

Agency Preferred Days and Hours Setup

Purpose of this document

The Agency Preferred Days and Hours functionality provides Ceres users with the ability to record the days and hours of operation for agency deliveries. It specifies the hours of operation that the foodbank may conduct business with the agency. It differs from agency days and hours, which is used to specify the operating hours for the agency that clients have access to the agency.

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

Table of Contents

AGENCY PREFERRED DAYS AND HOURS SETUP	3
	2
ACCESSING AGENCY PREFERRED DAYS AND HOURS	
Agency Preferred Days and Hours Page and Report	7
	Q

Agency Preferred Days and Hours Setup

Accessing Agency Preferred Days and Hours

Agency Preferred Days and Hours may be accessed from either the Agency List or the Agency Card. In either case it is accessed from the Navigation ribbon available on the Agency Card or Agency List. Go to Departments \rightarrow Financial Management \rightarrow Receivables \rightarrow Agencies.



You will see the list of Agencies. Select Navigate \rightarrow Distributions \rightarrow Agency Preferred Days and Hours.

Agencies - Microsoft Dynamics N	AV											- • ×
G 🕤 🔻 🔳 Finance Compar	ny 🕨 Department	s 🕨 Agencies & Receivables	 Agency Relations 	Agencies						e :	Search (Ctrl+F3)	
HOME ACTIONS NA	VIGATE REPO	श					C				Ceres	5.0 Testing
Comments Dimensions Contact	Ship-to ddresses Addre Agency	Attributes & Activity	r Review • nce Ledger Entries St	Leased torage Entries History	cs tatistics Pounds	Std. Agency C Distribution Codes	Qualifiers Agency Days and Hours Distribute	erred Days Handlin	r Restrictions g Capabilities g Appointmen	ts Documen	rders	
Departments	Agencies	-					Type to filte	r (F3) Name		→ ∧	Power BI Reports	•
Financial Management								Limitt	otals: 07/01/19	06/30/20	13 Select Report	»
A Agencies & Receivables	Show results:										Get started with	Power BI
Order Processing	🗙 Where	Blocked 🔻 is										
Marketing	🗙 And	Dormant 🔻 is 🛛 No									Agency Distribution	. ^
Inventory & Fees Agency Express	+ Add Filter										Agency No.: Ongoing Orders:	B0129 69
CMobile Documents Microsoft Dynamics CRM	No. 🔺	Name	Address	City	State	ZIP Code	Contact	Phone No.	Phone Ext. No.	Email 🔶	Ongoing Invoices:	0 :
▷ Purchasing	1011A	Pantry Agency	123 Mian Street	Meridian	ID	83725		503-608-3631		=	Ongoing Credit	1
Donation	1050-A	Uplift Organization	Post Office Box 5757	Kansas City	MO	64127	Connie Winterfield	555-503-1111		karenk@es	Posted Shipments:	307
Varehouse	A0442	Synergy Services-2	Do Not Disclose		MO		A0442 Contact 1				Posted Invoices:	248
Human Resources	A0592	TLC For Children and	Do Not Disclose	Kansas City	MO		Robert Drummond			Jmleoni77¢	Posted Return Re	18
Appian	A12346	JBL TEST	123 Test Ave	Kansas City	MO	64127				Jakel@esop	Posted Credit Me	24
Adv. Leased Storage	A1764	Scarborough Childrens Ho	Do Not Disclose		MO		Elizabeth Sartain			williamh@		

To edit an existing record click on the line you wish to change.

🚮 Edit - Pre	eferred	Days and	Hours	List														
- но	ME	ACTION:	S I	NAVIGATE														
*ъ			×		Ö		Q					B	Y,	44				
New	View List	Edit List	Delet	e Star Appoi	nding ntmen	Copy ts to	Show as List	Show as Chart	OneNote	Notes	Links	Refresh	Clear Filter	Find				
New		Manage			Proc	255	Vi	ew	Sho	w Attach	ed		Page					
Preferre	d Da	iys and	l Ho	urs List	Ŧ													Type to filter (F3)
Agency No.	-	Day of Week		Morning Openi	•	Morning Closing Hou	Afterno r Openin	ion g	Afternoon Closing Hou	Frequ	ency	Commen	ts		24/7	Last Modifie	Last Modifie	Agency Contact
B0129	-	Sunday		8:00:00 AM	1 1	2:00:00 PM				EVERY	WEEK					3/3/2020	ESOPRO\R	John Smith
B0129		Monday		8:00:00 AM	1 1	2:00:00 PM										3/3/2020	ESOPRO\R	John Smith
B0129		Tuesday		8:00:00 AM	1 1	2:00:00 PM										3/3/2020	ESOPRO\R	John Smith

To create a new line, either move the next available line and begin entering, or click New in the Home Ribbon.

