Roadnet Agency Order Exports

Purpose of this document

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

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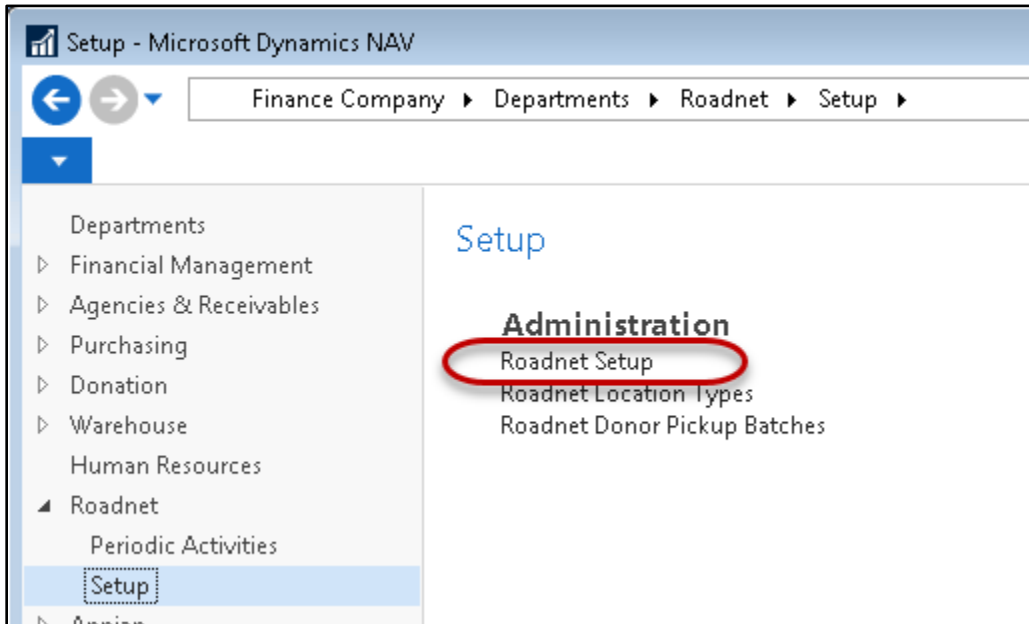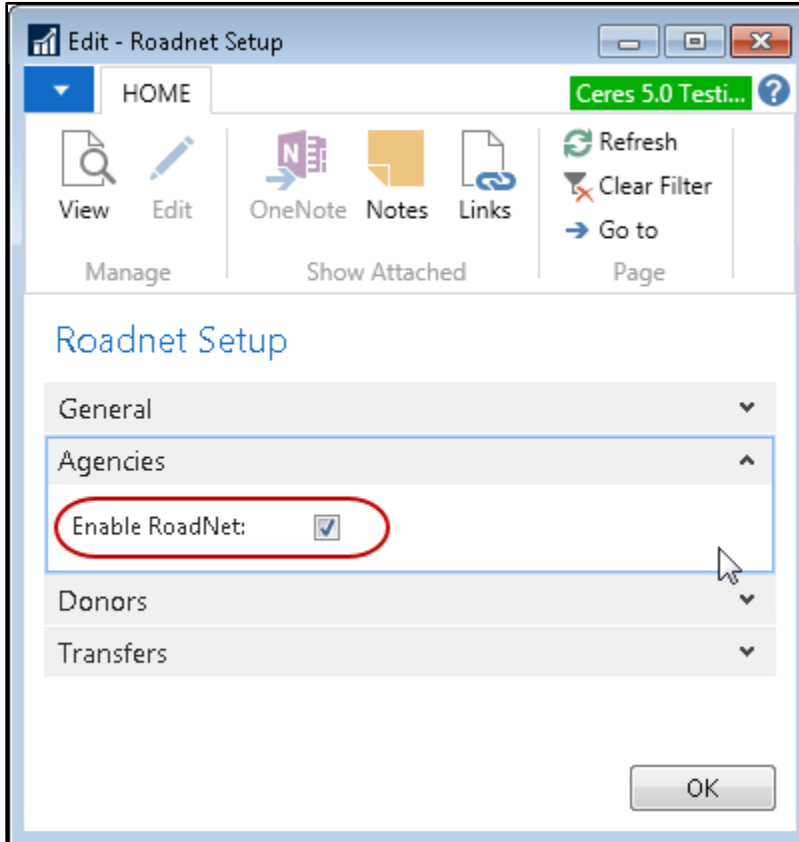
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Enabling Roadnet Integration

