CERES

Agency Pallets

Purpose of this document

This document will illustrate how to use the Agency Order/ Agency Pallets functionality in Ceres. Once an Agency order has been picked, food banks need to keep track of the number of pallets and where those agency pallets are stored. Agency Pallets helps with the creation of the agency pallets and the administration of those pallets.

Ceres Object release 5.00.00 & 5.00.48 are required for the functionality described in this document.

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Overview

The staging functionality in Ceres was enhanced to support multiple workflow models by tracking as much information as possible within Ceres.

The staging enhancements are based on Inventory Picks (Ship Option 2) and include:

- Default Bin Location – Standard pre-defined bin location for agency pallets created. Bin Locations can be setup by zone for clients that create picks by zone or with a single default agency pallet bin for clients that do not create separate picks by zone.

- Agency Pallet Tags – Tag that can be printed and placed on the agency pallets that are staged.

- Agency Pallet Administration – Provides the ability to move pallets, reprint an agency pallet tag, create additional agency pallet tags and close agency pallets.

Inventory Setup

The setup of default Staging Areas starts with defining Agency Pallet Staging Areas. Staging Areas can be accessed from Departments → Financial Management → Inventory → Setup → Inventory Setup.
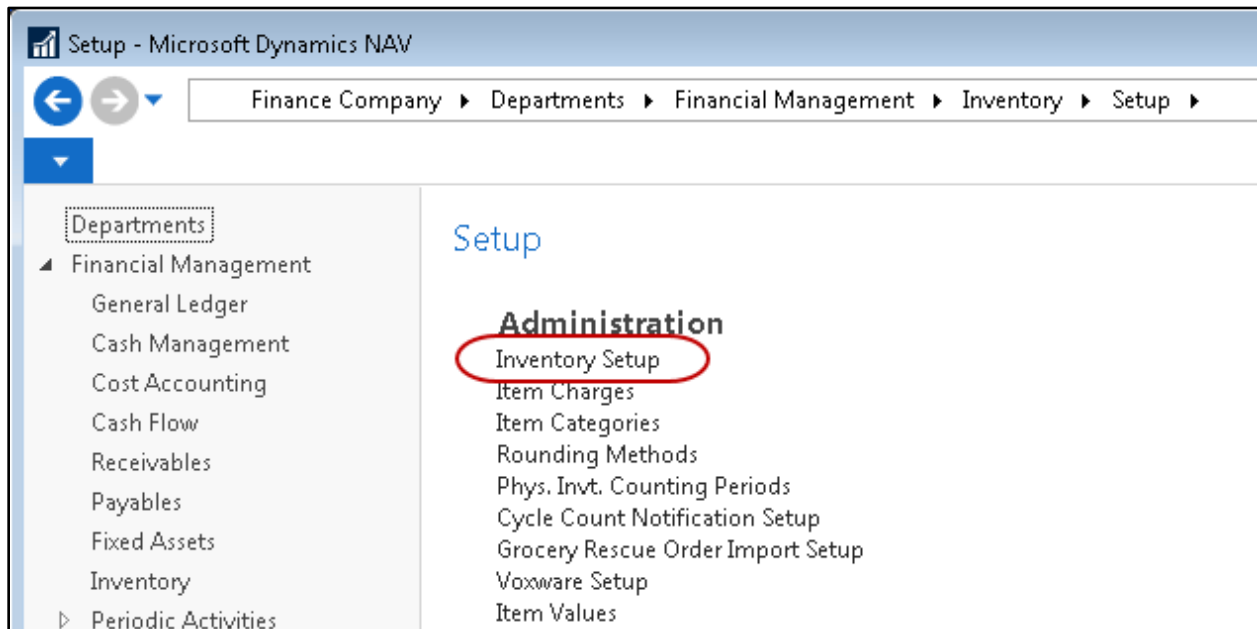
Enable Agency Pallet Tracking by checking the appropriate checkbox on the location tab.
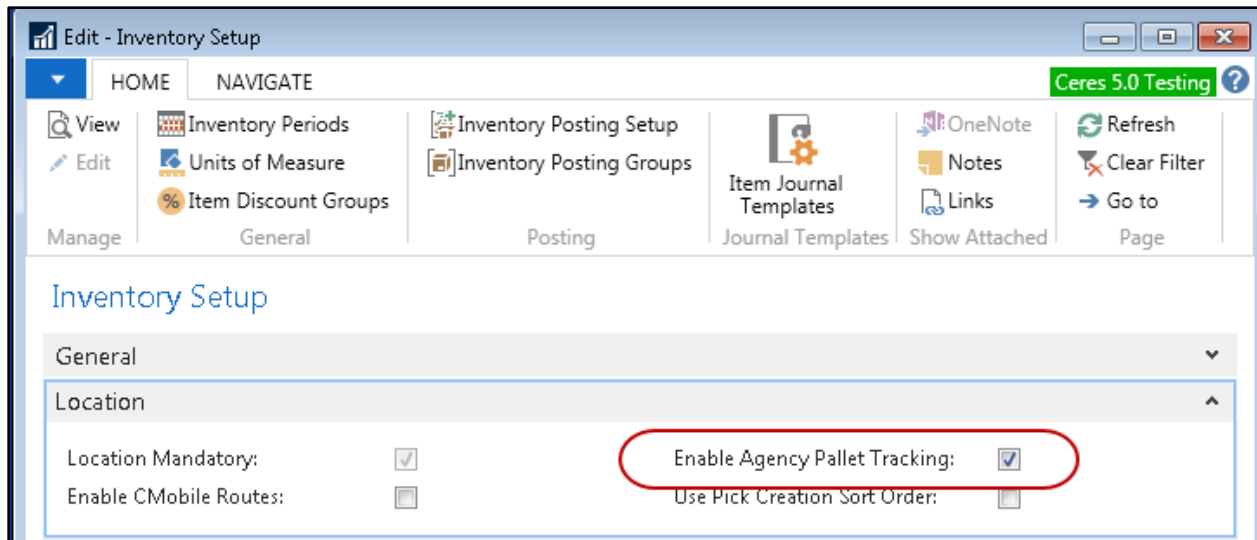
Navigate to the Numbering FastTab on Inventory Setup. Create and assign a number series for the agency pallet nos.
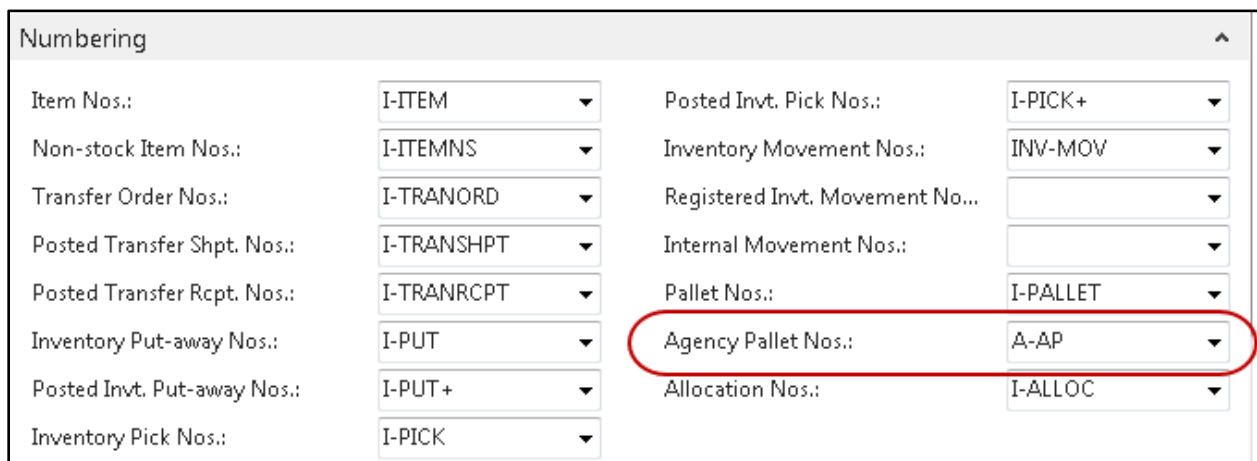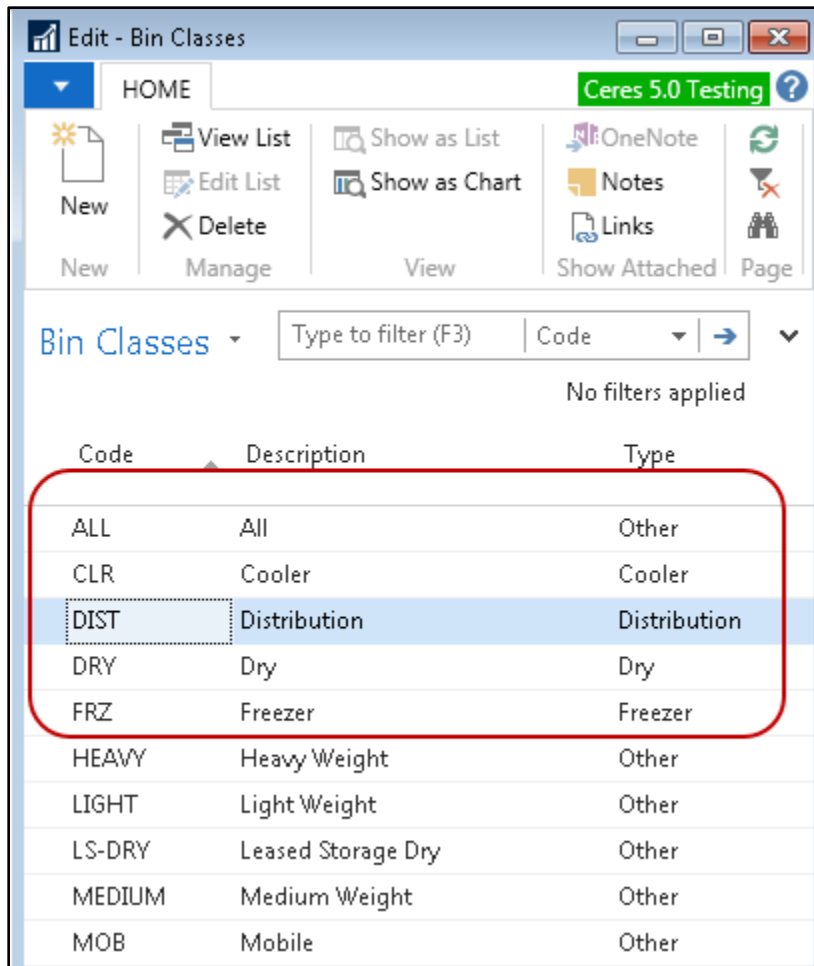
Bin Classes

