Agency Groups and Qualifiers

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

Purpose of this document

The purpose of this document is to introduce Qualifiers and Agency Groups which are used to manage inventory availability for Agency Orders.

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Purpose

The purpose of this document is to introduce 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 are using Agency Express 3. If you use Agency Express, Agency Groups are required, however the functionality may be used in Ceres alone.

Ceres Object release 4.00.00 is required for the functionality described in this document.
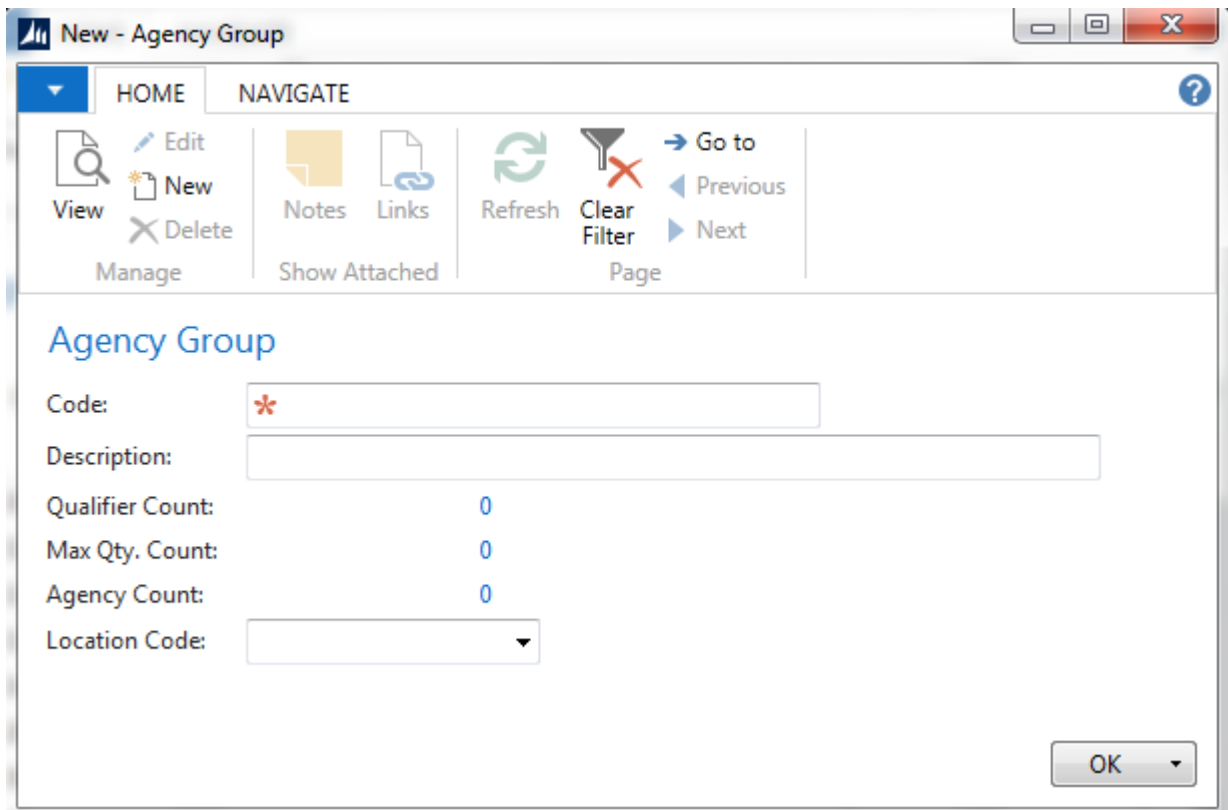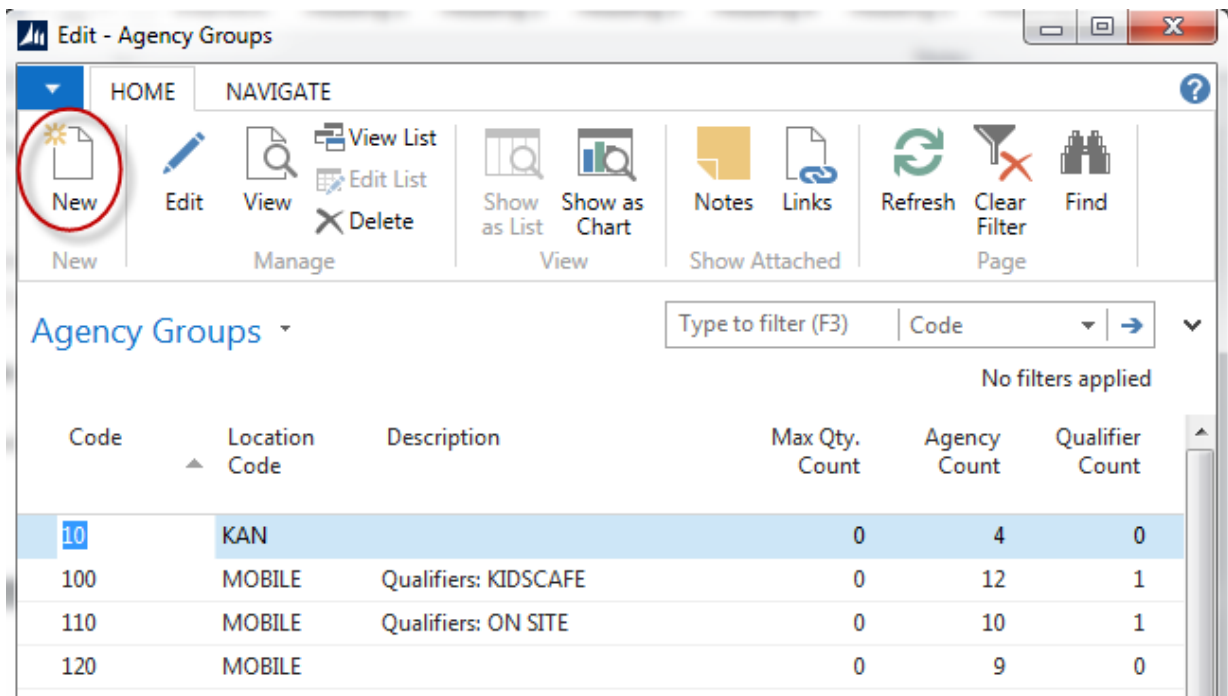
See Document "Agency Express Item Validation and Reservations Revisions" for some recent updates to Agency Group functionality.

