Preferred Pickup Days and Hours

Purpose of this document

The Preferred Pickup Days and Hours functionality provides for the specification of the days of the week and the associated hours for which a vendor or donor prefers pickups to occur. Though the process works for both donors and vendors, it is used primarily for managing pickups from donors. This document explains how to use the Donor Preferred Pickup Days and Hours functionality in Ceres.

Ceres Object release 5.00.00 is required for the functionality described in this document.

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Overview

During purchase order and donation order entry, Ceres will attempt to assign the next valid pickup date and time based on the preferred pickup days and hours setup for the vendor or donor. This allows pickup days and time to more tightly controlled and helps reduce wait times at the pickup site. The donor pickup days and hours for Roadnet routing is described in the Roadnet Donation Pickup Exports Procedure Document.

Setting up and Editing Preferred Pickup Days and Hours

1. The setup of preferred pickup days and hours begins with the specification of preferred hours. To access the Preferred Pickup Days and Hours setup from a Vendor Card, select Navigator → Vendor → Preferred Pickup Days and Hours, and from a Donor Card select Navigate → Donor → Preferred Pickup Days and Hours. Please note, that the below screens shots based on donor setup.
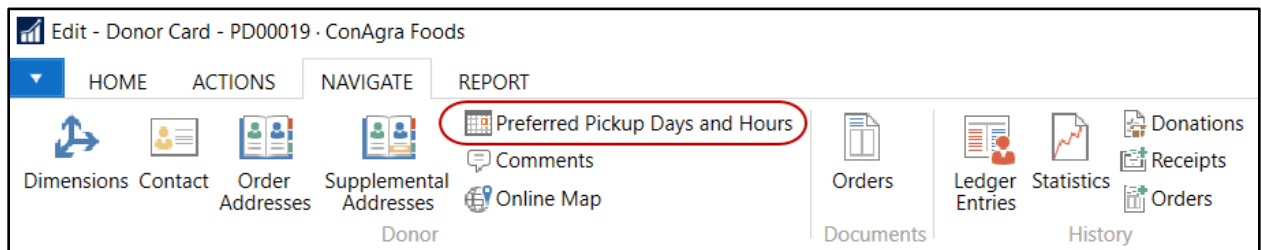
2. The Preferred Pickup Days and Hours Page will display in view mode. If days and hours have not yet been specified for this vendor/donor, the List will be empty as shown below.
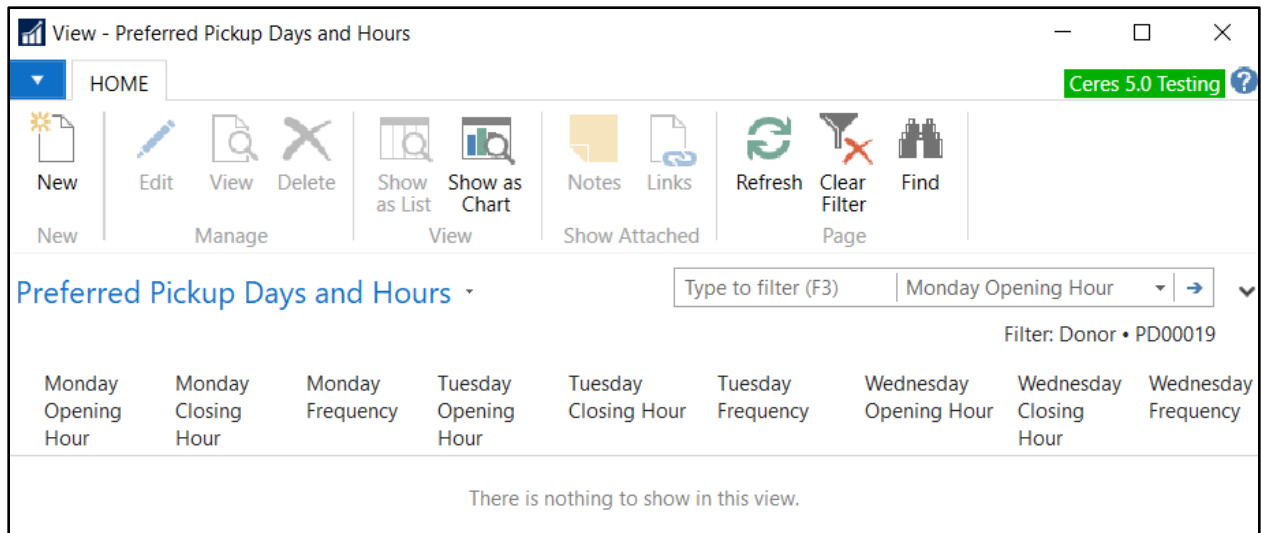
3. To specify days and hours, select Home → Manage → New. The Preferred Pickup Days and Hours Card Page will be displayed in edit mode.