If you are creating picks by zone, you must identify a bin class for each zone.

Access Bin Classes from Departments → Warehouse → Setup → Warehouse → Bin Classes.
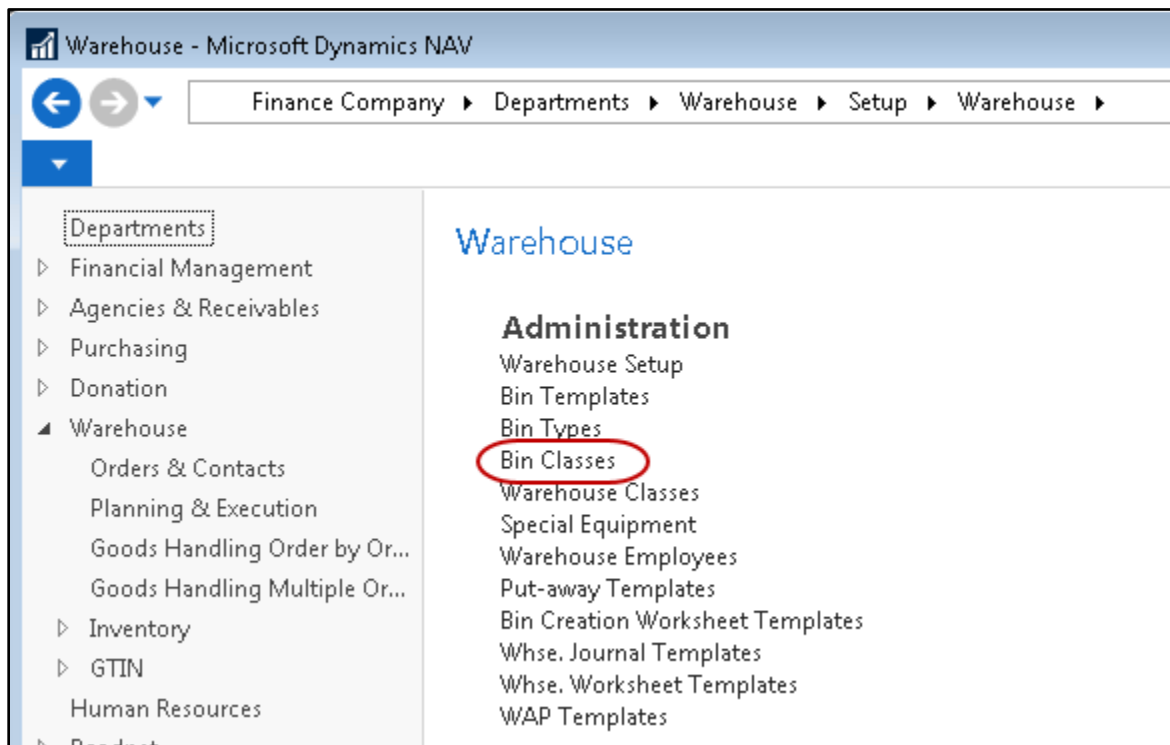
You should setup 5 bin classes, one for each zone, and other class for picks not assigned to a zone and lastly a distribution class that will be used once the agency pallet is either picked up or delivered to an agency.
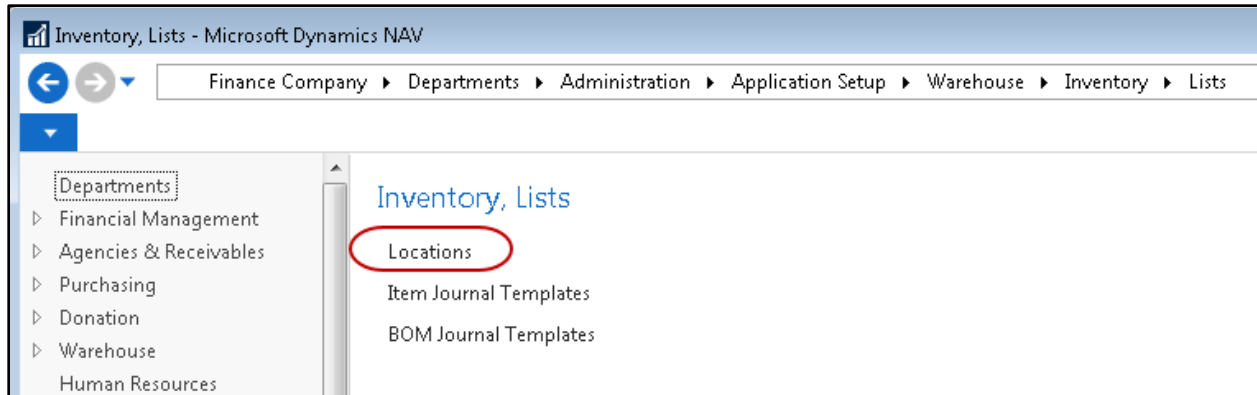
In the type field for each Bin Class, choose the appropriate type from the choices.
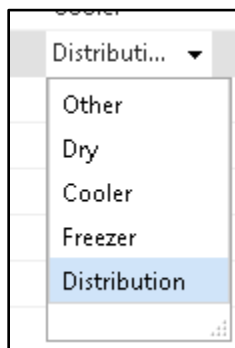

Once the Bin Classes have been created and linked to a type, the Location can be setup and the default agency pallet bins can be assigned.

Location

Access Locations from Departments → Administration → Application Setup → Warehouse → Inventory → Lists → Locations.

On the location card enable agency pallet tracking by checking the appropriate checkbox on the Warehouse tab.
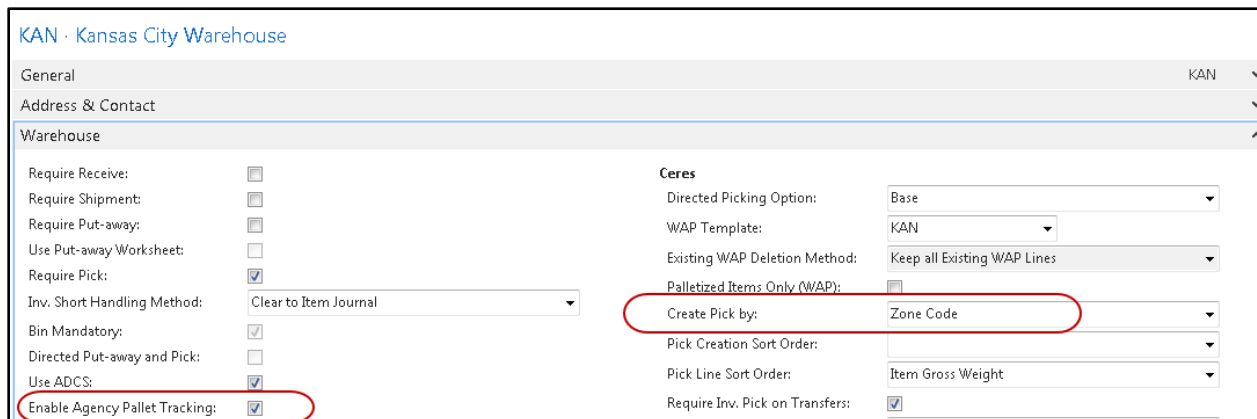
Based on the setting of the Create Pick by field, the system will enable/disable fields on the Bins Tab. If the field is set to Zone as shown above, the bin fields shown on the Bins tabs are active and need to be filled in.

If the field is not set to Zone as shown here, Only "Default Agency Pallet Bin Code" is active and needs to be filled in:

Defining the bins for the location. Prior to completing the bins tab with the default agency pallet bins, you must first define the bins for the location. Click on the Bins icon on the location to access the bin list.
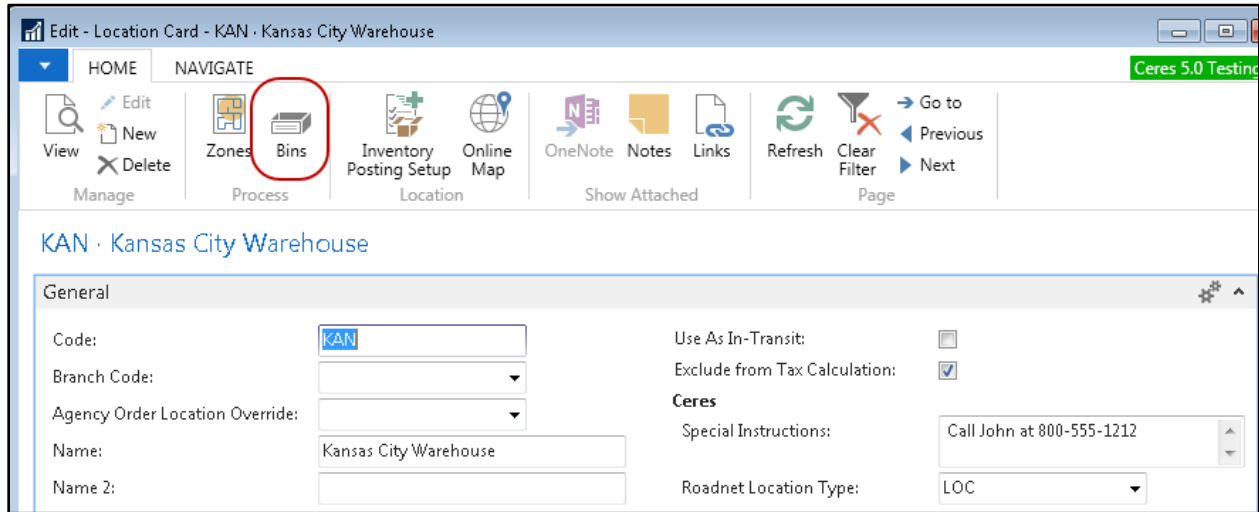
In the bin list, create the agency pallet bins if needed and assign each to the correct bin class. In this example we have created 5 bins, 1 for each zone (AP-COOL, AP-DRY an AP-FRZ) each set in the corresponding Bin Class code. We have defined an AP-OTHER bin for any pallets where the zone could not be identified and lastly the AP-DIST bin used when the agency pallet is delivered or picked up by an agency.

Now that the bins have been created we can complete the bins tab on the location code.

If we are not using create picks by zone, only the Default Agency Pallet Bin code would be filled in.

This completes the setup and agency pallets are now ready to be utilized.

Ceres Report Selection

Navigate to Departments → Administration → Application Setup → Warehouse → Inventory → Tasks and run the Ceres Report Selection – Inventory page. Select the Usage of Agency Pallet Tag and specify a Report ID of 14012550.
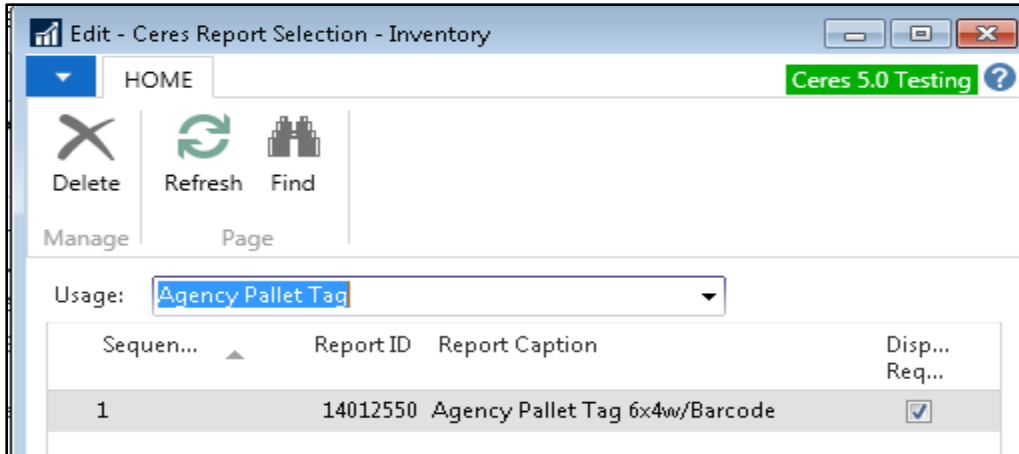
Creation of Agency Pallets

From Inventory Picks

Creation of agency pallets is done the Create Invt. Put-Away/Pick function. This is access from Departments → Warehouse → Planning & Execution → Create Invt. Put-Away/Pick.
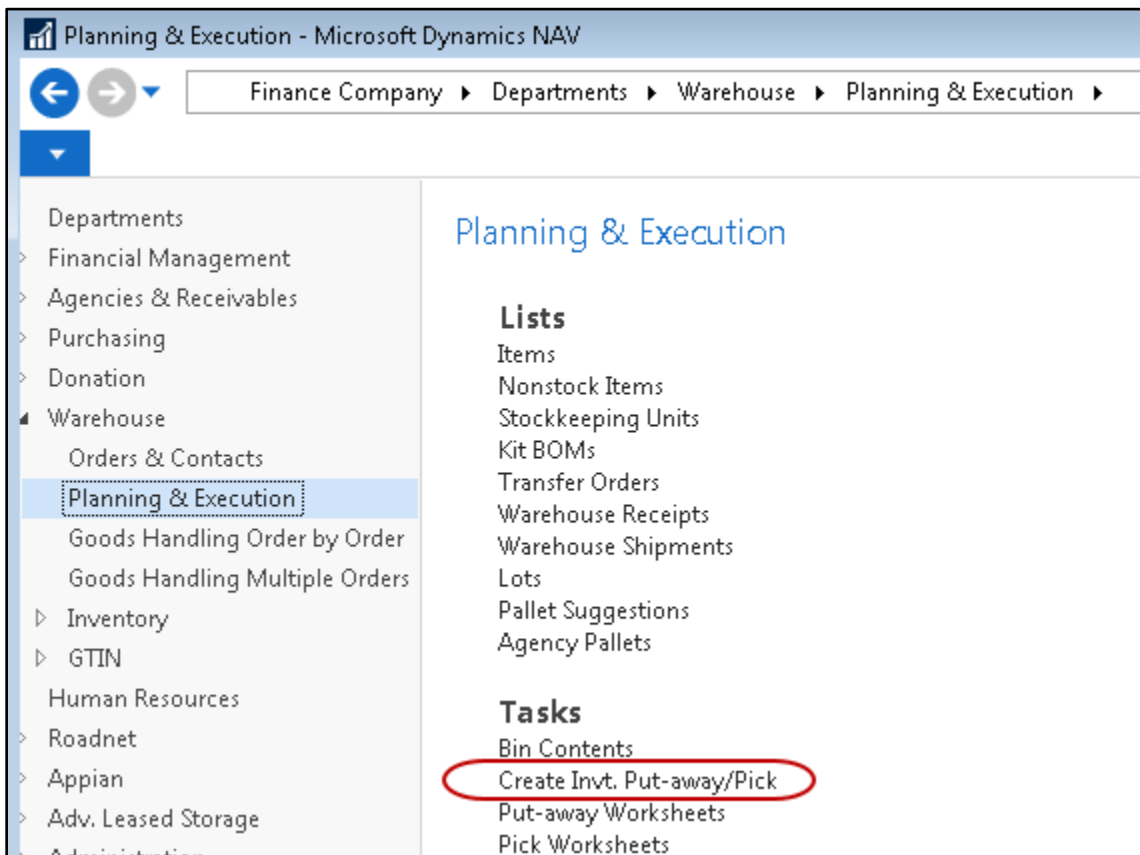
When running the program to create picks check the box to Print Agency Pallet Tag.

