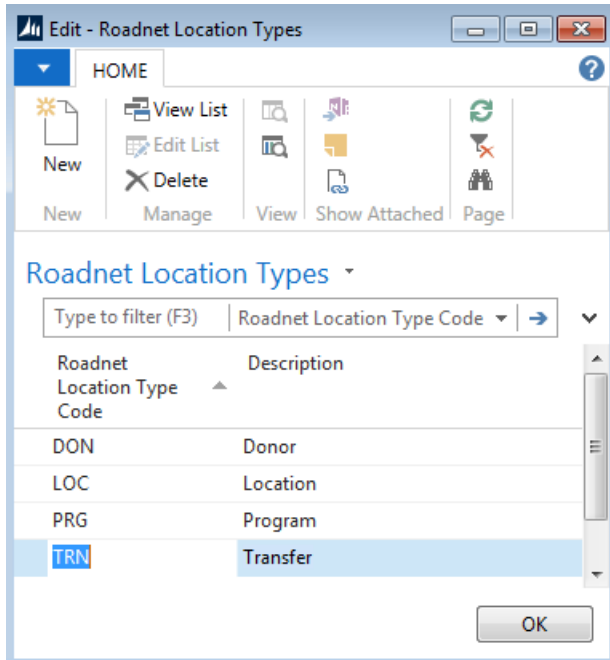
When the actual export is generated, the Location Type will show as 'BR' to comply with Roadnet formatting standards.

5. Roadnet Location Types can be accessed from Departments → Roadnet → Roadnet Location Types.



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

Note: Roadnet Location Types are also available for Agency Orders and Donation Orders that are reported to Roadnet



Preparing Locations

To reduce data input, users can setup special instructions and Roadnet Location Types on the Location Card, which flows to new transfers.

1. The Location Card can be accessed from Departments → Warehouse → Administration → Setup → Locations.
1. Lookup on the Roadnet Location Type field and select a Code
2. In the Special Instructions field, enter any special instructions that need to be mentioned

KAN - Kansas City Warehouse

General

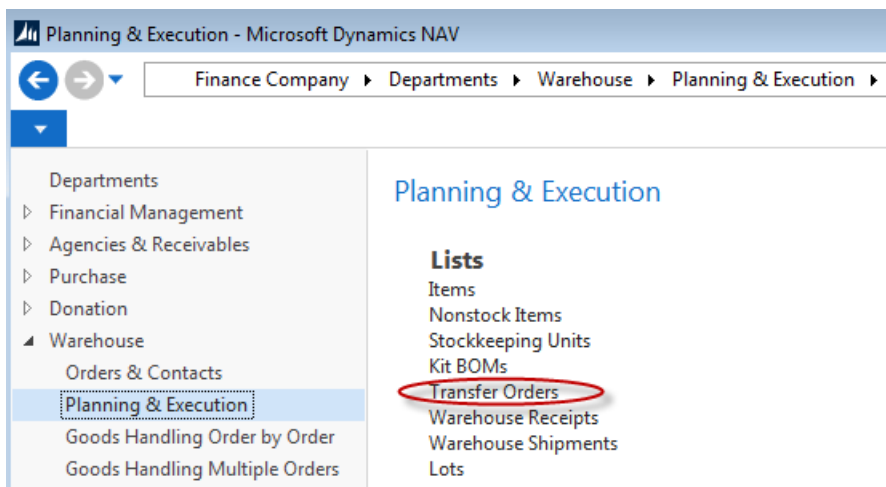
Code:	KAN	Country/Region Code:	
Branch Code:		Contact:	
Name:	Kansas City Warehouse	Use As In-Transit:	<input type="checkbox"/>
Address:	3801 Topping Avenue	Do Not Use For Tax Calculation:	<input checked="" type="checkbox"/>
Address 2:		Ceres	
City:		Special Instructions:	Call John at 555-123-4567
State:			
ZIP Code:		Roadnet Location Type:	LOC

Preparing Transfer Orders

Transfers that are being sent to Roadnet require users to specify pallet counts for the UNC storage requirements for dry, refrigerated, and frozen products. This helps with load planning in the route calculations. Users may optionally indicate special instructions and the Roadnet Location Type to provide further details.

Note: Transfers reported to Roadnet must be exported before a receipt is posted.

1. Transfer Orders can be accessed from Departments → Warehouse → Planning & Execution → Lists → Transfer Orders.



2. Create a new Transfer or select an existing order
3. Expand the Transfer-to FastTab
4. Enter values for the Frozen Pallet Count, Ref Pallet Count, and Dry Pallet Count for each UNC Storage Requirement

Note: These values are included in the export file and are calculated towards the file's totaled Sum Pallet Count field. If the value is left blank, the corresponding value in the export file will be blank.

