

# **Agency Profiles Overview**

#### Purpose of this document

Agency Profiles provide functionality in Ceres to increase the information the food bank can track about the Agencies they work with. Profiles are designed to help food banks group their Agencies by various user defined and standard data fields. See the Related Topics area for other new Agency Services/ Agency Management components.

- Agency Attributes
- Agency Approval Date and Agency First Order Date
- FBC Program Type
- Senate District, City Council District, Ward, and School District
- 501(c)(3) Fields
- Agency Training
- Agency Certifications

None of the information in these fields will automatically update the business rules in other fields, like UNC Activity Status or Agency Groups, but can track data that will allow for proper assignment decisions.

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

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### **Agency Attributes**

An Agency Attributes Table exists where three different types of flexible attributes can be defined. The options are: Attributes, Affiliation, and Tiering (Tier).

Attributes are intended to be data values to see groups of Agencies by their capabilities - such as storing frozen product, having a small parking lot, etc. You can assign one or many to each Agency.

Affiliation is for grouping Agencies by religious affiliation or similar. You can assign one or many to each Agency.

Tiering is to track a food bank assigned value or values to group agencies into priority groups or similar. You can assign one or many to each Agency.

Accessing:

1. Attributes can be accessed from Navigate  $\rightarrow$  Agency  $\rightarrow$  Agency Attributes on the Agency Card.

🚮 Edit - Agency Card - R1928 - Concerned Care-Ridgeway							
<ul> <li>HOME</li> </ul>	ACTIONS	NAVIGATE	REPORT				
🖓 Comments	📳 Ship-to Ado	dresses	Agency Activity Review	💑 Agency Training			
🔑 Dimensions	Supplemen	tal Addresses	Agency Reporting Requirements	🔝 Agency Certifications			
Contact	🊨 Shoppers	- C	🖹 Agency Attributes	🕂 More 🕶			
			Agency				

2. Select Home  $\rightarrow$  New to create new attributes.

🚮 Edit - Agency No. R1928 s								
<ul> <li>HOME</li> </ul>								
New List	Edit List	X Delete	Show as List Chart	OneNot				
New	Manage		View	Sh				
Agency Attr	Agency Attributes * Type Code Description							
Attribute	A1	D	y Storage/Handling					
Attribute	A2	Fr	ozen Storage/Handl	ing				
Attribute	A4	Re	cipient of HAR FR					
Affiliation	CC	C	oncerned Care					
Tier	MDSZ	M	id size; 100 to 200 se	rved				

**Type**: Select an option for the type of Attribute you are creating. The options are: Attribute, Affiliation, or Tier.

**Code**: Input a Code to identify the Attribute.

**Description**: Enter a description for the Attribute.

**Note:** There is a count field of each Attribute Type on the Information FastTab of the Agency Card. Clicking on each count will open up the Agency Attribute Card for the Type of Attribute selected.

Information				
Agency Express			Other	
Agency Group Code:	120	•	CMobile Related:	
Permit Web Orders:			Exclude from Compliance:	
AE Survey Online Order Status:	Enabled	•	Location & Government	
AE Ouest, Applicable Date:	<b></b>		Geographical Location Code:	•
Ceres Questionnaire Grn. Code:			Metropolitan Area Code:	•
Service Questionnaire orp. court.		•	Federal Congr. Dist. Code:	б 🗸
Survey Group Code:		•	State Congr. Dist. Code:	34 🗸
Agency Type & Information			Senate District:	M0-17
Service Areas:			Cha Caural District	
Product Sources:			City Council District:	
Funding Sources:			Ward:	
Client Records Maintained:			School District:	
UNC Food Bank ID No.:		•		
SDO:			Attribute Count:	3
Food Bank Program:			Affiliation Count:	1
FBC Program Type:	ON-SITE FD		Tier Count:	1
FBC Size Code:	•			
Mobile Pantry:				