Food banks may choose if the Roadnet integration is enabled for deliveries, pickups, or both depending on their routing needs. Enabling the functionality for deliveries allows users the ability to export Agency Orders for dynamic routing of deliveries.
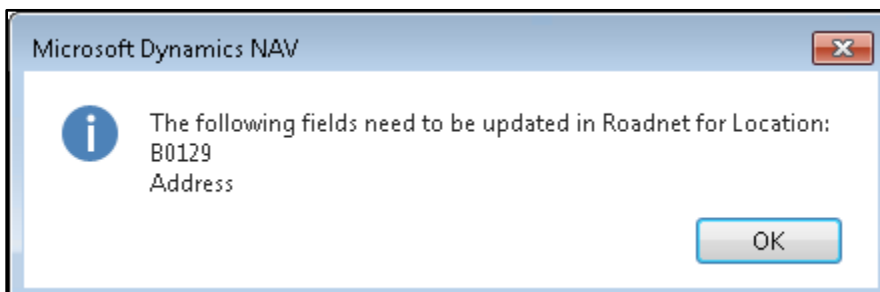
1. The Roadnet Setup can be accessed from Departments → Roadnet → Setup → Roadnet Setup.

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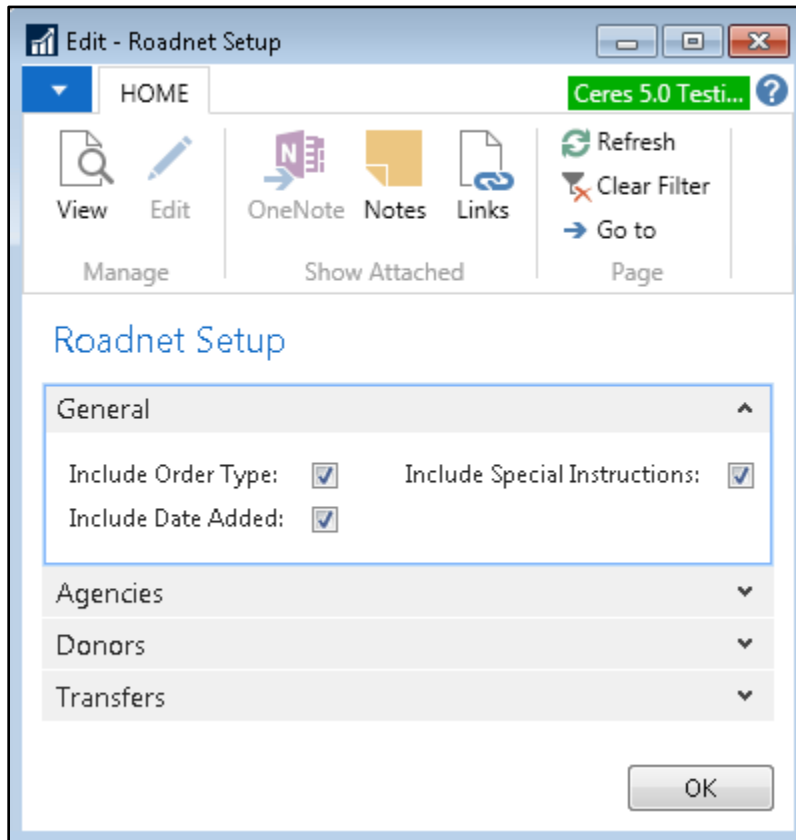

3. When Roadnet is enabled, any changes to an Agency Card will cause Ceres to show a warning informing you that you need to update the corresponding record in Roadnet. The updated master data does NOT export automatically from Ceres to Roadnet.