5. On the Special Instructions field, enter any special instructions that need to be mentioned

Note: If Special Instructions was checked on the Roadnet Integration Setup form, the Special Instructions will be included with the export.

6. If needed, select the location type for the Roadnet Location Type field

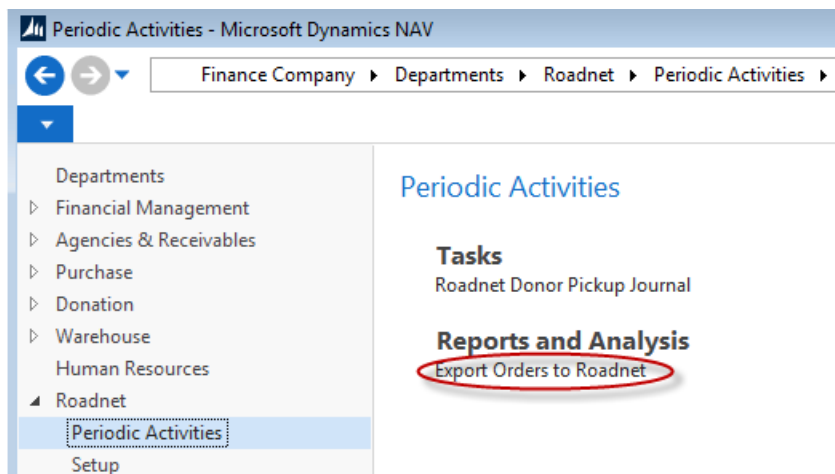
TRO-0012

General	TRO-0012	Released	Notes
Lines			Click here to create a new note.
Transfer-from			
Transfer-to			
Transfer-to Name:	Kansas City Warehouse	Inbound Whse. Handling Time:	
Transfer-to Address:	3801 Topping Avenue	Roadnet Location Type:	LOC
Transfer-to City:		Roadnet Exported:	<input checked="" type="checkbox"/>
Transfer-to State:		Frozen Pallet Count:	0
Transfer-to ZIP Code:		Ref Pallet Count:	0
Transfer-to Contact:		Dry Pallet Count:	0
Receipt Date:	2/6/2013	Special Instructions:	
			Show more fields

Exporting Transfer Orders

Once transfers have been prepared, users may 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. The Export Orders to Roadnet report can be accessed from Departments → Roadnet → Periodic Activities → Export Orders to Roadnet.




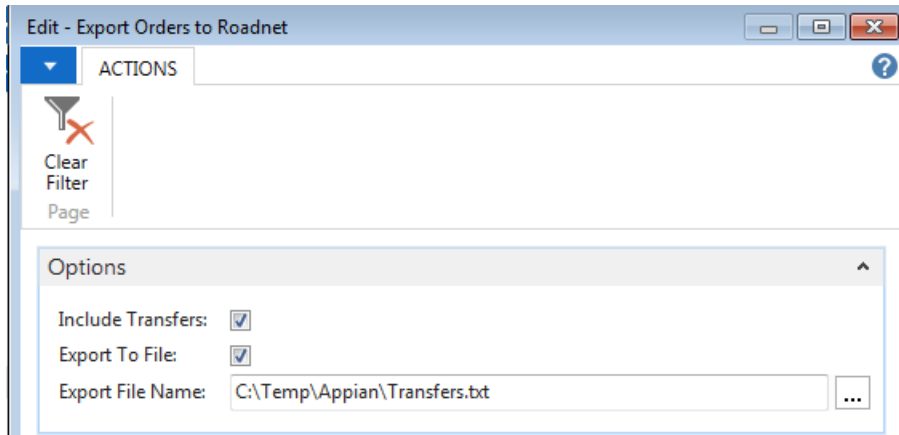
2. On the Options FastTab, place a checkmark in the Export Transfers field.

Note: If Export Transfers is not selected, the report will attempt to export Agency Orders instead