### **Other Agency Fields: Agency Approval Date & Agency First Order Date**

A0442 · Synergy S	A0442 · Synergy Services-2								
General						** ^			
No.:	A0442	Fund No.:	UR		•				
Parent Agency No.:	442 🗸	Location Code:	KAN	•					
Name:	Synergy Services-2	Shipment Method Code:	DELIVER	•					
Name 2:		FBC County Code:	MO-LAFAYET	•					
Address:	Do Not Disclose	FBC Agency Category Code:	ABUSED	•					
Address 2:		UNC Activity Status:	HOLDMULT	•					
City:	•	Agency Approval Date:	2/26/1996	-					
State:	MO	Agency First Order Date:	8/3/2012						
ZIP Code:	•	Monitoring Expiration Date:	5/30/2014	•					
Country/Region Code:	•	Last Date Modified:	6/11/2019						
Balance (\$):	9,722.61	Last Modified By:	ESOPRO\RXF						
Credit Limit (\$):	40,000.00	Blocked:			•				
		Dormant:							

1. On the General FastTab of the Agency Card the following fields exist:

**Agency Approval Date:** Enter the date the Agency was approved as a member of the food bank.

**Agency First Order Date**: This is a Ceres-maintained field which will automatically updated based on the first order in the Agency Ledger Entries.

2. An FBC Agency Category field exists on the Agency General FastTab.

General				** *
No.:	A0442	Fund No.:	UR 👻	
Parent Agency No.:	442 🗸	Location Code:	KAN 👻	
Name:	Synergy Services-2	Shipment Method Code:	DELIVER -	
Name 2:	5	FBC County Code:	MO-LAFAYET 👻	
Address:	Do Not Disclose	FBC Agency Category Code:	ABUSED	
Address 2:		UNC Activity Status:	HOLDMULT -	
City:	▼	Agency Approval Date:	2/26/1996 👻	
State:	MO	Agency First Order Date:	8/3/2012	
ZIP Code:		Monitoring Expiration Date:	5/30/2014 👻	
Country/Region Code:		Last Date Modified:	6/11/2019	
Balance (\$):	9,722.61	Last Modified By:	ESOPRO\RXF	
Credit Limit (\$):	40,000.00	Blocked:	•	
		Dormant:		

Clicking on the dropdown takes you to the FBC Agency Category Code list.

Select - FBC Agency Categories								
<ul> <li>HOME</li> </ul>	NAVIGATE			Fi	nance Comp	any - Master	0	
*``   🗖		m I nz	3		OneNote	🕃 Refresh		
New View	Edit Dalata C		⊴. ∎ 		Notes	🍢 Clear Filte	r	
List	List	as l	ist Cl	hart 🐻	Links	👫 Find		
New	Manage	Process	View	Show	v Attached	Page		
FBC Agency	Categories •	Type to	filter (F3	l) Code		•   ->	~	
					Not	ilters applied		
Code	Description	UNC Agency Category	Qu(	FBC Program Type	n		^	
ABUSED	Abused Children	GROUP HOME	No	ON-SITE FD				
BATTERED	Battered Persons	GROUP HOME	No	ON-SITE FD			Ξ	
<b>BEFORE\AFT</b>	Before\After Schoo	CHILDREN	No	ON-SITE FD				
CLUSTER	Harvesters Cluster	FOODBANK	No	FD PANTRY				
DAYCARE	Daycare	DAYCARE	No	ON-SITE FD				
DISASTER	Disaster Assistance	DISASTER	No	FD PANTRY				

Each Agency Category Code is tied to an FBC Program Type Code.

3. The FBC Program Type Code displays on the Information FastTab of the Agency Card. The field is non-editable from the Agency Card.

Information	
Agency Express	
Agency Group Code:	0 🗸
Permit Web Orders:	V
AE Survey Online Order Status:	Enabled 👻
AE Quest. Applicable Date:	<b>•</b>
Ceres Questionnaire Grp. Code:	•
Survey Group Code:	•
Agency Type & Information	
Service Areas:	
Product Sources:	
Funding Sources:	
Client Records Maintained:	
UNC Food Bank ID No.:	<b>_</b>
SDO:	
Food Bank Program:	
FBC Program Type:	ON-SITE FD

#### 501(c)(3) Parent Agency Default Setup

 On the Agency & Receivables Setup, a field called Default 501(c)(3) from Parent, has been added. If this field is checked, 501(c)(3) information will flow from the Parent Agency Card to the Agency Card and the 501(c)(3) fields on the Agency Card will not be editable. See Agency Overview Documentation for more information regarding the 501(c)(3) FastTab on the Agency Card.