4. Specify the preferred pickup time opening and closing time for any and all days as applicable to this vendor/donor. If the vendor/donor generally prefers previous notification prior to a pickup being scheduled, specify the previous notification in the Pickup Lead-time (Days) control. Enter the Frequency by specifying a valid value from the table of user-defined frequency codes.

New - Preferred Pickup Days and Hours - Donor · PD00019			— ☐ ✕

HOME

Ceres 5.0 Testing ❓

View	Edit / New / ✕ Delete	Notes	Links	Refresh	Clear Filter	Go to
	Manage	Show Attached			Page	

Donor · PD00019

General

Pickup Lead-time (Days):	2	Variance (Minutes):	15

Days and Hours

|	Opening Hour	Closing Hour	Frequency
Monday:	9:00:00 AM		2 WEEKS
Tuesday:			
Wednesday:	9:00:00 AM		2 WEEKS
Thursday:			
Friday:	9:00:00 AM		2 WEEKS
Saturday:			
Sunday:			

OK ▾

5. Once you are satisfied with the established days and hours, click the OK to close the Page.

6. You will be returned to the Preferred Pickup Days and Hours List Page in view mode. Notice however, that the days and hours you specified are now displayed. If at this point, you wish to change any of the information, select Home → Manage → Edit.
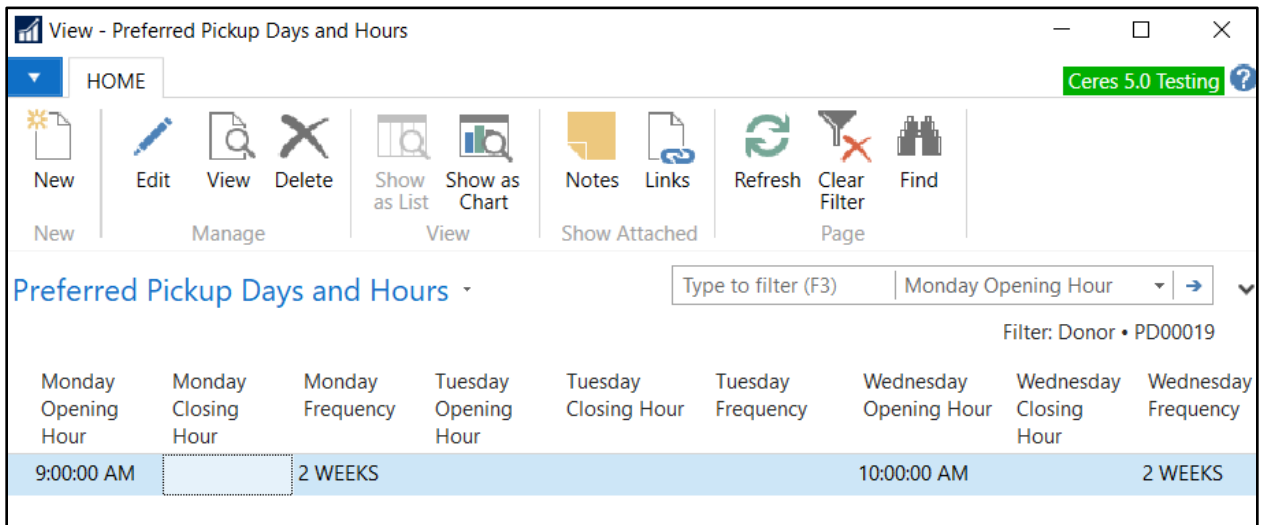
7. Selecting Home → New, at this point in the setup, will again display the Preferred Pickup Days and Hours Card Page in view mode. You can specify information, but it will display an error as shown below. If you encounter this error, select Yes to close the windows and then select Home → Mange → Edit. Make the necessary updates and then click Close.
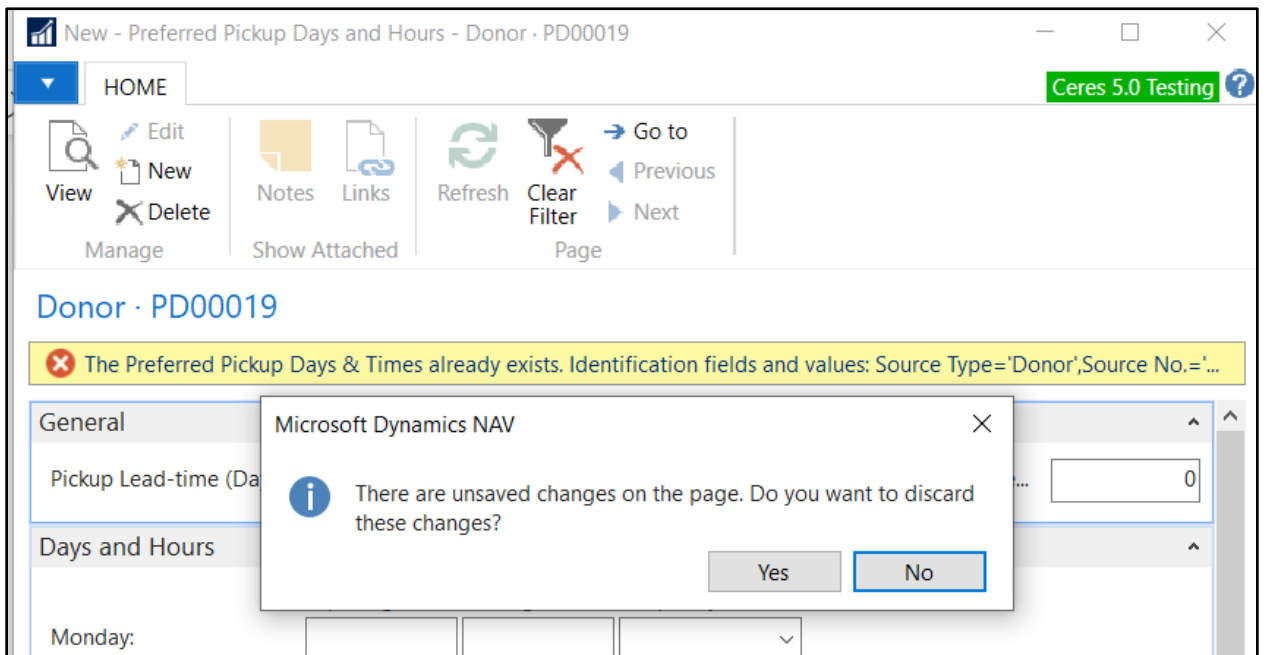
8. Should you wish to update the days and hours information for a vendor/donor at any point in the future, select Home → Mange → Edit from the Preferred Pickup Days and Hours Page. Make the desired changes, click Yes to save the changes, and then OK to close the Page.
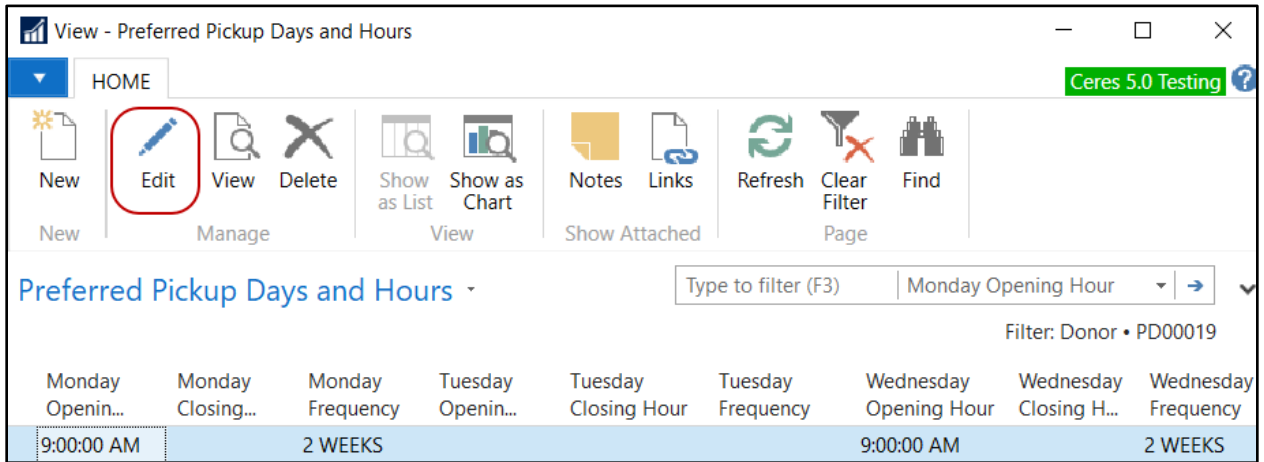