Roadnet Setup for Agency Deliveries

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

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

Include Order Type: The export will show an 'O' to indicate an order

Include Date Added: The export will relay the posting date from the Agency 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.

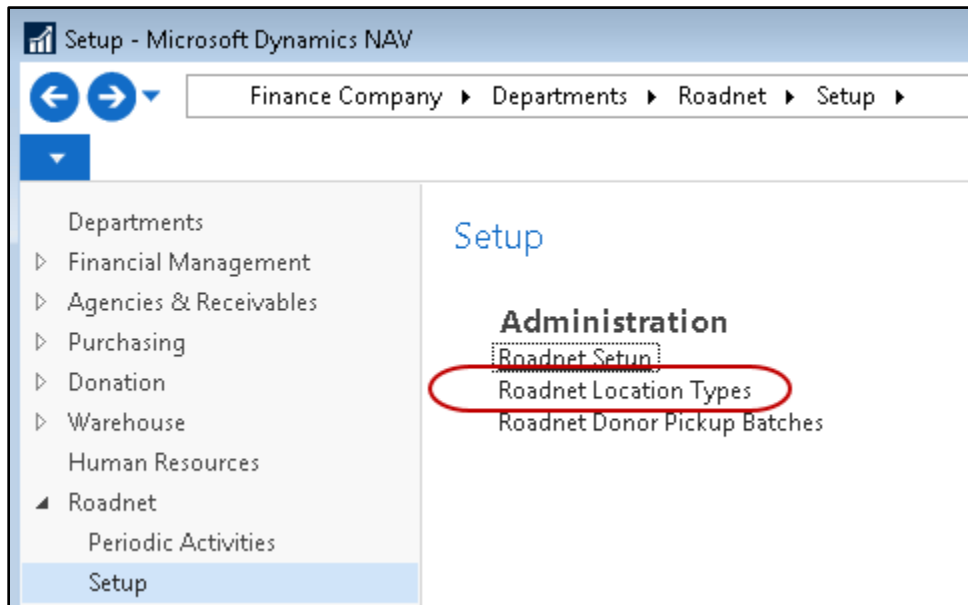2. Click OK when you have made your selections

Roadnet Location Types

Roadnet Location Types are optional fields that can assist your food bank with filtering Agency 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 the Agency Card. This information will flow to new Agency Orders.
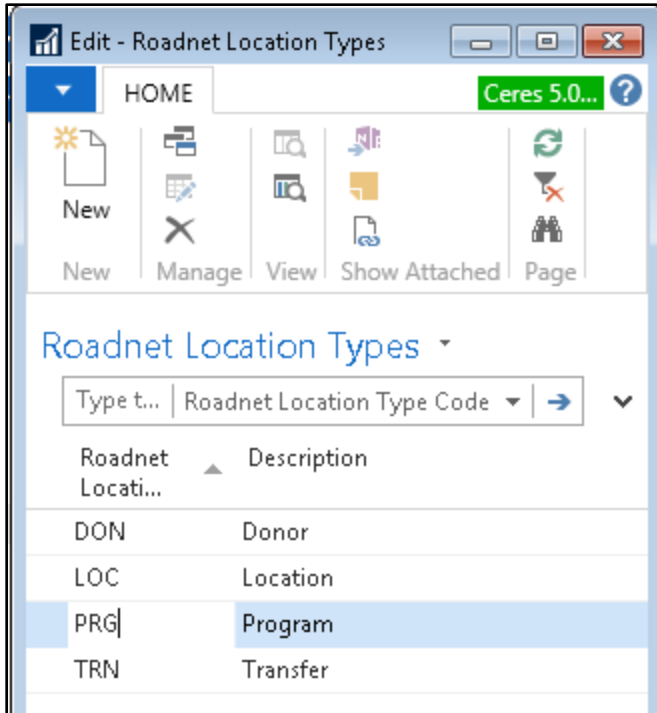
When the actual export is generated, the Roadnet Location Type will show as 'PRG' to comply with Roadnet formatting standards.

