



## 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.*

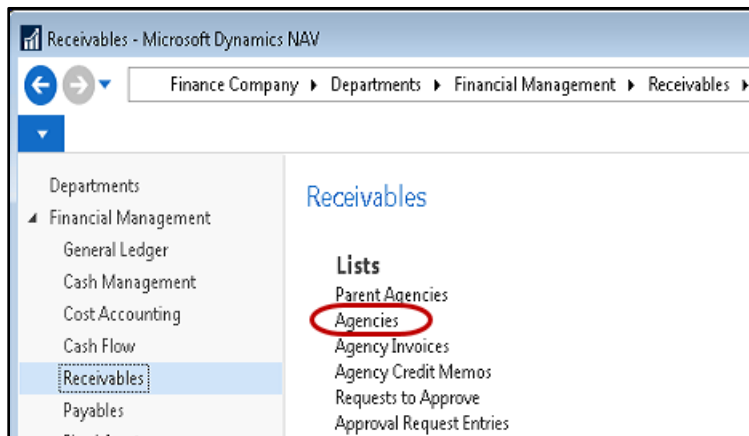
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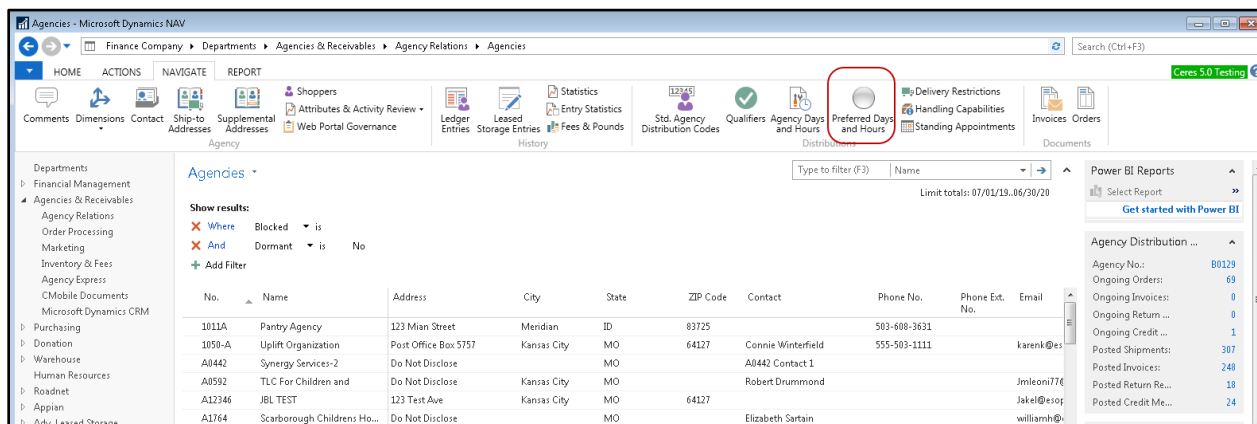
## Agency Preferred Days and Hours Setup

### 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 → Financial Management → Receivables → Agencies.



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



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

Agency No.	Day of Week	Morning Opening...	Morning Closing Hour	Afternoon Opening...	Afternoon Closing Hour	Frequency	Comments	24/7	Last Modifie...	Last Modifie...	Agency Contact
B0129	Sunday	8:00:00 AM	12:00:00 PM			EVERY WEEK		<input type="checkbox"/>	3/3/2020	ESOPRO\R...	John Smith
B0129	Monday	8:00:00 AM	12:00:00 PM					<input type="checkbox"/>	3/3/2020	ESOPRO\R...	John Smith
B0129	Tuesday	8:00:00 AM	12:00:00 PM					<input type="checkbox"/>	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.

Agency No.	Day of Week	Morning Opening...	Morning Closing Hour	Afternoon Opening...	Afternoon Closing Hour
B0129	Sunday	8:00:00 AM	12:00:00 PM		
B0129	Monday	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.

