



Agency Groups and Qualifiers

Purpose of this document

The purpose of this document is to review Qualifiers and Agency Groups. The most common use for Qualifiers are to help manage which Agencies can receive which Items from the food bank Inventory, and set a Maximum quantity if desired. Qualifiers may also be used to define which Grants can apply to an Agency Order or a Purchase, but the use of those types of Qualifiers are defined in other documents. Agency Groups are used to centralize the maintenance of the Agency/ Item qualifiers and maximum quantity limitations for Agencies. Agency Groups also serve to make the communication between Ceres and Agency Express more efficient. If you use Agency Express, Agency Groups are required, however the functionality may be used in Ceres even if not using Agency Express.

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

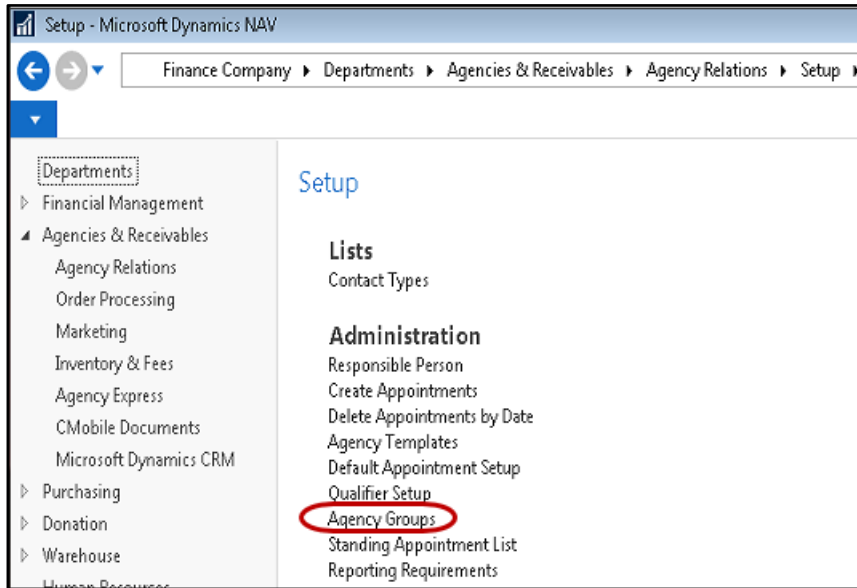
See Document “Agency Express Item Validation and Reservations Revisions” for some additional updates to Agency Group functionality.

Table of Contents

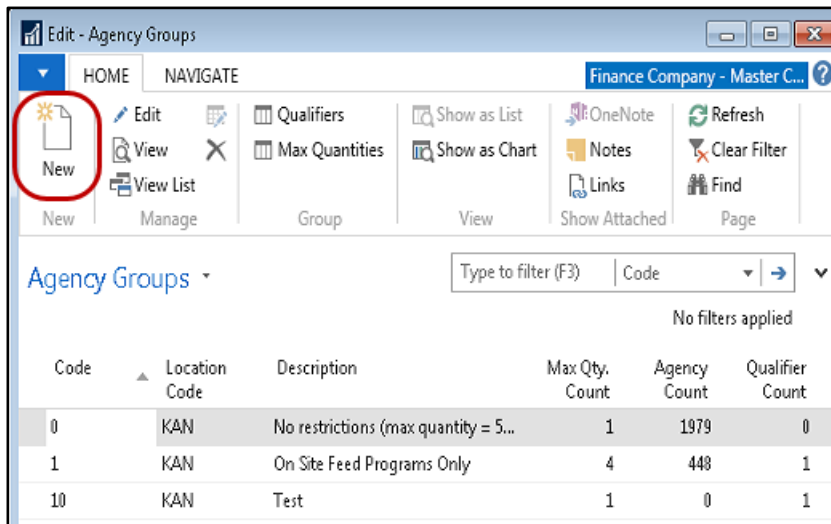
SETTING UP AND ASSIGNING AGENCY GROUPS.....	3
LOT NO. INFORMATION CARD	6
ASSIGNING AGENCIES TO A GROUP.....	8
RELATED TOPICS	8