🚮 Edit - Preferred	Days and Hours L	.ist			
 HOME 	ACTIONS N	AVIGATE			
New View List	Edit List Delete	Standing Appointme	Copy nts to	Show as List Chart	; (
New	Manage	Pro	cess	View	
Preferred Da Agency No.	Day of Week	Irs List 🔹 Morning Openi	Morning Closing Hour	Afternoon Opening	Aftei Clos
B0129 -	Sunday (8:00:00 AM	12:00:00 PM		
B0129	Monday 8	8:00:00 AM	12:00:00 PM		
B0129	Tuesday (8:00:00 AM	12:00:00 PM		

Enter the day of week or use the AssistButton to select the day of week.

Enter the hours of operation by filling in the Morning Opening Hour, Morning Closing Hour, Afternoon Opening Hour, Afternoon Closing Hour and Frequency. You can use F8 to copy from the line above. Frequency could be Weekly, Bi-Weekly, Monthly or similar.

Enter any Comments and Meal Types served related to that day.

Check the 24/7 field if appropriate.

Preferred Da	iys and Ho	urs List 🔹					
Agency 🔺 No.	Day of 🔹 🔺 Week	Morning 🔺	Morning Closing Hour	Afternoon Opening	Afternoon Closing Hour	Frequency	Comments
B0129	Sunday	8:00:00 AM	12:00:00 PM			EVERY WEEK	
B0129	Monday	8:00:00 AM	12:00:00 PM				
B0129	Tuesday	8:00:00 AM	12:00:00 PM				
B0129	Wednesday	8:00:00 AM	5:00:00 PM	l			

Note: The key to the Agency Preferred Days and Hour table includes the Agency No., Day of the Week and the Morning Opening Hour fields. If you change any of these on an existing line the system will ask you to confirm that you are renaming the record.

Microsoft	Dynamics NAV 🛛 💌
8	Do you want to rename the record?
	Yes No

Copy to Functionality:

If you have several Agencies with similar hours you may use the copy function to update other agencies. To use this function select the Home \rightarrow Copy to function.

📶 Edit	- Preferred	Days and H	lours	List						
-	HOME	ACTIONS	Ν	IAVIGATE	_					
×			×						C 🏹 🚻	
New	View List	Edit I List	Delete	e Standin Appointm	g Copy ents to	Show Show as as List Chart	OneNote	Notes Links	Refresh Clear Find Filter	
New		Manage		Pro	ocess	View	Show	/ Attached	Page	
Age	ency 🔔	iys anu	по	ITS LISU -						
1401		Day of Week	*	Morning Openi	Morning Closing Hour	Afternoon Opening	Afternoon Closing Hour	Frequency	Comments	
B012	29	Day of Week Sunday	*	Morning Openi 8:00:00 AM	Morning Closing Hour 12:00:00 PM	Afternoon Opening	Afternoon Closing Hour	Frequency EVERY WEEK	Comments	
B013 B013	29 29	Day of Week Sunday Monday	•	Morning Openi • 8:00:00 AM 8:00:00 AM	Morning Closing Hour 12:00:00 PM 12:00:00 PM	Afternoon Opening	Afternoon Closing Hour	Frequency EVERY WEEK	Comments	
B013 B013 B013	29 29 29	Day of Week Sunday Monday Tuesday	*	Morning Openi 8:00:00 AM 8:00:00 AM 8:00:00 AM	Morning Closing Hour 12:00:00 PM 12:00:00 PM 12:00:00 PM	Afternoon Opening	Afternoon Closing Hour	Frequency EVERY WEEK	Comments	
B013 B013 B013 B013	29 29 29 29 29	Day of Week Sunday Monday Tuesday Wednesda		Morning Openi 8:00:00 AM 8:00:00 AM 8:00:00 AM 8:00:00 AM	Morning Closing Hour 12:00:00 PM 12:00:00 PM 12:00:00 PM	Afternoon Opening	Afternoon Closing Hour	Frequency EVERY WEEK	Comments	

From the Copy Agency Pref. Days and Hours FastTab you can filter the copy from records. By default the current Agency, and all days will be used. You may change the filters to only copy a particular day or days. Please note that if you copy records to another Agency and the record already exists, the existing records will not be overwritten.

Edit - Copy Agency Pref. Days & Hours	- • •
 ACTIONS 	Ceres 5.0 Testing 🕜
Clear Filter Page	
Preferred Days & Hours	^
Show results:	
🗙 Where Agency No. 🔻 is 🛛 B0129	
🗙 And 🛛 Day of Week 🔻 is 🔹 Select a value	
🕂 Add Filter	
Copy to Agency	^
Show results:	
🗙 Where No. 🔻 is 🔽 🔽 🗸	
+ Add Filter	
Limit totals to:	
+ Add Filter	
01	Cancel
Microsoft Dynamics NAV	—
Copy the Agency Preferred Days and Hours for B0129 to Agency(ies)?	1.
Existing records will NOT be overwritten.	