Options

Create Invt. Put-Away:	☐
Create Invt. Pick:	☑
Create Invt. Movement:	☐
Print Document:	☐
Print as Single Document:	☐
Print Agency Pallet Tag:	☑
Show Error:	☐
Sort by Appointment Time:	☐
Pick Creation Sort Order:	▼

In addition to the picks being created and printed, the system will also create and generate agency pallet tags and print those as well. If the system is configured to create picks by zone, then you will receive one pallet tag for each zone used on the pick. Each pick generated will have one agency pallet tag generated and printed. Additional agency pallet tags for any pick can be acquired from the Agency Pallet Administration page. Below is an example of the agency pallet tag created.

Pick No: IPD-02776   **AP-DRY**
Shipment Date: 3/25/2020   **DRY**
Shipment Method: DELIVER

Order No: AO-01311   **1 of 1**

1st Baptist Church

170 Hope Street

Kansas City MO 64127

Pallet: AP-00018

From Agency Order

Ceres Object release 5.00.48 is required to create agency pallets from the agency order.

Agency pallets can also be created from the agency order prior to picks being created. From the agency Order header select Home → Process → Create Agency Pallet
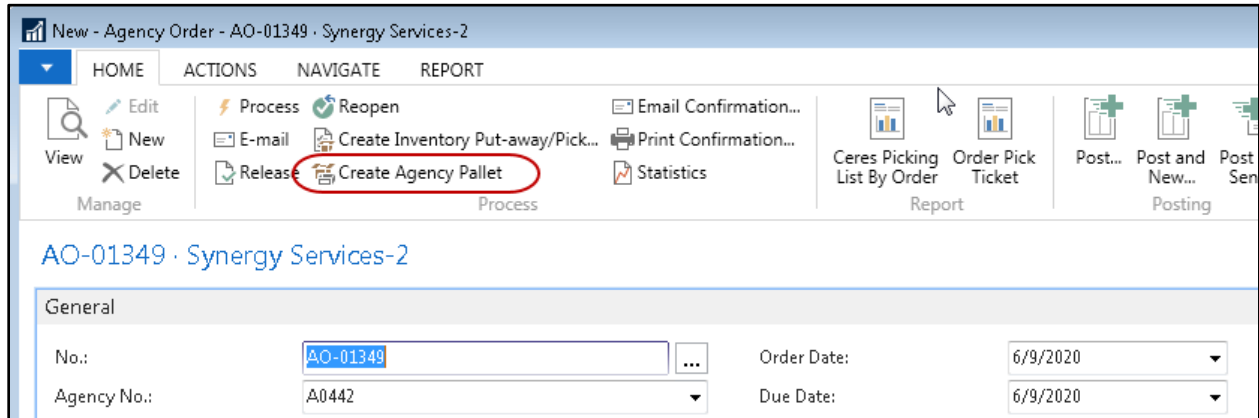
On the dialog box, specify the number of agency pallets to create for this order and choose whether you wish to just create the agency pallets or create and print the agency pallets. In this example we have specified 2 agency pallet labels.
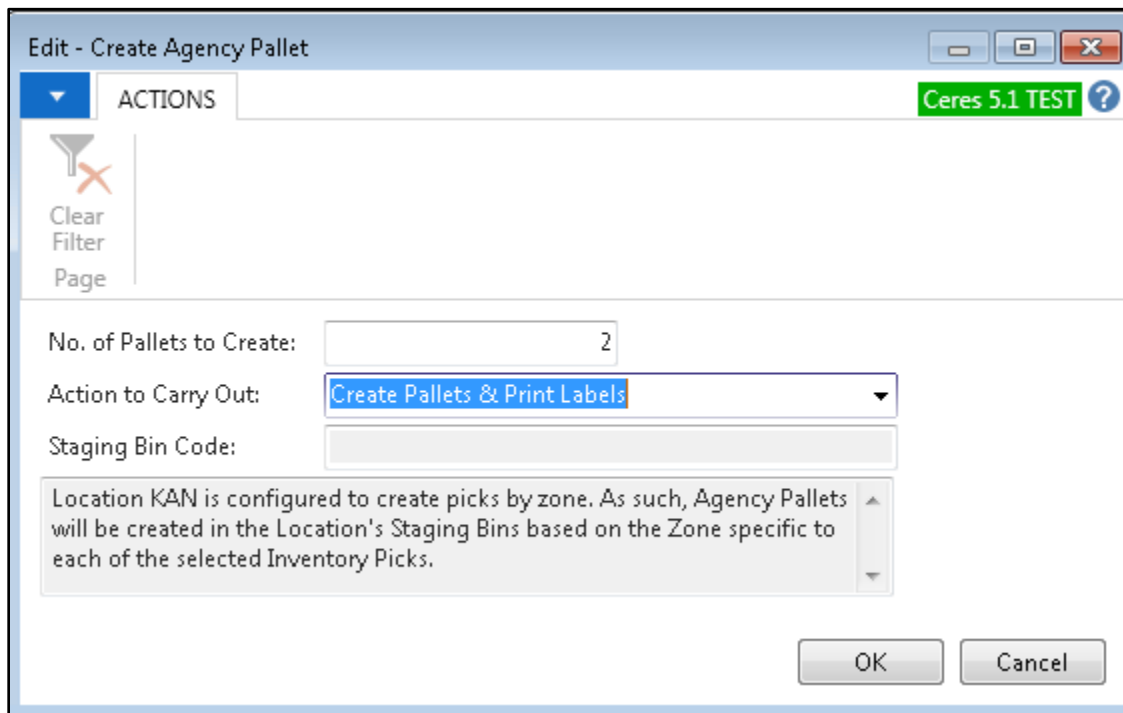
After creating the agency pallets you can view them be selecting NAVIGATE → Warehouse → Agency Pallets
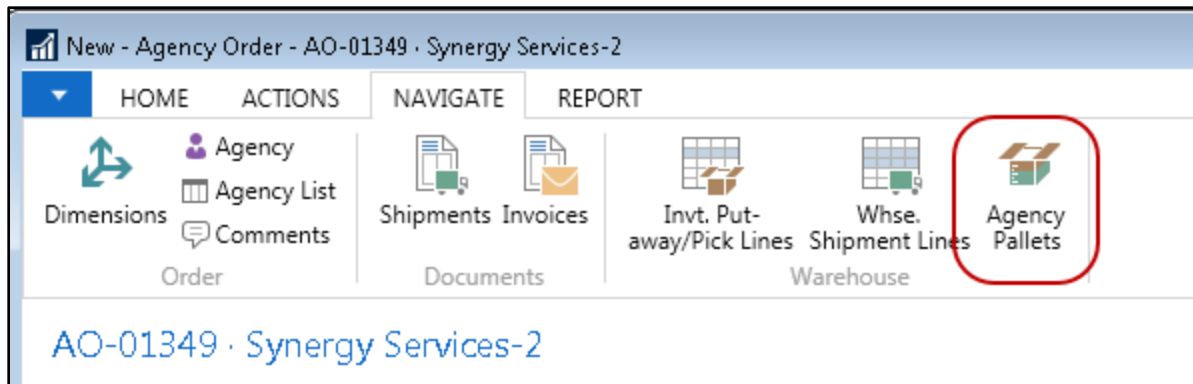
This will display a list of the agency pallets for the order. Notice that the Invt. Pick No. is not populated because the picks have not been created at this time. When picks are created for the order, the picks will be assigned to these agency pallets first. If more picks are created than the number of agency pallets created, the pick process will create additional agency pallets as required.