How Preferred Pickup Days and Hours are used in Ceres

The Preferred Pickup Days and Hours functionality applies to purchase/donation orders only. Upon specification of the vendor/donor number on an order, Ceres will consult the preferred pickup days and hours setup for the vendor/donor and use this information to calculate a suggested pickup date and time which can be viewed on the Receiving FastTab of the order. Only the day's opening hours will be used as the pickup Time.

Ceres will use today's date and in conjunction with the days that have preferred hours specified and the specified pickup lead time days to calculate a suggested pickup date. The suggested pickup time will be the time specified for the day of the week to which the pickup date correlates. If days and hours have not been setup Ceres will not suggest a pickup date or time.

For example, specified days and hours have been setup for donor PD00003 for Friday at 9:00 AM for every 2 weeks, with a 2 day lead time.
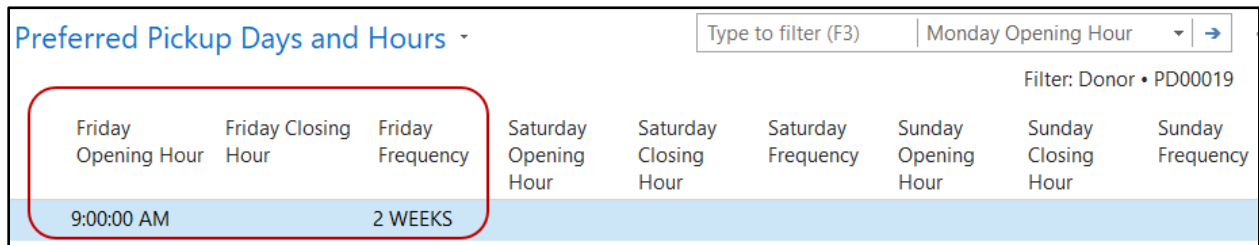
If we create an order for PD0019 on Thursday, 04/02/20 our next available day of the week to suggest would be Monday, 04/06/20 because of the 2 day lead time. This is the date that will be suggested in the Pickup Date field on the Receiving FastTab of the donation order. The time suggested will be 9:00 AM because this is the time associated with Monday as the preferred pickup time.

Should Ceres suggest a pickup date equal to today's date (because there is no lead time specified and today's day of the week has a preferred pickup time specified), a message will be presented to the user as shown below.
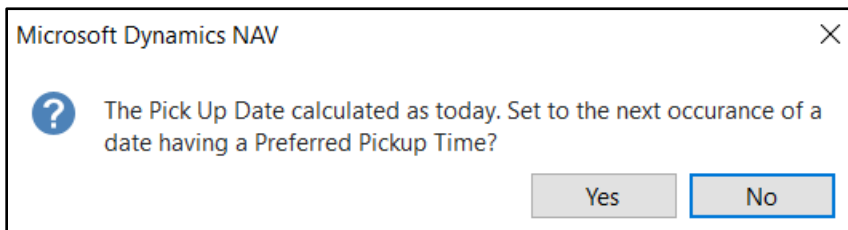
Click No to retain the today's date as the order's pickup date or Yes to have Ceres suggest the next viable date as described above.

Related Topics

1. Purchase Order Overview
2. Donation Order Overview
3. Roadnet Donation Pickup Exports