1. Roadnet Location Types can be accessed from Departments → Roadnet → Setup → Roadnet Location Types.

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

> **Note:** Roadnet Location Types are also available for Transfer Orders and Donation Orders that are reported to Roadnet.

Preparing Agencies

To reduce data input, users can setup delivery information and Roadnet Location Types on the Agency records, which then flow to new Agency orders.

1. The Agency Card can be accessed from Departments → Agencies & Receivables → Agency Relations → Lists → Agencies.

2. Select and open an Agency that will be routed by Roadnet.

3. Expand the Shipping FastTab.

4. Lookup on the Roadnet Location Type field and select a Code.

5. In the Delivery Info. field, enter any special instructions that need to be mentioned.

B0129 · Safehome, Inc.

General	Safehome, Inc. KS-LEAVENW ACTIVE
Address & Contact	John Smith williamh@esopro.com
Invoicing	GENERAL GENERAL
Payments	30
Information	
Shipping	

Location Code: MAIN
Zone Code:
Delivery Zone Code: ZONE 1
Delivery Info.:   Battered women's shelter--address...

Shipment

Shipment Method Code: PICKUP
Order Handling Group Code: HARV KSDE
Order Routing Group Code: CLUSTER
Default Ship-to Code: DEFAULT
Preferred Delivery Time:
Preferred Pickup Time:
Staging Area:
Roadnet Location Type: PRG

501(c)(3)

Preparing Agency Orders

Deliveries that are being sent to Roadnet allow users to specify pallet counts for the UNC storage requirements for dry, refrigerated, and frozen products. This helps in determining the load configuration for the delivery routing in Roadnet. Users may optionally indicate special instructions and the Roadnet Location Type to provide further details.

1. Agency Orders can be accessed from Departments → Agencies & Receivables → Order Processing → Lists → Agency Orders

AO-01166 · Safehome, Inc.

General		12/4/2019	12/4/2019	1/3/2020	Open	⌄
Lines						⌄
Invoice Details				30		⌄
Shipping and Billing		DEFAULT	Safehome, Inc.	12/4/2019		⌄
Delivery/Web						⌃

Delivery Info: Battered women's shelter--address private

Web Order Info
Web Order: ☐
Shopper E-mail Address: [ ]
E-mail Shopper: ☐
Web Acceptance Status: ▼
Rejected Reason Code: ▼
Web Accept. User ID: [ ]
Web Accept. Date: [ ]
Web Accept. Time: [ ]
Allocated Order: ☐
Web Allocation Status: ▼
Web Order Validated: ☐
Web Transmitted: ☐

Delivery Zone: ZONE 1 ▼
Shopper: [ ] ▼
Shopper Name:
Roadnet Location Type: PRG ▼
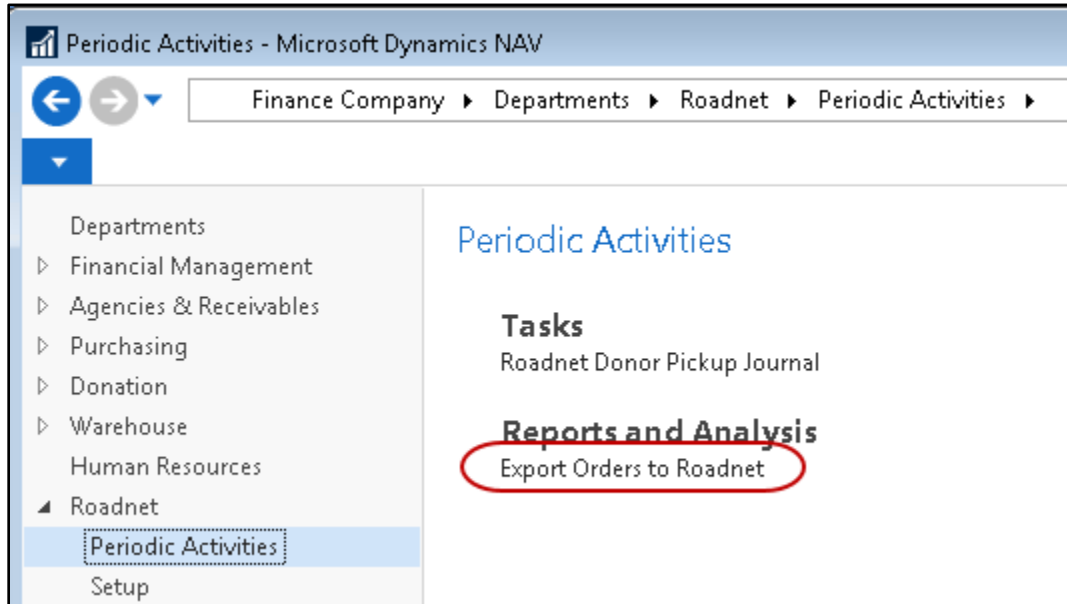Roadnet Exported: ☐