Agency Pallet Administration

Agency Pallet Administration is accessed from Departments → Warehouse → Goods Handling Order by Order → Agency Pallet Administration
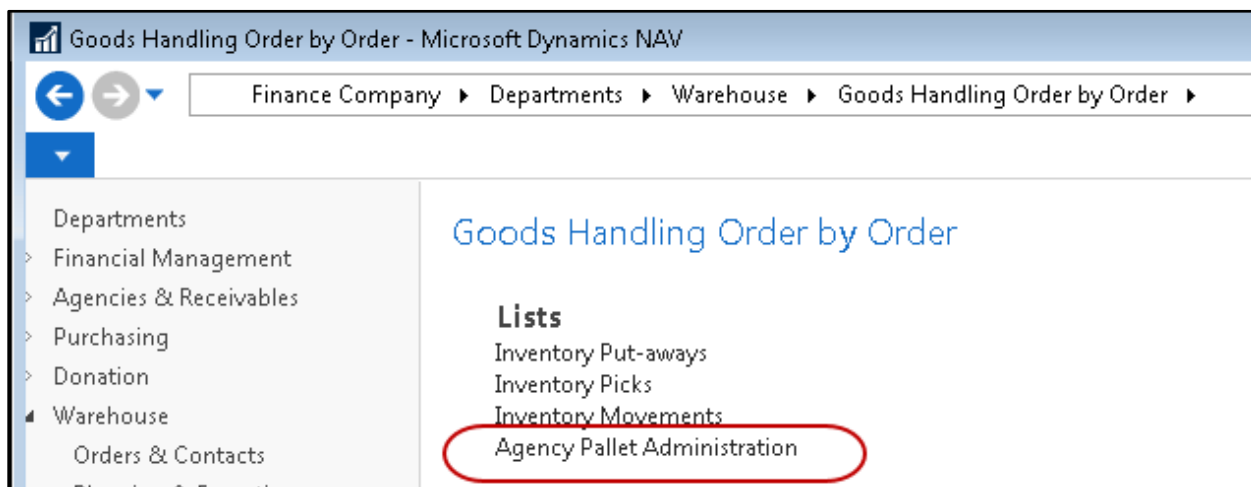
The Agency Pallet Administration page will open.
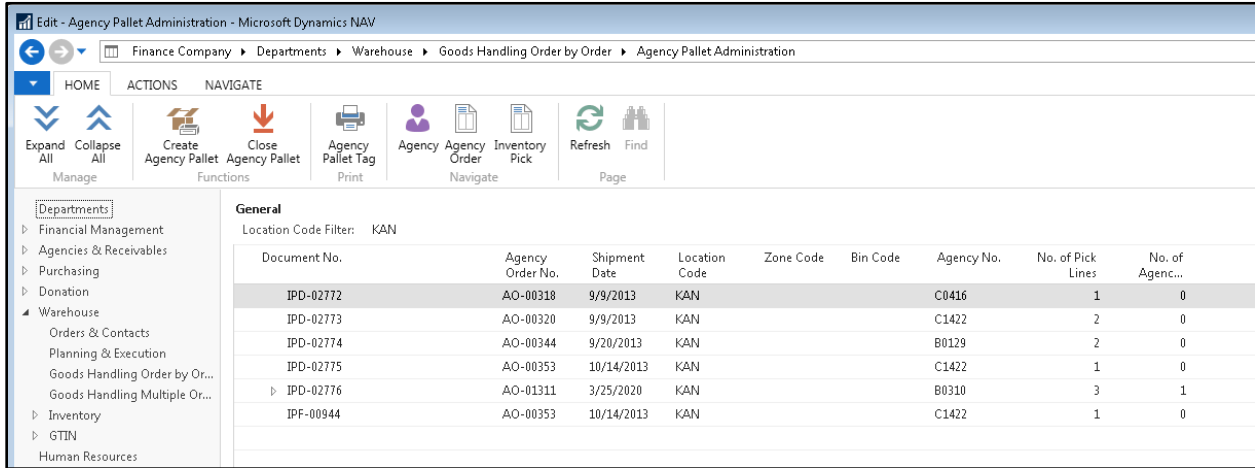
The following functions are available:

Expand All – this will show all agency pallets associated with each pick underneath each pick document. Most picks will have only one agency pallets associated with it unless an additional agency pallet has been created for that pick.

Collapse All – this will close the display of agency pallets associates with all picks.

> **Note:** Individually you may use the expand/collapse icons to the left of each pick to show or hide the agency pallets associated with an individual pick document.