Agencies & Receivables Setup								
General				* <sup>*</sup> ^				
Discount Posting:	No Discounts 🔷 👻	Allocations Exist:	V					
Credit Warnings:	Credit Limit 👻	Calculate Agency Fees from:	Item	•				
Apply Grants to Credit Warning:		Reason Code Mandatory:	V					
Invoice Rounding:		Suppress Printing of Shpt:						
Default Item Quantity:		Use Parent Agency:	V					
Create Item from Description:		Shopper Mandatory:	V					
Appln. between Currencies:	None 👻	Same Fund on Sales Lines:						
Logo Position on Documents:	Right 👻	Always Show Available Quantity:						
Communities on Decements	L.A.	Show Requested Qty. Message:						
Company Position on Documents:	Left 🕈	Agency Top Off Text Code:	TOPOFF	•				
Freight G/L Acc. No.:	-	Require Shipment Method Code:	<b>V</b>					
Default Posting Date:	Work Date 👻	Default 501(c)(3) from Parent:						
Allow Tax Difference:		Appointment Consumption Method:	Both Order Types	•				
Calc. Inv. Discount:		Confirm App. Consumption:	Both Order Types	•				
Tax Bus. Posting Gr. (Fee):	-	Delivery Consump Lead (Hours):		4				
Sync Posting Date / Shpt. Date:	<b>V</b>	Delivery consumpliced (nous).		_				
Delivery Charge Type:	Account (G/L) 🔹 🗸	Pickup Consump. Lead (Hours):		3				
Delivery Charge No.:	485000 👻	Exclude Item from CM:						
Delivery Charge Description	Deliver: Fee	Allow Pallet No. Change CM/RTO:	V					
Derivery charge Description:	Delivery ree	Automatic Delivery Charge Calc:						
Inventory Lookup:	Qualified Not Zero 🛛 🔻							

#### **Agency Training**

Training information is recorded at the Agency level. Training can be tracked based on when it occurred or expires. To enter the information, from the Agency Card, click Navigate → Agency → Agency Training



**Training Code:** Select an existing Code. To setup new Codes, click on the down arrow in the Training Code field and then select Advanced  $\rightarrow$  Home  $\rightarrow$  New. Input a Code and Description to identify the training.

Training Description: Automatically updates when a Code is selected.

**Training Date:** Enter the date the training was completed.

**Expiration Date:** Enter the date that the current training expires.

#### **Agency Certifications**

 Certification information is set at the Agency level. Certifications can be tracked based on expiration date. To enter the information, from the Agency Card, click Navigate → Agency → Agency Certifications

	Edit - Agency Card - A0442 - Synergy Services-2							
HOME ACTIONS NAVIGATE REPORT								
	🖓 Comments 🛛 👔 Ship-to Addresses		Agency Activity Review	Agency Training				
& Dimensions 📴 Supplemental Addresses		Agency Reporting Requirements	🕒 Agency Certifications					
	Contact		🊨 Shoppers		Agency Attributes	+ More +		
	Agency							

2. Update the fields in the Agency Certification Page. Click Home → New to add Agency Certifications:



**Certification Code:** Select a Code. To setup new Codes, click on the down arrow in the Certification Code field and then select Advanced  $\rightarrow$  Actiions  $\rightarrow$  New. Input a Code and Description to identify the certification.

Certification Description: Automatically updates when a Code is selected.

**Certification Date:** Enter the date the Certification was completed.

**Expirate Date:** Enter the date the Certification expires.

### **Related Topics**

- 1. Agency Overview
- 2. Parent Agency Overview
- 3. Agency Order Overview
- 4. Agency Questionnaires
- 5. Agency Groups and Qualifiers
- 6. Agency UNC Activity Status by Group