Pallet Counts
Frozen Pallet Count: 0
Ref Pallet Count: 0
Dry Pallet Count: 0

2. Create a new order or select an existing order

3. Expand the Delivery/Web 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 Delivery Info 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.

Exporting Orders

Once the Agency deliveries have been released, 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.
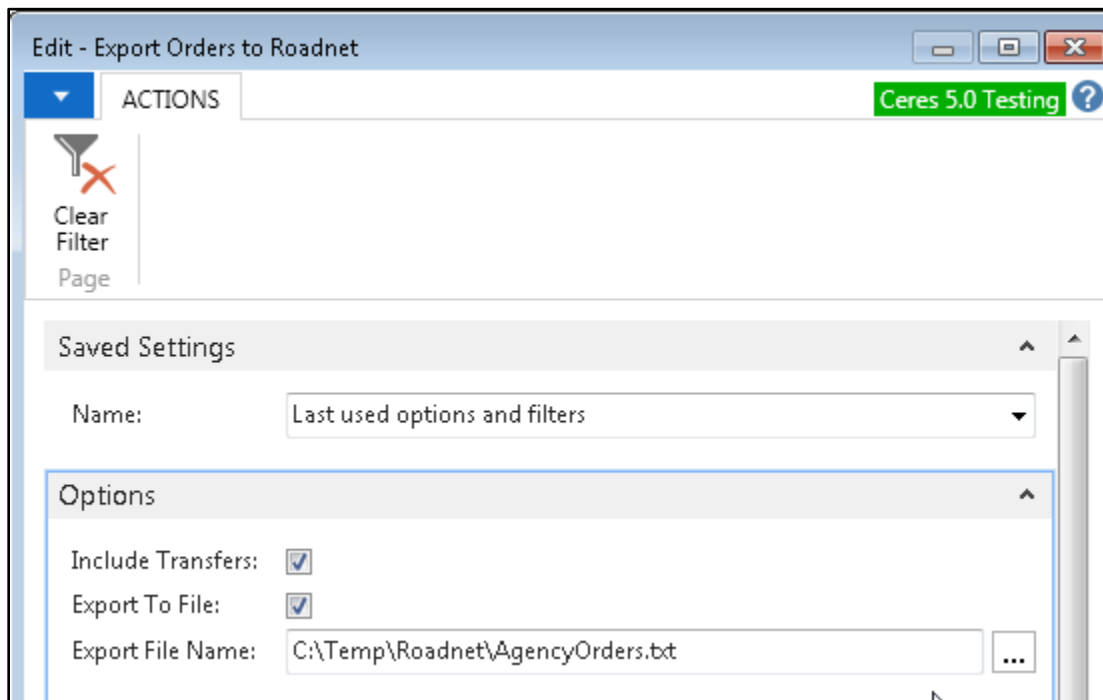