Create Agency Pallet – Use this function to create an additional agency pallet for an individual pick. Select the pick line and click on the icon. You may create 1 or more additional agency pallets for the pick and choose whether or not to print them. If the location is configured to print picks by zone,

you will not be able to specify the bin code for the pallet, they will be created in the default agency pallet bin code specified on the location card.
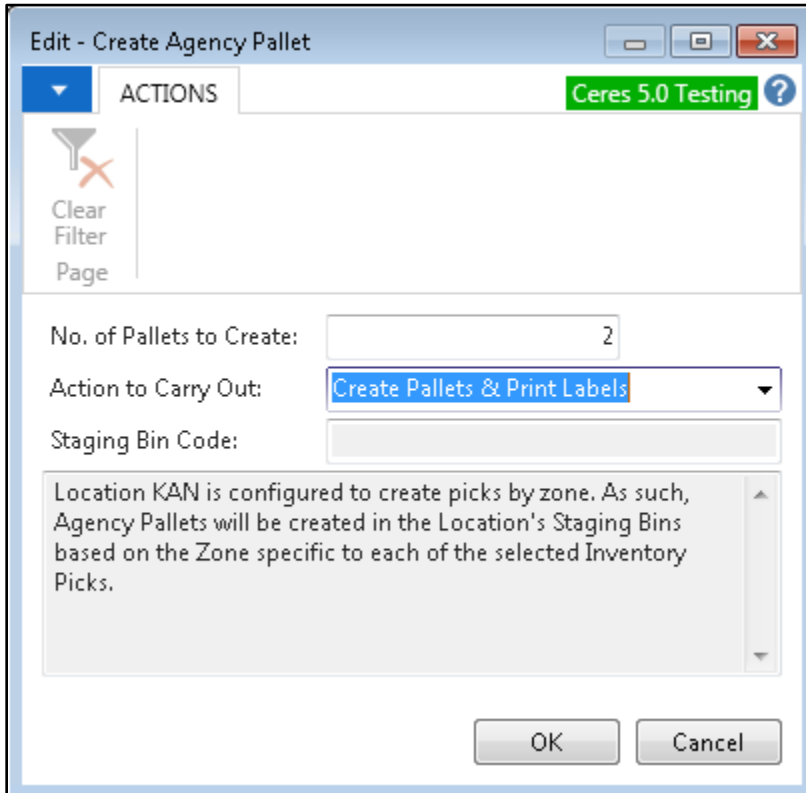
Close Agency Pallet – If the agency pallet has been picked or delivered and was not properly closed you can use this function to close the agency pallet. Also, if an agency pallet was created in error, you may also close the incorrect agency pallet with this function. The administration page is defaulted to not show closed pallets, although you may change the filter to show closed pallets. It is NOT possible to reopen a closed agency pallet; you would need to create a new agency pallet if needed. When you select this function you will be prompted to confirm the close.
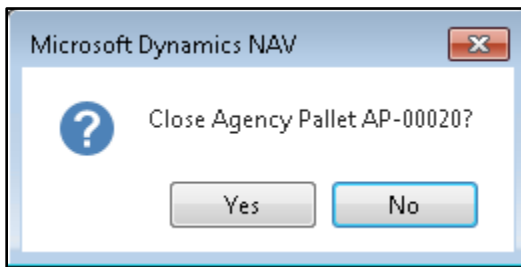
Agency Pallet Tag – this allows for the reprint on an agency pallet tag.

Agency – this function will display the agency card associated with the agency pallet tag

Agency Order – this function will display the agency order document associated with the agency pallet tag

Inventory Pick – this function will display the inventory pick document associated with the agency pallet tag

Agency Pallets

Agency Pallets is accessed from Departments → Warehouse → Planning & Execution → Agency Pallets

This will display the Agency Pallet Page.

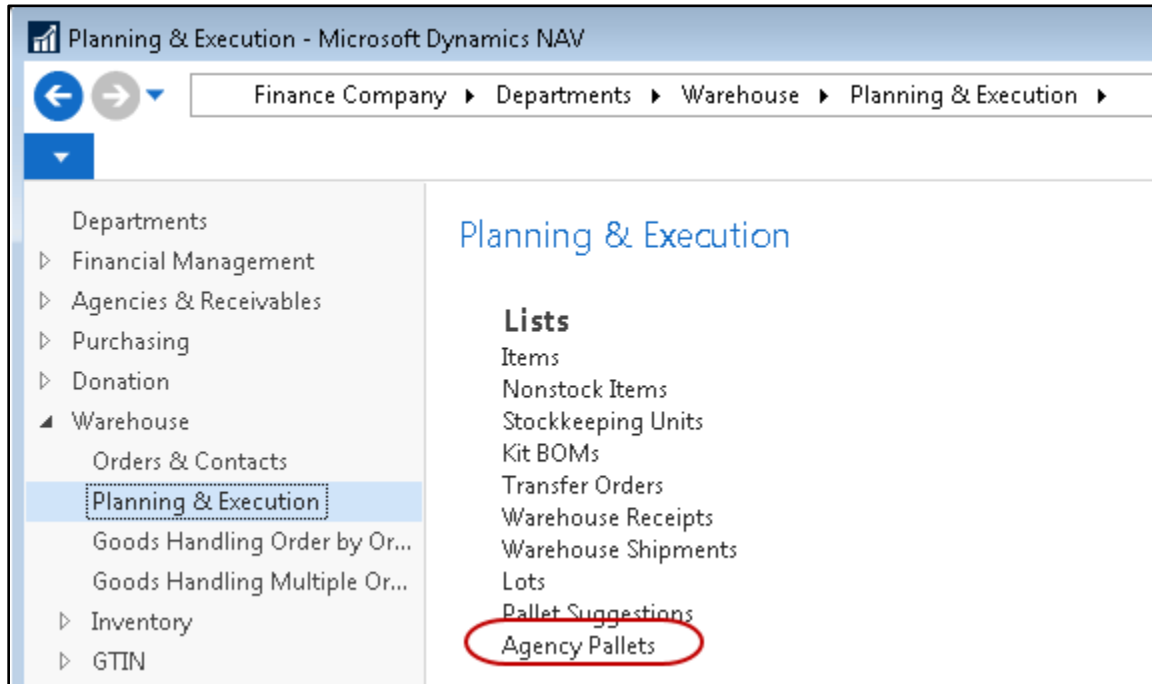| No.	Invt. Pick No.	Agency No.	Agency Name	Agency Order No.	Location Code	Bin Code	Zone Code	Clos...	Shipment Date	Agency Order Exists
AP-00003	IPD-02645	B0129	Safehome, Inc.	AO-01066	KAN	AP-DRY	DRY	☐		No
AP-00004	IPD-02645	B0129	Safehome, Inc.	AO-01066	KAN	AP-DRY	DRY	☐		No
AP-00005	IPD-02647	A0442	Synergy Services-2	AO-01072	KAN	AP-DRY	DRY	☐		No
AP-00008	IPD-02649	B0129	Safehome, Inc.	AO-01073	KAN	AP-DRY	DRY	☐		No
AP-00009	IPF-00935	B0129	Safehome, Inc.	AO-01073	KAN	AP-FRZ	FREEZER	☐		No
AP-00010	IPD-02650	B0129	Safehome, Inc.	AO-01074	KAN	AP-DRY	DRY	☐		No
AP-00011	IPD-02651	B0129	Safehome, Inc.	AO-01074	KAN	AP-DRY	DRY	☐		No
AP-00012	IPD-02652	A0442	Synergy Services-2	AO-01075	KAN	AP-DRY	DRY	☐		No
AP-00013	IPD-02653	B0129	Safehome, Inc.	AO-01074	KAN	AP-DRY	DRY	☐		No
AP-00014	IPD-02654	B0129	Safehome, Inc.	AO-01074	KAN	AP-DRY	DRY	☐		No

Note: Shipment Date and Agency Order Exists fields were added with the release of Ceres 5.00.48.