Setting up and Assigning Agency Groups

1. To create Agency Groups, go to Departments → Agencies & Receivables → Agency Relations → Setup → Agency Groups.



2. To create a new Agency Group, click on the New on the Home Ribbon



Code: Enter a numeric or alpha-numeric value here. We recommend that you leave space between codes (i.e. 10, 20, 30, etc.) so that you can add new codes as needed. Please be sure NOT to use special characters such as @, &, * or |, etc. as these same characters are used in filtering and may cause problems when running reports, filtering lists, etc.

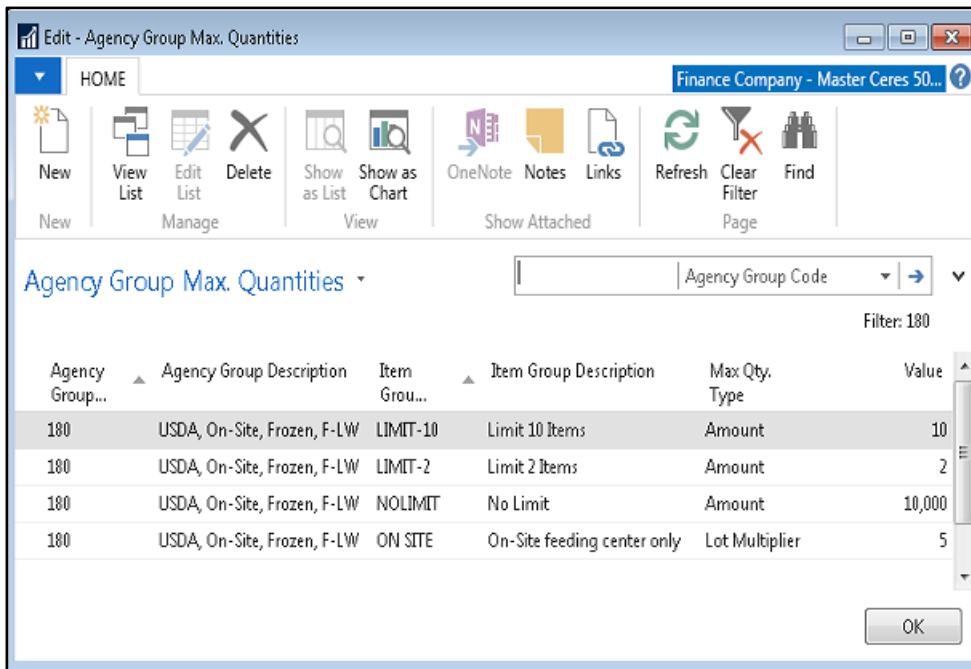
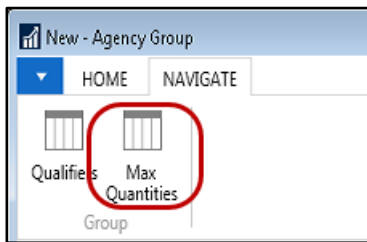
Location: Enter the Location Code or use the down arrow to select from available Locations. You must complete this field for the Inventory to be available on Agency Express 3.

Description: This is the description of the Agency Group. It is configurable by the food bank staff and does not auto-fill. This should best describe the Agency Group's members, Location, limits and qualifiers. For example – USDA, Kids Café, Medium (Location KAN)

Max Qty. Count: This is also a flow field and it displays the number of Agency Group Max. Quantities assigned.

There are two types of Agency Group Max. Quantities that can be assigned: Item Group or non-Item Group (blank). Item Group Codes must be created (or already created) in order to select one to use here. The Item Group Code must also be on the Item card for this type of Maximum Quantity to work.

Maximum quantities are optional and are set up by selecting Navigate → Group → Max Quantities from the Edit - Agency Groups window.



When used, Maximum Quantities limit the maximum quantity of items that share the Item Group Code listed (blank or otherwise). A blank Item Group Code can be used to easily apply a maximum quantity to all items.