2. On the Options FastTab, ensure that Export Transfers is blank.

   Note: If Export Transfers is selected, the report will attempt to export Transfer Orders between food bank locations 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
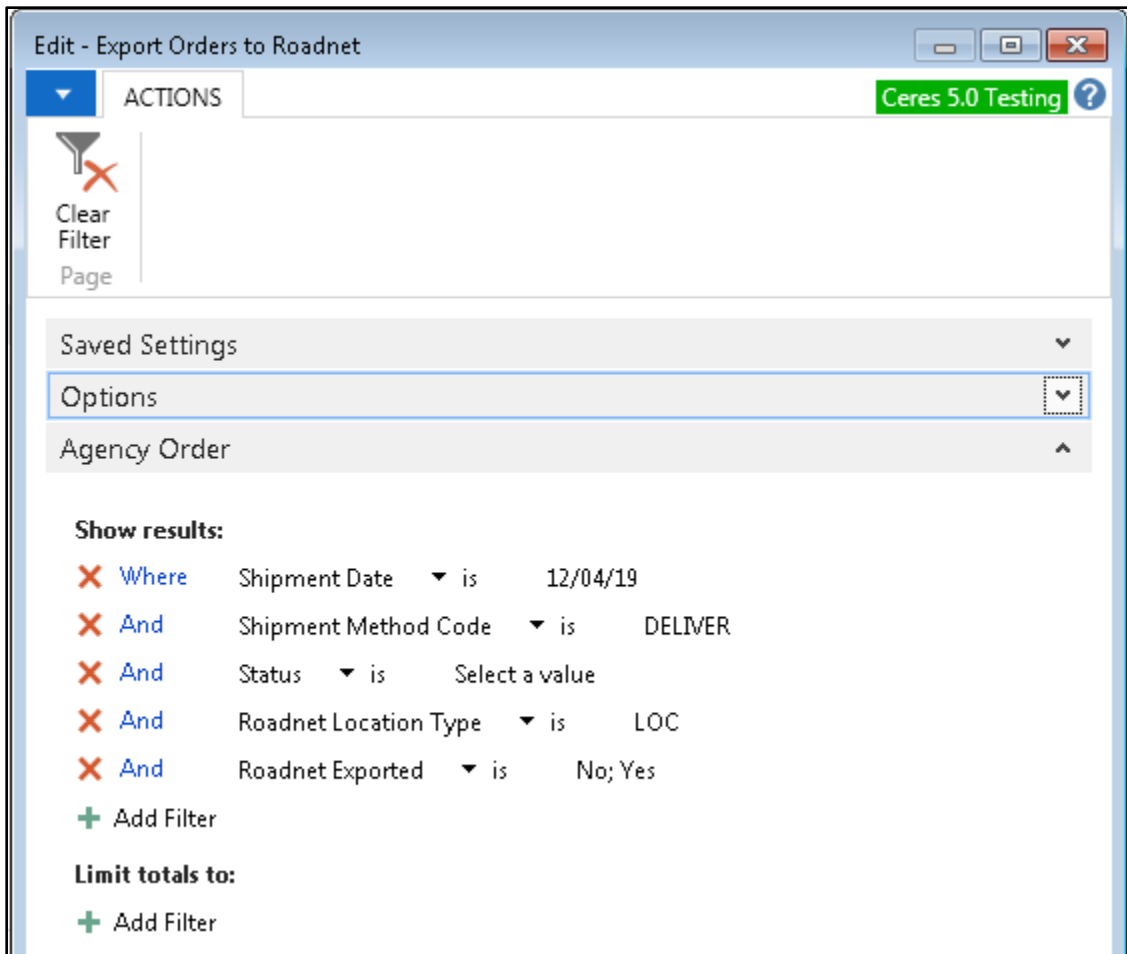
   Note: If Export to File is unchecked, Ceres will not update the value of the Roadnet Status field on the Agency Order(s)

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

5. In the Roadnet Exported field on the Agency Order FastTab, 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

6. 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 orders that are released, have a Shipment Date of 08/08/18, 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.

7. 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:

Below is an example of the exported file

```
00010   AOR2449 200   100   0   100   8   5   2   1   2010   1710   0   300   PRGOUse rear parking lot  2011-01-12
```

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

Related Topics

1. Agency Overview
2. Agency Order Overview
3. Location Overview
4. Roadnet Donation Pickup Exports
5. Roadnet Transfer Order Exports
6. Transfer Order Overview