From the Agency Pallet Page you can perform the following functions

Register Movement – Move the agency pallet to another bin or to the Distribution bin to close the pallet. Click on the Register Movement Icon and enter the To Bin Code the pallet was moved to. Then click OK to complete the movement.
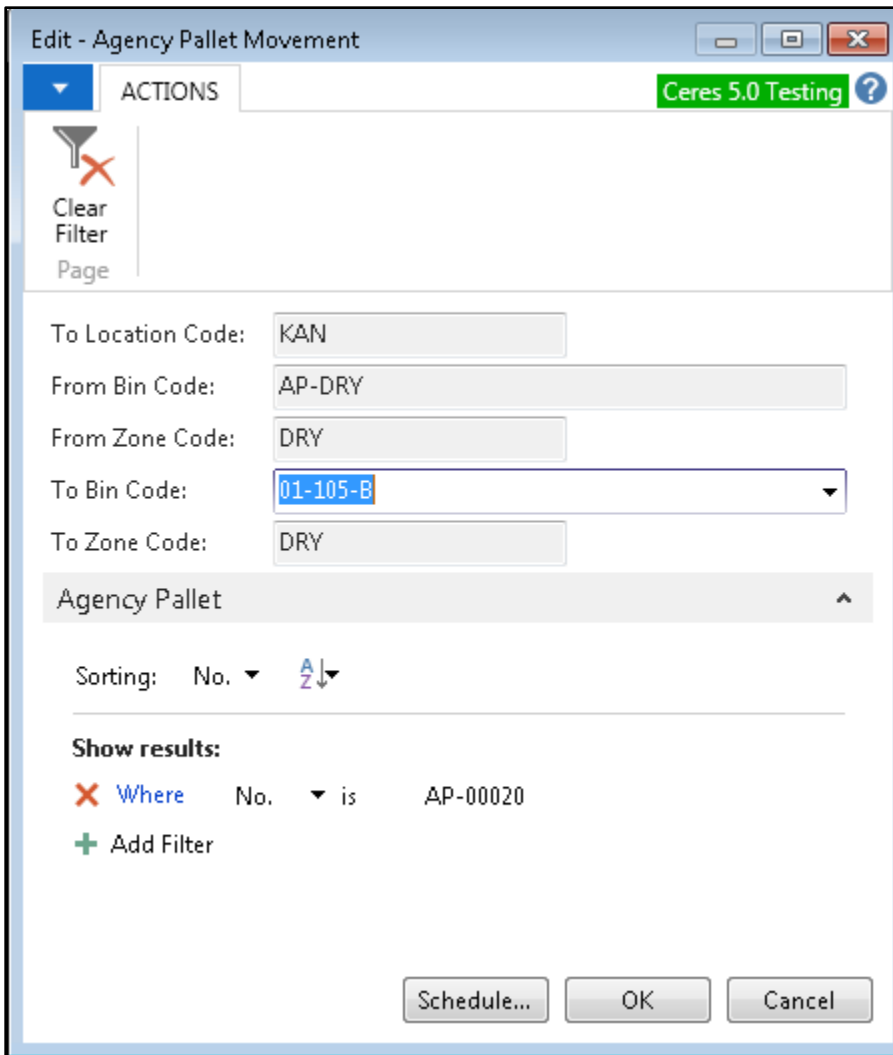
Close Pallet Tag - If the agency pallet has been picked or delivered and was not properly closed you can use this function to close the agency pallet. Also, if an agency pallet was created in error, you may also close the incorrect agency pallet with this function. The administration page is defaulted to not show closed pallets, although you may change the filter to show closed pallets. It is NOT possible to reopen a closed agency pallet; you would need to create a new agency pallet if needed. When you select this function you will be prompted to confirm the close.
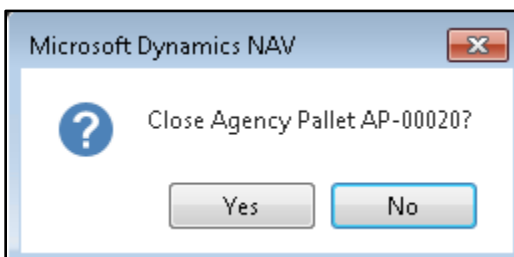
Agency Pallet Movement History – Display a page showing all movements of the agency pallet through the warehouse

No.	From Locatio...	From Bin Code	From Zone Code	To Locatio...	To Bin Code	To Zone Code	User ID	Date	Time
AP-00020	KAN	AP-DRY	DRY	KAN	01-105-B	DRY	ESOPRO\R...	4/2/2020	8:28:17 AM

Filter: AP-00020

Type to filter (F3)   No.

Agency Pallet Tag - this allows for the reprint on an agency pallet tag.

Edit - Agency Pallet Tag 6x4w/Barcode

ACTIONS   Ceres 5.0 Testing

Clear Filter
Page

Saved Settings

Name: Last used options and filters

Agency Pallet

Show results:

✕ Where   No.   ▼ is   AP-00020

✕ And   Invt. Pick No.   ▼ is   IPD-02776

✕ And   Agency Order No.   ▼ is   AO-01311

Print...   ▼   Preview   Cancel

```
Pick No:            IPD-02776                        01-105-B
Shipment Date:      3/25/2020                            DRY
Shipment Method:    DELIVER

Order No:           AO-01311            3 of 3

              1st Baptist Church

              170 Hope Street

          Kansas City  MO 64127

Pallet:  AP-00020
```

Related Topics

1. Locations
2. Bin Classes
3. Inventory Setup
4. Inventory Picks
5. Zone Overview