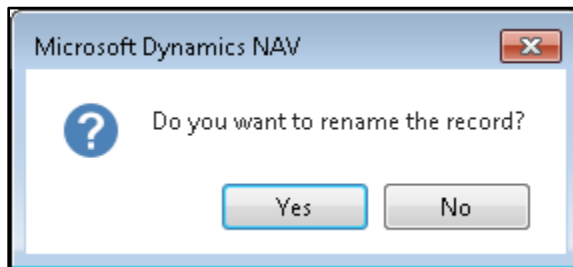
Enter the hours of operation by filling in the Morning Opening Hour, Morning Closing Hour, Afternoon Opening Hour, Afternoon Closing Hour and Frequency. You can use F8 to copy from the line above. Frequency could be Weekly, Bi-Weekly, Monthly or similar.

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

Check the 24/7 field if appropriate.

Preferred Days and Hours List ▾							
Agency No.	Day of Week	Morning Opening...	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				

**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.



### 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 → Copy to function.

Edit - Preferred Days and Hours List

HOME ACTIONS NAVIGATE

New View List Edit List Delete Standing Appointments **Copy to** Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

New Manage Process View Show Attached Page

Preferred Days and Hours List ▾

Agency No.	Day of Week	Morning Opening...	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				

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

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 C1724

+ Add Filter

Limit totals to:

+ Add Filter

OK Cancel

Microsoft Dynamics NAV

? Copy the Agency Preferred Days and Hours for B0129 to 1 Agency(ies)?

Existing records will NOT be overwritten.

Yes No

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 - Preferred Days and Hours List

HOME

ACTIONS

NAVIGATE

New

New

View List

Manage

Edit List

Manage

Delete

Standing Appointments

Process

Copy to

Show as List

View

Show as Chart

View

OneNote

Show Attached

Notes

Show Attached

Links

Show Attached

Refresh

Page

Clear Filter

Page

Find

Preferred Days and Hours List

Agency No.

Day of Week

Morning Openi...

Morning Closing Hour

Afternoon Opening...

Afternoon Closing Hour

Frequency

Comments

C1724

Sunday

8:00:00 AM

12:00:00 PM

EVERY WEEK

C1724

Monday

8:00:00 AM

12:00:00 PM

C1724

Tuesday

8:00:00 AM

12:00:00 PM

C1724

Wednesday

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→ Agencies & Receivables → Agency Relations → Agency Preferred Days and Hours.

Agency Relations - Microsoft Dynamics NAV

Finance Company ▶ Departments ▶ Agencies & Receivables ▶ Agency Relations ▶

Departments
Financial Management
Agencies & Receivables
**Agency Relations**
Order Processing
Marketing
Inventory & Fees
Agency Express
CMobile Documents

### Agency Relations

#### Lists

- Contacts
- Parent Agencies
- Agencies
- Agency Days and Hours
- Agency Preferred Days and Hours**
- Responsible Person