Setting up and Assigning Agency Groups

1. To create Agency Groups, go to Departments → Agencies & Receivables → Administration → Order Processing → Setup.
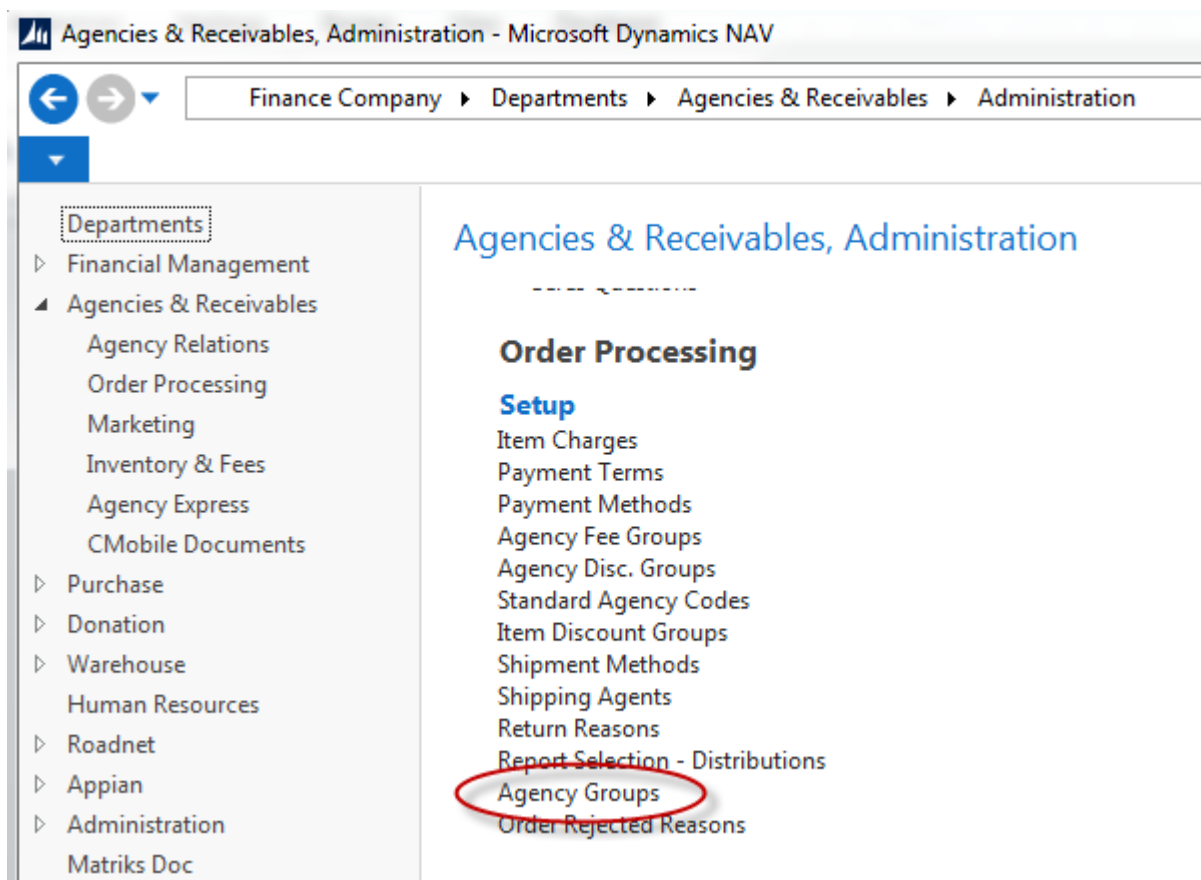
2. To create a new Agency Group, click on the New on the Home Ribbon

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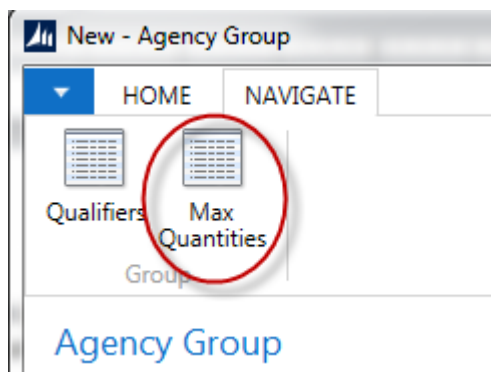
Location: Enter the Location Code or use the down arrow to select from available Locations. You must complete this field for the Inventory to be available on Agency Express 3.

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:

10026 · LOT-452748 · Tea

General ▲

Item No.:	10026 ▼	Consume by Date:	12/31/9999 ▼
Variant Code:	▼	Expiration Date:	12/31/9999 ▼
Lot No.:	LOT-452748	Ship by Date:	12/31/9999 ▼
Description:	Tea	Receive Date:	3/16/2012 ▼
Maximum Quantity:	3.00	Unit Cost:	0.00
Test Quality:	▼	Total Cost:	0.00
Certificate Number:		Unit Value:	0.00
Blocked:	None ▼	Total Value:	0.00
GTIN Code:	▼	Unit Gross Weight:	3
GTIN Version No.:	0	Ext. Gross Weight:	0

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.

If the Item Group Code on the Item Card is blank, then the settings for the 'blank' Item Group Code Max. Qty. Type and Value will be used for available quantity during distributions.

Agency Group Max. Quantities ▾

Type to filter (F3) | Agency Group Code ▼ → ✓

Filter: 10

Agency Group Code ▲	Agency Group Description	Item Group Code ▲	Item Group Description	Max Qty. Type	Value
10	Group 10 - KAN	LIMIT-10	Limit 10 Items	Lot Multiplier	10
10	Group 10 - KAN	LIMIT-100	Limit 100 Items	Amount	100
10	Group 10 - KAN	LIMIT-15	Limit 15 Items	Amount	15
10	Group 10 - KAN	PRSTR	Project Strength Sacks View ...	Lot Multiplier	5
10	Group 10 - KAN	▼		Amount	500

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 the Agency in this Agency Group can see/order.