3. 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

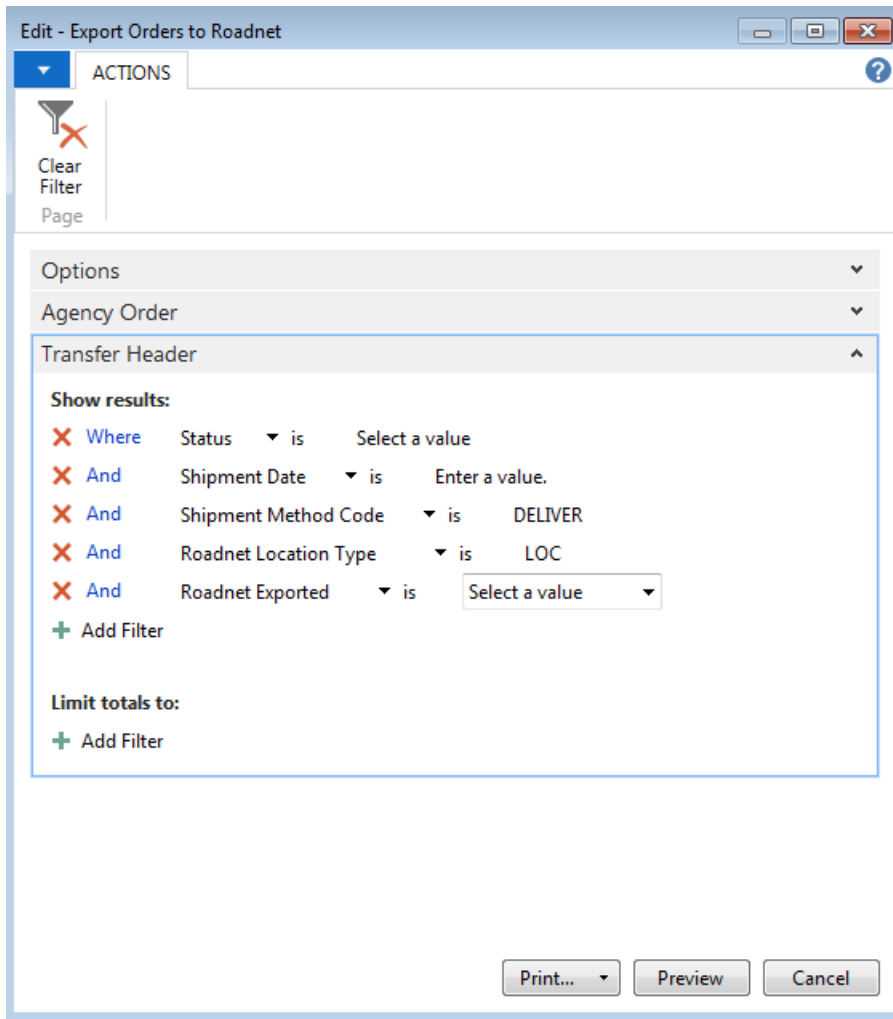
Note: If Export to File is unchecked, Ceres will not update the value of the Roadnet Status field on the Transfer Order(s)

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



5. Expand the Transfer Header FastTab
6. In the Roadnet Exported field, select if you want to filter for orders that have not been sent to Roadnet, or filter for orders that have already been sent and need resubmission. If you want to choose both, leave this field blank
7. Set the rest of the filters accordingly to limit the orders that are included in the export. In the example below, the generated report will include transfers that are released, are Delivery orders, have a Roadnet Location Type of LOC, and were not sent to Roadnet.

Note: The Shipment/Pickup Date 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.



8. 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 Orders to Roadnet
JITC for Harvesters

Transfer Header: Roadnet Exported: No

Page 1
SWPROS17jb

Location ID	Transfer Order No.	Case Count	Frozen Case Count	Ref Case Count	Dry Case Count	Pallet Count	Frozen Pallet Count	Ref Pallet Count	Dry Pallet Count	LB Count	Frozen LB Count	Ref LB Count	Dry LB Count	Location Type	Order Type	Special Instructions	Date Added
* HOU	XFERO-00	7	0	0	7	0	0	0	0	126	0	0	126	BR			

NOTE: * denotes Transfer Orders that are Not Sent to Roadnet

Below is an example line from the exported file

CS-001 TRN000001 50 0 0 50 23 5 10 8 2050 0 50 2000 BR TCall John at 555-123-4567 2011-01-12

Once the export file is created, the corresponding Transfer Orders will change so that the Roadnet Exported field will be checked

TRO-0012

General	TRO-0012	Released	▼
Lines			▼
Transfer-from			▼
Transfer-to			▲
Transfer-to Name:	<input type="text" value="Kansas City Warehouse"/>	Inbound Whse. Handling Time:	<input type="text"/>
Transfer-to Address:	<input type="text" value="3801 Topping Avenue"/>	Roadnet Location Type:	<input type="text" value="LOC"/>
Transfer-to City:	<input type="text"/>	Roadnet Exported:	<input checked="" type="checkbox"/>
Transfer-to State:	<input type="text"/>	Frozen Pallet Count:	<input type="text" value="0"/>
Transfer-to ZIP Code:	<input type="text"/>	Ref Pallet Count:	<input type="text" value="0"/>
Transfer-to Contact:	<input type="text"/>	Dry Pallet Count:	<input type="text" value="0"/>
Receipt Date:	<input type="text" value="2/6/2013"/>	Special Instructions:	<input type="text"/>

Related Topics:

2. [Location Overview](#)
3. [Roadnet Agency Order Exports](#)
4. [Roadnet Donation Exports](#)
5. [Transfer Order Overview](#)