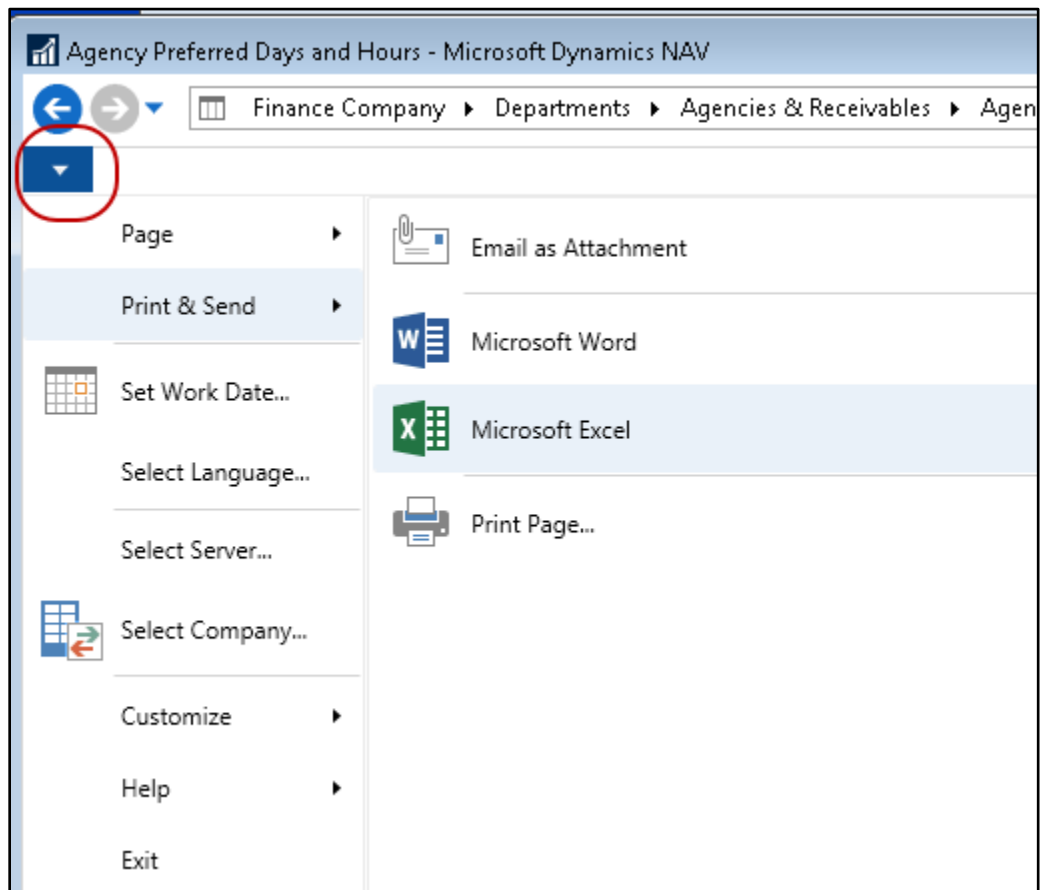
Agency Preferred Days and Hours

Type 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	Agency E-mail
B0129	Sunday	8:00:00 AM	12:00:00 PM			EVERY WEEK		<input type="checkbox"/>	3/3/2020	ESOPRO\...	John Smith	karenk@esopro.com
B0129	Monday	8:00:00 AM	12:00:00 PM					<input type="checkbox"/>	3/3/2020	ESOPRO\...	John Smith	karenk@esopro.com
B0129	Tuesday	8:00:00 AM	12:00:00 PM					<input type="checkbox"/>	3/3/2020	ESOPRO\...	John Smith	karenk@esopro.com
B0129	Wednesday	8:00:00 AM						<input type="checkbox"/>	4/1/2020	ESOPRO\...	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	<input type="checkbox"/>	3/3/2020	ESOPRO\...	Gary Ashmore	
B0558	Monday	9:00:00 AM	11:00:00 AM	1:00:00 PM	3:00:00 PM	2 WEEKS	Monday	<input type="checkbox"/>	3/3/2020	ESOPRO\...	Gary Ashmore	
B1404	Sunday	9:00:00 AM	11:00:00 AM	1:00:00 PM	3:00:00 PM	2 WEEKS	test	<input type="checkbox"/>	3/3/2020	ESOPRO\...	Robin Wade	
B1404	Monday	9:00:00 AM	11:00:00 AM	1:00:00 PM	3:00:00 PM	2 WEEKS	Monday	<input type="checkbox"/>	3/3/2020	ESOPRO\...	Robin Wade	
C1724	Sunday	8:00:00 AM	12:00:00 PM			EVERY WEEK		<input type="checkbox"/>	4/1/2020	ESOPRO\...	Bryan Chenault	
C1724	Monday	8:00:00 AM	12:00:00 PM					<input type="checkbox"/>	4/1/2020	ESOPRO\...	Bryan Chenault	
C1724	Tuesday	8:00:00 AM	12:00:00 PM					<input type="checkbox"/>	4/1/2020	ESOPRO\...	Bryan Chenault	
C1724	Wednesday	8:00:00 AM						<input type="checkbox"/>	4/1/2020	ESOPRO\...	Bryan Chenault	

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



## Related Topics

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