In the above example, if the order is for an Agency in Agency Group 10, and the Item Card did NOT have an Item Group Code assigned, then the available quantity on the order line would be 500 for that Item and Agency.

10026 · Tea

Item Group Code:	LIMIT-10 ▼

If the Item Card had an Item Group Code of LIMIT 10, (Example Item: 10026 - Tea), then the available quantity would be 10 x the Maximum Quantity Amount on the Lot. For POT-452748, Item 10026; available quantity for that item on the order would be 30.

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

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:
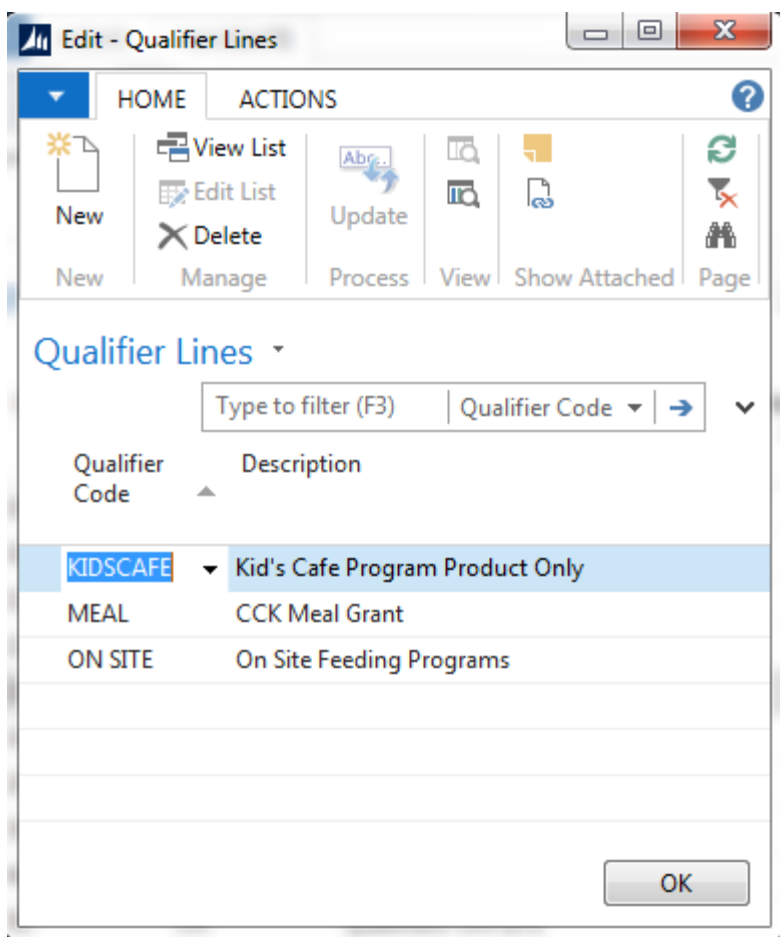
Agency Groups ▾

Type to filter (F3) Code

No filters

Code	Location Code ▲	Description	Max Qty. Count	Agency Count	Qualifier Count
10	KAN	Group 10 - KAN	5	4	0
100	MOBILE	Qualifiers: KIDSCAFE	0	12	1
110	MOBILE	Qualifiers: ON SITE	0	10	1
120	MOBILE		0	9	0
130	KAN	Qualifiers: KIDSCAFE,MEAL,ON S...	0	1	3
140	LS-DRY		0	1	0
20	KAN	Qualifiers: ON SITE	0	4	1
30	KAN	Qualifiers: ON SITE	0	435	1
40	KAN		0	1997	0
50	CA	Qualifiers: ON SITE	0	1	1
55	CA	Agency Group 55 - CA	0	0	0
60	HOU	Qualifiers: ON SITE	0	4	1
70	TOP		0	1	0
80	HOU	Qualifiers: PROJECTSTRENGTH	0	250	1
90	KAN	Qualifiers: KIDSCAFE	0	56	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.   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. The Agency Overview document contains instructions on accessing the Agency Card and establishing that field 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 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