When the Max. Qty. Type is *Amount*; the available amount is limited to the amount shown in the value column. When the Max. Qty. Type is *Lot Multiplier*; the standard Lot Maximums are used, and the results are multiplied by the quantity in the value column.

Base Lot Multipliers Max Quantities are assigned when the product is received; either on a Purchase or Donation Order in the Maximum Quantity field.

Lot No. Information Card

When the order is received (posted), the Lot No. Information Card stores this information:

68103 · LOT-00256 · Elbow Macaroni

General	
Item No.:	68103
Variant Code:	
Lot No.:	LOT-00256
Description:	Elbow Macaroni
Maximum Quantity:	25.00
Test Quality:	
Certificate Number:	
Blocked:	None
GTIN Code:	
GTIN Version No.:	0
Consume by Date:	12/31/9999
Expiration Date:	12/31/9999
Ship by Date:	12/31/9999
Receive Date:	11/9/2012
Unit Cost:	410.00
Unit Value:	0.00
Unit Gross Weight:	1,000
Ext. Gross Weight:	1,000,000
Handling Fee (per LB):	0.00
VAP Fee (per LB):	0.00

If the Maximum Qty. field is not populated during receipt and the food bank wishes to restrict distribution by Lot Multipliers, then the user must go to the Lot Card and edit the Maximum Quantity field on the General tab.

The Item Group Code on the Item Card will determine which Max. Quantity line to use for orders. Item Group Code Max. Qty. Type and Value will be used for available quantity during distributions.

If the Max Qty. Type for this item is Lot Multiplier, then Ceres will take the Maximum Quantity on the Lot x the Quantity in the *Value* column to determine how much of that product an Agency in this Agency Group can see/order.

Edit - Agency Group Max. Quantities

Finance Company - Master Ceres 50...

Agency Group Max. Quantities

Agency Group Code

Filter: 180

Agency Group...	Agency Group Description	Item Group...	Item Group Description	Max Qty. Type	Value
180	USDA, On-Site, Frozen, F-LW	LIMIT-10	Limit 10 Items	Amount	10
180	USDA, On-Site, Frozen, F-LW	LIMIT-2	Limit 2 Items	Amount	2
180	USDA, On-Site, Frozen, F-LW	NOLIMIT	No Limit	Amount	10,000
180	USDA, On-Site, Frozen, F-LW	ON SITE	On-Site feeding center only	Lot Multiplier	5

OK

68103 · Elbow Macaroni

Item	UNIT		
Inventory	3,500	3,500	
Costs & Posting	410.00	EPP	EPP
Fees & Distribution			
Unit Fees:	0.00	Item Group Code:	ON SITE
Gross Weight:	1,000	Agency Unit of Measure:	UNIT
		Exclude from Lb. based Delivery Charge:	<input type="checkbox"/>

If the Item Card had an Item Group Code of LIMIT-10, (Example Item: 68103 – Elbow Macaroni), then the available quantity would be 10. However, this item has an Item Group Code of ON SITE, so the quantity available to an Agency in the 180 Agency Group Code would be 5 x the Maximum Quantity Amount on the Lot (in this case 5 x 25 = 125).

Note: Other factors also impact Available Quantity in determining how much an Agency should see as available to order – not just Agency Groups max. quantity.

Agency Count: This is a flow field that displays the number of agencies that have been assigned this Agency Group Code. If no agencies have been assigned yet, this value will show as 0. If a value exists, you may view the agencies that have been assigned that Agency Group by clicking on the number in that column:

Edit - Agency Groups

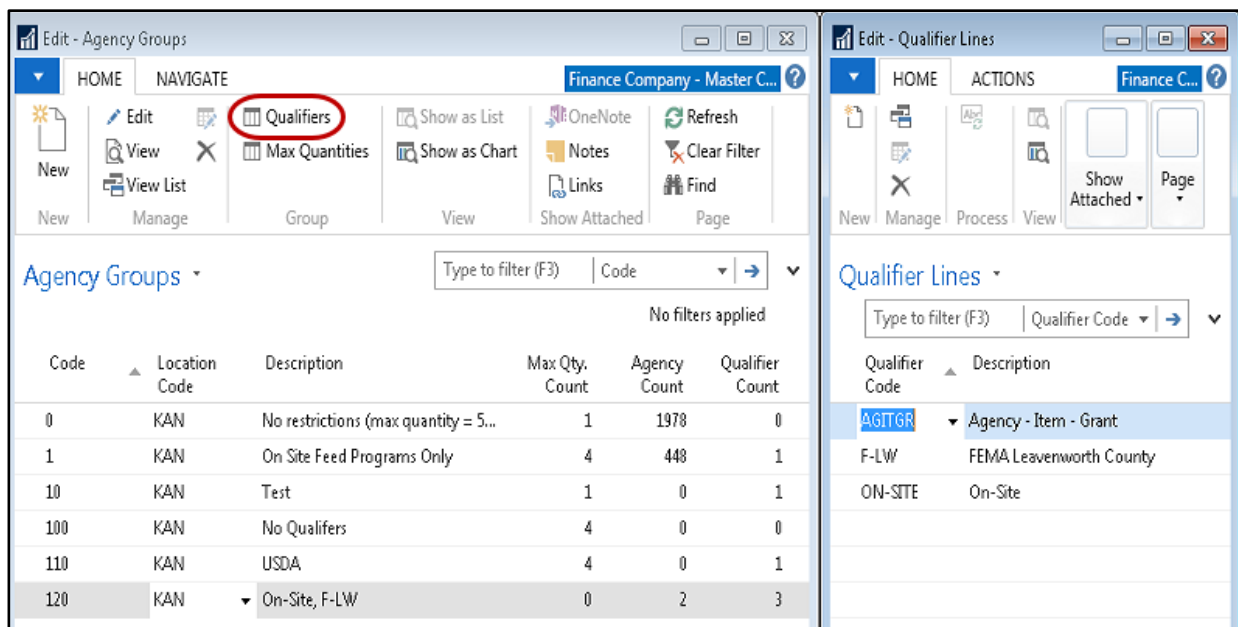
HOME NAVIGATE Finance Company - Master C...

New Edit View Qualifiers Show as List OneNote Refresh
New View View List Max Quantities Show as Chart Notes Clear Filter
New Manage Group View Show Attached Page

Agency Groups Type to filter (F3) Code No filters applied

Code	Location Code	Description	Max Qty. Count	Agency Count	Qualifier Count
0	KAN	No restrictions (max quantity = 5...	1	1979	0
1	KAN	On Site Feed Programs Only	4	448	1
10	KAN	Test	1	0	1

Qualifier Count: This is a flow field and the value displayed here is the number of qualifiers assigned to this Agency Group. To add Qualifiers to an Agency Group, make sure your cursor is on the line of the Agency Group you wish to modify, then go to Navigate → Group → Qualifiers. This takes you to the Qualifier List, where you can add/edit/remove qualifiers assigned to this Agency Group.



Click Home → New to add a Qualifier to the Agency Group or click on an empty line in the list. All Agencies assigned to this Agency Group will inherit the Qualifiers and Location codes. Any items that are not qualified (restricted) will be available to these Agencies as well.

Assigning Agencies to a Group

An Agency Qualifier/ Max Quantity Group is assigned to the Agency on the Agency Card via the Agency Group Code. The Agency Overview document contains instructions on accessing the Agency Card and establishing that value.

Any Qualifiers added on the Agency Card specifically add to the qualifiers referenced from the Group code. Many sites will use Qualifiers on the Agency Card to manage County Qualifiers and/or Grant Qualifiers in addition to the Agency Group Qualifiers.

Related Topics

1. AE3 Agencies, Shoppers & Items
2. Agency Managing Web Orders
3. Agency Express Item Validate and Reservation Revisions
4. Agency Overview
5. Item Overview
6. Grants Overview
7. Donation Order Overview
8. Purchase Order Overview