Agency Preferred Days and Hours Setup

No

Yes

Last Reviewed 10/20/2014

In the Copy to Agency FastTab filter the Agencies you want to copy to. In the example above, Ceres will copy all days of the week for Agency 1011A to Agency A0592. Press OK to copy the records.

🚮 Edit - P	referred	Days and I	Hours	List											
- H	OME	ACTIONS	5 1	NAVIGATE											
×Ъ			X				Q					B	T _×		
New	View List	Edit List	Delet	e Stan Appoin	ding tment	Copy s to	Show as List	Show as Chart	OneNote	Notes	Links	Refresh	Clear Filter	Find	
New		Manage			Proce	SS	V	iew	Show	/ Attach	ed		Page		
Preferr Agenc No.	ed Da	Day of Week	Ho	Morning Openi	A N	Aorning Closing Hour	Aftern Openi	oon ng	Afternoon Closing Hour	Frequ	ency	Comment	ts		
C1724	•	Sunday		8:00:00 AM	12	2:00:00 PM				EVERY	WEEK				
C1724		Monday		8:00:00 AM	12	2:00:00 PM									
C1724		Tuesday		8:00:00 AM	17	2:00:00 PM									
C1724		Wednesd	ay	8:00:00 AM											

Agency Preferred Days and Hours Page and Report

An Agency Preferred Days and Hours List page can be displayed that is based on the setup outlined above. To view the List, go to Departments \rightarrow Agencies & Receivables \rightarrow Agency Relations \rightarrow Agency Preferred Days and Hours.



gen <mark>cy</mark> Pr	eferred Da	a <mark>ys</mark> and H	ours 🔹								Тур	pe to filter (F3)	Agency No.
Agen 🔺 No.	Day of 🔺 Week	Morn Open	Morning Closing	Afternoon Opening	Afternoon Closing	Frequency	Comments	24/7	Last Modifie	Last Modifie	Agency Contact	Agenc	y E-mail
B0129	Sunday	8:00:00 AM	12:00:00 PM			EVERY WEEK			3/3/2020	ESOPRO\R	John Smith	karenk	@esopro.com
B0129	Monday	8:00:00 AM	12:00:00 PM						3/3/2020	ESOPRO\R	John Smith	karenk	@esopro.com
B0129	Tuesday	8:00:00 AM	12:00:00 PM						3/3/2020	ESOPRO\R	John Smith	karenk	@esopro.com
B0129	Wednesday	8:00:00 AM							4/1/2020	ESOPRO\R	John Smith	karenk	@esopro.com
B0558	Sunday	9:00:00 AM	11:00:00 AM	1:00:00 PM	3:00:00 PM	2 WEEKS	test		3/3/2020	ESOPRO\R	Gary Ashmore		
B0558	Monday	9:00:00 AM	11:00:00 AM	1:00:00 PM	3:00:00 PM	2 WEEKS	Monday		3/3/2020	ESOPRO\R	Gary Ashmore		
B1404	Sunday	9:00:00 AM	11:00:00 AM	1:00:00 PM	3:00:00 PM	2 WEEKS	test		3/3/2020	ESOPRO\R	Robin Wade		
B1404	Monday	9:00:00 AM	11:00:00 AM	1:00:00 PM	3:00:00 PM	2 WEEKS	Monday		3/3/2020	ESOPRO\R	Robin Wade		
C1724	Sunday	8:00:00 AM	12:00:00 PM			EVERY WEEK			4/1/2020	ESOPRO\R	Bryan Chenault		
C1724	Monday	8:00:00 AM	12:00:00 PM						4/1/2020	ESOPRO\R	Bryan Chenault		
C1724	Tuesday	8:00:00 AM	12:00:00 PM						4/1/2020	ESOPRO\R	Bryan Chenault		
C1724	Wednesday	8:00:00 AM							4/1/2020	ESOPRO\R	Bryan Chenault		

You can also export the Days and Hours Page to Excel or Word using base Ceres functionality.

🚮 Age	ncy Preferred Days a	and H	lours - M	/icrosoft Dynamics NAV	
Q	🔊 🗖 Financ	e Co	mpany	Departments Agencies & Receivables	Agen
-					
\bigcirc	Page	٠		Email as Attachment	
_	Print & Send	٠	w	Microsoft Word	
	Set Work Date		x	Microsoft Excel	
	Select Language				
	Select Server			Print Page	
4	Select Company				
	Customize	•			
	Help	٠			
	Exit				

Related Topics

- 1. Agency Overview
- 2. Parent Agency Overview
- 3. Agency Days and Hours